
TriNetX Access Management

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TriNetX Access Management

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TriNetX Access Management

1 Overview

TriNetX is a self-service web-based data exploration tool which helps clinical researchers to define a patient cohort using inclusion and exclusion criteria and to explore cohort attributes.

TriNetX has partnered with healthcare organizations (HCOs) spanning 24 countries, thousands of sites, with data providers covering 99% of US health plans to deploy a linked and continually updated global health research network representing over 300 million patients. It has been used to analyze over 20,000 protocols and has presented over 5,800 clinical trial opportunities to its HCO members.

TriNetX contains data from UMMS EHR systems, as well as from a global network of healthcare organizations. UMMS data begins in 2016, with member facilities data starting with the live implementation of Epic. Encounters include inpatient, emergency, outpatient (both ambulatory and office visits). Data domains: demographics, diagnoses, procedures, medications, labs, genomics, and visits. All data in TriNetX have been deidentified. UMMS data is refreshed monthly.

This document contains details and outlines the process for how user access will be requested and managed for this application.

2 Access Setup Requirements

There are 2 components to obtaining TriNetX access:

1. Every user requesting access must have the UMB (University of Maryland Baltimore) credentials comprised of **UMID** (University of Maryland ID) Enterprise Active Directory account. It is created and maintained by the CITS (Center for Information Technology Services).
2. Every user must also have a **TriNetX** application user account. It is created and maintained by the RIC (Research Informatics Core) team, which is part of the UMMS (University of Maryland Medical System) ED&A (Enterprise Data & Analytics) department.

There are 4 scenarios how users will obtain or request access depending on their affiliation and current setup:

Type of User	UMID	TriNetX Account	Sponsorship for UMID
UMB Faculty	✓	✓	N/A
UMB Non-Faculty	✓	Needs to submit a request	N/A
Non UMB with existing UMID	✓	Needs to submit a request	It has already been obtained
Non UMB with no UMID	✗	Needs to submit a request	Required

The non UMB users with no UMID will get UMID as part of submitting the TriNetX access request form.

The specifics for each scenario are listed in the next section.

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3 Types of Users, Affiliate Organizations & Deactivation Process

3.1 Types of Users

- The types of users who will need access include, but are not limited to: *Principal Investigators, Research Coordinators, Researchers, MDs, PhDs, RNs, Faculty, Residents, Fellows, Medical and Graduate Students.*
- All users will have the same level of access within the application, regardless of position, role, title, etc.
- All employees of UMB or UMMS can get a TriNetX account, but the UMB affiliates and UMMS organization will follow a different process for obtaining access and deactivation of accounts.

3.2 UMB Users

New Accounts	<ul style="list-style-type: none">• The majority of TriNetX users will be UMB faculty and staff. All of them should already have a UMID.• All UMB faculty are eligible and will be proactively granted accounts. Faculty is defined as those with a 51+% appointment. The current UMB faculty will be bulk loaded and their TriNetX accounts will be created automatically through the load by the RIC team. They will not need to submit access request form as described in step # 4.• The UMB non-faculty will have their TriNetX accounts created manually and will need to submit access request form as described in step # 4.• There will be a bi-weekly load of users who are new UMB faculty and have joined UMB after the initial bulk load to give them TriNetX access.
Deactivation	<ul style="list-style-type: none">• There will also be a bi-weekly file containing a list of users who left UMB to deactivate their accounts in TriNetX.

3.3 Non UMB Users

New Accounts	<ul style="list-style-type: none">• UMMS, College Park, and UMBC users will need to submit access request form as described in step # 4.• A sponsor is needed to obtain a UMID for non-UMB users that want access to TriNetX. Generally, the user requesting access should know who their sponsor is.• The process for College Park and UMBC users access is still in development.
Renewal & Deactivation	<ul style="list-style-type: none">• The UMID accounts must get renewed every year. An email will be sent to the sponsor asking if the specific user's UMID account needs to be renewed. The sponsor must respond to the e-mail confirming to renew the UMID account - as long as the staff member has not left the organization (or have not changed their department, position or role where UMID accounts would no longer be required, because they are not doing research related work or don't need UMID for another reason). Otherwise the sponsor should indicate not to renew the account if applicable. If the sponsor doesn't respond to the e-mail, the UMID account will be deactivated.

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- If the staff member left their respective organization or no longer needs UMID due to change in department, position or role, the sponsor should notify the UMB CITS to deactivate UMID Enterprise AD account as soon as they know it, even before the renewal e-mail is sent by UMB as part of the access audit process.
- All deactivated UMID user accounts, including for non UMB faculty and staff, will be included in the bi-weekly file to deactivate in TriNetX.

