

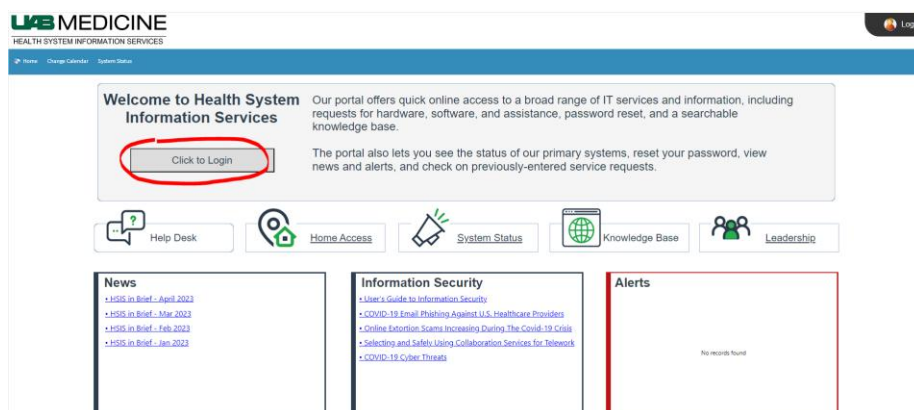
External Clinical Trial Monitor Requests for EHR Access (Coordinator Instructions)

Below you will find the process for obtaining Cerner IMPACT view-only access for research monitors.

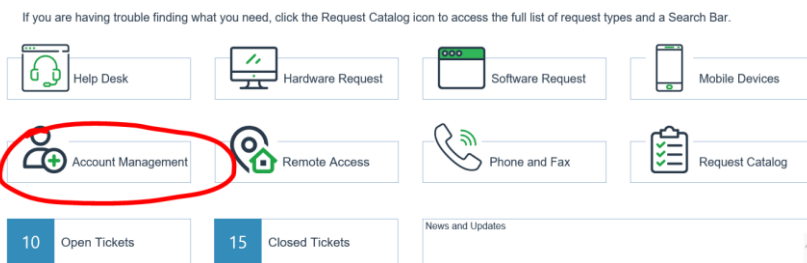
Initial Visit (This process should be initiated at least 30 days prior to the Monitor's Initial Visit):

1. Once a UAB research coordinator is notified of a monitor's upcoming visit, the coordinator should go to the Health System Information Services portal to enter an account request.

https://helpdesk.uabmc.edu/CherwellPortal/Home2?_af743e5bd2#0



2. Click on *Account Management*



3. Choose 'External Account Request'

Home Change Calendar System Status Knowledge Base How To Videos

Account Management
- Request or terminate a UABMC ID account.

ACCOUNT MANAGEMENT

Internal Account Request
Do you need to request a new account or modifications to an existing UAB Medicine account?

External Account Request
Do you need to request a new account or modifications to an existing UAB Medicine account?

Extend Vendor Access
Are you a vendor who needs to request an extension of access?

IMPACT/Cerner/PowerChart Training Request
Do you need training for IMPACT, Cerner or PowerChart?

Omniceil Account Change Request
Do you need to make a change to an existing Omnicell account?

Omniceil Account Request
Are you an existing employee who needs to request a new Omnicell account?

Omniceil Password Reset Request
Are you in need of a password reset for your Omnicell account?

4. Complete all fields indicating this is a 'new account'.
 - a. Indicate the following: The account is for a research monitor, the estimated start date, the purpose of the request is for 'research', and how long the account will need to be active.
5. Fill in the user's info and indicate the accounts needed are 'AD (Active Directory)' and 'Cerner (IMPACT)'. Click 'Submit'.
 - a. For the Unique Identifier, one of the following is required in order for an account to be established:
 - i. Last 6 numeric digits of Social Security Number,
 - ii. Last 6 numeric digits of Driver's License Number & state, or
 - iii. Last 6 numeric digits of Employee ID
 - b. This information will be stored encrypted and only used to uniquely identify a user when an account issue arises.

