**TIPS FOR FILLING OUT THE REMOTE MONITORING FORMS:**

**Confidentiality statement form, Healthlink user access form, and Individual user access form**

1. All 3 documents must be signed and dated by each CRA requesting EMR access. Only the following 3 types of signatures are acceptable: certified electronic, DocuSign or wet signature.
2. If you are crossing out any mistake you may have made, please put your initial and date next to it.
3. **Confidentiality statement form:**
   1. Please only check those boxes appropriate to your remote visit. Given that this is a remote visit, do not check the box for “visual observation of patients……..”
   2. Please enter your name and the company you are associated with in the appropriate boxes.
4. **Healthlink request form:**
   1. Please provide the “secret word”. This can be a simple word or phrase of your choice. This information is required to provision your access.
   2. Please provide your e-mail address at the company you are associated with.
   3. If you are requesting access for multiple studies, please provide the IRB#s in the form for all of the studies you are requesting access for.
   4. Please include the name and e-mail address of the study coordinator for each study you are requesting access for.
   5. If you do not have a confirmed remote monitoring visit (RMV) date, you may leave it blank (section one of the healthlink access form).
   6. The provisioning process takes a few days (steps outlined below). Please keep that in mind when scheduling dates for RMV.
5. **Individual user access form:**
   1. Please enter the name of the CRO or Sponsor that signed the original EHR participation agreement on the ‘Participant’ line.
   2. Please enter the sponsor name (if different than Participant) on the ‘Name of Sponsor’ line.
   3. Please add your Full Name and Job Title under ‘Name of Authorized Employee or Representative of Participant to Use UCLA EHR System.’
6. **Steps in the provisioning process leading to EMR access:**
   1. Provisioning study- process initiated as soon as the agreement is fully executed/
   2. Provisioning monitor access- This process takes 5-7 business days and can be initiated only upon receipt of completed and signed confidentiality form and healthlink user access form. Please be sure to include the “secret word” (a simple word or phrase) in the Healthlink user access form.
   3. Once provisioning is complete, the monitor is sent a link to e-training (about 30 minutes).
   4. Upon completion of e-training and confirmation of proficiency, access to EHR will be available within 48 hours.
   5. Once EMR access is confirmed, please reach out to the study team to schedule remote visits.