4 Submitting Access Request Form

An editable PDF form will need to be downloaded by using '**click here**' link from the following web page:

<https://intra.umms.org/umms/departments/portfolio/enterprise-data-and-analytics-division/research-informatics/trinetx-account-access-request>

The below information must be completed on the access request editable PDF form:

Requestor	
Request Date	
Requestor Name	
Primary Affiliation (<i>UMB, UMMS, etc.</i>)	
Department or Division	
Title/Role	
Terminal Degree (<i>EX: MD, PhD, etc.</i>)	
Additional Information	
Email Address	
Contact Phone Number	
Do you have a UMID account?	

- Once the PDF access request form is completed and saved, e-mail it as an attachment to EDA-Research@umm.edu.
- The RIC team will receive the e-mail with a completed request form.
- The RIC team will contact the requestor to obtain a sponsor's name if applicable and then contact the sponsor to get an approval for a UMID account.
- If the sponsor had approved a UMID account, the RIC team will contact UMB CITS to proceed with the UMID account creation.
- The RIC team will create a TriNetX user account.

5 UMID E-Mail Notification for Account Activation

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Once the CITS creates a UMID Enterprise Active Directory user account, an e-mail will be sent to the requestor with a link to activate the account. The activation needs to be completed by the requestor in a timely fashion, since the link will expire if the account is not activated.

6 Changing UMID Password

- During the activation process, a prompt will be available to select a new UMID password.
- The links for resetting password are also available on the TriNetX page:

[Forgot Password?](#) and [First Time User, Setup Your Password](#)

- The links redirect to the <https://directory.umaryland.edu/pw.asp?ICT=NP> web page.
- Follow the password length and format requirements provided in the e-mail and the password reset prompt.
- *The UMID account activation and password selection should be done prior to logging in to TriNetX.*

7 TriNetX Welcome E-Mail Notification

Once the user account has been setup in TriNetX, the requestor will receive the following e-mail message:

From: support@trinetx.com <support@trinetx.com>
Subject: TriNetX: Welcome New User

CAUTION: This message originated from a non UMMS, SOM, or FPI email system. Hover over any links before clicking and use caution opening attachments.



Dear TriNetX User (e-mail address),

We are pleased to provide you with access to TriNetX. You may login by navigating to the TriNetX web site using your internet browser.

TriNetX URL: <https://live.trinetx.com>

After entering your email address, you will be directed to your organization's login page. Upon successful login, you will be redirected back to TriNetX, where you will be required to accept our end user agreement upon your first login.

Please contact the Help Desk by standard means if you have any concerns accessing TriNetX.

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Sincerely,
Your TriNetX System Administrator

STATEMENT OF CONFIDENTIALITY AND DISCLAIMER The information contained in this transmission along with any and all attachments are privileged, and confidential information protected by federal and state laws. It is intended for the exclusive use of the person(s) named above. If you are not the intended recipient, you are hereby notified that any review, dissemination, distribution, or duplication of this communication is strictly prohibited and that you received this message in error. Please immediately notify the sender and destroy all copies of this message along with any attachments.

For more information on how TriNetX, Inc. processes private information, please refer to the Privacy Policy at: <https://www.trinetx.com/privacy-policy>

8 TriNetX User Agreement

All users who are granted access must review the guidelines published by TriNetX regarding the use of data by visiting this web page: <https://trinetx.com/real-world-resources/publications/trinetx-publication-guidelines/> and adhere to these guidelines.

Additionally, as per the instructions in the Welcome e-mail, all users will be required to accept the TriNetX end user agreement upon initial login.

9 Internet Browser

- The following Internet browsers are recommended for use with TriNetX:

Google Chrome for Windows version 107.x or higher or Microsoft Edge version 108.x or higher