Account Management \ External Account Request

Tell us how we can help you:

What type of request?:
☒ New Account ☐ Update or Reactivate an Account

Is this access for a research monitor?
☒ Yes ☐ No (Required)

Estimated Start Date:

What is the purpose of this request?
☐ Clinical ☒ Research ☐ Both

How long will this account need to be active?
 (End Date/Contract End can't be longer than a year.)

User needing access...

First Name: Mi: Last Name:

Department: External Company:

(Company) Email: ☐ SSN ☒ Drivers License ☐ Employee ID

Phone: Unique Identifier:

Account(s) Needed: ☒ AD (Active Directory) ☐ Email (If Contractor, Traveler, Instructor or Student, full SSN must be provided. Others may provide driver's license number (note the issuing state), the full employee ID (8-digits minimum) or at least the last six-digits (6) of the SSN.)

☒ Cerner (IMPACT) ☐ Sunrise ☐ HealthStream ☐ Other

Additional Information:

6. Once submitted the research coordinator (requestor) who enters the information will receive a service request (SR) number for tracking purposes.
7. Notify the monitor that training must be completed no later than 14 business days prior to the scheduled visit in order to be granted view-only access to Cerner IMPACT.
8. The link to the Cerner IMPACT training will be emailed to the monitor at the address provided.
9. Once training has been completed, the monitor should reply to the email confirming completion.
 - a. A new SR will be required should training not be completed within 30 days of the initial request.

10. Login information for the monitor will be emailed to the research coordinator (requestor) within 7-10 business days after training completion. **The research coordinator is responsible for sharing this information with the monitor.**
11. After the request has been entered, the UAB research coordinator will need to set up a patient list in Cerner IMPACT using the following steps (the patient list can be built at any time prior to the monitor's visit):
 - a. Open IMPACT
 - b. Click 'Patient List' (located in middle top of the page)
 - c. Click "wrench" symbol
 - d. Choose 'New'
 - e. Choose 'Custom'
 - f. Click 'Next'
 - g. Add Name of Study in box
 - h. Click 'Next'
 - i. Choose 'Finish'
 - Note: When adding patients to the list, highlight the study and click the arrow to move the study to the active list*
 - j. Click 'OK'
 - k. Click "green man" symbol
 - l. Enter MRN
 - m. Choose 'Search'
 - n. Double click patient's name
 - o. When finished adding patient names, click the "wrench" symbol
 - p. Highlight the study name
 - q. Click the arrow to move back to the available list

To add a Proxy (Note: this must be completed to grant the monitor access):

- a. Move the study name to active
NOTE: If additional created lists are present, please take caution to make sure the appropriate active study name is highlighted for the monitor. If another created list is inadvertently highlighted, the monitor will be given view-only access to this list instead.
- b. Click 'Properties' (sign next to the "wrench" symbol)
- c. Choose 'Proxy'
- d. Choose 'New' located on the bottom right
- e. Choose 'Provider'
- f. Enter the monitor's name (Note: Monitor MUST have completed training & be active)
- g. Choose 'Access'
- h. Choose 'Read-Only'
- i. For "To" date, enter "2100" for the year
- j. Choose 'Ok'. The monitor's name and access should show-up on the left.

12. Notify the monitor that the applicable patient list has been created and will be available to view in IMPACT in a “View-Only” manner at the next visit. Please make the monitor aware that the search function has been disabled in this view and the screen is likely to look different from what was presented in training.

