

Scientific Computing and Data Services

REDCap Essentials

<https://redcap.mountsinai.org>

Savas Sevil, REDCap Product Owner
Scientific Computing and Data
March 07, 2025



Icahn
School of
Medicine at
**Mount
Sinai**

Introduction – Team Members



Patricia Kovatch

Professor and Dean for
Scientific Computing
and Data Div.



Ranjini Kottaiyan

Senior Director
Finance & Administration



Farhan Mahmood

Director, Scientific
Computing



Eric Rosenberg

System Administrator



Rupan Hossain

Database Administrator



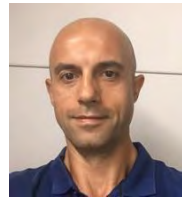
Mark Green

Executive Director
Scientific Computing
and Data Div



**James Chip
Masters**

Director of Research
Data Services
Scientific Computing
and Data Div



Savas Sevil

REDCap Product
Owner



**Cate Bauer-
Martinez**

Senior REDCap
Analyst



Jing Yang, PhD

Applications Support
Analyst

Acknowledgements



Acknowledge CTSA:

An acknowledgement of support from the Icahn School of Medicine at Mount Sinai and the Clinical and Translational Science Awards (CTSA) grant UL1TR004419 from the National Center for Advancing Translational Sciences should appear in a publication of any material, whether copyrighted or not, based on or developed with Mount Sinai-supported computing resources including REDCap:

Please use the following acknowledgement in your publications:

“This work was supported in part through the computational and data resources and staff expertise provided by Scientific Computing and Data at the Icahn School of Medicine at Mount Sinai and supported by the Clinical and Translational Science Awards (CTSA) grant ULTR004419 from the National Center for Advancing Translational Sciences.”

Acknowledge Scientific Computing and Data:

All publications must include the following language in the acknowledgments section:

“This work was supported in part through the resources and staff expertise provided by Scientific Computing and Data at the Icahn School of Medicine at Mount Sinai.”

May want to check if new grant award number.

Welcome to REDCap!

- REDCap is a secure web platform for building and managing online databases and surveys.
- REDCap offers a streamlined process for rapidly creating and designing projects. REDCap also offers a vast array of tools that can be tailored to virtually any data collection strategy.



Agenda

- **REDCap Account Management for internal and external collaborators**
- **2FA**
- **Development vs Production**
- **Project Ownership and User Rights**
- **Orphaned projects and transferring ownership**
- **Resources**



REDCap Account Management

All users must have a REDCap account

- All REDCap accounts require **Mount Sinai credentials**
- REDCap accounts = Mount Sinai credentials
- Username and password
- **NOTE:** We cannot reset passwords - > REDCap require Mount Sinai credentials

Please log in with your user name and password. If you are having trouble logging in, please contact [Mount Sinai REDCap Support](#).

Username:	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="Log In"/>	Forgot your password?

Types of accounts

- Internal accounts
- External accounts

How do I obtain a REDCap account?

Internal collaborators

All Mount Sinai users must have a REDCap account
Mount Sinai or Icahn School of Medicine employee

- Log in with your Mount Sinai credentials
- Username
- Password
- On your first login, verify your email

✔ Verify your email address
Your email address has been confirmed.



Please log in with your user name and password. If you are having trouble logging in, please contact [Mount Sinai REDCap Support](#).

Username:

Password:

Log In

[Forgot your password?](#)

How do I obtain a REDCap account?

External collaborator

All external users must have Mount Sinai credentials



PI or other sponsor/delegate must request on behalf of external collaborator

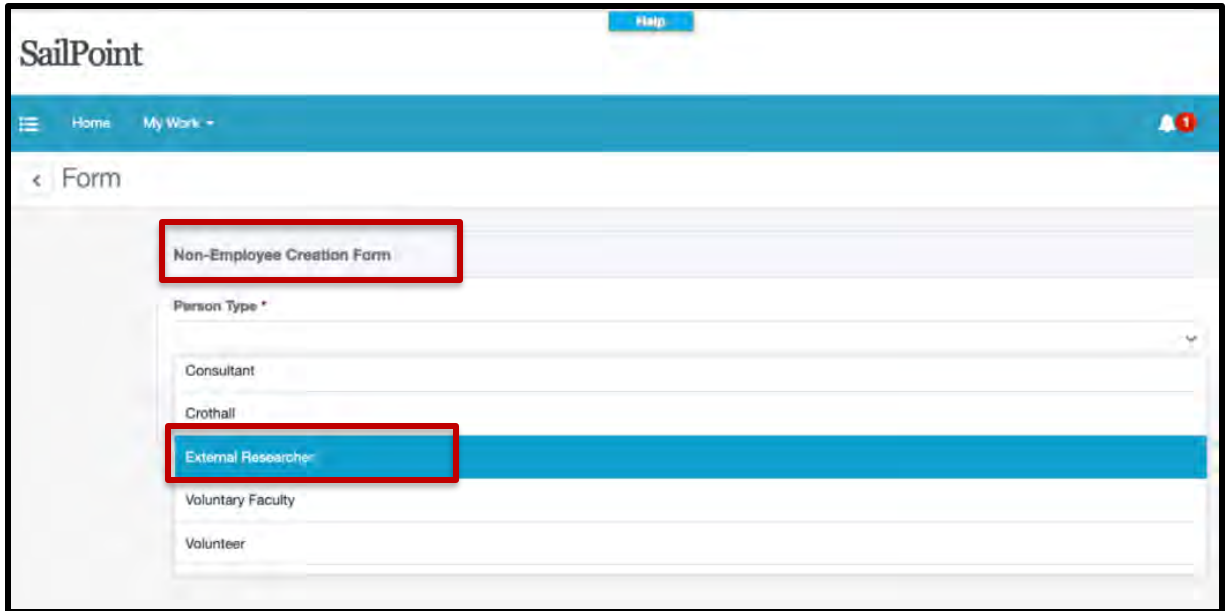
- ▶ Through **Sailpoint**, request a Non-Employee account (**External Researcher**)
- ▶ Once approved, the PI will receive an email notification informing them that the SailPoint request is complete. This email will contain a Mount Sinai username and password for the collaborator.
- ▶ Share Mount Sinai username and password with the external collaborator



How do I obtain a REDCap account?

