**Research Consents – Options for getting Research Consents into EPIC**

1. **Solarity Scan –** Batch scanning of paper documents

Requirements:

1. Scanner
2. SallyDay will provide the link for the scanner to be ordered thru FTS
3. Solarity access
4. CARS request “App Solarity Ambulatory Scanning”
5. Training
6. Training will be scheduled with the Document Imaging Lead
7. Job Aids will be provided
8. Documents need to be prepped accordingly
9. ID on all pages – Name, DOB, CSN, MRN (at least two of these identifiers)
10. Labels are preferred and recommend
11. All required signatures to be present

*\*Note* – Multiple consents can be scanned at one time

1. **Solarity Import** – Electronically imports documents from your X: Drive if no scanner available

Requirements:

1. Solarity access
2. CARS request “App Solarity Ambulatory Scanning”
3. X: Drive access
4. Documents must be prepped accordingly
5. Adobe is recommended so you can electronically add the required IDs
6. All required signatures to be present
7. Training
8. Training will be scheduled with the Document Imagining Lead
9. Job Aids will be provided

*\*Note* - Multiple consents can be imported at one time.

1. **OnBase Sweep** – Contact SallyDay Eisele to be connected with Jeff Levee who will set users up with this process.

Requirements:

1. CARS approval for OnBase upload form
2. Research Consents will need a Name, MRN and CSN on all pages
3. Set up time with Jeff

*\*Note* - Only one consent can be done at a time

1. **Email** – [MedRecs@ohsu.edu](mailto:MedRecs@ohsu.edu)

* **Only for very low volume**: 1 or 2 documents a day.
* **If a Higher volume** is sent by email, they will be sent back and asked to be sent via paper or Solarity scanning.
* **Only one consent can be emailed at a time** (they will be sent back if more than one patient is in an email)
* **Patient ID is be needed on all pages.** Must include at least two of the following: MRN/NAME/DOB and/or CSN at least two of these are required.

**How the applications work and how the Research Consents end up in EPIC –**

**How Solarity works –**

Documents are scanned or Imported thru the Solarity Application. Once documents are scanned, they get sent to a review process or they are auto-posted with a quality review check. Once thru the Solarity process, the documents will store in OnBase and OnBase will send a hyperlink to EPIC to view the document.

**a. Where is the document viewable in EPIC after using Solarity?**

If a CSN was provided it will be viewable in both the Encounters tab where it linked to the CSN and in the media tab. If no CSN was provided the document will be viewable in the media tab.

**How OnBase works –**

You enter the CSN in OnBase, it sweeps it into a queue for my team to review, then moves it into OnBase to store and routes a hyperlink to Epic.

1. **Where is the document viewable in EPIC after using OnBase?**

It will be viewable in both the Encounters tab where it linked to the CSN and in the media tab.

**Important to Note:**

1. Questions: Contact SallyDay Eisele [woodsa@ohsu.edu](mailto:woodsa@ohsu.edu)
2. All research consents need patient signatures and the signature of the person obtaining the research consent. If these are not visible, the research consent will be sent back.
3. All research consents need proper patient ID on all pages.
4. Page one needs two of the following:
5. MRN, NAME, CSN and/or DOB
6. Page two needs one of the following:
7. MRN, NAME, CSN and/or DOB