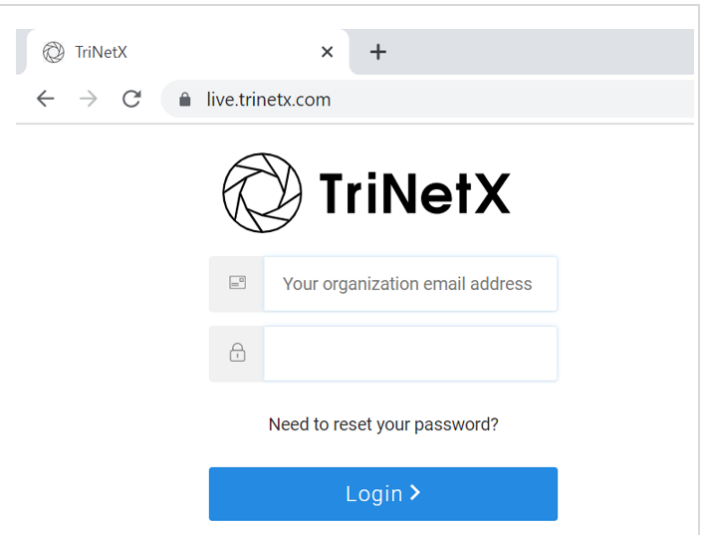
10 Login & Password

- The TriNetX application will use the same username and password as the UMID.
- The UMID and TriNetX user name and password will not be linked to or synched with the UMMS AD Active Directory account.
- The initial login will require user's **e-mail address**, then it will be automatically re-directed to another login page for the second authentication through UMID Enterprise AD.
- The 2nd login page will require the **UMID username and password**.
- The UMID/TriNetX user name are not the same as the e-mail address.
- See section [6 Changing UMID Password](#) in this document for details about resetting a password.

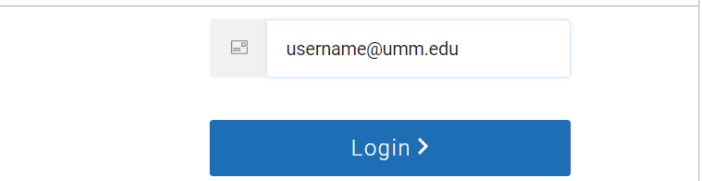
11 Accessing the System

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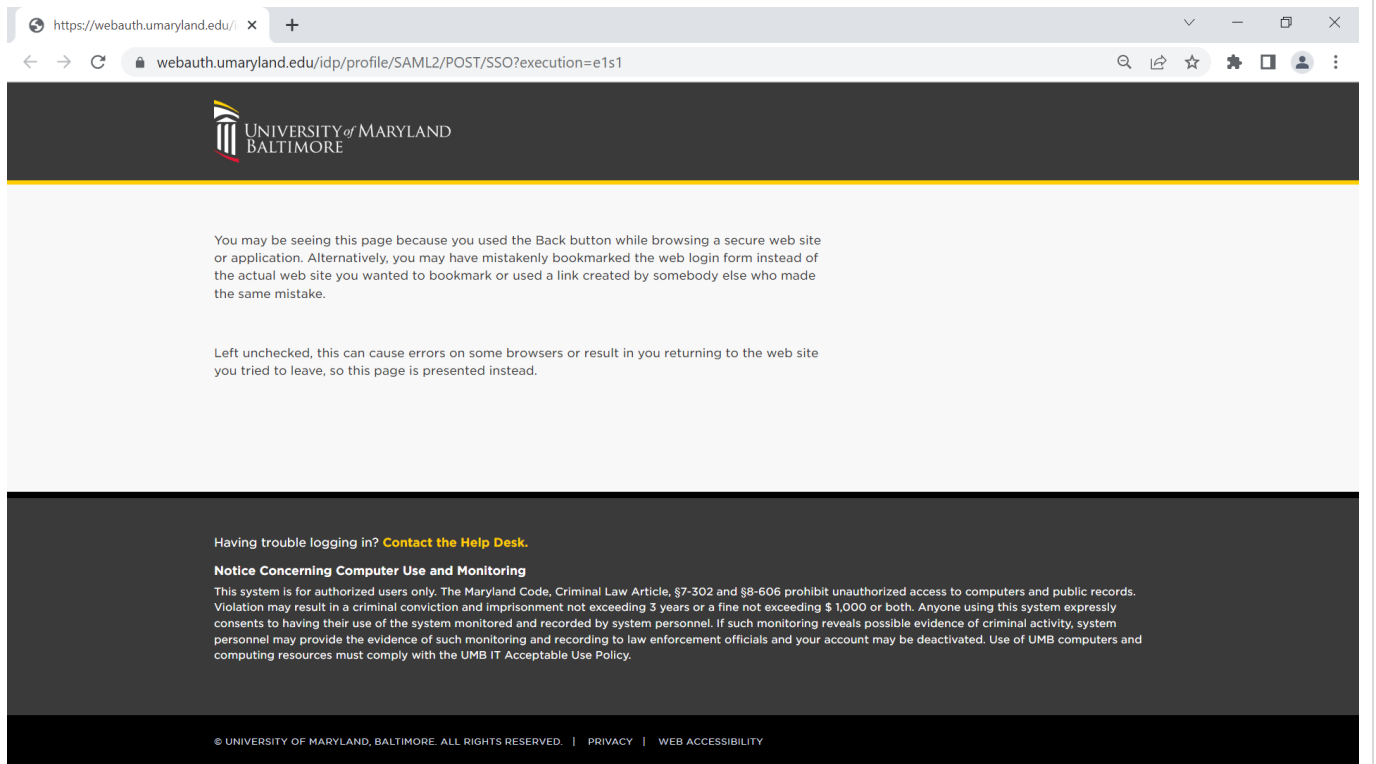
- To logon to TriNetX, use the following link:
<https://live.trinetx.com/>
- Enter your organization's e-mail address and click on the Login button.
- Note that the password is not entered on the initial login page (or not until a valid e-mail address has been entered), and it will be required on the next screen along with the UMID username.