External collaborator

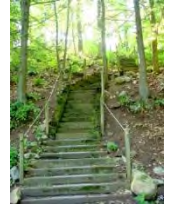
Sailpoint interface



The screenshot displays the SailPoint user interface. At the top left, the 'SailPoint' logo is visible. A navigation bar includes 'Home' and 'My Work' with a dropdown arrow. A notification bell icon with a red '1' is in the top right. Below the navigation bar, a breadcrumb trail shows '< Form'. The main content area is titled 'Non-Employee Creation Form', which is highlighted with a red box. Below this title is a dropdown menu for 'Person Type *'. The dropdown is open, showing several options: 'Consultant', 'Crothall', 'External Researcher', 'Voluntary Faculty', and 'Volunteer'. The 'External Researcher' option is highlighted with a blue background and a red box. A 'Help' button is located in the top right corner of the interface.

How do I obtain a REDCap account? Part 2!

External collaborator



All external users must have Mount Sinai credentials

External Collaborator must:

- ▶ Navigate to <https://mshmsvpn.mssm.edu> to change their password
- ▶ Change their Mount Sinai Password
- ▶ Navigate to <https://redcap.mountsinai.org>
- ▶ Log in with their Mount Sinai Login ID and new Password
- ▶ Upon first login, the Collaborator will be prompted to verify their email address. *Note: use an active email address.*
- ▶ Collaborators can then create new projects or be added to existing projects by the project owners.
- ▶ ***Please note: Collaborator accounts are temporary and will expire at 120 days, however they can be renewed by the PI or other sponsor/delegate prior to the expiration date.***

2FA

Step 1: Login with your credentials at REDCap (mountsinai.org).

rcap.mountsinai.org/redcap/



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Please use the following acknowledgement in your publications:

"This work was supported in part through the computational and data resources and staff expertise provided by Scientific Computing and Data at the Icahn School of Medicine at Mount Sinai and supported by the Clinical and Translational Science Awards (CTSA) grant UL1TR004419 from the National Center for Advancing Translational Sciences."

To associate the CTSA grant UL1TR004419 to an existing publication, please follow [these instructions](#) from the NIH (see the section "Associating Funding to your Publications").

Clinical Data Pull (CDP) is now available: Import clinical data into REDCap from Epic

The five types of Epic data currently supported: Basic demographics, Condition/Problem list, Medication lists, Vital signs, Laboratory.

User requirements: Access to Epic. Listed as key study personnel in the IRB protocol. Have a REDCap project in production.

Must submit a request to <https://bit.ly/3guXoag> with IRB approval and protocol documents listing the required data elements.

Cost: Custom project builds and clinical data pull costs are based on based on estimated hours of work and paid via salary support.

Scientific Computing's Development Data Policy: Scientific Computing is not responsible for and cannot restore lost development data. Please move your project from Development to Production as soon as real study data collection begins.

Please log in with your user name and password. If you are having trouble logging in, please contact [Mount Sinai REDCap Support](#).

Username: ramall01

Password: *****

Log In

[Forgot your password?](#)

Welcome to REDCap!

REDCap is a secure web platform for building and managing online databases and surveys. REDCap's streamlined process for rapidly creating and designing projects offers a vast array of tools that can be tailored to virtually any data collection strategy.

REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, ad hoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

