Scientific Computing and Data Services

REDCap Essentials

https://redcap.mountsinai.org

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

Introduction – Team Members

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Acknowledgements

CTSA Clinical & Translational Science Awards ®

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.

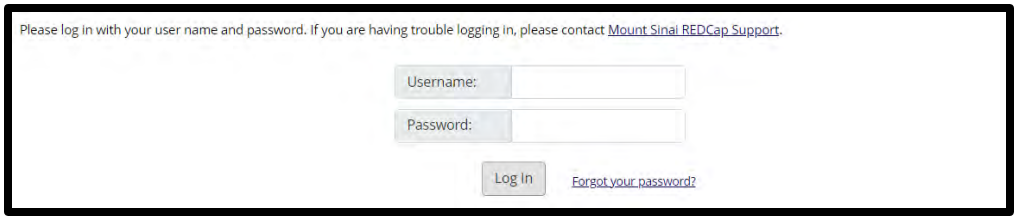
Agenda

- 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



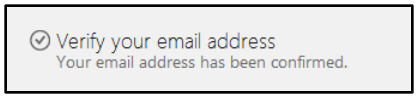
Types of accounts

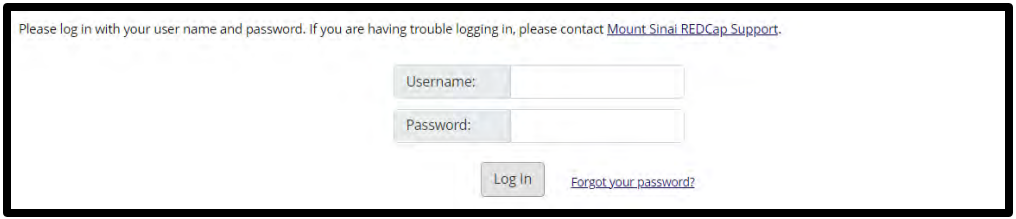
- Internal accounts
- External accounts

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





Mount Sinai

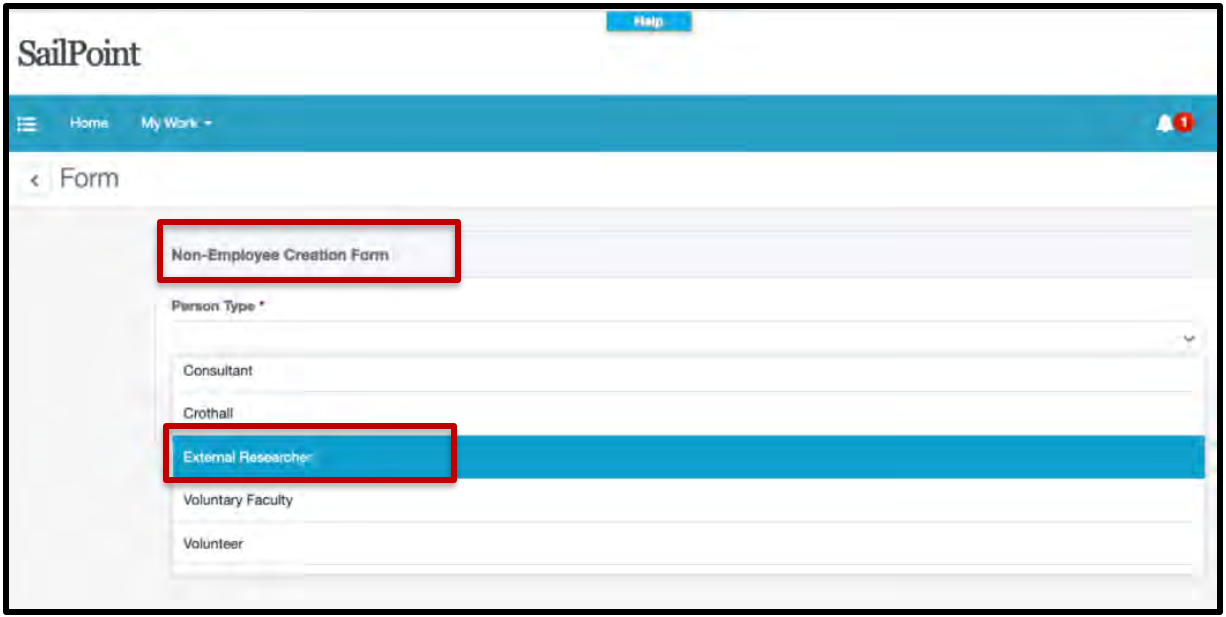
How do I obtain a REDCap account? External collaborator

