Getting Started with REDCap

So, you’ve decided to move forward with REDCap to manage your project data. But 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).**

The SOM (ICTR) and SPH 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. If you are SOM/SON/KKI/JHH/JHBM, Scott Carey and his team will be your primary support contacts.

**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. Some features are not available at the Bronze level and there is no support provided. It is primarily intended for projects with little or no funding. More information can be found at this link:

[http://redcap.jhu.edu/NewREDCapModel_20170104a.htm](http://redcap.jhu.edu/NewREDCapModel_20170104a.htm)

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

The value of watching the available 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.

**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 #**
- **Budget Information**
  - Budget / IO Number (Silver / Gold projects)
  - 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:

https://mrprcbcw.hosts.jhmi.edu/redcap/surveys/?s=K9TF4Y98T3

When the 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. The requestor will receive an email request to setup their password.

**Step 4: Request REDCap User Accounts for Project Team.**
Anyone requiring direct access to your REDCap project (setup, design, user management, data entry, reporting…) will require a REDCap user account. Currently, REDCap is NOT using JHED for authentication because of the extremely large number of non-JH users on multi-site projects. Currently, there are plans to initialize a new server that will be used for JH-Only projects and large registry projects. When implemented, the new REDCap instance will use your JHED credentials. For now, however, you will need to request a REDCap user account for each team member. You can request these accounts using the same link:

https://mrprbcw.hosts.jhmi.edu/redcap/surveys/?s=K9TF4Y98T3

You will be notified when the accounts have been created.

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 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. 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, who should have the necessary permissions to add users to the project.

**Step 5: A Few Things to Consider As You Get Started**

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.
  - When naming fields, we recommend making them:
    - Concise
    - Consistent
    - Intuitive
- Unknown, Other, Refused, N/A:
  - It is not uncommon for a list of options to include one of more of these options. Using standard coding for these options is an important “best practice” that will be very helpful to you and the person doing the actual data analysis.
  - 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.
  - Recommended (Best Practice) coding:
    - 99: Unknown
    - 98: Not Applicable (N/A)
    - 97: Refused to Answer (Preferred Not to Answer)
88: Other

- Yes/No Fields:
  - 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.
  - 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.
  - There are times when you will need additional options for Yes/No fields. In these instances, we still encourage you to use the standard coding for Yes/No. For example:
    - 1: Yes
    - 0: No
    - 99: Unknown (note the use of the recommended coding for “Unknown”)

- Field Validation
  - 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
  - When using the date validation, ensure that you have consistently used the same format throughout your project (we often see a mix of mdy, ymd, dmy…).

- Mark Identifiers
  - When setting up fields, be sure to flag fields that are identifiers (name, email, phone, mrn, dob, other HIPAA related fields).

### Step 5: Where to Find Help.

The first three recommended resources include:

- REDCap Help File (there is a Help link left side of the REDCap screen)
- The Vanderbilt Videos (see link above)
- The UC Denver Videos (see link above)

Additionally, there are regularly scheduled Bronze Walk-In Clinics available at both the Bayview and Downtown locations. These occur approximately every 3 weeks (sometimes a little more, sometimes a little less).

If you are a Silver / Gold project, you can request support by submitting a REDCap Support Ticket (see link on left side of your REDCap screen).