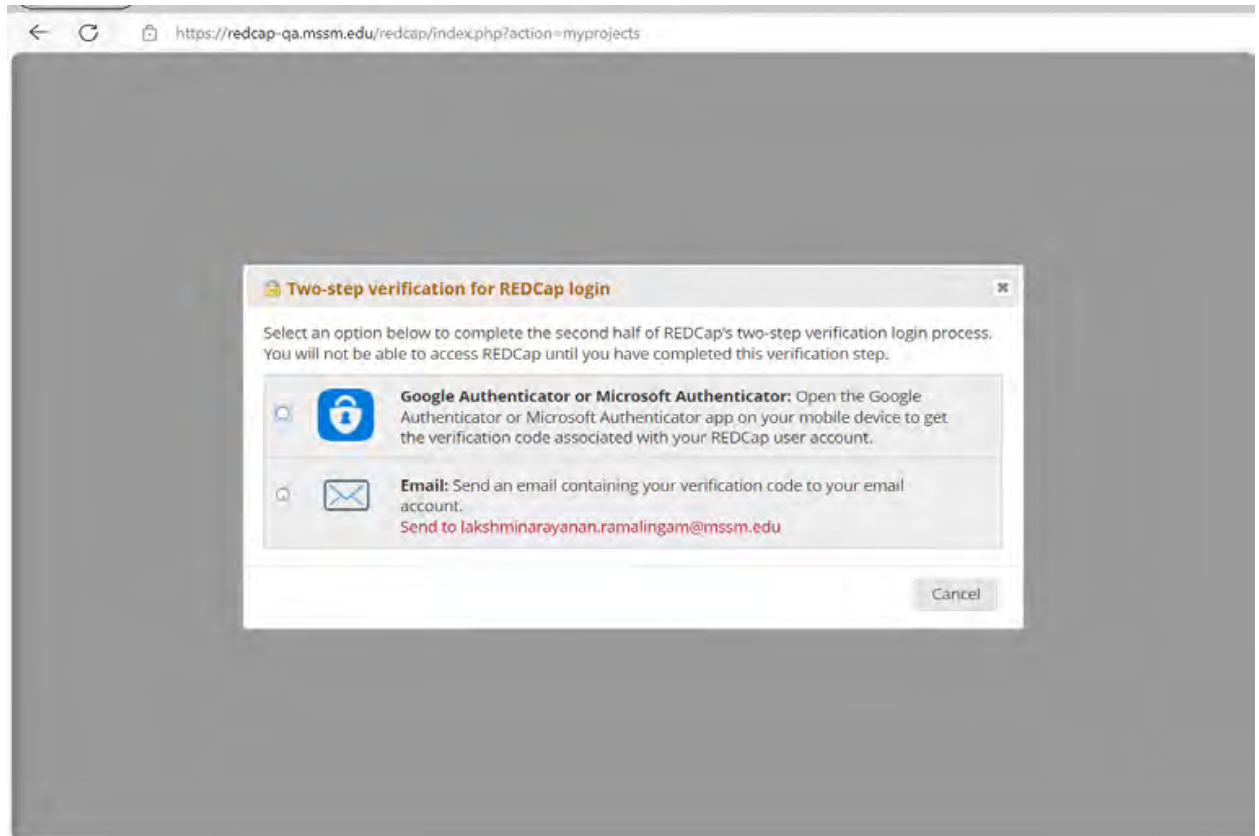
REDCap Features

Build online surveys and databases quickly and securely in your browser -

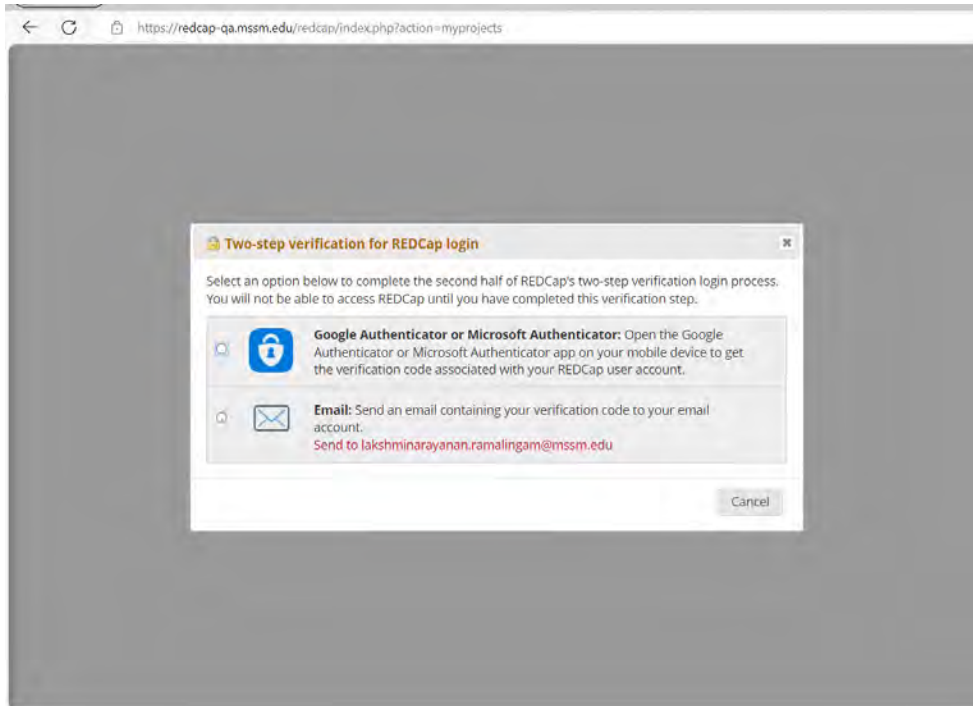
Create and design your project using a secure login from any device. No extra software required. Access from anywhere, at any time.

Fast and flexible - Go from project creation to starting data collection in less than one day. Customizations and changes are possible any time, even after

Step 2: A multifactor authentication window will pop up.



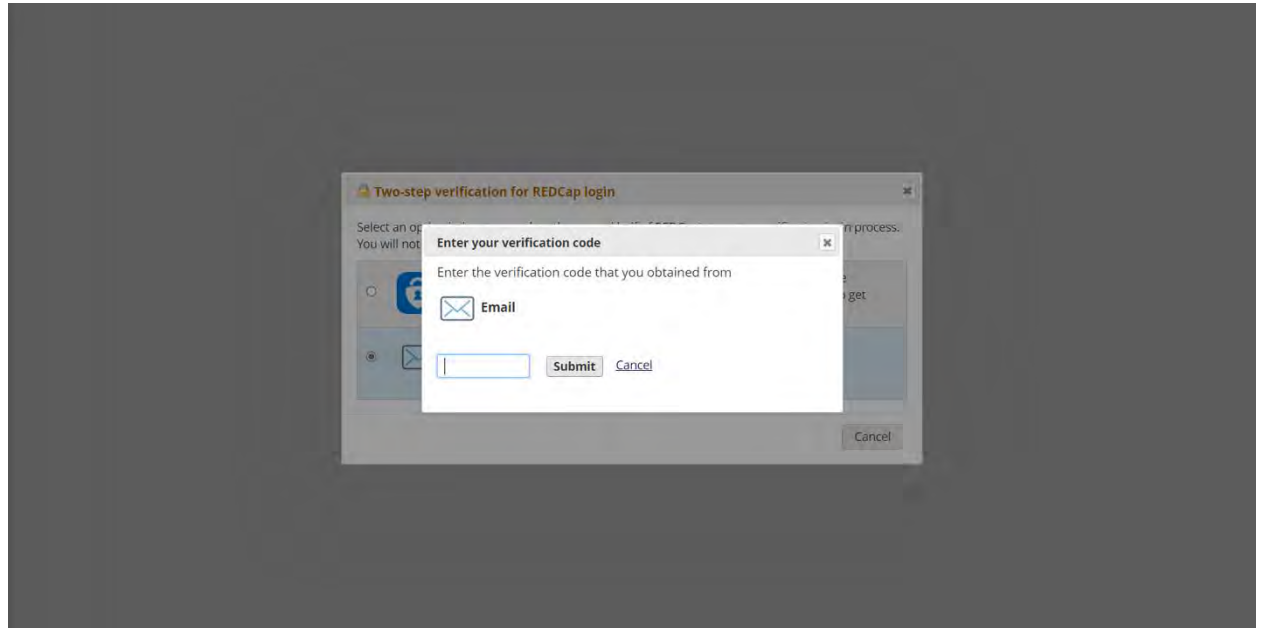
Step 3: Select the email option.