- Upon entering the e-mail address, user will be redirected to another website.

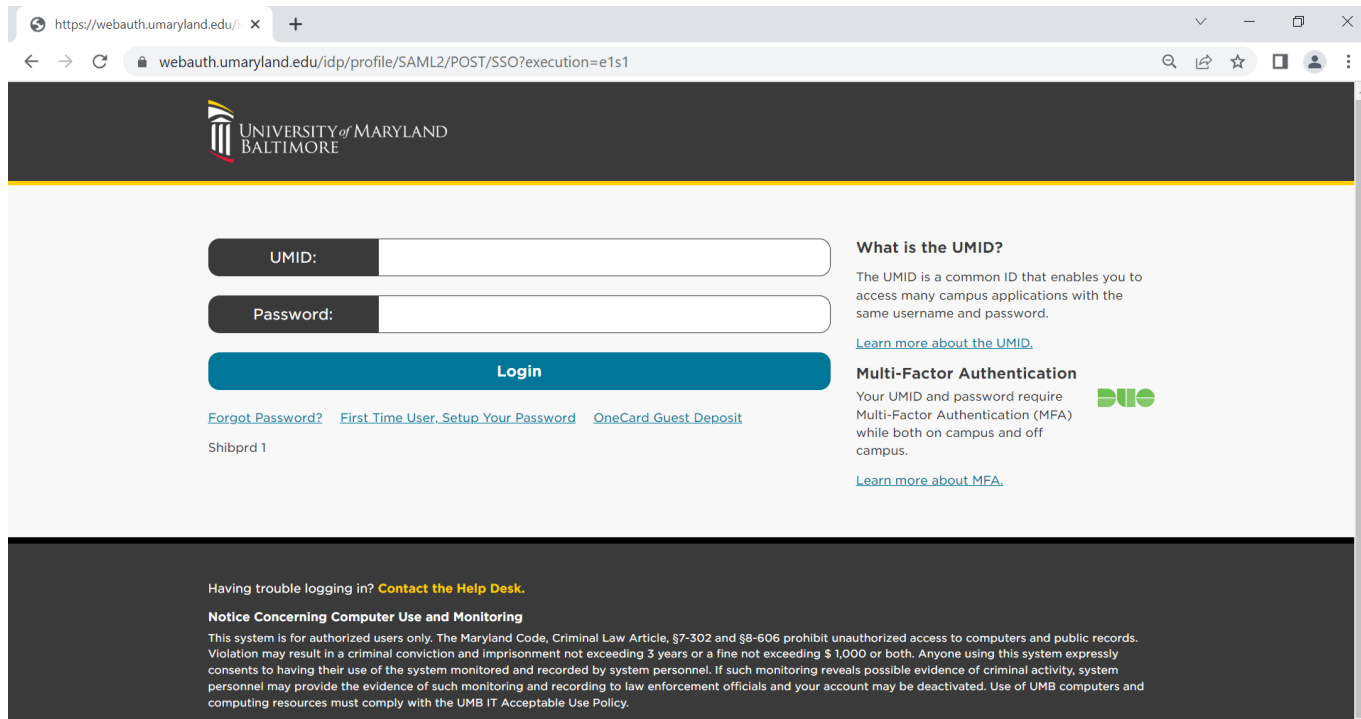


- Note: the page that the user is redirected to cannot be opened directly from the URL. The below error message will display if <https://webauth.umaryland.edu/idp/profile/SAML2/POST/SSO?execution=e1s1> is accessed.

