UTHealth Houston

Title: **Sharing Source Documents for Remote Monitoring**	Version: 1.0	**Effective Date:** **23 August 2024**	**Page 1 of 8**

1. Purpose

1.1 To outline the procedures for securely sharing source documents using OneDrive for remote monitoring purposes.
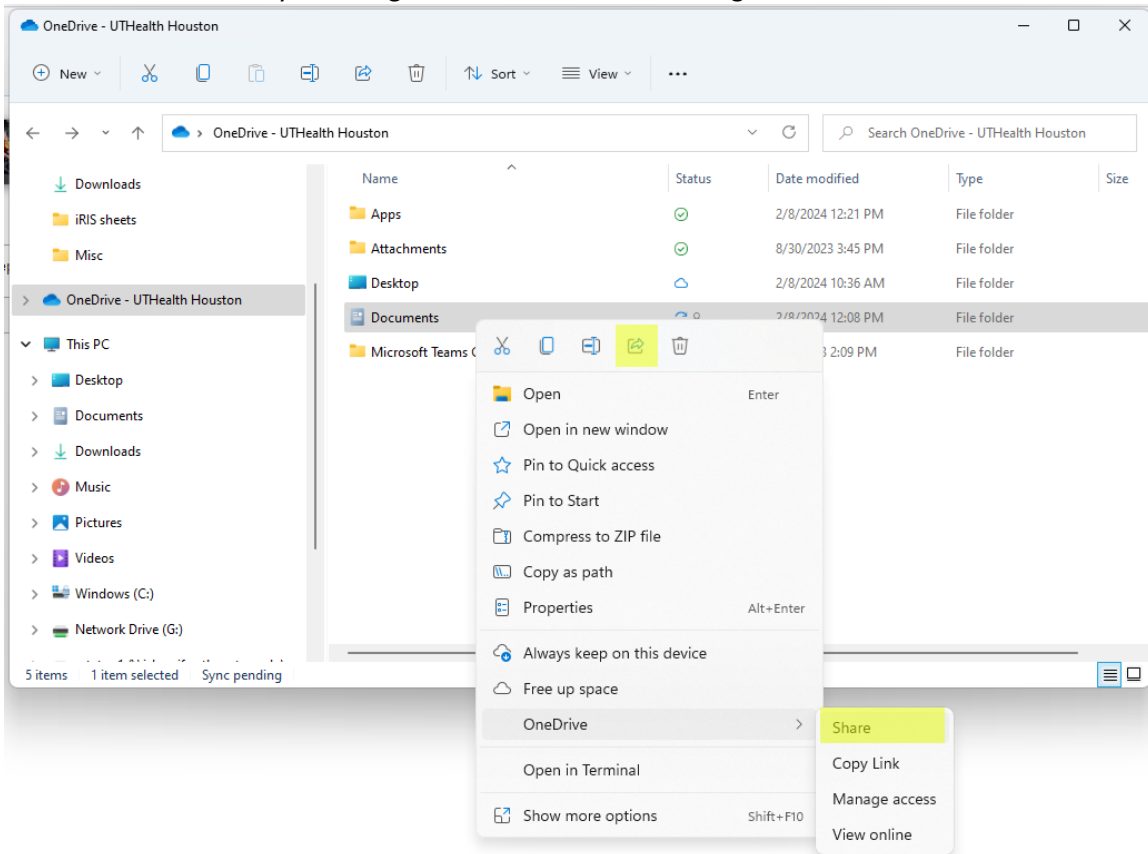
2 Scope and Responsibility

2.1 This SOP applies to all individuals participating in the conduct of clinical research at UTHealth who wish to share source documents for remote monitoring purposes

2.2 It is the responsibility of all users to adhere to this SOP and ensure that documents are shared securely and appropriately.

Instructions

Through computer files:

