Duke Clinical Research Institute **Quick Reference Card**

Research Data Authorization

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



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- 2 Participant Metrics displays the number of participants at each status: New, Pending, Authorized, Revoked, Withdrawn Consent, Declined, Declined - Follow Up, and Authorization Error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



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Site Coordinators

- **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

Image: Constrained and the second second

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)

	Participants	Projects Users	Learning Cente
ew Enrolln	nent		
ulk Participant Upload			
mload Bulk Participant Tem	olate		
- Current Project	3		
Transform			
Site *	Ţ	Participant Id *	← 3
First Name *	←−3	Last Name *	← 3
Email Address *	←3	4b	4 a

Enroll New Participant

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:

		Acknowledgement
	f the Privacy Policy?	Do you agree to the terms of
ecline	Yes, I will finish later Declin	Yes, go to Medicare.gov
	Yes, I will finish later	Yes, go to Medicare.gov

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*.

Research Data Authorization

Privacy Policy

The Duke Clinical Research Institute (DCRI) is part of the Duke University School of Medicine.

WHAT IS INVOLVED?

- You will be asked to follow a link to sign into your Medicare.gov account, either now or later, and authorize the sharing of your Medicare information with the research team
 - You will be given clear instructions to help enable your participation
 - You will log in using your Medicare.gov username and password
 A Research Data Authorization team member will be available to
 - assist you and may follow up with you afterwards if you choose to log in at a later time

Duration:

Once you have your Medicare.gov username and password, the process of logging in and providing authorization should take no more than a few minutes. You can choose to stop participating at any time. If you authorize the sharing of your CMS claims data, only claims for healthcare during the time of the clinical study will be shared. You can withdraw authorization at any time. WHAT ARE THE RISKS?

There are no physical risks or risks to your healthcare coverage associated with this access. There is a risk of loss of confidentiality. Every effort will be made to keep your information confidential, however, this cannot be guaranteed. You may refuse your participation or withdraw at any time during the study.

CONFIDENTIALITY

Records that identify you will be kept confidential as required by law. Federal



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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

New Enrollmer	nt Participants	Projects Users Bulk Participant Upload	Learning Center					
Participant List	1 Status J	ownload Bulk Participant Terr	status Date ↑		Actions	clear Filters		
Participant Id	New, Aut X	Duke - X	Start date - End date		3a	3b		
003	New	Duke		2►		° -	—3c	
SS123456	New	Duke				•		
			Edit Participant					
123	Authorized	Duke	Euit Participant	↓ I				
123	Authorized	Duke	Current Project	↓ 				Cancel Save

- 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* \odot or *Reauthorize* \odot 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 <u>Technology Training</u> [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, <u>RDAuth@duke.edu</u>.



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