

Directive to study teams for scanning signed research consent forms into the RWJBH Epic System

Applies to: All research studies which are conducted in a Rutgers or RWJBH clinical setting where the RWJBH Epic EMR is in use, and where consent of subjects is required by the IRB.

Details:

- Scan signed informed consents after all applicable signatures and dates have been obtained, irrespective of whether a subject ultimately enrolls in the study. (If the participant does not enroll in a study or fails screening, this should be indicated in a progress note in Epic.)
- The requirement to scan consents extends to all subsequent re-consents signed by participants.
- The requirement to scan consents also extends to all ancillary consents, such as genomics, sub-studies, HIPAA etc.
- Signed consent forms are to be scanned, uploaded, and named individually (and not as one document.)

Naming Convention: The file name for signed research informed consents should adhere to the following naming convention:

1. **For research studies in OnCore:**

OnCore Study number_Type of Consent (i.e., main study, genomics, QOL sub study, Version 2.0 re-consent, etc.)_Date signed

Examples:

- a. CINJ Study: CINJ060222_Main consent_17Oct2022
- b. Non-Oncology: NB22-SMITH-01_Genomics_21SEP2022

2. **For research studies NOT in OnCore:**

IRB number of the IRB of record_Type of consent_Date signed

Examples:

- a. Rutgers eIRB study: Pro2022001834_Main consent_11Oct2022
- b. RWJBH IRBs:
 - NBI_2022-032_Main consent_11Oct2022
 - MMC_2022-053_Main consent_11Oct2022
 - CBMC_2022-9_Main consent_11Oct2022
- c. Western IRB: WIRB_2022-044_Main consent_11Oct2022

Mechanism to scan:

Consent forms may be scanned using either Media Manager or via OnBase (if accessible.) Note that detailed instructions for using Media Manager are included as Appendix A.

Additional Resources:

Tip sheets for both OnBase and Media Manager are available via the Research Coordinator Learning Home Dashboard directly within Epic Hyperspace (Press F1 to find Learning Home Dashboards inside of Epic.) You will see “Scanning Guides” as a component on the right-hand side:

Scanning Guides

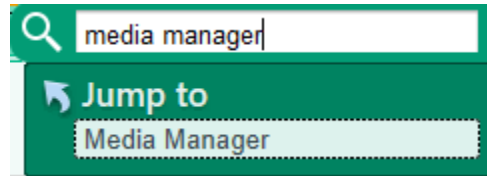
- [Ambulatory - Epic Integrated Scanning Media Manager](#)
- [Acute - Epic Integrated Scanning Media Manager](#)
- [Epic - Integrated Scanning for Registration](#)
- [Epic - Editing Scanned Documents via Media Manager](#)
- [Epic - Sending Scanned Documents for Corrections](#)
- [Epic - Bookmark Tip Sheet](#)
- [Epic - Completing Physician Acknowledgement on Scanned Document](#)
- [OnBase - Scan Annotation](#)
- [OnBase - Batch Prep Process \(Ambulatory Only\)](#)
- [OnBase - Batch Scanning Tipsheet \(Ambulatory Only\)](#)
- [OnBase - Faxing Documents to efax](#)
- [OnBase - Fax Processing Guide](#)
- [OnBase - First Time OnBase Set Up \(Licensing Unity Client\)](#)
- [OnBase - Manager Review Status \(For Batch Scan and Fax Processing\)](#)
- [OnBase - Previsit Documentation Workqueues](#)
- [OnBase - Reverse Keyset Lookup](#)
- [OnBase Patient Window \(OPW\)](#)
- [OnBase - Batch Scanning Instructions - How to Reorder Supplies](#)
- [OnBase - Supplemental Separator Page](#)
- [OnBase - Batch Cover Sheet](#)
- [OnBase - Packet Cover Sheet](#)
- [OnBase - Packet Cover Tipsheet](#)
- [OnBase - Patch Code Sheet](#)
- [OnBase - CAM Request](#)
- [Scanning - Printing Registration Facesheet](#)
- [Scanning FAQ's](#)

> Training Companion

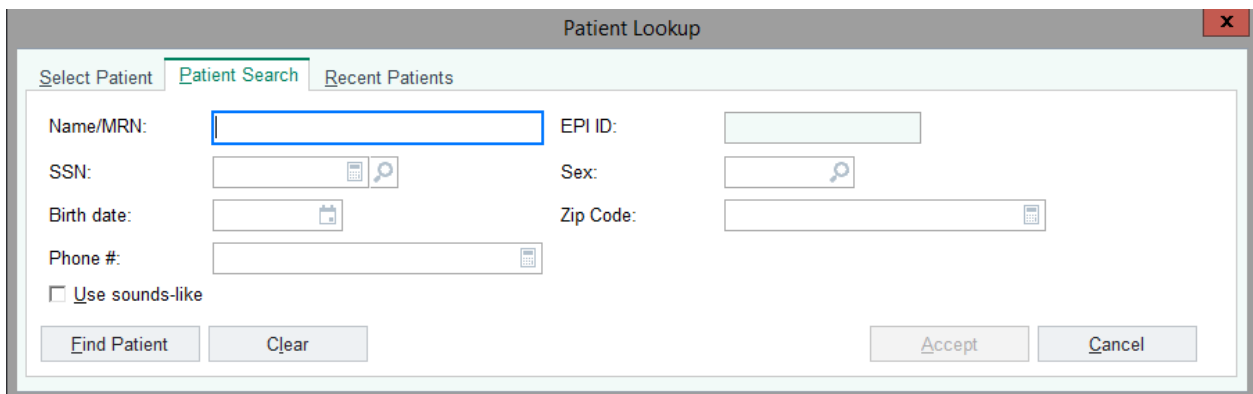
Note: If using OnBase, please follow the same naming conventions for consent forms described above.

