

Standard Operating Procedure (SOP)

Adding BAA Activities in Epic

Purpose:

To ensure proper documentation and follow-up when a group is missing a BAA (Business Associate Agreement) activity in Epic.

Scope:

This procedure applies to Account Coordinators (ACs) and Account Managers (AMs) who are responsible for tracking, updating, and closing BAA activities in Epic.

Procedure:

1. Identify Missing BAA Activity

- **For Account Coordinators (ACs):**
 - Search both **open and closed activities** in Epic to confirm the group does not have a BAA activity.
- **For Account Managers (AMs):**
 - It is only necessary to review **open activities**.

2. Add New Activity in Epic

- Navigate to the **group profile** in Epic.
- Add a new activity using the **activity code BAUD**.
- Change the **description** to:
ADS EB BAA

3. Assign Ownership

- Ensure the **Account Manager (AM)** is set as the **Owner** of the activity.

4. Document and Close the Activity

- Based on the actions taken, document accordingly in the activity notes:
 - If a **signed BAA** was **attached and/or sent**, note that.
 - If an **affirmation email** was **attached and/or sent**, note that.
 - Once documentation is complete, **close the activity**.
-

Notes:

- If unsure about BAA Processing steps, refer to the SOPs for [Processing Signed BAAs](#) and [Processing Non-Signed BAAs](#)