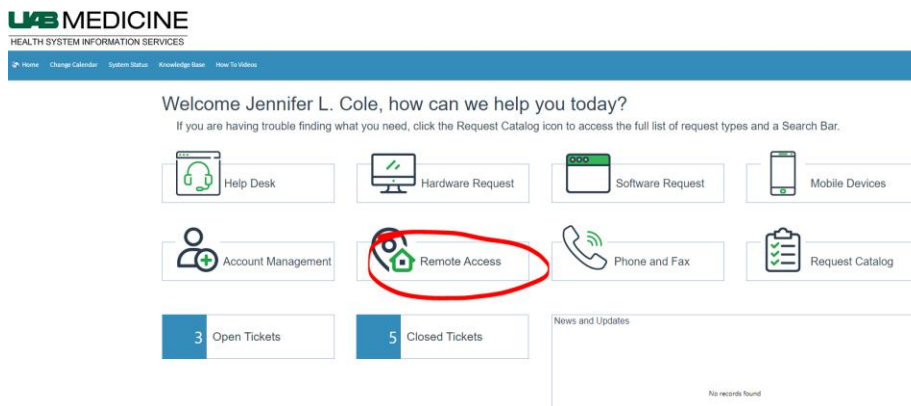
Remote Access

1. If the monitor requires remote access to Cerner IMPACT, the *Remote Access-Token Request* form with the fields indicated as shown below will also need to be completed after the above steps have been completed. Please note that if the research monitor is onsite and using non-UAB equipment, remote access is still required to access the EMR. The research coordinator should visit the Health System Information Services portal to enter an account request.

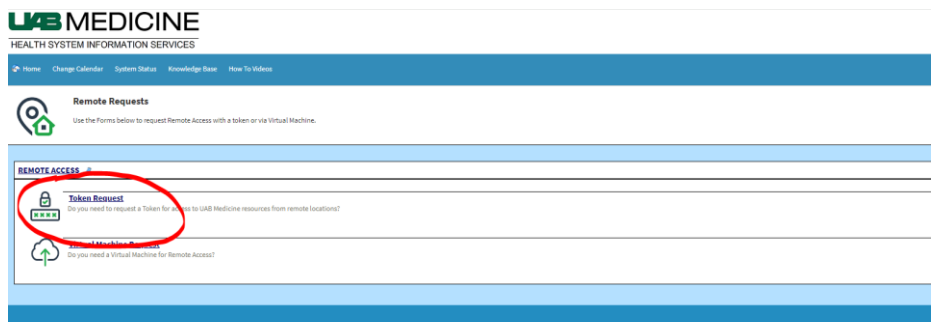
https://helpdesk.uabmc.edu/CherwellPortal/Home2?_52266692#2

***Although UAB Medicine is now using Multi-Factor Authentication (MFA), the research coordinator should still complete the form as if a token is being requested.**

2. Click on the Remote Access icon.



3. Choose ‘Token Request’



- Complete the form as shown below requesting an On Demand Token. Be sure to complete all fields and enter the following wording in the Additional Notes field: 'Please enroll monitor in MFA using above cell phone number'.

Cherwell Web Portal \ Remote Access

Token Request

[Tell us how we can help you:](#)

Use this form to request an RSA SecureID token, or redistribute an already issued token. A token is necessary to gain access to UABHS systems when outside the internal firewall.

What do you want to do?:

- ☒ Request a new token (one token per user only)
- ☐ Renew an expiring token
- ☐ Re-Distribute an issued software token to a different device
- ☐ Change Remote Access Method (Existing Token Users Only)

What do you need access to?:

- ☒ Citrix-Apps
- ☐ Citrix-RDP
- ☐ VPN

Applications you need access to:

☒ Cerner	☐ Horizon
☐ CareAware	☐ Careflow
☐ EMMI	☐ HealthQuest
☐ Lawson	☐ Neodata
☐ Fetalink	☐ iSite
☐ IDX	☐ Sunrise
☐ PEER	☐ Other

Who is this access for?:

- ☐ Yourself
- ☐ Another UABHS Employee
- ☒ Vendor or External

Is access temporary?:

- ☒ Yes
- ☐ No

Termination Date:

[Tell us how we can help you:](#)

What type of request?:

- ☒ New Account
- ☐ Update or Reactivate an Account

Who is the update for?:

Is this access for a research monitor?

- ☒ Yes
- ☐ No

Estimated Start Date:

What is the purpose of this request?

- ☐ Clinical
- ☒ Research
- ☐ Both

How long will this account need to be active?

(End Date/Contract End can't be longer than a year.)

