

REDCap User Guide - Production Status Requirements

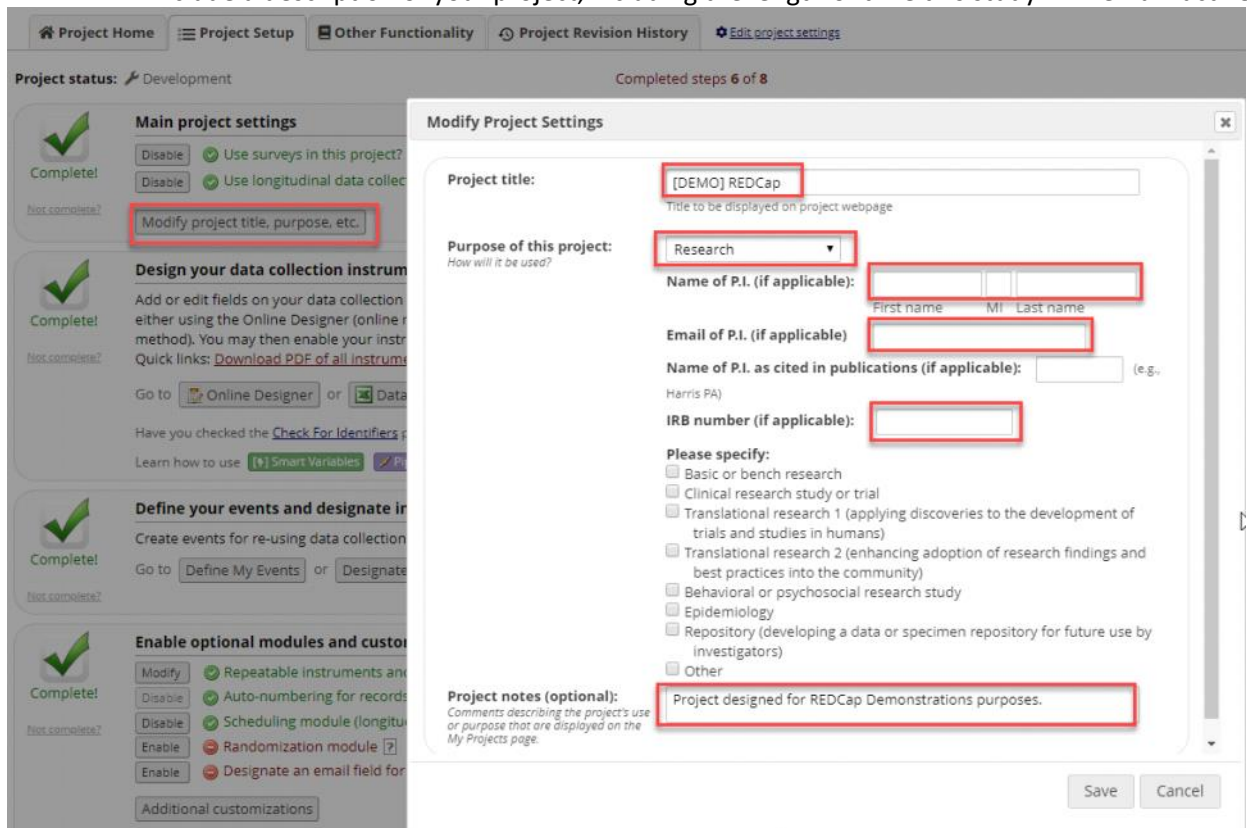
Special Note: You must not place Production data into your project until it is placed in Production mode!

Follow these steps before requesting to place project into Production from REDCap Administrator. Then read further to learn about the benefits of placing your project into Production Mode.

Before placing your project in Production & How to request for Production Mode

1. Ensure you have appropriately defined Project Settings

- a. Project Title
- b. Purpose of this project
 - i. Operational Support
 - ii. Research
 - 1) Include Approved UVA IRB Study Number
 - 2) PI names, email
 - 3) Specify type of research (basic/bench, clinical study/trial, translational research, etc...)
 - iii. Quality Improvement
 - 1) Include UVA IRB Study Tracking # 21566 if exempt
- c. Project Notes
 - i. Include a description of your project, including the length of time this study will remain active



Project status: Development Completed steps 6 of 8

Main project settings

Complete! ☐ Use surveys in this project? ☐ Use longitudinal data collection? ☐ [Modify project title, purpose, etc.](#)