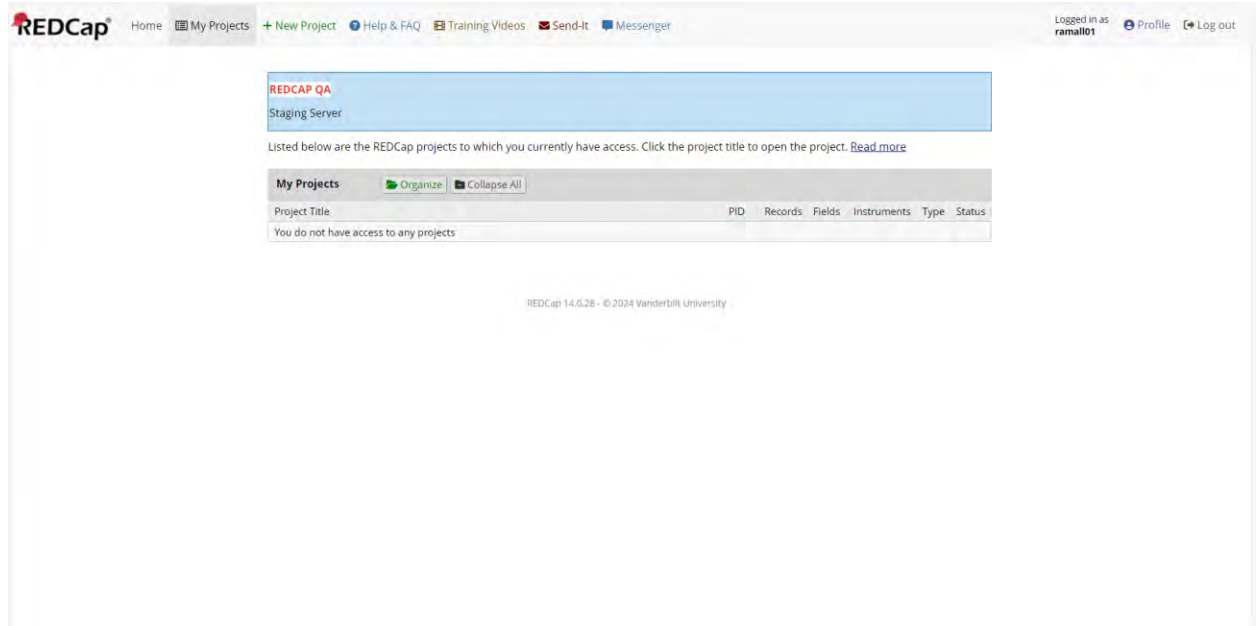
Step 4: You will receive the verification code through the specified email.



Step 5: Type the verification code in the multifactor authentication window.



Step 6: This will enable you to enter the REDCap.



The screenshot displays the REDCap web application interface. At the top, the navigation bar includes the REDCap logo, a 'Home' link, a 'My Projects' menu, and several utility links: '+ New Project', 'Help & FAQ', 'Training Videos', 'Send-It', and 'Messenger'. On the right side of the navigation bar, it shows the user is logged in as 'ramallot' with links for 'Profile' and 'Log out'.

Below the navigation bar, there is a blue banner for 'REDCAP QA Staging Server'. Underneath this banner, a message states: 'Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. [Read more](#)'.

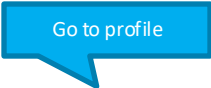
The 'My Projects' section features a table with the following structure:

My Projects		Organize	Collapse All			
Project Title	PID	Records	Fields	Instruments	Type	Status
You do not have access to any projects						

At the bottom center of the page, the footer text reads: 'REDCap 14.0.28 - © 2024 Vanderbilt University'.

If you want to avoid using your email and prefer to use Google or Microsoft Authenticator:

Step 7: Go to your profile



REDCap Home My Projects + New Project Help & FAQ Training Videos Send-It Messenger

Logged in as ramall01 Profile Log out

Edit Your User Profile

If you wish, you may edit your User Profile information below. This information will not be given out to anyone but will be used to help us better keep track of who is using REDCap and also in case you need to be contacted regarding your access to REDCap.

Basic Information

First name:

Last name:

Primary email:

Phone number:

Mobile phone number:

Tip: To enter a number with an extension, place a comma between the number and the extension.

Save Basic Info

Login-related options:

Additional Options

While your primary email address is used for receiving emails and notifications from REDCap, your secondary and tertiary email addresses can only be used when sending out emails from REDCap (e.g., sending survey invitations), in which they appear as the "From" address in the email.

Secondary email:

Tertiary email:

User Preferences

End User Instructions For Users of this REDCap Instance. See: [REDCap User Manual](#)

Step 8: In the “Edit Your User Profile” screen, select “Set up Google Authenticator or Microsoft Authenticator or two-step login.”

REDCap Home My Projects + New Project Help & FAQ Training Videos Send-It Messenger

Logged in as ramall01 Profile Log out

👤 Edit Your User Profile

If you wish, you may edit your User Profile information below. This information will not be given out to anyone but will be used to help us better keep track of who is using REDCap and also in case you need to be contacted regarding your access to REDCap.

Basic Information

First name:	<input type="text" value="Lakshmi Narayanan"/>
Last name:	<input type="text" value="Ramalingam"/>
<input checked="" type="checkbox"/> Primary email:	<input type="text" value="lakshminarayanan.ramalingam@mssm.e"/>
📞 Phone number:	<input type="text"/>
<input type="checkbox"/> Mobile phone number:	<input type="text"/>

Tip: To enter a number with an extension, place a comma between the number and the extension.

Login-related options:

Additional Options

While your primary email address is used for receiving emails and notifications from REDCap, your secondary and tertiary email addresses can only be used when sending out emails from REDCap (e.g., sending survey invitations), in which they appear as the 'From' address in the email.

Secondary email:	<input type="button" value="Add email"/>
Tertiary email:	<input type="button" value="Add email"/>

User Preferences


Step 9: A pop-up message will appear with the steps to enable Google or Microsoft Authenticator.

The screenshot shows the REDCap user interface. At the top, there is a navigation bar with the REDCap logo, 'Home', 'My Projects', '+ New Project', 'Help & FAQ', 'Training Videos', 'Send-It', and 'Messenger'. On the right side of the top bar, it says 'Logged in as ramallo' with a profile icon and a 'Log out' button.

On the left side, there is a sidebar menu with options: 'Edit Your Profile', 'Basic Information', 'Login-related', and 'Additional Options'. The 'Basic Information' section is expanded, showing fields for 'First name', 'Last name', 'Primary email', 'Phone number', and 'Mobile phone number'. There is a 'Set up' button next to the 'Primary email' field.