User needing access...

First Name: Mi: Last Name:

Department: External Company:

(Company) Email: ☐ SSN

Job Title: ☐ Employee ID

Phone: ☒ Drivers License State:

Account(s) Needed: ☒ AD (Active Directory) ☐ Email ☐ Medicine Learning

☒ Cerner (IMPACT) ☐ Sunrise ☐ Other

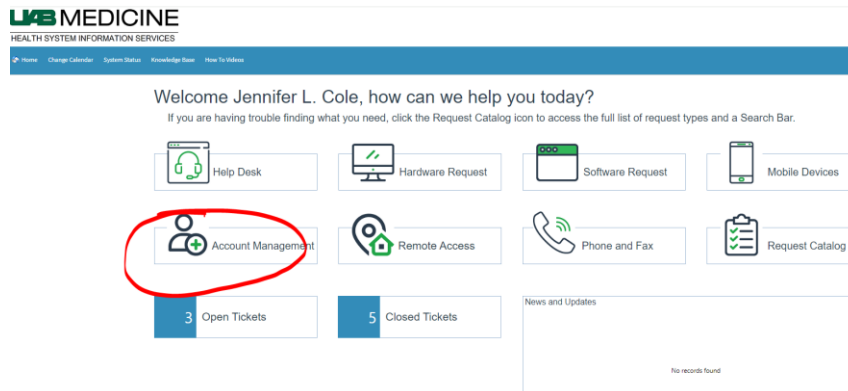
Additional Information:

- Once submitted, the requestor will receive a service request (SR) number for tracking purposes.

Subsequent Visits/Reactivation of an IMPACT account

1. The monitor's account will be set to expire either annually or on the study expiration date, whichever occurs first. For continued access the research coordinator should go to the Health System Information Services portal to enter an account request. Please allow 7-10 business days for accounts to be reactivated.

https://helpdesk.uabmc.edu/CherwellPortal/Home2?_=52266692#2



2. Choose 'Extend Vendor Access'

UAB MEDICINE

HEALTH SYSTEM INFORMATION SERVICES

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Account Management

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ACCOUNT MANAGEMENT [?](#)



[Internal Account Request](#)

Do you need to request a new account or modifications to an existing UAB Medicine account?



[External Account Request](#)

Do you need to request a new account or modifications to an existing UAB Medicine account?



[Extend Vendor Access](#)

Are you a vendor who needs to request an extension of access?



[Fetch Request](#)

Change Fetch Permissions



[IMPACT/Cerner/PowerChart Training Request](#)

Do you need training for IMPACT, Cerner or PowerChart?



[Infor / Lawson Account](#)

Request access or modification to a Lawson/Infor Account.



[Omnicell Account Change Request](#)

Do you need to make a change to an existing Omnicell account?



[Omnicell Account Request](#)

Are you an existing employee who needs to request a new Omnicell account?

3. Complete the form and click submit.

UAB MEDICINE
HEALTH SYSTEM INFORMATION SERVICES

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Save Cancel Refresh Delete Attach (0) Record 1 of 1 Current Record List Grid

Account Management \ Extend Vendor Access

Tell us how we can help you:

Use this form to request an extension of vendor access

Requester Information

First Name: E-mail: Phone:
Last Name: Department:

Account Needing Access Extended

Employee Search: First Name: E-mail:
Extend Access Until: Last Name: AD Username:
(Max 1 Year)

Do you need to extend access to Cerner?
☐ Yes
☒ No
Reason for Extending Access:

Do you need to extend remote token access?
☐ Yes
☐ No

Add Attachment Cancel Submit

IMPORTANT: If system access is no longer needed for a research monitor please notify the HSIS Support Desk immediately so the account can be disabled.

Password Resets or Other Issues

1. If a password reset is needed or other issues encountered, the monitor should contact their research coordinator who should then reach out to the HSIS Support Desk at 205.934.8888 on the monitor's behalf. Research coordinators should be prepared to supply a copy of their UAB badge and driver's license to the Support Desk in order to validate their identity.