



Standard Operating Procedure:

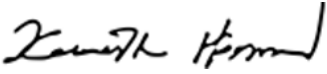
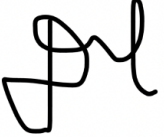
REDCap User Accounts

SOP Number:	105
Version Number:	2.0
Approved Date:	December 18, 2023
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

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. Users are responsible for contacting the FoM DM Team to request their account be unsuspended.
 - 3.2.1.1. The DM Team requires PI permission to unsuspend user accounts. Access requests will be responded to within 1-2 business days.

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>