Standard Operating Procedure:
REDCap Project User Training

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Department/System:	Digital Solutions – Data Management /REDCap

DOCUMENT HISTORY

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1	New Document	December 16, 2020

APPROVALS

Approver Name	Approver Signature	Date
Gurm Dhugga Associate Director, Research & Digital Technologies UBC Faculty of Medicine		December 16, 2020
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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) Research Data Management (DM) Team.

2. **SCOPE**

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

3. RESPONSIBILITIES

3.1. The FoM Research DM Team is responsible for developing and reviewing FoM Research DM training materials, as necessary.

3.2. The FoM Research DM Team is responsible for scheduling, booking and conducting training sessions.

3.3. The Principal Investigator (PI) 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 Team.

4. RELATED SOPS/DOCUMENTS

4.1. FoM Research 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 overseeing the development of REDCap project 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 Research 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 Research DM team notifies PI and/or PA that the requested project has been approved and REDCap project training is ready to commence upon the request of the PI. PI, PA and/or research team members are invited to request training directly with the DM Team, or can independently review training materials on the UBC MedNET Data Management space and associated videos.

If the PI, PA or research team member(s) requests a training session:

6.2. Arranging training session occur once the project has been created. Research Team can request a training session by emailing the FoM Research Data Management Team.

6.3. FoM Research DM Team schedules training and sends booking details to PI, PA and/or Research Team.

6.4. FoM Research DM Team conducts training sessions for general, study/project specific and special features, as required for each project.

6.5. PI and/or PA is responsible for documenting its team's individual training records.

Note: Users can refer to the training documents posted on the UBC MedNet Data Management Space and associated videos. FoM Research DM Team can provide instructions for research/project team members to access online REDCap instructions and videos. Required REDCap level training for team members is solely determined by the PI/Project Lead and/or PA; however, all PI and/or PA 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)
N/A