1. Access your OneDrive by clicking My Files on your computer's navigation panel and selecting OneDrive on the left.
2. Locate the file or folder you wish to share and right click it. You can share by clicking the share icon or by hovering over OneDrive and selecting **Share**.
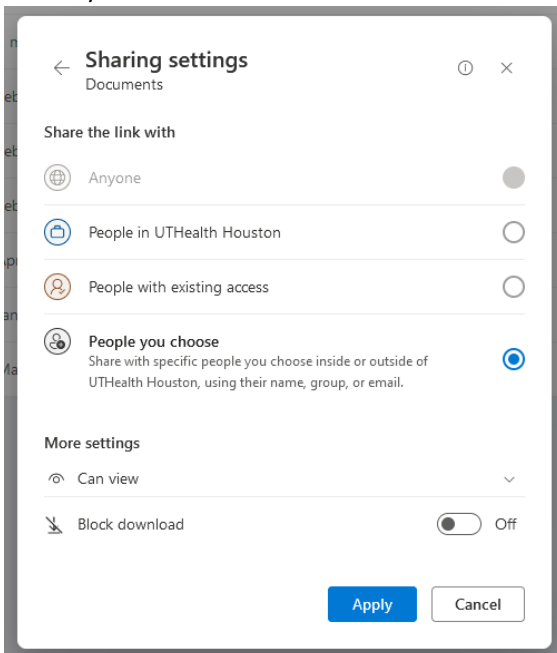
3. Enter the name or email address of the person/group you wish to share with. You can also change their permissions to only viewing or to have editing capabilities.
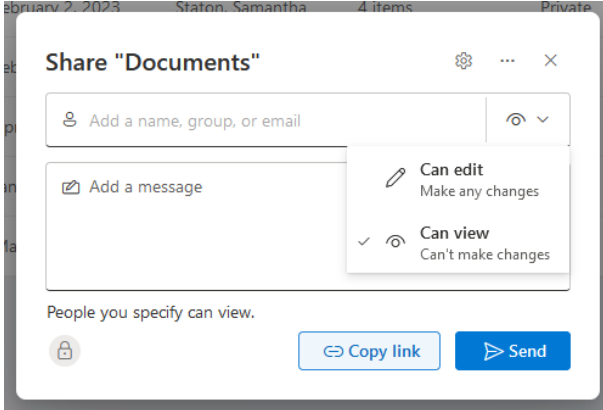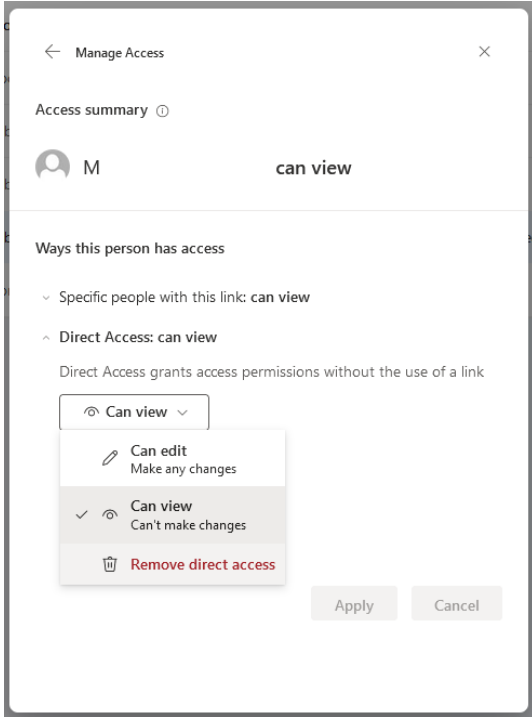
From here, you can click the gear icon to change the settings of who can access this file/folder and to block downloads.

4. Select **Apply** and the person/group will receive an email stating the file/folder has been shared with them. They then click the link to have access.
5. After adding people and sharing with them, you can change their level of access by going to the file/folder, right clicking, hovering over OneDrive, and selecting **Manage Access**. Select the name of the specific person you are editing. From here, you can change if they can only access through a link or directly.
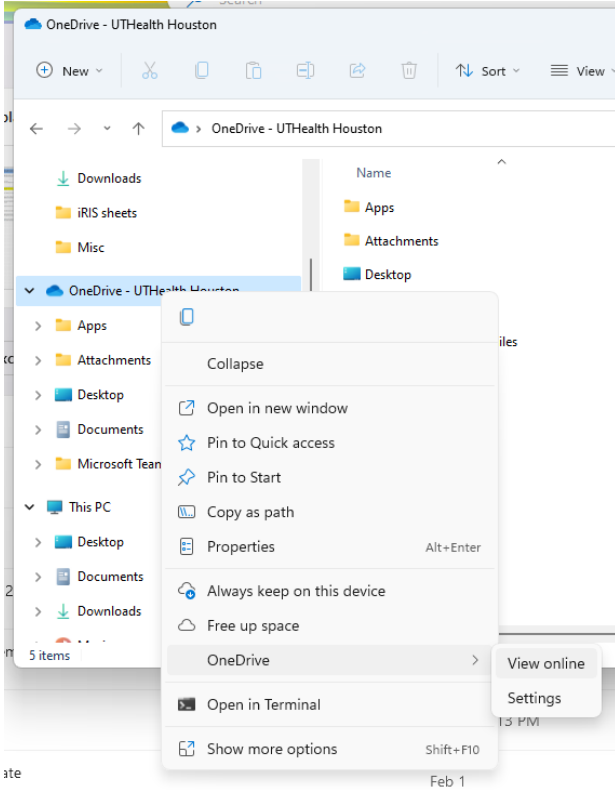
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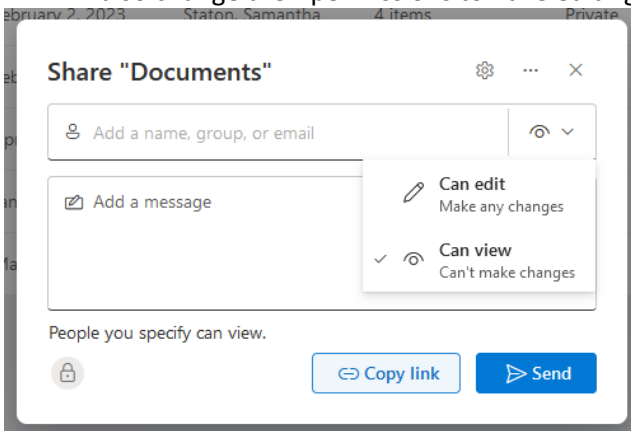| Title: Sharing Source Documents for Remote Monitoring	Version: 1.0	Effective Date: 23 August 2024	Page 3 of 8

