

**Ottawa Health Science Network Research Ethics Board (OHSN-REB) /
Conseil d'éthique de la recherche du réseau de science de la santé d'Ottawa (CÉR-RSSO)**

Instructions for Use of SharePoint and OneDrive to send and receive documents to/from Potential/Existing Participants (for TOH/OHRI Staff only)

Microsoft 365 SharePoint and OneDrive are preferred methods of document transfer.

Microsoft 365 SharePoint:

- May be used to send documents **from research staff to potential/existing participants**.
For example when:
 - Research team member needs to send the Informed Consent Form to a potential participant to review and sign.
 - Research team member needs to send a study Survey to a participant to complete.

Microsoft 365 OneDrive:

- May be used to send documents **from potential/existing participants to research staff**.
For example:
 - Participant needs to return their signed consent form to the research team.
 - Participant needs to return their completed study Survey to the research team.
- Note, this is the research staff's personal OneDrive, where files are only accessible to them.
Unfortunately, the Request File feature is only available in OneDrive and not SharePoint.
 - Upon receipt, research staff are responsible for moving documents uploaded into their OneDrive into a SharePoint folder within 24 hours, where they will then be accessible to multiple research team members.

The SharePoint and OneDrive processes may be used:

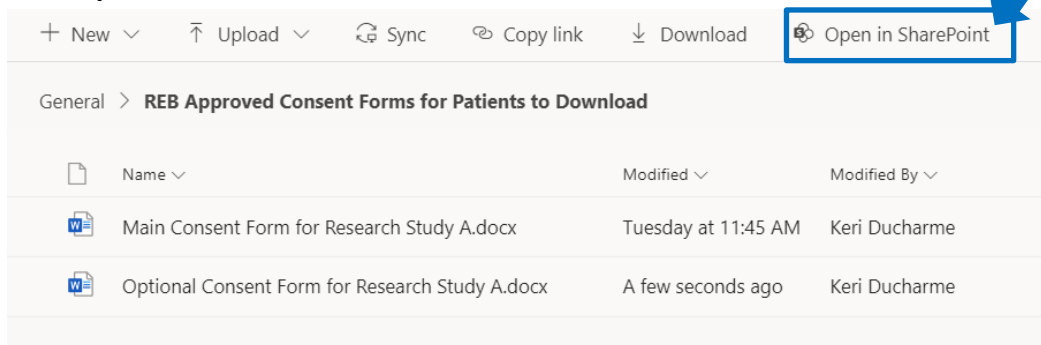
- Together (for example, send consent form to potential participant via SharePoint and ask that it be signed and returned via the link provided to them (i.e.: via OneDrive), *or*
- Separately (for example, using a registered mail service such as Canada Post, mail the consent form to potential participant (or send the consent form to potential participant via MyChart), and ask that it be signed and returned via the link provided to them (i.e.: via OneDrive).

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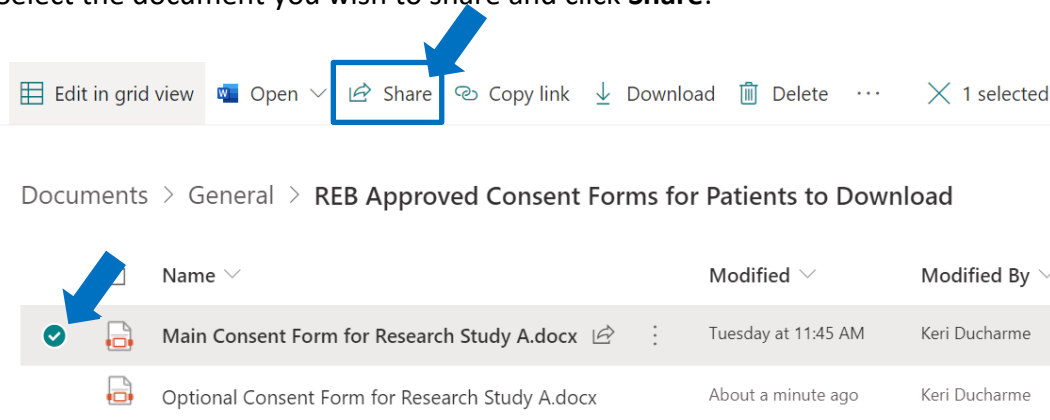
**SharePoint Process to Send Documents to Potential/Existing Participants
(**CANNOT** be used for sharing documents with external Sponsors)**

1. Create a Microsoft Team for your research group.
2. Within your research group's Team, create a channel for the research study. Note, when creating a channel, you can set permissions, so only specific people within the Team can see the channel if need be.
3. Within the channel, create a folder to house the REB approved consent form (and/or other REB approved study documents) that you wish to send to potential/existing participants.