The main content area displays a pop-up message with the following text:

To use two-step verification to log in to REDCap using Google Authenticator or Microsoft Authenticator mobile app, you will need to first download the app onto your mobile device. Use a link below to download the app on your mobile device.

- 1) Download the Google Authenticator or Microsoft Authenticator app to your mobile device**
Download the app by searching for 'Google Authenticator' or 'Microsoft Authenticator' in your mobile device's app store (e.g., Apple App Store, Google Play Store).
- 2) Open the app, and scan this QR code** [View QR code in separate window](#)

- 3) Use the app when you log in to REDCap**
After you have scanned the QR code using the Google Authenticator or Microsoft Authenticator app, you can open the app at any time in the future to obtain your verification code for REDCap. The verification code is always changing, so it will be different each time you log in. **NOTE: The app does not require an internet connection** on your device in order to work.

Below the QR code, there is a text box with the following information:

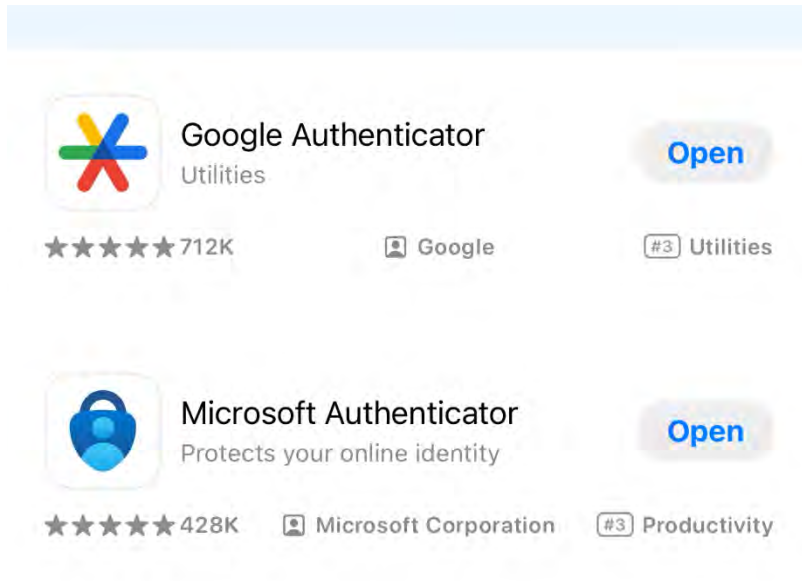
If you're having trouble scanning the QR code, enter the values below into your Google Authenticator app using the Manual Entry method. Also, make sure you set it as 'Time-based'.

Account: ramallo1@redcap-qa.mssm.edu
Key/secret: VMNNGAXYRSIQEQZD

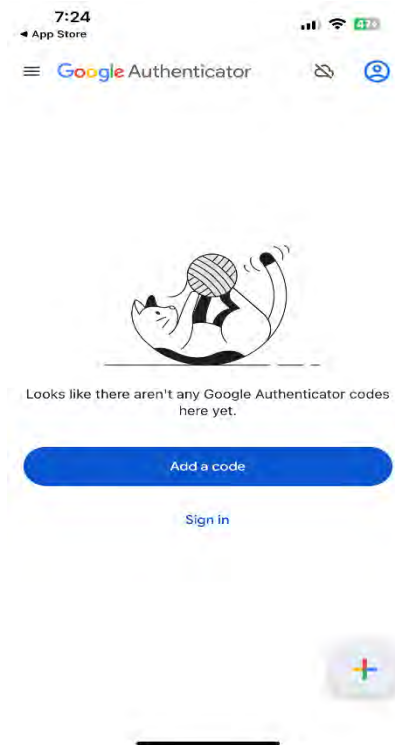
At the bottom right of the pop-up, there is a 'Close' button.

Step 10: Follow step 1 of the pop-up message: Download the Google Authenticator or Microsoft Authenticator app to your mobile device.

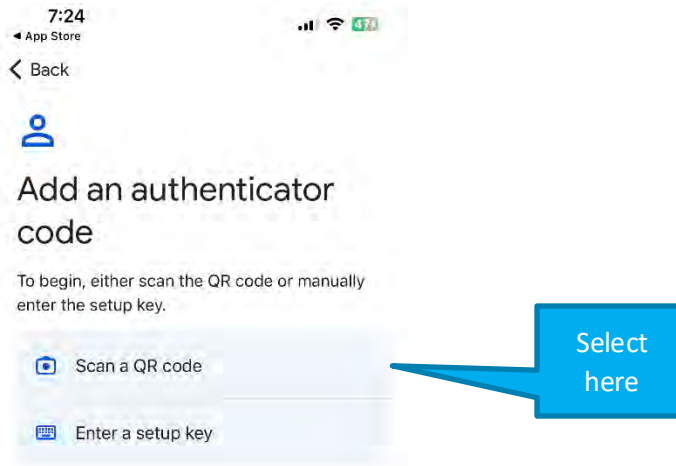
Download the app by searching for 'Google Authenticator' or 'Microsoft Authenticator' in your mobile device's app store (e.g., Apple App Store, Google Play Store).



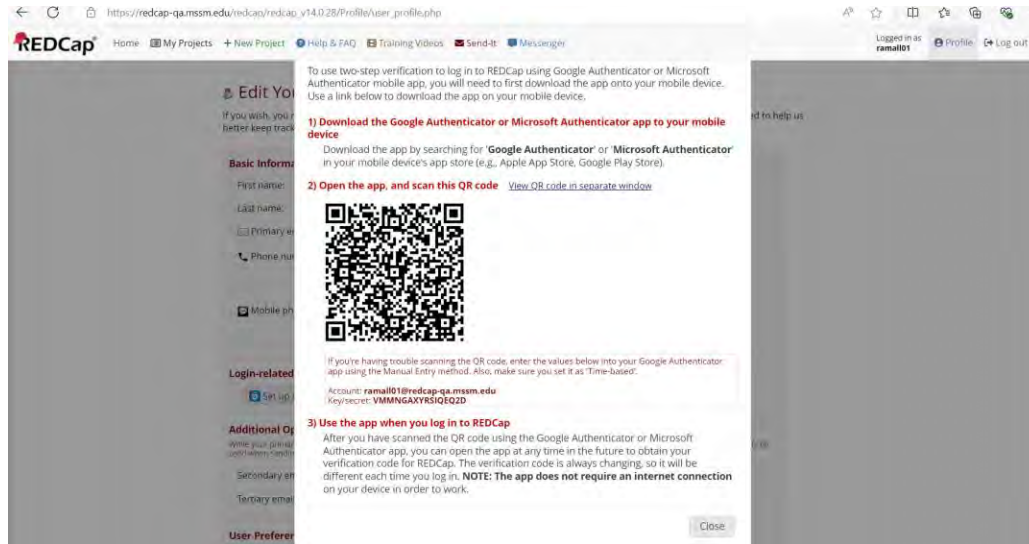
Step 11: Select “Add a Code.”



