So, you’ve decided to move forward with REDCap to manage your project data, but you’re not sure where/how to begin? The process is pretty straightforward (assuming you already have IRB approval or your project is exempt). Here are the basic steps.

**Step 1: Determine the appropriate sponsor (SPH or SOM/ICTR).**

SPH (Biostatistics Core) and SOM (ICTR) co-sponsor REDCap at JH. It’s all one instance of REDCap, but we have separate teams who support projects based on the PI’s affiliation. If it is an SPH project, Andre Hackman and his team will be your primary support contacts. As a general rule, if you are SOM/SON/KKI/JHH/JHBMC, Scott Carey and his team will be your primary support contacts (there are a few exceptions).

**Step 2: Determine the appropriate REDCap Project Tier.**

There are three REDCap tiers available (Bronze, Silver, or Gold). In most situations, Silver is the appropriate choice and is currently $50/month. The Bronze level is subsidized and is made available at no cost, but also does NOT include support. Additionally, there are some advanced features are not available at the Bronze. It is primarily intended for projects with little or no funding. More information can be found [HERE](https://projectredcap.org/resources/videos/) (“REDCap Service Tiers” page).

**Step 3: Watch the training videos.**

The value of watching the introduction and training videos cannot be overstated. These videos will introduce to you to important features in REDCap and will be invaluable in preparing you to setup your REDCap project. In our experience, it is the projects that plow ahead (learning as they go) that experience the most issues. Those who watch the videos (even regarding features that may not seem relevant to their current project needs) end up with much stronger projects and experience less frustration along the way.

There are two very good resources. Vanderbilt (created REDCap) has provided a set of intro/training videos. Most are very short and watching them all would require a little over 2 hours in total. But they can be watched a few at a time over several days, as most of the videos are just a few minutes long. This link will take you to the Vanderbilt videos:

[https://projectredcap.org/resources/videos/](https://projectredcap.org/resources/videos/)
A second resource that we believe is extremely valuable is a YouTube channel provided by University of Colorado / Denver. Their team has created, and made public, several (currently 10) very good videos to help both beginners and advanced users. Their videos can be found here and total about 90-minutes if you were to watch them all.

https://www.youtube.com/playlist?list=PLrnf34ZtZ9FohXnuD6KmwVb1xgbGDu3rY

NOTE: It is important to the success of your project that you familiarize yourself with REDCap BEFORE jumping in headfirst. Take the time to watch the videos above. It will be time well spent.

And finally, before starting, be sure to review the “Getting Started” content found at JH REDCap Training Central.

Step 4: Request your REDCap Project.

The next step is to request your REDCap project. Before requesting the project, you will want to gather the necessary information required in the request form.

- Name of Project
- Short Name / Acronym (if appropriate)
- PI
  - Name
  - Email
  - PI Publication Name (e.g. Carey SM)
- Study Coordinator
  - Name
  - Email
- IRB #
  - If exempt enter “exempt”
- Budget Information (Silver / Gold projects)
  - Budget / IO Number
  - Budget Contact Person (Name / Email)
- Project Funding Information
  - Sponsor(s)
  - Award Amount(s)

When you are ready to request your REDCap project, use this link:

http://redcap.jhu.edu (click on the “Request new Project” link)

Once your project request has been processed, you will receive an email notification. If the requestor does not already have a REDCap user account, one will be created and will be added to the project with project administration rights.
Step 5: Add REDCap Users To Your Project.

Anyone requiring direct access to your REDCap project (setup, design, user management, data entry, reporting…) will require a REDCap user account.

For **JH** employees, setting up a REDCap user account is very easy.

- Visit redcap.jhu.edu
- Click on the “My REDCap Projects” link
  - If they already have a REDCap user account, they will be taken to the REDCap projects page.
  - If they do NOT have a REDCap user account, they will be prompted to initialize their account. This takes must a minute or two and involves the following steps:
    - Provide Name and Email Address
    - Click Submit
    - Verify the email address by opening an email from REDCap having a “Confirm Email” link.