4. Click **Open in SharePoint**:

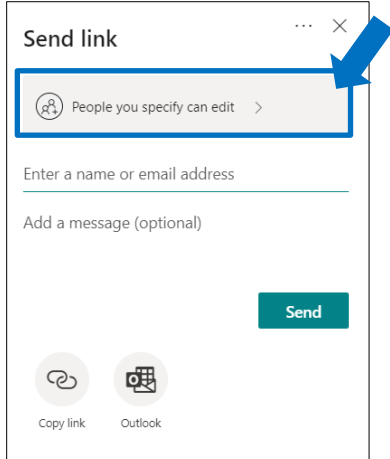


5. Select the document you wish to share and click **Share**:



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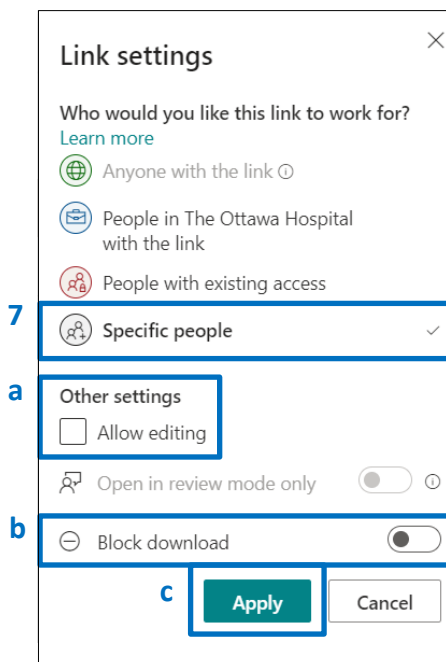
6. In the pop-up, select the drop-down list to change the type of link you will create:



7. In the Link Settings, ensure the **Specific people** option is selected. **This creates a link to the document that will only work for the people that you specify.** For example, if the recipient forwards the link to another party, the link will not work for the other party.

Note: For privacy reasons, the 'Anyone with the link' option has been disabled at TOH.

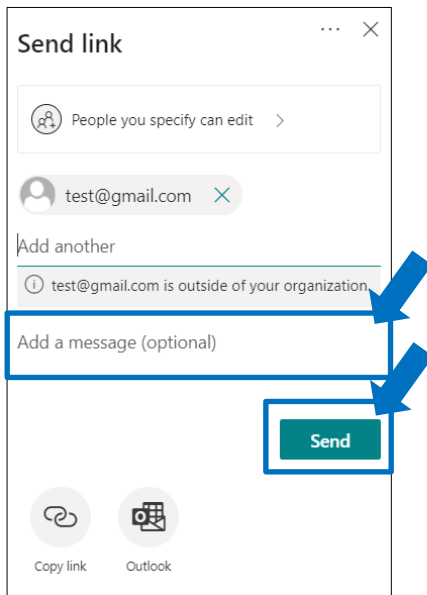
- a. Ensure 'Allow editing' is unchecked.
- b. Ensure 'Block download' is OFF (as recipient will need to download the document).
- c. Click **Apply**.



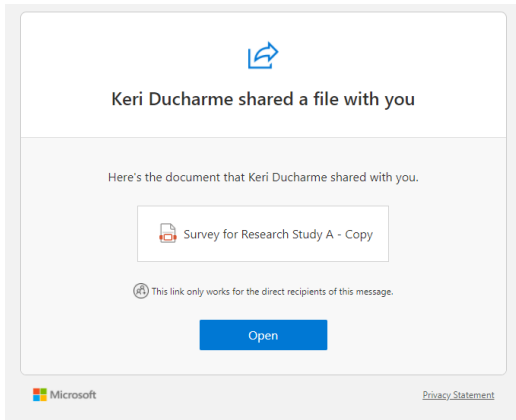
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- Enter the email address(es) of the potential/existing participant(s). This will provide those specific people with access to download the document.