Step 12: Choose the “Scan a QR code” option in Google Authenticator.




Step 13: Scan the QR code displayed in REDCap on your computer using your mobile device.



The screenshot shows a web browser displaying the REDCap user profile page. The page title is "Profile/USER_profile.php". The browser address bar shows "https://redcap-qa.mssm.edu/redcap/redcap_v14.0.28/Profile/USER_profile.php". The page content includes a navigation menu with "Home", "My Projects", "New Project", "Help & FAQ", "Training Videos", "Send It", and "Messenger". The main content area is titled "Edit Your Profile" and contains a sidebar with "Basic Information" (First name, Last name, Primary email, Phone number, Mobile phone) and "Login-related" (Sign up). The main content area displays instructions for two-step verification:

To use two-step verification to log in to REDCap using Google Authenticator or Microsoft Authenticator mobile app, you will need to first download the app onto your mobile device. Use a link below to download the app on your mobile device.

- 1) Download the Google Authenticator or Microsoft Authenticator app to your mobile device**
Download the app by searching for 'Google Authenticator' or 'Microsoft Authenticator' in your mobile device's app store (e.g., Apple App Store, Google Play Store).
- 2) Open the app, and scan this QR code** [View QR code in separate window](#)

- 3) Use the app when you log in to REDCap**
After you have scanned the QR code using the Google Authenticator or Microsoft Authenticator app, you can open the app at any time in the future to obtain your verification code for REDCap. The verification code is always changing, so it will be different each time you log in. **NOTE: The app does not require an internet connection on your device in order to work.**

Below the QR code, there is a section for manual entry:

If you're having trouble scanning the QR code, enter the values below into your Google Authenticator app using the Manual Entry method. Also, make sure you set it as 'Time-based':

Account: **ramall01@redcap-qa.mssm.edu**
Key/secret: **WMMNGAXYRSIQEQZD**

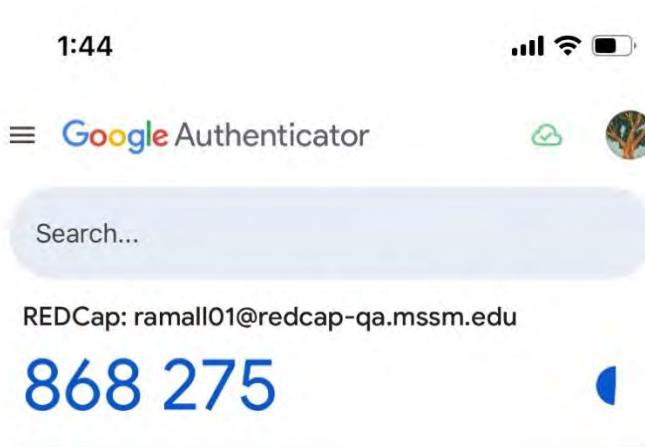
A "Close" button is located at the bottom right of the instructions.

If you're having trouble scanning the QR code, enter the values below into your Google Authenticator app using the Manual Entry method. Also, make sure you set it as 'Time-based'.

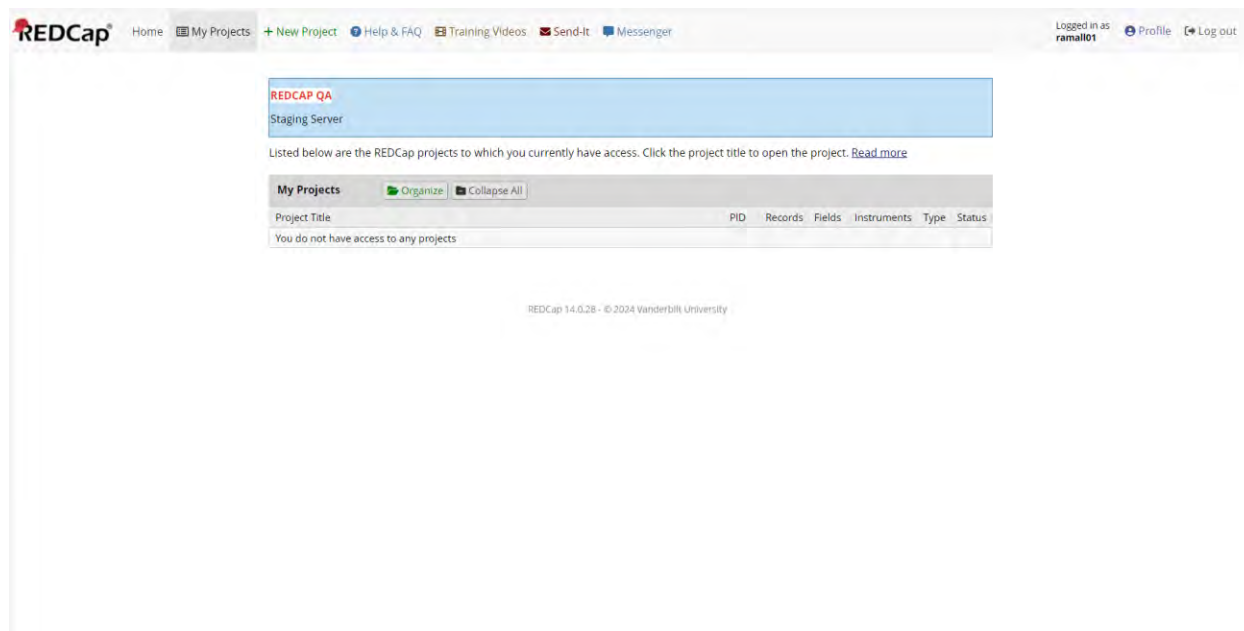
Account: xxxxxxxx@xxxxxxx.mssm.edu

Key/secret: xxxxxxxxxxxxxxxx

Step 14: Enter the code displayed on your mobile device.