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



How do I obtain a REDCap account? Part 2! External collaborator

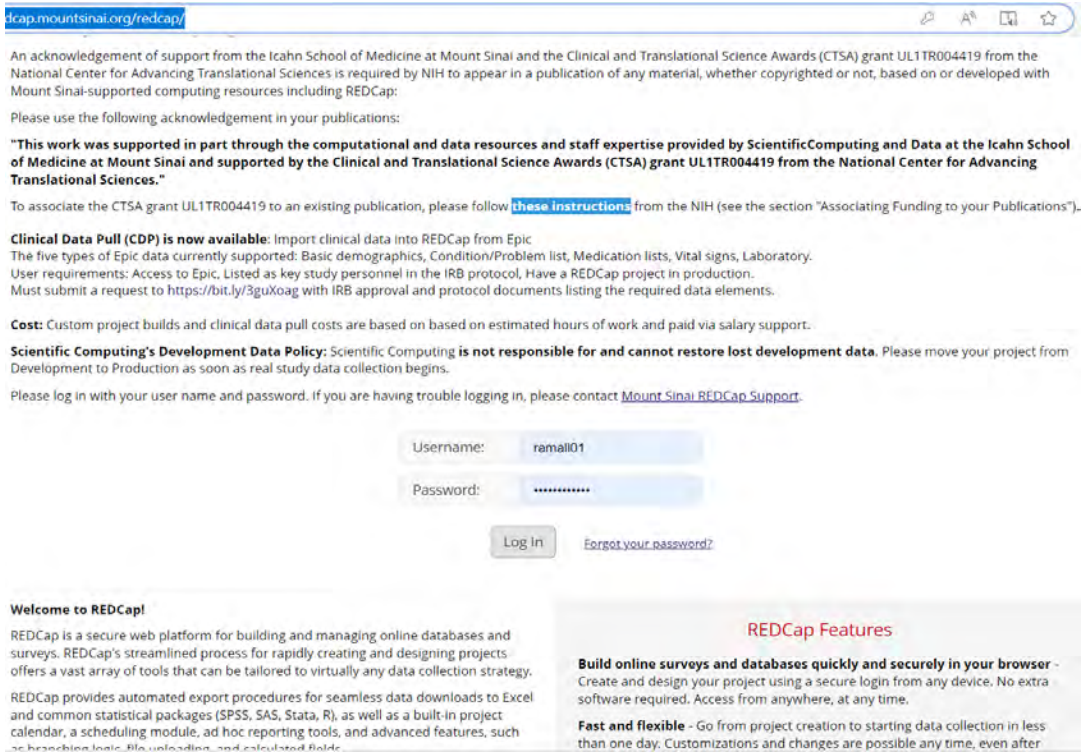
All external users must have Mount Sinai credentials

External Collaborator must:

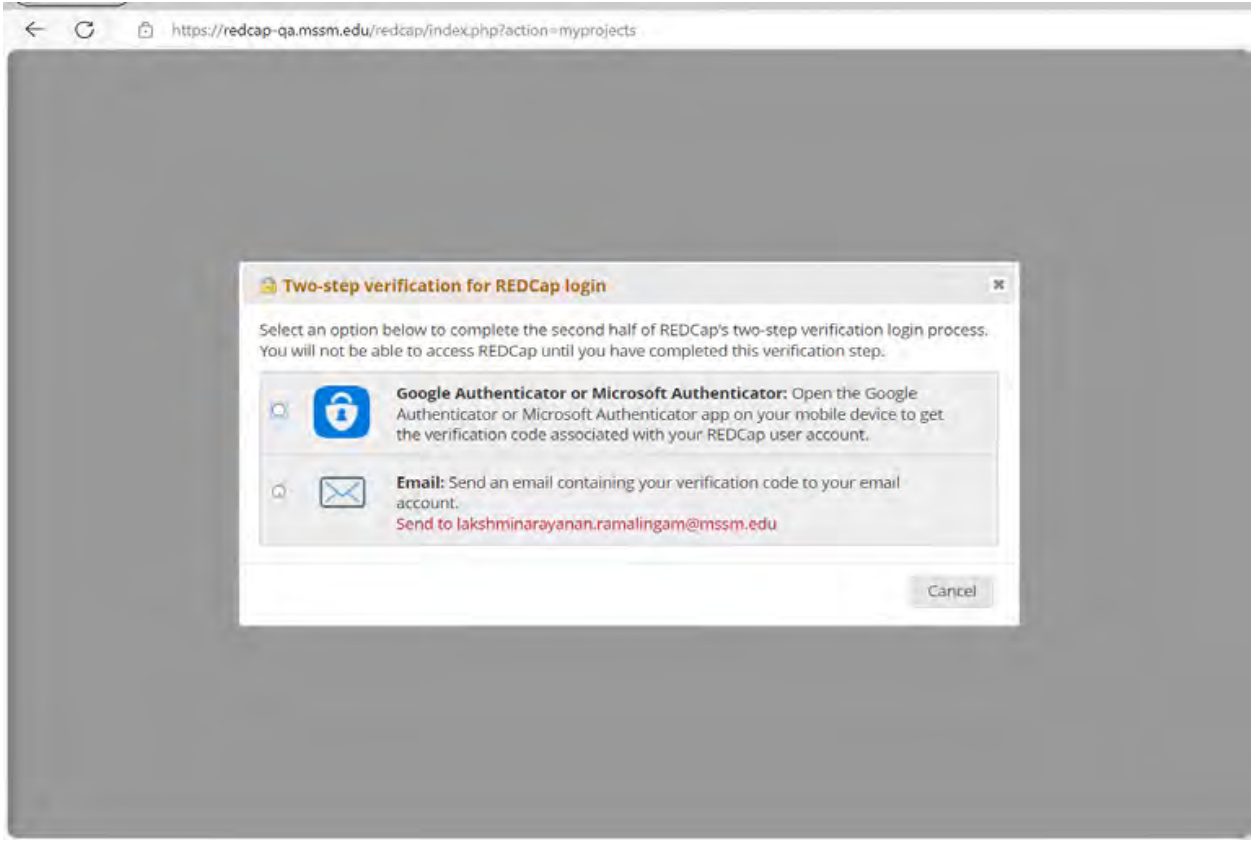
- Navigate to https://mshmsvpn.mssm.edu to change their password
- Change their Mount Sinai Password
- Navigate to https://redcap.mountsinai.org
- Log in with their Mount Sinai Login ID and new Password
- Upon first login, the Collaborator will be prompted to verify their email address. *Note: use an 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