Through web browser:

1. Access your OneDrive by going to office.com and signing in with your UTHealth credentials. Click the App Launcher/Menu icon in the top left and select OneDrive from the list.

   You can also gain access to the web version by going to My Files on your computer's navigation page, right clicking on **OneDrive**, going down to **OneDrive**, and selecting **View Online.**
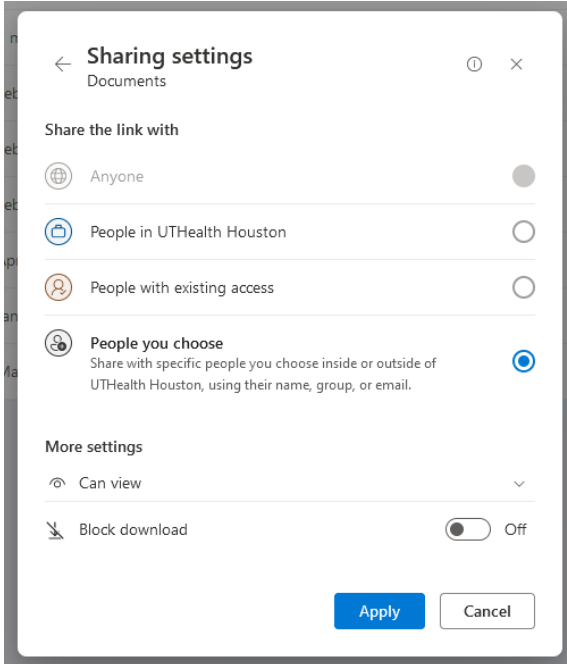
2. Go to **My Files** on the left and select the specific file/folder you wish to share.
3. Click **Share** to the top left, or right click and select **Share** from the drop-down menu.
4. Enter the name or email address of the person/group you wish to share with. You can also change their permissions to have editing capabilities.
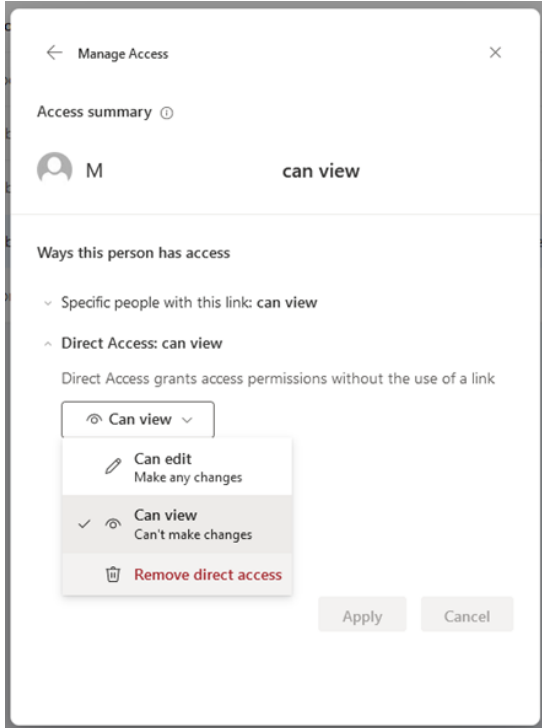

From here, you can also hit the gear icon to change the settings of who can access this file/folder and to block downloads.

5. Select **Apply** and the person/group will receive an email stating the file/folder has been shared with them. They then click the link to have access.