Step 15: You will be directed to the REDCap landing page.



The screenshot displays the REDCap user interface. At the top left is the REDCap logo. The navigation bar includes links for Home, My Projects, New Project, Help & FAQ, Training Videos, Send-It, and Messenger. On the top right, it shows the user is logged in as 'ramallo1' with links for Profile and Log out.

A blue banner at the top of the main content area reads 'REDCAP QA Staging Server'. Below this, a message states: 'Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. [Read more](#)'.

The 'My Projects' section features a table with columns for Project Title, PID, Records, Fields, Instruments, Type, and Status. The table is currently empty, displaying the message 'You do not have access to any projects'. Above the table are buttons for 'Organize' and 'Collapse All'.

At the bottom center of the page, the footer text reads: 'REDCap 14.0.28 - © 2024 Vanderbilt University'.

Development vs Production

How do I know if my project is in Development or Production?

Development Project	19088	0	119	6 forms	■	🔧
Production Project	19089	0	119	6 forms	■	✅







All projects are in **Development** status when first created. In Development, you can design, build and test your REDCap projects. Changes happen in real-time. There are no safeguards to protect your data.



The Production status provides safeguards to ensure that data which has already been collected is not deleted, re-coded or overwritten unintentionally. Moving your project to **Production** ensures you're maintaining data accuracy, integrity, quality, and best practices.

Production vs Development

Features	Development	Production
"Real data can be entered	X	
Changes that may cause unintentional data loss or data corruption are reviewed by a REDCap Administrator.	X	
Snapshots of data dictionary are logged before and after change	X	
Changes require draft mode to safeguard data	X	

Should I collect data in Development? NO!

You should not collect data in Development mode. Development mode is for developing, designing, testing, and practicing.



BEST PRACTICE


**Collect real-time data in Production mode
only!**

How do I move data from Development to Production?

Carefully!

You can move real-time data from Development to Production without data loss by following a two-step process.

1) Project Setup -> Move your project to production status



Not started

Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to [Move project to production](#)

How do I move data from Development to Production?

2) Move your project to production status-> Keep existing data or delete?

Move Project To Production Status?

Are you sure you wish to leave the DEVELOPMENT stage? If you proceed, the project will be moved to PRODUCTION status so that real data may be collected. If you select the 'Delete ALL data' option below, all current collected data, calendar events, and uploaded documents will be deleted, otherwise all will remain untouched as the project is moved to production.

★ Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Keep existing data or delete?

Keep ALL data saved so far. (50 records)

Delete ALL data in the project (including any survey responses), calendar events, documents uploaded onto forms/surveys, and all archived data export files stored in the File Repository, and any logged events that pertain to data collection.

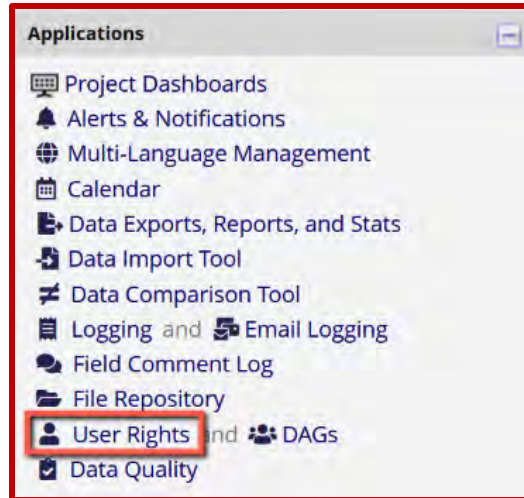
Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

YES, Move to Production Status Cancel

Project Ownership and User Rights

Who is the project owner in REDCap?

Project teams are the owners of the REDCap projects. The REDCap Administrators do not own the REDCap projects.



BEST PRACTICE
Each REDCap project needs a minimum of two project owners.

What are the responsibilities of a REDCap project owner?

- Project owner has **USER RIGHTS** under Applications
- Project owner has full administrative rights of REDCap project.
- Oversees the project
- Ensures all project users have appropriate privileges
- Grant permissions and user rights (project ownership)
- Transfers ownership to others when they leave to maintain continuous ownership of a REDCap project.

If you see **User Rights** under Applications on the left hand navigation panel in your project, **you are a project owner!**

User Rights = Project Ownership!

- Who is on the project?
- What privileges, roles, or rights do they need?
- User rights management is the responsibility of the project owner (the person who creates the project) and/or the user users added with User Right access.

Know who is on the project and what rights and privileges they have

The screenshot displays a user rights management interface. The left pane, titled 'Basic Privileges', shows a list of permissions with checkboxes, including 'Project Owner and Setup', 'User Rights', 'Data Access Group', 'Alerts & Notifications', 'Calendar', 'Add/Edit/Organize Reports', 'Stats & Charts', 'Data Import Tool', 'Logging', 'File Repository', 'Data Quality', 'API', 'REDCap Mobile App', and 'Settings pertaining to project records'. The right pane, titled 'Privileges for Viewing and Exporting Data', contains a table for configuring rights for various data categories.

	Data Viewing Rights			Data Export Rights			
	No Access (Hidden)	View Only	View & Edit	No Access	Download*	Remove All Identifier Fields	Full Data Set
Demographics	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Baseline Data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Month 1 Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Month 2 Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Month 3 Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Completion Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

* Use spreadsheet ensure that all the form text fields will be retrieved as well as any qualitative fields and identifier fields.

Buttons at the bottom: Save Changes, Cancel, Remove user.

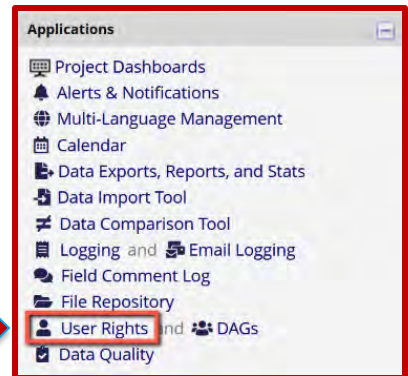
How can I add users to my REDCap project?