Appendix A: Instructions for scanning research informed consent forms into a patient’s chart in Epic using Media Manager

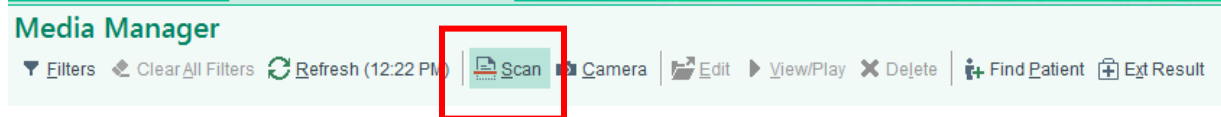
- Navigate to the Media Manager Activity. The easiest way to do this is by searching in the Search bar for “Media Manager” and then clicking the hyperlink to that activity.



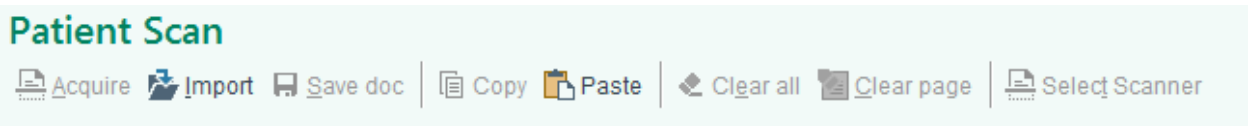
- Select the appropriate patient you wish to scan the document for:



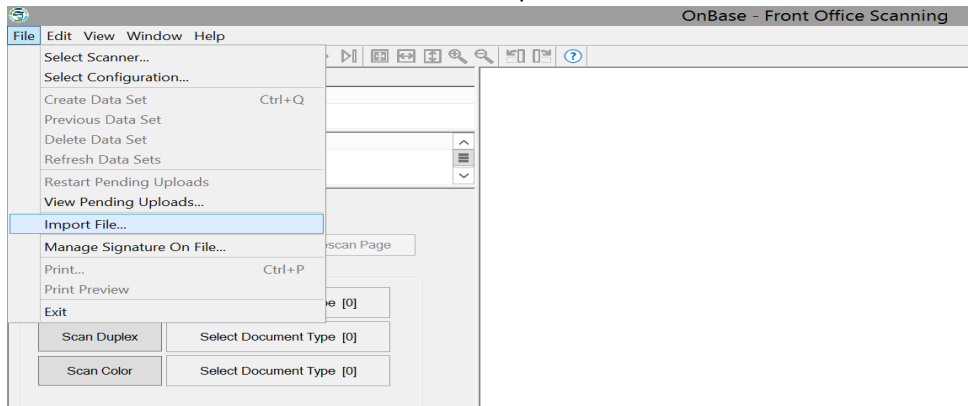
- Once Media Manager is Open > Select the appropriate option to pull your document into the patient’s chart:
 - Scan



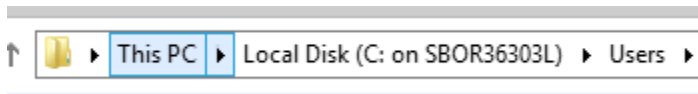
- If your computer is connected to a scanner, you can leverage the “Acquire” option.
- If this is a document on your computer, you can select the “Import” button



- Alternatively, for consent documents that are imported and not scanned directly, you can click on “File” at the top left of the screen and select the “Import File” option

