Research Data Authorization

Site Coordinators

Overview

Research Data Authorization (RDA) is an application developed by the Duke Clinical Research Institute (DCRI) a division of the Duke University Health System (Duke Health), that allows you to provide authorization for collecting your health data when you are signing up to participate in a study. This Quick Reference Card outlines the Site Coordinator's tasks within RDA.

Accessing RDA

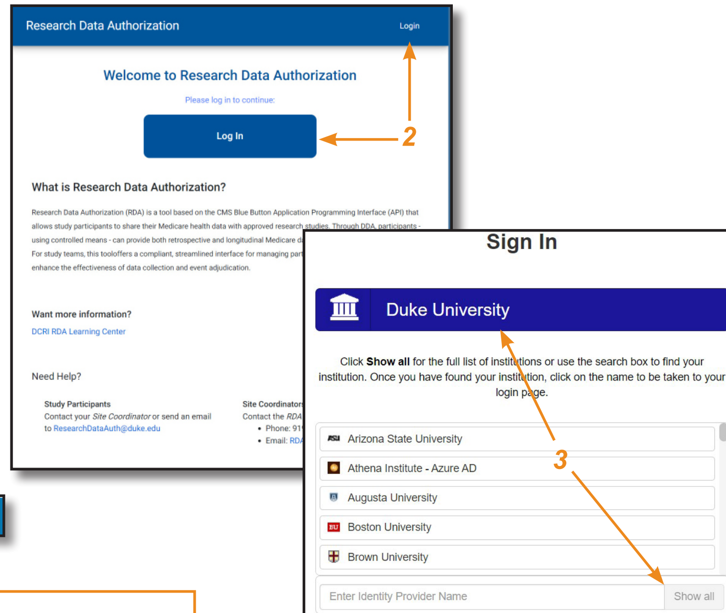
To log into the **Research Data Authorization** tool:

1. Go to https://rda.dcri.duke.edu
2. Click either the **Login** link or the **Log In** button - you are routed to the **Duke Sign In** page
3. Select your organization
   - If you are a *Duke employee* or if you have a *duke.edu* account, click **Duke University** to connect and log in using your Duke credentials
   - If your organization is a part of InCommon, click the **Show all** button to find and click on *your organization* and log in using your organization's credentials
   - If your organization is *not* a part of InCommon, or if you *do not* have a duke.edu account, follow these steps:

     a. Click **Duke University**

     a. Click **Log in with OneLink**

     b. Log in with your *OneLink* credentials



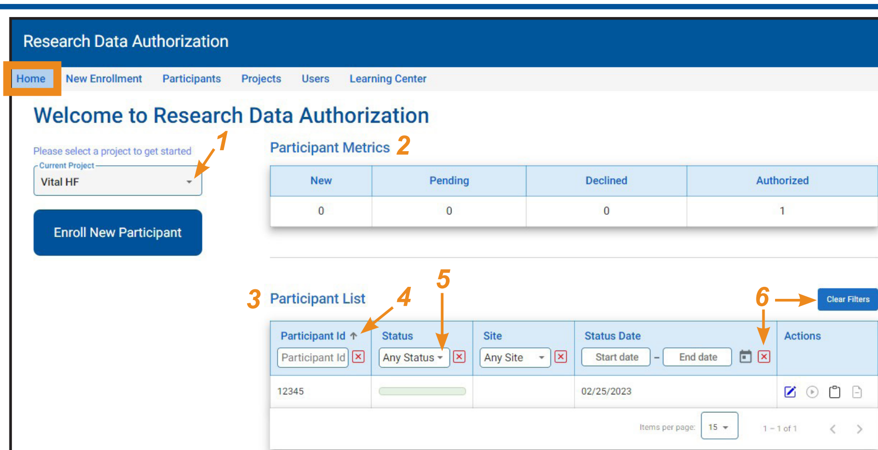
Creating a New OneLink Account

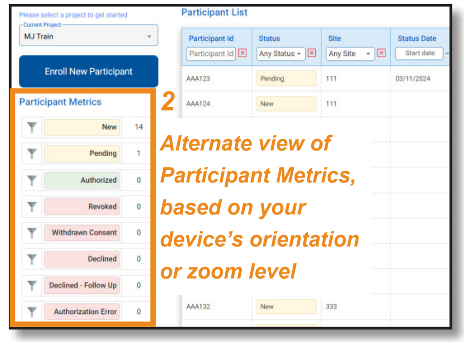
To create a new OneLink account (for non-Duke and non-InCommon users):