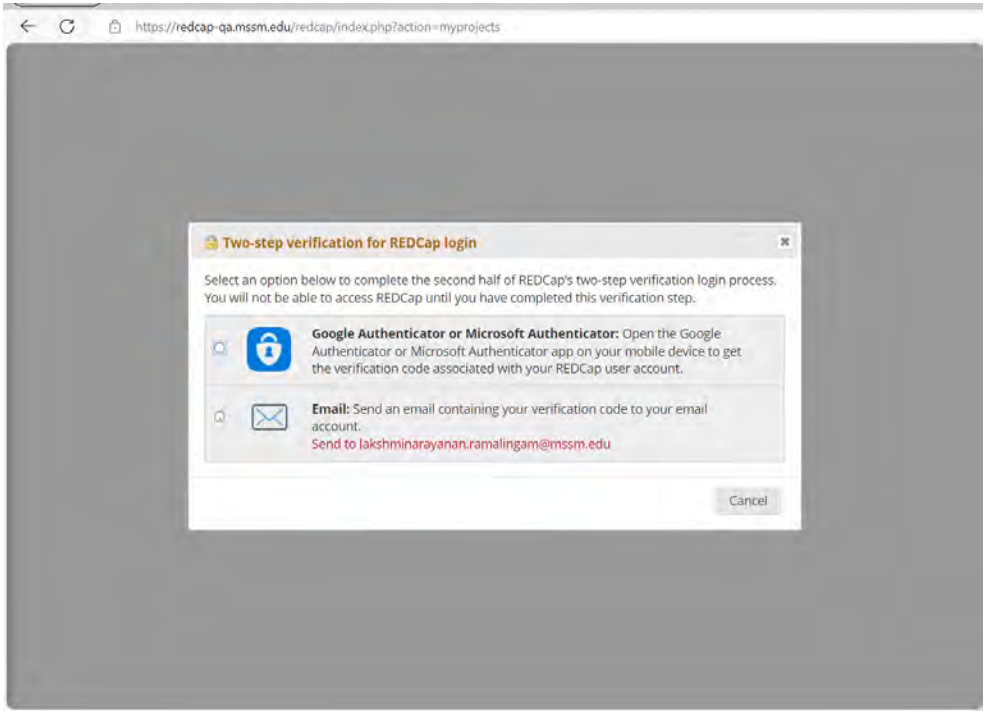
Step 1: Login with your credentials at REDCap (mountsinai.org).



Step 2: A multifactor authentication window will pop up.

