





Standard Operating Procedure: REDCap Project Transfer

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DOCUMENT HISTORY

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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 FoM Research IT or an external entity.



3. RESPONSIBILITIES

- 3.1. The FoM Research DM Team is responsible for reviewing project transfer documentation, approving transfer or migration of projects and overseeing the transfer process from platform of origin to test and review environment(s) 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 documentation and of transfer process, and testing the projects in the new environment.
- 3.3. The FoM Research DM Team is responsible for filling out the “project transfer” form in the Project Lifecycle and conducting the transfer process from platform of origin to test and review environment to the platform of destination.

4. RELATED SOPS/DOCUMENTS

- 4.1. FoM Research DM SOP 102 REDCap Project Request
- 4.2. FoM REDCap Project Request Form
- 4.3. FoM Research DM SOP 103 REDCap Service Agreement
- 4.4. FoM REDCap Service Agreement
- 4.5. FoM Research DM SOP 105 REDCap User Accounts
- 4.6. FoM Research DM SOP 110 REDCap Project Archiving

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 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.
- 5.6. **Service Agreement:** The joint contract agreed to by both the FOM Research 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 Research 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 Research DM Team to request a project transfer.
- 6.2. The FoM Research DM Team determines whether or not the project is eligible for transfer to FoM Research REDCap.
- 6.3. If the project is eligible, the PI or PA requests a new project with FoM REDCap by completing the FoM REDCap Project Request Form and the FoM REDCap Service Agreement (see FoM Research DM SOP 102 REDCap Project Request and FoM Research DM SOP 103 REDCap Service Agreement).
- 6.4. Through correspondence and meetings with the Research Team, the FoM Research DM Team fills out the Project Transfer form in the Project Lifecycle.
- 6.5. PI or PA reviews and approves the project transfer details through tracked ticket correspondence.
- 6.6. 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.
- 6.7. The FoM Research DM Team creates a test project in the FoM REDCap Development Instance for testing purposes and notifies the PI and/or PA of the project and their user access.
- 6.8. In most cases, PI/PA or the Research Team performs transfer processes and makes project adjustments and preforms testing in the development environment. In some cases, the FoM Research DM Team might perform the transfer or some aspects of it themselves.
- 6.9. Once adjustments have been made and testing is completed, the Research Team uploads the project XML or Data Dictionary into the new project in REDCap.

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

- 6.10. Upon transfer completion, the Project Transfer form is updated by the FoM Research DM Team in the Project Lifecycle.
- 6.11. Research Team decommissions the project in platform of origin and archives it (see FoM Research DM SOP 110 REDCap Project Archiving). If the project was transferred



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

7. REFERENCES

N/A