



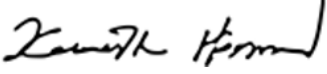

Standard Operating Procedure: REDCap Project User Training

SOP Number:	106
Version Number:	2.0
Approved Date:	May 24, 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"> • Branding • Minor procedural updates and wording changes 	May 24, 2024

APPROVALS

Approver Name	Approver Signature	Date
Kenny Hammond Manager, Research Data Services, UBC Faculty of Medicine		May 24, 2024
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1. PURPOSE

- 1.1. To define the procedure for User Training on REDCap projects supported the UBC Faculty of Medicine (FoM) Data Management (DM) Team.

2. SCOPE



- 2.1. This procedure applies to all FoM DM Team members, Principal Investigators (PI)/Project Leads, Project Administrators (PA) and additional Research/Project Team members using FoM REDCap.

3. RESPONSIBILITIES

- 3.1. The FoM DM Team is responsible for developing and reviewing FoM DM training materials, as necessary.
- 3.2. The FoM DM Team is responsible for scheduling and conducting training sessions.
- 3.3. The Principal Investigator (PI)/Project Lead and/or Project Administration (PA) is responsible for determining which study team members require training, arranging for training sessions, and evaluating whether training objectives have been met for their Research/Project Team.

4. RELATED SOPS/DOCUMENTS

- 4.1. FoM DM SOP 101 REDCap Project Lifecycle

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 coordinators/assistants, nurses, data entry and other study 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.

6. PROCEDURE

- 6.1. FoM DM team notifies PI and/or PA that the requested project has been approved and provides REDCap training resources. PI, PA and/or research team members are invited to request training directly with the FoM DM Team, or can independently



- review training materials, videos and resources on the Electronic Data Capture with REDCap section of the UBC FoM Research Technology Website.
- 6.2. If the PI, PA or Research/Project Team member(s) requests a training session:
- 6.2.1. Research/Project Team can request a training session by emailing the FoM DM Team.
 - 6.2.2. FoM DM Team schedules training and sends meeting details to PI, PA and/or Research Team.
 - 6.2.3. FoM DM Team conducts training session for general, study/project specific and special features, as required for each project.
 - 6.2.4. PI and/or PA is responsible for documenting its Team's individual training records.

Note: Required REDCap level training for team members is solely determined by the PI/Project Lead and/or PA; however, all PIs and/or PAs are strongly recommended to have REDCap advanced level training (Project set-up and customization, User Rights, etc.) and should show evidence of proficiency and understanding of the system.

7. REFERENCE(S)

- 7.1. UBC FoM Research Technology website: <https://restech.med.ubc.ca>