For **Non-JH** employees, the process is a little different and just a bit more complicated (but not too bad!).

- Submit a JH REDCap Support Request ticket using this link:
  - https://redcap.link/jhsupportrequest
- When prompted for a support type (new project, technical support…) select “New REDCap User”.
- Provide all requested information and follow instructions that will be automatically sent to you after your request is received/processed.
- Additional information can be found HERE.

**NOTE**: The creation of REDCap user accounts gives them general access to REDCap, but NOT to any specific projects. You will need to add them to your project(s) with the appropriate individual user rights… or you can add them to one of several existing user ROLES that provide various common levels of access (these roles can be modified as appropriate for each project. Please do not ask REDCap administrators to add users to your project, as this type of access is best managed by the PI or Study Coordinator. Additionally, it is strongly recommended that users are given only the permissions required for their work within the project. For example, a typically data entry person would not require data export privileges.

Step 6: A Few Things to Consider as You Get Started (read this!)

We regularly come across several issues that would have been better addressed on the front-end, when the project was setup. Please take these suggestions to heart as you setup your project.
• There is a feature that allows REDCap to “autoname” your fields based on the question. We strongly recommend NOT using this option. Instead, create your own field names.
  o When naming fields, we recommend making them:
    ▪ Concise
    ▪ Consistent
    ▪ Intuitive

• Unknown, Other, Refused, N/A:
  o It is not uncommon for a field menu to include one or more of these options. Using standard coding for these options is an important “best practice” that will be helpful to you and the person doing the data analysis.
  o Use of any/all of these options should be considered carefully to determine if/when they may be appropriate and valuable to the project aims.
  o Recommended (Best Practice) coding:
    ▪ 99: Unknown
    ▪ 98: Not Applicable (N/A)
    ▪ 97: Refused to Answer (Preferred Not to Answer)
    ▪ 88: Other

• Yes/No Fields:
  o REDCap actually provides a Yes/No data type that codes 1=Yes, 0=No. This is pretty standard coding for Yes/No throughout the research community.
  o If you want to use a standard radio button for your Yes/No question, that is fine, but you would be well served to use the same coding options.
  o There are times when you will need additional options that are not available in a standard Yes/No field. In these instances, you’ll need to create a dropdown or radio button field. You are strongly encouraged to use standard coding when this is necessary. For example
    ▪ 1: Yes
    ▪ 0: No
    ▪ 99: Unknown (note the use of the recommended coding for “Unknown”)

• Field Validation
  o When setting up fields on your REDCap forms, there is an option for Field Validation. This allows you to enforce specific formatting for that field.
  Examples include:
    ▪ Date
    ▪ Time
    ▪ Integer
    ▪ Number
    ▪ Decimal (must conform exactly to the format such as x.xx)
    ▪ Phone
    ▪ JHH/BV MRN
    ▪ Hopkins Enterprise ID
  o When using the date validation, be consistent throughout the project (we often see a mix of mdy, ymd, dmy…).
• Mark Identifiers
  o When setting up fields, be sure to flag fields that are identifiers (name, email, phone, mrn, dob, other HIPAA related fields).

Step 7: Where to Find Help.

• The best place to start is JH REDCap Training Central, where you will find a wealth of information regarding REDCap. In particular, start by paying extra attention to these resources in Training Central:
  o Start with the Introduction and Training videos. Most of these videos are short and focused on specific topics. These will be very helpful.
  o If you will be using surveys (sent to study participants for completion), there is a video HERE that you will find very helpful. Probably best to watch this after watching the other videos (for context).
  o The “Getting Started” links cover important topics that will help you in avoiding common problems. Review these!
  o REDCap Help File (there is a Help link left side of the REDCap screen)

Additionally, there are regularly scheduled 90-minute REDCap Zoom Clinics. These occur every 2-3 weeks.

If you are a Silver / Gold project, you may also request support by submitting a REDCap Support Ticket. You will find the “Request Support” link on the left side menu of every REDCap project page.