Design your data collection instrument

Complete! [Add or edit fields on your data collection instrument](#) (online method). You may then enable your instrument. Quick links: [Download PDF of all instruments](#)

Go to [Online Designer](#) or [Data Manager](#)

Have you checked the [Check For Identifiers](#) page? ☐ [Learn how to use Smart Variables](#)

Define your events and designate instrument

Complete! [Create events for re-using data collection instrument](#)

Go to [Define My Events](#) or [Designate instrument](#)

Enable optional modules and customize

Complete! ☐ Repeatable instruments and auto-numbering for records ☐ Scheduling module (longitudinal) ☐ Randomization module ☐ Designate an email field for [Additional customizations](#)

Modify Project Settings

Project title: [DEMO] REDCap
Title to be displayed on project webpage

Purpose of this project: Research
How will it be used?

Name of P.I. (if applicable):
First name MI Last name

Email of P.I. (if applicable):

Name of P.I. as cited in publications (if applicable): (e.g., Harris PA)

IRB number (if applicable):

Please specify:

☐ Basic or bench research

☐ Clinical research study or trial

☐ Translational research 1 (applying discoveries to the development of trials and studies in humans)

☐ Translational research 2 (enhancing adoption of research findings and best practices into the community)

☐ Behavioral or psychosocial research study

☐ Epidemiology

☐ Repository (developing a data or specimen repository for future use by investigators)

☐ Other

Project notes (optional):
Comments describing the project's use or purpose that are displayed on the My Projects page.

Project designed for REDCap Demonstrations purposes.

[Save](#) [Cancel](#)

1. Check for Identifiers

[Project Home](#) [Project Setup](#) [Other Functionality](#) [Project Revision History](#) [Edit project settings](#)

Project status: Development Completed steps 0 of 8


Not started
[I'm done!](#)

Main project settings

[Disable](#) Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

[Disable](#) Use longitudinal data collection with defined events? [?](#)

[I'm done!](#) [Modify project title, purpose, etc.](#)


Not started
[I'm done!](#)

Design your data collection instruments & enable your surveys

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to [Online Designer](#) or [Data Dictionary](#)

You may also browse for pre-built data collection instruments in the [REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

This Check For Identifiers Module will help you assess whether or not some fields may be identifiers, and then allows you to easily tag such fields as identifiers for greater data security. The list below will help you better understand what data elements are considered Identifiers by HIPAA:

18 HIPAA Identifiers

- Names
- All geographical information (Street address, city, county, precinct, zip code, and their equivalent geocodes)
- All elements of dates (except year) for dates directly related to individual, including birth date, admission date, discharge date, date of death; and all ages over 89 and all elements of dates (including year) indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older
- Phone numbers
- Fax numbers
- Electronic mail addresses
- Social Security numbers
- Medical record numbers
- Health plan beneficiary numbers
- Account numbers
- Certificate/license numbers
- Vehicle identifiers and serial numbers, including license plate numbers
- Device identifiers and serial numbers
- Web Universal Resource Locators (URLs)
- Internet Protocol (IP) address numbers
- Biometric identifiers, including finger and voice prints
- Full face photographic images and any comparable images
- Any other unique identifying number, characteristic, or code (note this does not mean the unique code assigned by the investigator to code the data)

These data elements must be identified as Identifiers during the development phase. This can be done via the Check for Identifiers link found in the "Design your data collection instruments & enable your surveys" section.

You will check the boxes that are identifiers and select Update Identifiers at the bottom of the page:

[DEMO] REDCap

Check For Identifiers

This module will help you assess whether or not some fields may be identifiers, and then allows you to easily tag such fields as identifiers for greater data security. While this same process can be accomplished in the Data Dictionary or Online Designer, this page provides a streamlined way of tagging fields as identifiers very quickly. Based off the variable name or field label, the fields listed below may possibly contain identifiers (e.g., name, phone number, address). Please review the entries and select all identifiers, where appropriate. Any fields already tagged as identifiers will already be checked below.