1. Click **Register new account**
2. Compete the form, and then click **Submit** - you will receive an email with instructions and a link to finish setting up your account
3. For further help with setting up your OneLink account, see OneLink Help

Home Tab

1. On the **Home** tab, click the **Current Project** drop-down to select a Project
2. **Participant Metrics** displays the number of participants at each status: *New*, *Pending*, *Authorized*, *Revoked*, *Withdrawn Consent*, *Declined*, *Declined - Follow Up*, and *Authorization Error*
   (**Note**: The **Participant Metrics** section might display to the *left*, depending on your device's orientation or zoom level - see screen shot on next page)
3. **Participant List** displays the *Participant ID*, *Status*, *Site*, *Status Date*, and *Actions* columns

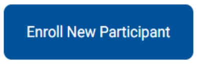




4 Hover your mouse over a column heading and click the up/down arrow to sort the list in ascending/descending order
5 Drop-downs allow you to filter each column
6 Click the **red X** to clear an individual column filter, or click **Clear Filters** to clear all filters you have applied to the columns

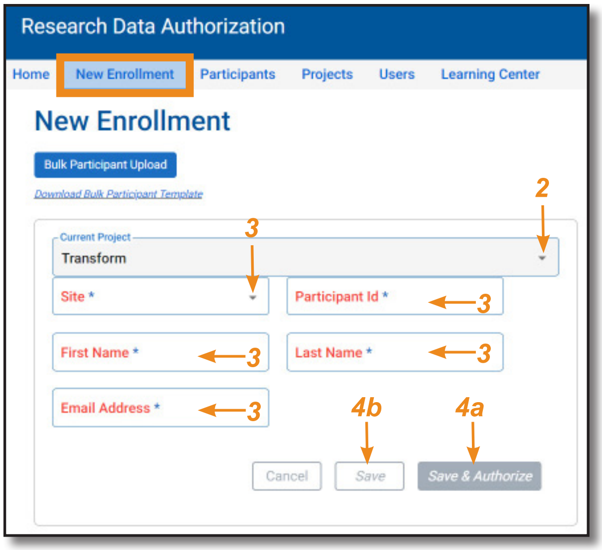
Adding Participants Manually

Site Coordinators can add Participants *manually*. The **Bulk Participant Load** option is performed by the **Project Administrator** or **System Administrator**.



1 On the **Home** tab (image above) click **Enroll New Participant**
2 On the **New Enrollment** tab (image at right), click the **Current Project** drop-down to select a Project
3 Select the **Site**, enter the **Participant ID**, **First Name** and **Last Name**, select the **Status**, and enter the participant's **Email Address** (fields in red with an asterisk are *required*)
4 Do one of the following:
   a To trigger the Authorization process, click **Save & Authorize**
   b Otherwise, just click **Save**

Note: Clicking **Save & Authorize** triggers the **Research Data Authorization** page for the Participant to complete (see *Participant Authorization*, below)

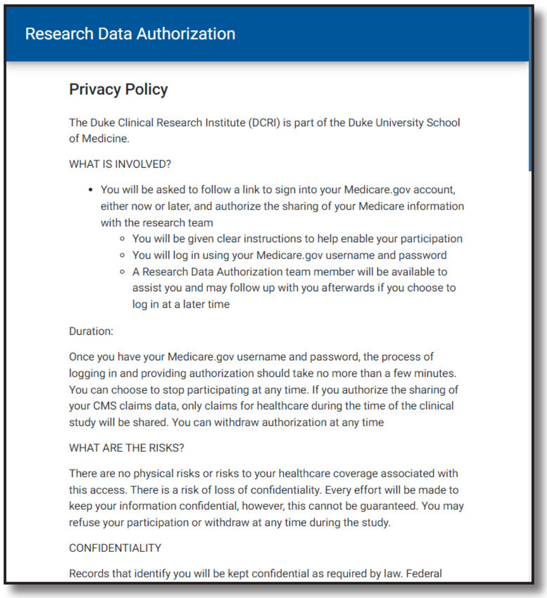


Participant Authorization

When you trigger the **Research Data Authorization** page (by clicking **Save & Authorize**, **Authorize**, or **Reauthorize**), the screen at right appears, which you will then show to the Participant.