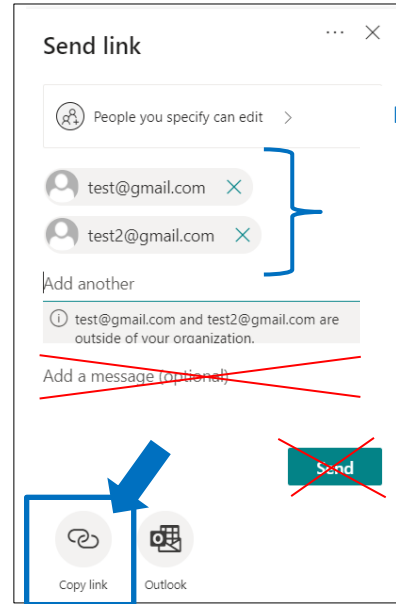
If sending to 1 recipient, after the email address has been entered, enter a message and click **Send:**



The recipient will then receive an email indicating that you have shared a file with them, along with any message you may have entered:



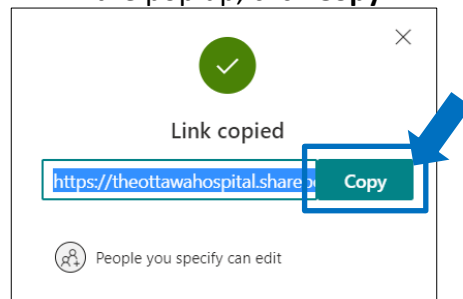
If sending to multiple recipients, after all email addresses have been entered, click **Copy Link:**



Email addresses that are entered will appear here. Verify the spelling of each before moving forward.

ALERT! Do NOT add a message or click 'Send' as recipient email addresses will then be visible to each recipient (privacy issue). When sending to multiple recipients, the 'Copy Link' feature must be used only.

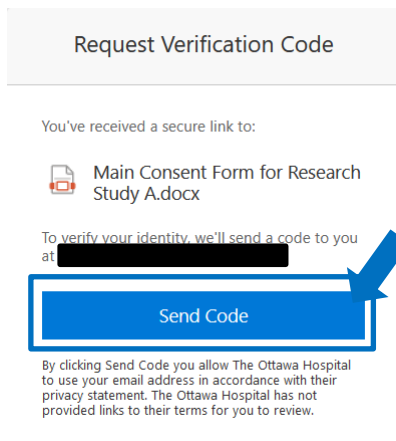
In the pop up, click **Copy**:



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<p><i>Alternatively, the 'Copy Link' feature may be used.</i></p>	<p>Paste the copied link into an Outlook email that you will send to the potential/existing participant. Use the 'BCC' field for <u>all</u> email addresses so recipients cannot see who the email is being sent to.</p> <p>Sample instructional text to include in the email: <i>To download the [document name, e.g.: consent form, completed survey], click on the following link and follow the prompts: [insert link]</i></p> <p>Note: If potential/existing participants will be expected to return documents to you via a link (for example a signed consent form or completed survey), do not send the email yet. Instead, continue with the instructions below as a second link will need to be inserted into the email prior to it being sent.</p>
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9. When the potential/existing participant clicks **Open**, or **on the link of the shared file**, a separate 'Request Verification Code' Window will open. They will need to click **Send Code**:



The code will be sent to the same email address that the initial email was sent to.

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10. The potential/existing participant will then receive a second email with an Account Verification Code. They will need to copy the code they received via email:

Hello,

For security purposes, you must enter the code below to verify your account to access Main Consent Form for Research Study A.docx. The code will only work for 15 minutes and if you request a new code, the code will stop working.


Account verification code:
82060681

Note: This is an example; each recipient will receive a code unique to them.

11. In the initial email they received, the potential/existing participant will need to paste the Account Verification Code, and click **Verify**:

Enter Verification Code

You've received a secure link to:

 Main Consent Form for Research Study A.docx

To open this link, enter the code we just emailed to [redacted]. [Send again](#)

[code received via email]