Identifiers

Variable Name	Field Label	Identifier?
record_id	Record ID	☐
mrn	MRN	☐
ssn	SSN	☐
dob	Date of Birth (DOB)	☐
street_address	Street Address	☐
city	City	☐
zip	Zip	☐
date_of_procedure	Date of Procedure	☐
date_of_death	Date of Death (DOD)	☐
identifiers_complete	Complete?	☐

2. Complete Main Project Settings Page

Ensure all information is complete on the Main project settings section depending on the type of project you have created (Research, Quality Improvement, or operational Support). For Research please ensure you have included the project title, Name of P.I., IRB number, the specific type of research, and project notes.

3. Check all Project Development phases appropriate for your build Select "I'm Done"

**Complete!**
[Not complete?](#)

Main project settings

☒ Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

☒ Use longitudinal data collection with defined events? [?](#)

**Complete!**
[Not complete?](#)

Design your data collection instruments & enable your surveys
Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#) OR [Download Data Dictionary with drafted changes](#)
Go to or Explore the
Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?
Learn how to use

**Complete!**
[Not complete?](#)

Define your events and designate instruments for them
Create events for re-using data collection instruments and/or set up scheduling.
Go to or

**Complete!**
[Not complete?](#)

Enable optional modules and customizations

☒ Repeating instruments and events [?](#)

☒ Auto-numbering for records [?](#)

☒ Scheduling module (longitudinal only) [?](#)

Complete!

Not complete?

Disable

Enable

Enable

Enable

Auto-numbering for records ?

Scheduling module (longitudinal only) ?

Randomization module ?

Designate an email field for sending survey invitations ?

Additional customizations

Settings displayed to Administrators only:

Enable

Twilio SMS and Voice Call services for surveys ?

Optional

I'm done!

Set up project bookmarks (optional)

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

Go to [Add or edit bookmarks](#)

Optional

I'm done!

User Rights and Permissions

You may grant other users access to this project or edit the user privileges of current users on this project by navigating to the User Rights page. Additionally, if you wish to limit user access to certain records/responses for this project, you may want to use Data Access Groups, in which only users within a given Data Access Group can access records created by users within that group.

Go to [User Rights](#) or [Data Access Groups](#)

Complete!

Not complete?

Test your project thoroughly

It is important to test the essential components of your project before moving it into production. Try creating a few test records and entering some data for each to ensure that your data collection instruments look and behave how you expect, especially branching logic and calculations. Then review your test data by creating reports and exporting your data to view in Excel or a statistical analysis package. If you have surveys, complete the surveys as if you were

4. Confirm you have granted access of any users that will need access to your project. You can do this by reaching out to the administrator and requesting to add your list of users. The Administrator will reach out to those users, or give you the instructions that you can share.
5. Test your project Thoroughly, including access for your users
This is done by entering test data into your project, and having your users perform test data entry. This will help you find errors in logic or catch other issues prior to production. When the administrator is receives your Production request, they will ask you to test if they do not see any test data in the project.
6. Finally request to have your project moved to Production Status.
When you Select Move project to Production a notification will go to the administrator to approve your request. The Administrator will reach back out to your with any questions or concerns. Upon resolving these items your project will be placed in Production state. After the status is updated to production, **YOU CAN NOW PLACE PRODUCTION DATA INTO YOUR REDCAP PROJECT!**

Not started

Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to [Move project to production](#)



Benefits and Security of placing projects in Production Mode

1. It is requirement for Production use of REDCap
2. Makes the REDCap system compliant
3. Eliminates risk of data loss
4. Eliminates risk of unintended changes to project design and setup
5. Enables you to take advantage of the Project Revision History feature. This feature takes snapshots of your Data Dictionary at important stages such as:
 - a. Final Data Dictionary is captured automatically at time Production Status is enabled for your project (project is locked down to enable safe data collection)
 - b. As Revision are made to the Project the Data Dictionary is captured automatically and a log of the Requestor & Approver ID/Name are collected along with date time.

Project Revision History				Hide data dictionary snapshots
Created project	01/23/2018 5:40pm	-	Created by fw3u (Fauzia Khan)	
Moved to production	03/01/2018 9:02am	 Download data dictionary	Moved to production by fw3u (Fauzia Khan)	
Production revision #1	03/06/2018 8:29am	 Download data dictionary	Requested by fw3u (Fauzia Khan) Approved by fw3u (Fauzia Khan)	
Production revision #2 (current)	05/24/2018 9:23am	 Download data dictionary	Requested by fw3u (Fauzia Khan) Approved by fw3u (Fauzia Khan)	