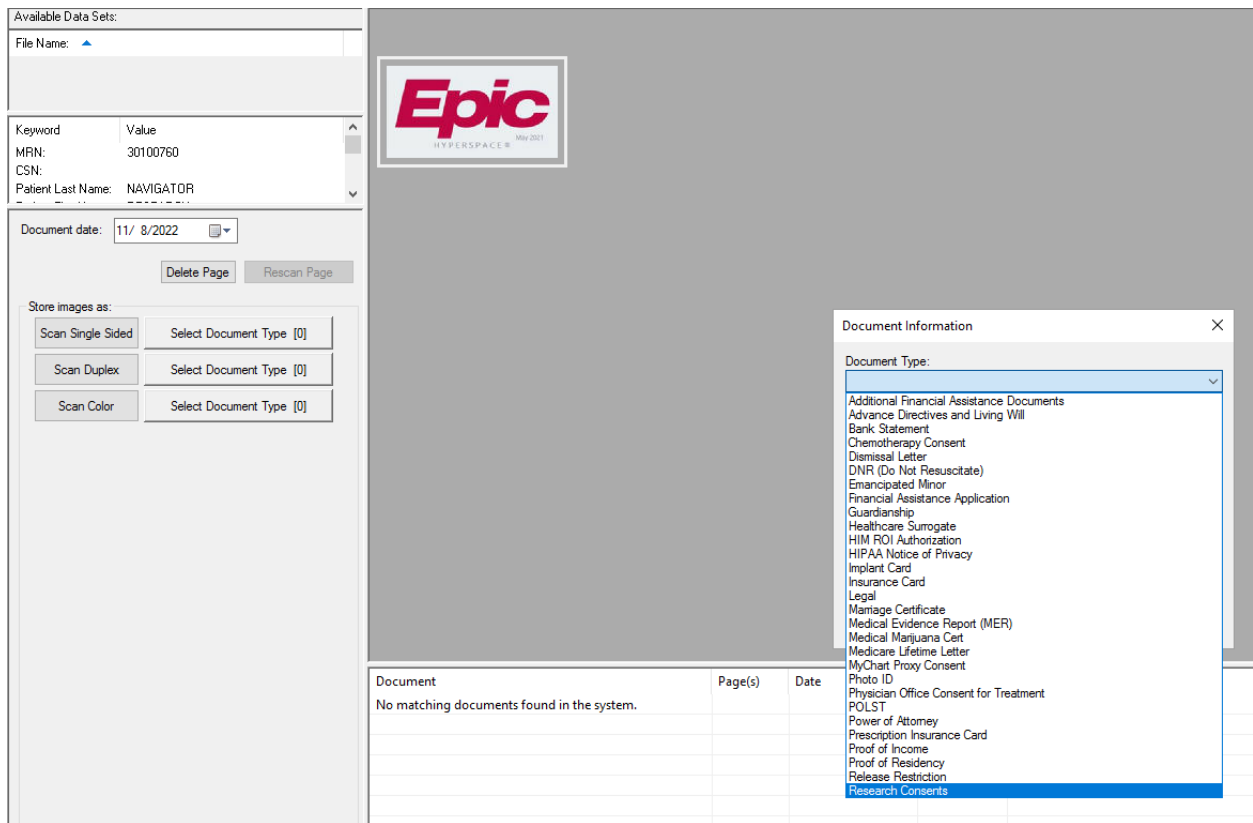
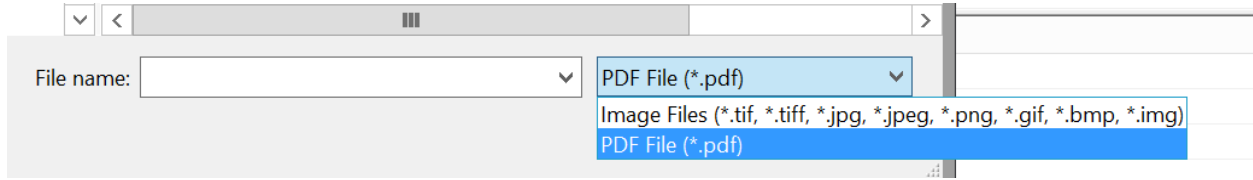


- Navigate to find the document you are scanning in the appropriate folder. **The typical path to get to your local workstation is “This PC > Local Disc (C: on “Computer Name”) > Users > “YOUR USERNAME” > and then the appropriate location you store your files. The example below is using Computer name SBOR36303L. This will vary for each person.**



- Once your scanner is connected, you can select “Select Document Type” > Research Consents.

- Alternatively, for consent documents that are imported and not scanned directly, locate the file and ensure the file type aligns with the document to be imported. Then click “Open” and choose the appropriate option to “Store Image as” when clicking on “Select Document Type”.



- Next, under “Document Description,” provide a Document Description/Name in accordance with the Informed Consent Form Document naming conventions described above in the directive regarding scanning Informed Consent forms (In the example below, “#####” is the corresponding Study Code). If there is a Service Date and/or Received Date fields, complete those as applicable. For consent documents that are imported and not scanned directly, click “Upload” on the bottom left to finalize document filing within Media Manager.

Document Data

Description: #####_Main Consent_21NOV2022

Doc type: Research Consents

Document Information

Document Type: Research Consents

Document Description: STUDYCODE_Main Consent_01Nov2022

Service Date: 11/ 1/2022

Received Date: 11/ 1/2022

Note: the date values set here apply to all documents archived during this operation, and changing them here will apply to previous document(s) as well.

OK Cancel

- For issues, please create an EPIC service now ticket. This can be accessed through the question mark icon in the upper right-hand side of the main toolbar at the top of the page to "Get Help". General EPIC help can also be accessed through the F1 key on the user's keyboard.

