I. PURPOSE
This document outlines the review process for verifying an external user’s (researcher’s) role on an approved IRB protocol, prior to granting them access to OHSU patient records and/or the Epic database.

II. RESPONSIBILITIES
A. Epic Access Support Staff
B. IRB Chair, IPS Vice Chair-IPS or IPS Staff
C. ITG Administration Staff
D. OHSU Sponsor (Research Administrator or Principle Investigator (PI) who will be the external user’s signing/approval manager throughout the access and termination processes)

III. PROCEDURES
A. Inquiry submitted to the IRB for external PI access to Epic: The IRB Vice Chair-IPS will confirm the external user’s role on an approved IRB protocol and send this confirmation back to the OHSU Sponsor along with instructions on how to proceed with requesting Epic access.

B. To request Epic access for external users, the OHSU sponsor:
   a. Requests a temp account through CARS. Temp accounts must be renewed yearly.
   b. Ensures the external user has completed all required OHSU information security training and are aware of the OHSU Acceptable Use of Computing and Telecommunications Resources Policy, OHSU Confidentiality Policy and any other related information security policies.
   c. Upon approval of the Active Directory, request access to Epic using the Epic Access Request form.
      i. Many areas of Epic require training to be completed before approval can be granted. The OHSU Sponsor is responsible for validating the external user’s completed training.
      ii. The request form will direct Epic access to select a linkable template specific to the External PI so Epic staff can periodically run reports on who has access if needed.
C. Request submitted via Epic Access Request Form: To confirm an external users role on an IRB approved research protocol (once the Epic Access Request Form has been submitted or if the requestor has already proceeded with submitting the Epic Access Request Form), Epic support staff use Research Snapshot in Cognos:

1. Go to: Cognos and log in using OHSU login and password
2. Click on: Public Folders
3. Click on: Research Administration
4. Click on: Researcher Snapshot
5. Type in name
6. Choose data bases to search (for this query, uncheck all but eIRB)
7. Click on “run”
8. Check status for approved

D. If the external user is not listed on an approved IRB protocol, the external user should be directed to have the OHSU PI submit a modification to the IRB and add the external user to the protocol prior to requesting access to OHSU patient records. The IRB Vice-Chair can assist the external user and OHSU PI, as needed.

E. Once the external user has been provided Epic access, the user will select Research for their Epic Role, and External Researcher w/IRB Approval.

F. **AUTHORITY**

Acceptable Use of Computing and Telecommunications Resources Policy No. 11-20-010
Confidentiality of Health Information
ISD 70000009: Access Authorization to Electronic Restricted Information

G. **DOCUMENTS**

N/A

H. **REFERENCES**

N/A