Verify

12. The potential/existing participant will then be able to open and download the document.

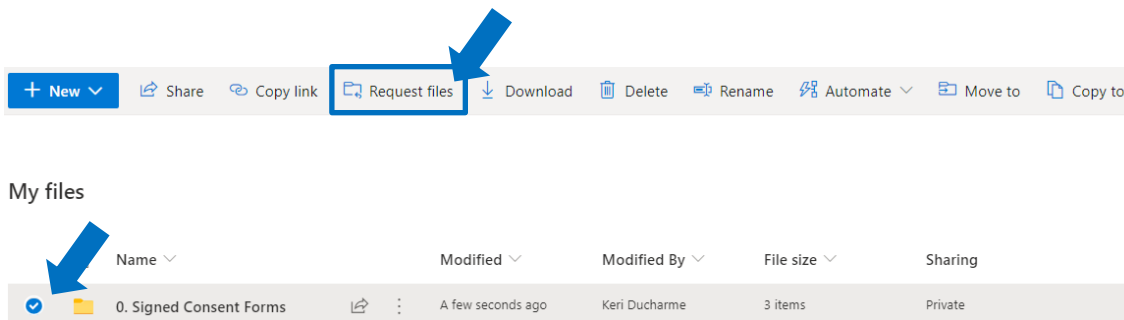
Additional Resources on File Sharing via SharePoint:

- [The Ottawa Hospital- Sharing files and Managing Permissions Video](#)
- [Microsoft Support- Share SharePoint Files or Folders](#)

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**OneDrive Process for Potential/Existing Participants
to Send Documents to TOH/OHRI Research Staff**

1. Open OneDrive. Note, this is your personal OneDrive, where files are only accessible to you. Unfortunately, the Request File feature is only available in OneDrive and not SharePoint. **You will be responsible for moving documents uploaded into your OneDrive into SharePoint.**
2. In your OneDrive, create a folder where you will temporarily house documents returned by potential/existing participants (for example, signed consent forms, completed surveys, etc.). When the potential/existing participant returns the completed document, this is where it will be uploaded.
3. Select the folder and click **Request Files**:



4. Under **What files are you requesting**, enter a description for the files you are requesting from potential/existing participants. They will see this description when they get the file request. Click **Next**.

The image shows a 'Request files' dialog box. It has a title bar 'Request files' and a text input field with the placeholder 'What files are you requesting?'. The input field contains the text 'Signed consent form'. Below the input field, there is a note: 'Recipients will see the above request name and can upload only.' At the bottom of the dialog, there are two buttons: 'Next' and 'Cancel'. A blue arrow points to the 'Next' button.

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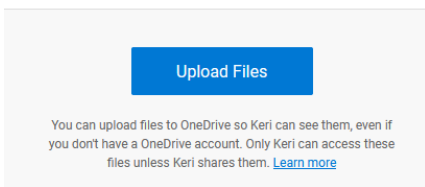
5. Send the File Request or Copy the Link:

If sending to 1 recipient, enter the email address, enter a message (optional) and click **Send:**

The recipient will then receive an email indicating that you have requested a file from them:



Keri Ducharme sent you a request for "Consent Form"



If you entered a message it will also be present in the email.

Alternatively, the 'Copy Link' feature may be used.

If sending to multiple recipients, click **Copy Link:**

**Do NOT add a message or enter an email address, as recipient email addresses will then be visible to each recipient (privacy issue).
 If sending to multiple recipients, the 'Copy Link' feature must be used only.**

Paste the copied link into an Outlook email that you will send to the potential/existing participant. **Use the 'BCC' field for all email addresses so recipients cannot see who the email is being sent to.** Only enter your email address in the 'To' field.

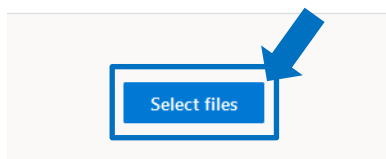
Sample instructional text to include in the email:
To return your [document name, e.g.: signed consent form, completed survey, etc.], click on the following link and follow the prompts: [insert link]

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6. After the potential/existing participant clicks **Upload Files**, or **on the link** that was sent to them via email, an additional window will open, prompting them to **Select Files** and upload:

Keri Ducharme is requesting files for

Consent Form



Potential/existing participants will not be able to see any of the documents in the folder; they will only be able to upload into the folder.

7. Documents uploaded into a research team member's OneDrive may only remain there temporarily. **Research team members utilizing this process are responsible for transferring all files uploaded into their OneDrive into the applicable SharePoint folder with 24 hours of upload.** Moving the files over to SharePoint will enable access to other members of the research team.

Additional Resources on File Requests via One Drive:

- [The Ottawa Hospital- Create File Requests Video](#)
- [Microsoft Support - Create a File Request in OneDrive](#)