Instruct the Participant to read each section, and then select one of three options:

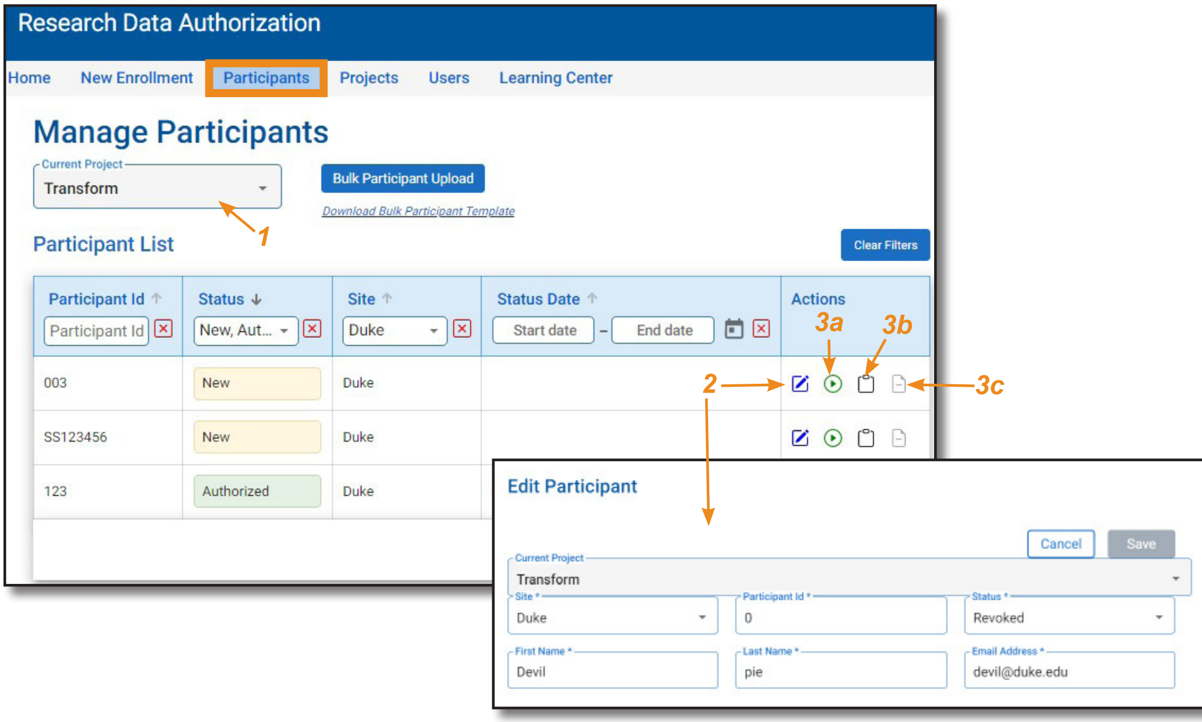
Yes, go to Medicare.gov – allows the Participant to complete the authorization process now (they will need their **Medicare.gov** login credentials to proceed). Once they have completed the authorization process, the Participant's **Status** will be set to *Authorized*.



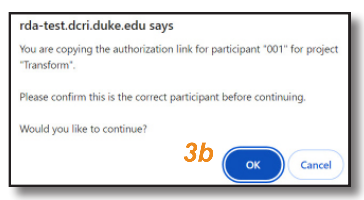
Yes, I will finish later – sets the Participant's **Status** to *Pending*. You can then copy the **Participant Authorization** link to paste into an email message to them with details about completing the process later. (See *Managing Participants* below)

Decline – allows the Participant to decline authorization of the use of their Medicare data for the study. This sets the Participant's status to *Declined*.

Managing Participants



1. On the **Participants** screen, select the project from the **Current Project** drop-down
2. Click the **Edit** button to manage Participant details
   You can edit the Participant's *Project*, *Site*, *Participant ID*, *Status, Name*, and *Email Address*



3. For Participants with a *New*, *Pending*, or *Revoked* status:
   - **a** Click the *Authorize* icon or *Reauthorize* icon
   - **b** Click the **Copy** icon to copy the *Authorization link* to the clipboard
     - ◊ You will see the *Confirmation pop-up* at right after clicking this icon - click **OK** to continue
     - ◊ You can then *paste* the link into an email to the Participant with instructions for completing their Authorization later
   - **c** Click the **Delete** icon (appears red/active if data is available) to remove a Participant's CMS data

Getting Help

If you have questions or comments about the content of this QRC, please email [Technology Training] [**dcriittrain@dm.duke.edu**]. If you experience any technical problems working with **Research Data Authorization** that you are unable to resolve, contact the **RDA Support** team via phone, **919-668-0014**, or email, **RDAuth@duke.edu**.

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