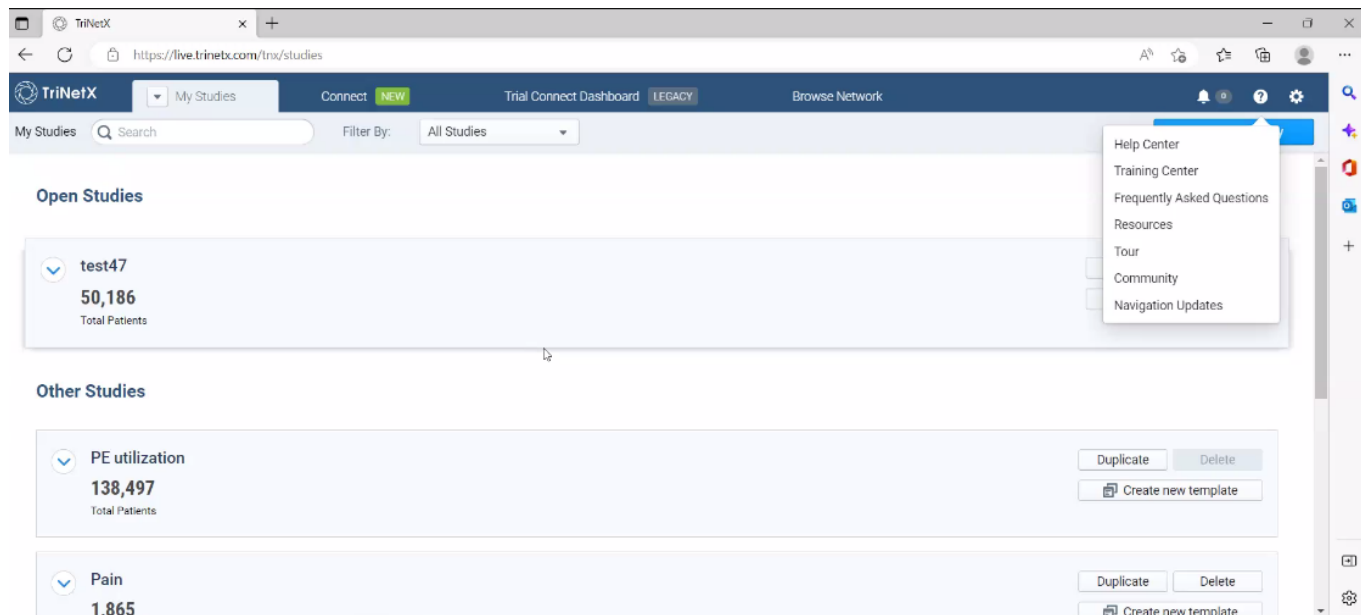


- Enter the UMID username and password on the second login page and click Login.
- See section [6 Changing UMID Password](#) in this document for details about resetting a password.

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➤ Once the user successfully logs in to the application, the home page with My Studies tab will open.



Note there are a few useful menus under the (?) button in the upper right.

12 Support

- For issues with UMB UMID accounts, contact the CITS helpdesk at 410-706-4357. More information about UMB Helpdesk, CITS location, hours of operation, etc., is available at:

<https://www.umaryland.edu/cits/>

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 <https://www.umaryland.edu/helpdesk/>

 <https://www.umaryland.edu/helpdesk/umb-account/>

- For general research related questions, refer to the UMB ICTR (University of Maryland Baltimore Institute for Clinical & Translational Research) <https://www.umaryland.edu/ictr/> web page.
- For issues with TriNetX application, contact RIC team by e-mail at EDA-Research@umm.edu.
- For other technical support issues, contact your respective organization's Helpdesk.
- The UMMS Helpdesk can be contacted by calling 410-328-HELP (410-238-4357) or by e-mail at helpdesk@umm.edu. For more details visit <https://intra.umms.org/umms/departments/ist/helpdesk>.

13 Training

* Refer to the '*TriNetX Training.pdf*' document for more details on training, documentation and other useful resources.

14 Glossary

AD	Active Directory
CITS	Center for Information Technology Services
ED&A	Enterprise Data & Analytics
HCO	Healthcare Organizations
ICTR	Institute for Clinical & Translational Research
RIC	Research Informatics Core
UMB	University of Maryland Baltimore
UMBC	University of Maryland Baltimore County
UMID	University of Maryland ID
UMMS	University of Maryland Medical System