To add users to a REDCap project, you need **User Rights** on the project.

- Individual with **User Rights** access can alter all privileges for all other users.
- This privilege should only be granted to the **highest level users**.

To grant a user access to a REDCap project

- User must have Mount Sinai credentials and a REDCap account.
- Log in to REDCap and then, on the My Projects tab, choose your project's name.
- Under "Applications", select User Rights.



How can I add users to my REDCap project?

To add users to a REDCap project, you need **User Rights** on the project.

To grant a user access to a REDCap project

- Select User Rights
- In the "Add new user" field, enter the username (**not the email address**).
- Select Add with custom rights, and then check the boxes next to the rights you want to assign to the new user.
- Select Add user.

Project Home | **Project Setup** | **User Rights** | **Data Access Groups**

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

?

Add new users: Give them custom user rights or assign them to a role.

— OR —

Create new roles: Add new user roles to which users may be assigned.

(e.g., Project Manager, Data Entry Person)

Basic Privileges

Expression Date: (subject)

Search and Assign

- Assign Design and Setup
- User Rights
- Data Access Groups

Other privileges:

- Alerts & Notifications
- Calendar
- Add/Update/Generate Reports (Also allows user to view Add records (not full history) of data in the reports)
- Filters & Charts
- Data Import Tool
- Data Comparison Tool
- Logging
- File Repository
- Data Quality
 - MetaData/EDC
 - API
 - VIEWS ON REDCap
- Create & edit rules
- Enforce rules
- API Export
- API Import/Update

Settings pertaining to the REDCap Mobile App:
 REDCap Mobile App (Also allows user to update role status in the mobile app)

Allow user to download data for all records at the event?

Settings pertaining to project records: **Roles/Item Access**

- Create Records
- Rename Records

Privileges for Viewing and Exporting Data

Table with columns: No. Access (None), View, Item, & Edit, No. Access, Data "Identified?", No. Access, Full Data, Data Del.

	No. Access (None)	View	Item & Edit	No. Access	Data "Identified?"	No. Access	Full Data	Data Del.
Demographics	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Baseline Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Month 1 Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Month 2 Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Month 3 Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completion Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

* Downloaded content that all from form fields will be removed or red in any analytics fields and identifier fields.

Orphaned projects and transferring ownership

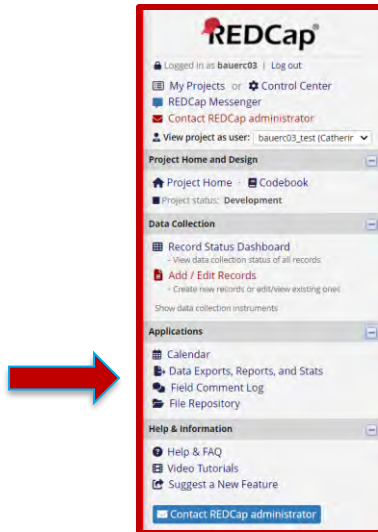
What happens if the project owner leaves and does not transfer User Rights, project ownership?

- REDCap Projects without active owners are considered “**orphaned.**”
- For 'orphaned' projects in REDCap, it is crucial ensure ownership is transferred properly .
- A Principal Investigator or Department Administrator will need to confirm this change to this REDCap project.
- If this is a research project, then please ensure you are following the research protocol and adding the new project owners must to the Institutional Review Board (IRB) if necessary.

BEST PRACTICE
Transfer project ownership before
a project owner leaves the project.

How do I know if I have an orphaned REDCap project?

- No one on the project has access to **User Rights**.
- **User Rights** does not display under Applications the project.
- Projects without active owners are considered orphaned projects.



Expiration (click expiration date to edit)	Project Design and Setup	User Rights	Data Access Groups
never	✘	✘	✘
never	✘	✘	✘
never	✘	✘	✘
never	✘	✘	✘
never	✘	✘	✘

What are best practices for managing User Rights?

- **ONLY provide needed access rights:** This is especially important for the high level roles of "Project Design & Setup" and "User Rights"
- **Set expiration dates for users:** If you are adding a user to a project for a limited amount of time, set an expiration date for their access at the time you add them to the project.
- **Create and utilize User Roles in your project:** A User Role has a pre-defined level of access. For instance, you might create a user role for Data Entry to only enter data but not change project settings or delete data.
- **Consolidate sensitive information in one instrument:** If there are users who should not see identifiable information in the project, the best solution is to keep all of the sensitive information on one instrument and restrict access through User Rights.
- **Maintain at least two active project owners at all times.**
- **Departure procedures for study team members**
 - ✓ Suspend access to the REDCap project in User Rights.
 - ✓ Suspend individual API tokens.

Resources

Resources

Upcoming REDCap Advanced Training

- ▶ Audience: **Open to all REDCap users**
- ▶ Date and Time: **Friday, March 14th from 12pm – 1 pm (EST)**
- ▶ Online: **Click here to register - Zoom link is provided following registration.**
- ▶ The session will cover: Project Setup, Managing Users, Project Life Cycle and Data Management

Interested in learning more about REDCap?

- For information about REDCap, please visit the **REDCap website**.
- For questions and information about REDCap Chargebacks, please visit the **REDCap FAQ**
- For video tutorials of REDCap in action and an overview of its features, please see the **Training Resources** page.
- If you require assistance or have any questions about REDCap, please contact **Mount Sinai REDCap Support**.

REDCap videos

https://www.youtube.com/@ucdredcap5650/videos#training_videos

Great resources courtesy of a REDCap Consortium partner institution!

(University of Colorado Denver courtesy training videos)

Digital Concierge Services

Virtual REDCap Office Hours: Wednesdays at 3:30pm to 4:30pm

- Open to all
- Get help with specific project questions
- First-come, first-served

- Every Wednesday from 3:30 p.m. – 4:30 p.m. (ET):
[Click here to register and join](#)

- You can also get help with other services such as: DTP Academic Technology, HPC, MSDW, Self-service Cohort Query Tools, eRAP, Data Ark Data Commons, DTP Cybersecurity, and Levy Library Resources and Services

More REDCap Office Hours

- Bonus Day scheduled once a month to accommodate users who cannot attend on Wednesdays.