Integrated Health Record Access for External Research Monitors/Auditors

External auditors with a legitimate need to access relevant OHSU patient records stored in the Electronic Health Record (EHR) may be provided with direct access to Epic under the supervision of an OHSU employee. Such external auditors include surveyors, inspectors, and auditors from local, state or federal agencies or credentialing bodies, or monitors from companies sponsoring clinical studies conducted at OHSU. Access must be requested for each visit/inspection and, if the audit/inspection is prescheduled, at least one week in advance of arrival of the auditor at OHSU. Special accommodations will be made for unannounced audits and inspections.

To request Epic access for an auditor, complete a Research Monitor/Auditor Epic Access Request Form below and email it to HIM Release Desk at [himrelease@ohsu.edu](mailto:himrelease@ohsu.edu). Note that there are a limited number of passwords available for monitor access on a given day. Therefore, last minute requests for access may not be able to be accommodated. It is important to request access as soon as a monitor visit is scheduled if access will be required. Passwords will usually be sent to the requestor to provide to the auditor the Friday before the scheduled visit. To add patients to an account during an audit, add the patients to the Access Request Form previously submitted, indicating “New since last request” and checking the “Updated request” box at the top of the form. Page Mirza Carranza to inform her of the need for the update. Updates to existing accounts may take up to 24 hours to process.

Under no circumstances should an auditor share their password with anyone. If multiple auditors require access to review medical records, a separate password must be requested for each auditor and each auditor must use their own password. If an OHSU employee becomes aware that a password has been used by simultaneous multiple users, they are obligated to report it immediately to the OHSU Integrity Privacy & Security office at extension 4-8849.

The OHSU Connect Guide, a basic navigation tutorial, is available at <http://ozone.ohsu.edu/research/crp/cto/docs/OHSU_Connect_Training_Manual.pdf>. Prior to a monitor or auditor accessing OHSU’s EHR for the first time, the contact for the audit should download this document and email it, in advance of the audit if possible, to the auditor to assist them in their audit.

Auditors may access Epic from available OHSU workstations, from designated workstations in Health Information Management (HIM), or from their own computers. To assure availability of a workstation if necessary for an audit/inspection, workstations may be reserved for auditors by including this information in the request for Epic access for the auditor.

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# Research Monitor/Auditor Epic Access Request

Updated request (check if monitor already on site)

Name of Requester:

Contact Number:

Study IRB#:

Auditor Name:

Auditor Sponsor/

Agency Name:

Start Date of Visit:       End Date of Visit:

HIM Workstation Required?  Yes  No

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| New Since Last Request? (x) | MRN | Patient Name |
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### ew Since Last Request? (x)ly in advance of the visitForward completed form to HIM Release Desk, MC OP17A, Fax with Coversheet: 4 6288, or [himrelease@ohsu.edu](mailto:himrelease@ohsu.edu)

**Allow at least 1 week for processing of request**