



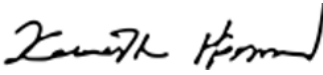

Standard Operating Procedure: REDCap Project Transfer

SOP Number:	111
Version Number:	2.0
Approved Date:	May 20, 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 • Updates to procedure and minor wording changes 	May 20, 2024

APPROVALS

Approver Name	Approver Signature	Date
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1. PURPOSE

- 1.1. To define the procedure of transferring projects into the UBC Faculty of Medicine (FoM) REDCap from separate REDCap instances or other software platforms.

2. SCOPE

- 2.1. This procedure applies to all project transfer requests addressed to the FoM Data Management (DM) Team, whether the platform originally hosting the data is maintained by UBC IT or an external entity.



3. RESPONSIBILITIES

- 3.1. The FoM DM Team is responsible for reviewing project transfer requests, approving transfer and/or migration of projects and overseeing the transfer process from platform of origin to the platform of destination.
- 3.2. The Principal Investigator (PI) or Project Administrator (PA) is responsible for acting as the representative for the transfer process. Duties will include approval of transfer process documentation, and validating the projects in the new environment.

4. RELATED SOPS/DOCUMENTS

- 4.1. FoM DM SOP 102 REDCap Project Request
- 4.2. FoM REDCap Project Request Form
- 4.3. FoM DM SOP 103 REDCap Service Agreement
- 4.4. FoM REDCap Service Agreement
- 4.5. FoM DM SOP 105 REDCap User Accounts

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. **Service Agreement:** The joint contract agreed to by both the FoM DM Team and the PI or PA for commencement of work and services related to REDCap project



data management as outlined. For clinical trials sponsors this document constitutes transfer of responsibility of duties for services under section 5.2 of ICH E6 GCP as adopted by Health Canada under the Food and Drug Regulations Amendment 1024.

- 5.7. **Project Lifecycle Tool:** an active, internal project used by the FoM DM Team to track the lifecycle of projects and to assist in REDCap data management.
- 5.8. **FoM REDCap Development Instance:** REDCap installation/server used for testing, virtually identical as production or live installation/server.

6. PROCEDURE

- 6.1. The PI or PA contacts the FoM DM Team to request a project transfer, or uploads a copy of the project XML (metadata only) or data dictionary to the FoM REDCap Project Request Form.
- 6.2. The FoM DM Team determines whether or not the project is eligible for transfer to FoM REDCap.
 - 6.2.1 If the project is eligible, the PI or PA requests a new project with FoM REDCap by completing the FoM REDCap Project Request Form if they haven't already done so, and sign the FoM REDCap Service Agreement (*see* FoM DM SOP 102 REDCap Project Request and FoM DM SOP 103 REDCap Service Agreement).
- 6.3. PI or PA removes necessary user rights to the study in platform of origin to prevent any changes to be made while transfer is in progress.
- 6.4. FoM DM creates new REDCap project by importing the project XML and/or data dictionary.
- 6.5. In most cases, PI/PA or the Research Team performs transfer processes. In some cases, the FoM DM Team might perform the transfer or some aspects of it.

Note: It is the Research Team's responsibility to review the new project and approve the transfer was successful.

- 6.6. Research Team decommissions the project in platform of origin and archives it according to their local archiving processes. If the project was transferred



from an external software, it is the PI or PA's responsibility to decommission the project in that software according to their local archiving processes.

7. REFERENCES

N/A