6. After adding people and sharing with them, you can change their level of access by going to the file/folder, right clicking, hovering over OneDrive, and selecting **Manage Access**. Select the name of the specific person you are editing. From here, you can change if they can only access through a link or directly.
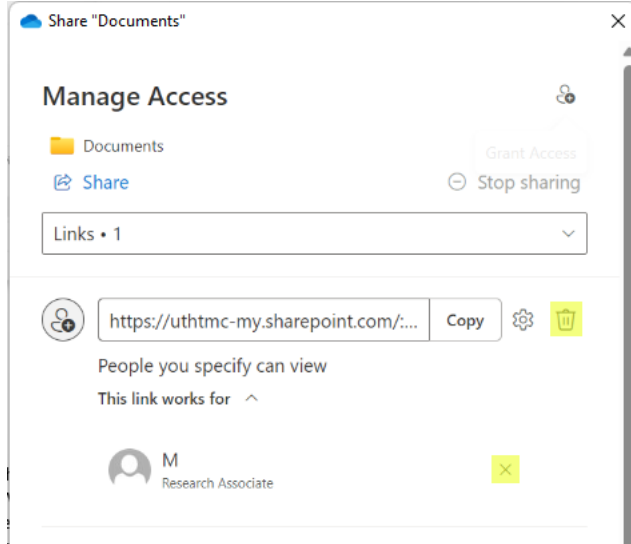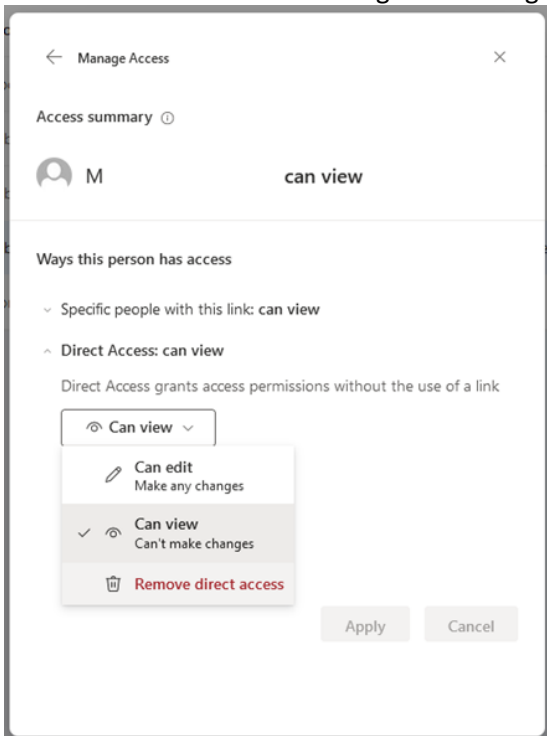
To remove access:
1. Go to the file/folder that is currently shared.
2. Right click and select **Manage Access**.
   a. If you are accessing through your computer files, you will right click, hover over **OneDrive**, then select **Manage Access**.
3. If they are accessing through a link: Through the people tab, select **Links**. Find the specific link you wish to edit and select it. From here, you can edit specific people by clicking the X next to their name, or you can remove everyone's access for the link entirely by clicking the trashcan icon.

4. If they are accessing directly: Under the **People** tab, select the person's name. Select **Direct Access** and change the setting to **Remove Direct Access** and hit **Apply**.

Source Documents
1. Gather relevant pages of the source documents – if they are electronic versions – convert them to PDF. If they are hard copies, scan them to PDF.
2. Redact identifiers – study participant name, initials, address, phone number, MRN etc. See instructions below for redacting.

How to Redact PDF Document

Step one: First, open the document you wish to redact. Go to the Tools menu, then select Redact.

Step two: Selecting this option will reveal the redaction menu at the top of your document. Select Mark for Redaction and then select Text & Images.

Step three: Now you simply need to select the text that you want to redact. Once selected, Acrobat will highlight your selection in red.

Step four: Click Apply to redact. This is a permanent redaction, and so Acrobat pops up a warning box letting you know that. You'll need to click OK to proceed.

Step five: Once you click OK Acrobat will ask if you wish to "also find and remove hidden information in your document" You should consider this a vital stage in fully redacting information. It's always better to be certain you've removed all possible traces of sensitive information by clearing the data too. Click Yes, let Acrobat search your document, and then click Remove.

Using the "Find Text" tool to double check: If you're filing a long document with many possible references to confidential or sensitive information then, for peace of mind, it is worth performing a quick search using Acrobat's Find Text feature. Simply select Mark for Redaction followed by Find Text. This will open the Search dialog box on the left. Here, you can search for specific words (e.g. if there's a name you need to redact), or for common patterns of sensitive information, such as credit card or social security numbers.