



Standard Operating Procedure:

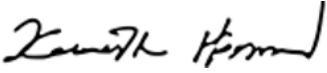
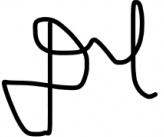
REDCap User Accounts

SOP Number:	105
Version Number:	3.0
Approved Date:	July 18, 2024
Department/System:	Digital Solutions – Data Management /REDCap

DOCUMENT HISTORY

Version Number:	Summary of Changes Made:	Effective Date
1	New Document	December 16, 2020
2	<ul style="list-style-type: none"> • Authentication: Added language to reflect PHSA/VCH/PHC federation • Removed references to enabling CWL accounts as this procedure has ceased • Split procedures into On-boarding, Off-boarding and Unsuspending accounts user accounts • Branding 	December 18, 2023
3	<ul style="list-style-type: none"> • Updated Account Suspension procedure 	July 18, 2024

APPROVALS

Approver Name	Approver Signature	Date
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1. PURPOSE

- 1.1. To define the procedure used for on-boarding and off-boarding REDCap User Accounts in the UBC Faculty of Medicine (FoM) REDCap application.

2. SCOPE

- 2.1. This procedure applies to all FoM Research DM Team members, Principal Investigators (PI)/Project Leads and Project Administrators (PA) involved in the request and creation of REDCap user accounts on the production instance of REDCap.

3. RESPONSIBILITIES

3.1. Onboarding

- 3.1.1. Users are responsible for having an active UBC Campus Wide Login (CWL) and/or Provincial Health Service Authority (PHSA)/Vancouver Coastal Health (VCH)/Providence Health Care (PHC) account.
- 3.1.2. Principal Investigator (PI) and/or Project Administrator (PA) is responsible for adding user accounts to each project and managing user rights for authorized Team members.
- 3.1.3. Research Team is responsible for obtaining a UBC CWL account for external user(s) who do not have a UBC CWL account or a PHSA/VCH/PHC account.

3.2. Account Suspension

- 3.2.1. User accounts are automatically suspended in REDCap after 180 days of inactivity.
- 3.2.2. Users must contact their PA or PI to unsuspend their account. PI or PA unsuspends the user's account in the User Rights page of the REDCap project. The PI will receive an automated email from REDCap informing the user's account has been unsuspended.

Note: Unsuspending a user's account allows them to access the REDCap system and all of the projects assigned to that user account.

3.3. Off-boarding

- 3.3.1. In each project, the PI or PA is responsible for removing user accounts by adding an expiration date to the user account in the User Rights page.

4. RELATED SOPS/DOCUMENTS

- 4.1. FoM Research DM SOP 101 REDCap Project Lifecycle
- 4.2. FoM REDCap Recommended User Roles



5. DEFINITIONS

- 5.1. **Principal Investigator (PI)/Project Lead:** Primary individual in charge of and responsible for the proper conduct of a research project and/or sponsor for non-research projects.
- 5.2. **Project Administrator (PA):** Person responsible for the development of REDCap data instruments and the overall management of the project data.
- 5.3. **Research/Project Team:** Research/project assistants, nurses, data entry and other personnel involved with and granted access to the REDCap project. The Team members report to the PI/Project Lead but are generally directly supervised by the PA.
- 5.4. **FoM Data Management (DM) Team:** Team Lead, Scientific Analyst and other FoM DM individuals responsible for managing projects in REDCap and assisting Research/Project Teams in conducting research studies or projects.
- 5.5. **REDCap Project:** A set of data entry forms, surveys, schedules and other data management tools pertaining to a specific research study or project.
- 5.6. **User accounts:** Provincial Health Services Authority/Vancouver Coastal Health/Providence Health Care (PHSA/VCH/PHC) and/or Campus Wide Login (CWL) accounts that have multifactor authentication and provide access to online systems, like FoM REDCap.

6. PROCEDURE

- 6.1. Creating Profile in REDCap Database
 - 6.1.1. Users with an active CWL or PHSA/VCH/PHC account create their profile in REDCap database upon first login.
 - 6.1.1.1. If a user does not have a CWL or PHSA/VCH/PHC account, they must request an account with their respective IT.
 - 6.1.2. PI and/or PA adds the new user account(s) to their project and assigns them to the appropriate User Role or assigns the necessary User Rights to user account(s) after they successfully created/setup their profile in REDCap (6.1.1).
 - 6.1.3. PI and/or PA are recommended to assign and manage User Accounts, per the FoM REDCap Recommended User Roles document and User Rights How-to on the Research Technology website under the How-to section – “User Rights”.
- 6.2. Training
 - 6.2.1. FoM DM Team provides ongoing PI and/or PA support/training as requested. Instructions on how to add/manage User Rights are also available on the UBC FoM Research Technology website under the How-to section – “User Rights”.



6.3. Off-boarding

- 6.3.1. The PI/PA is responsible for expiring user access to projects when a user is off-boarded, per the 'User Rights' Data Management Training Materials on the Electronic Data Capture with REDCap section of the Research Technology website.

7. REFERENCE(S)

- 7.1. UBC FoM Research Technology website: <https://restech.med.ubc.ca>
- 7.2. Sponsor Guest CWL Account: <https://it.ubc.ca/services/accounts-passwords/campus-wide-login-cwl/how-sponsor-guest>