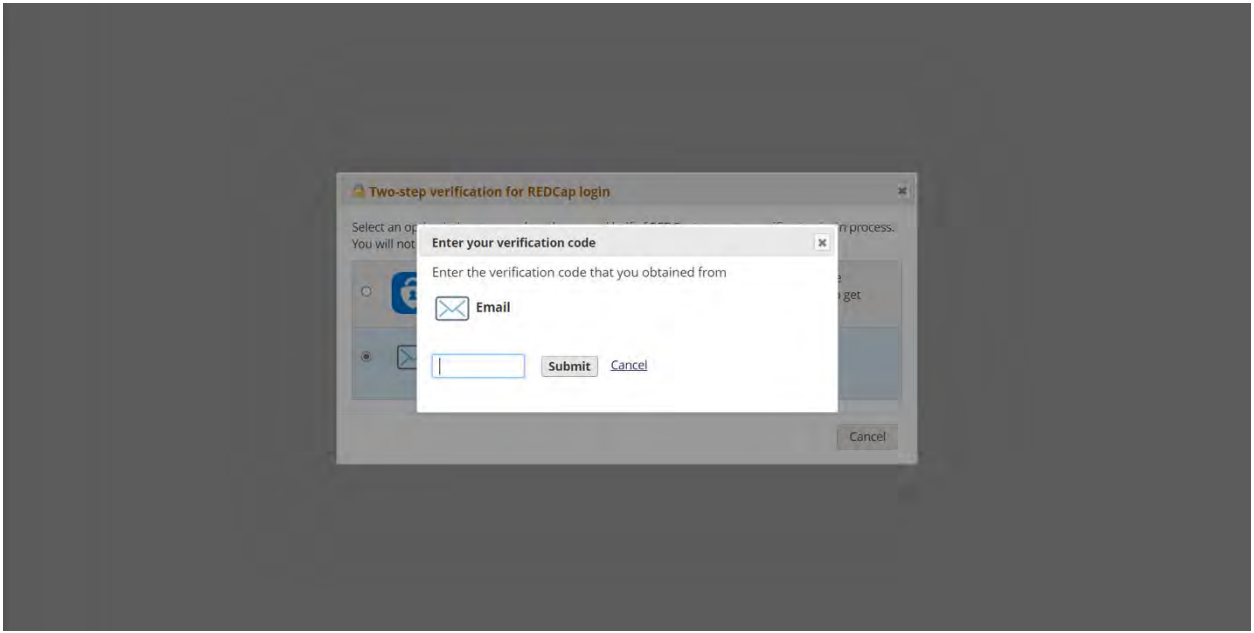


Step 3: Select the email option.

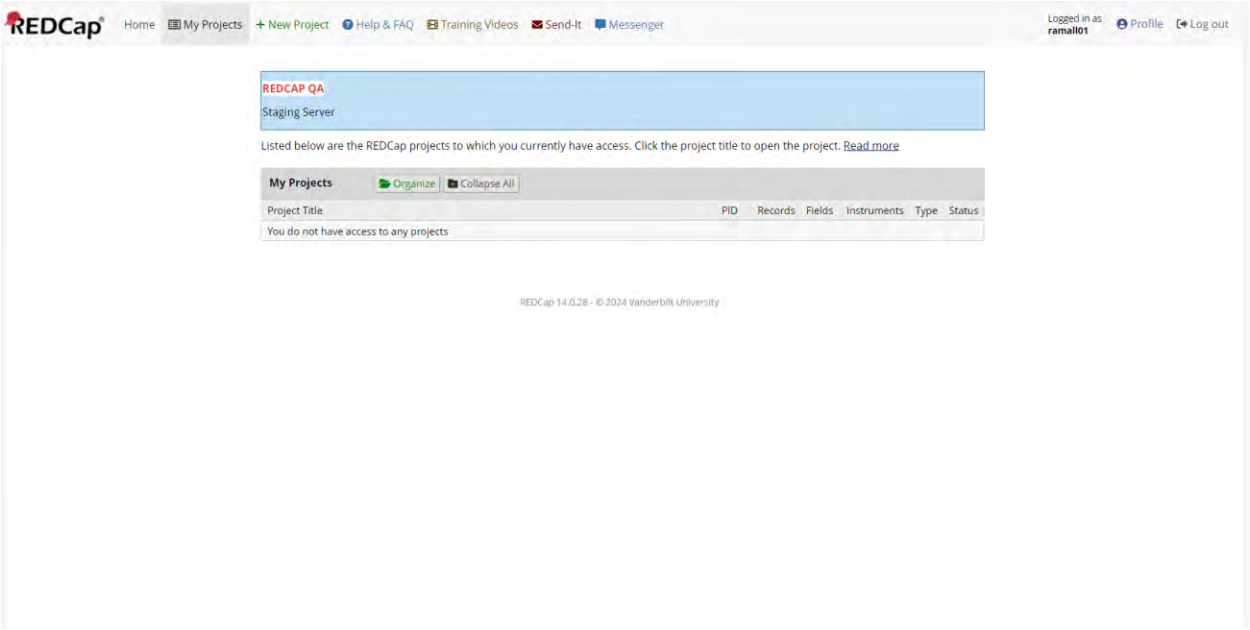


Step 4: You will receive the verification code through the specified email.

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

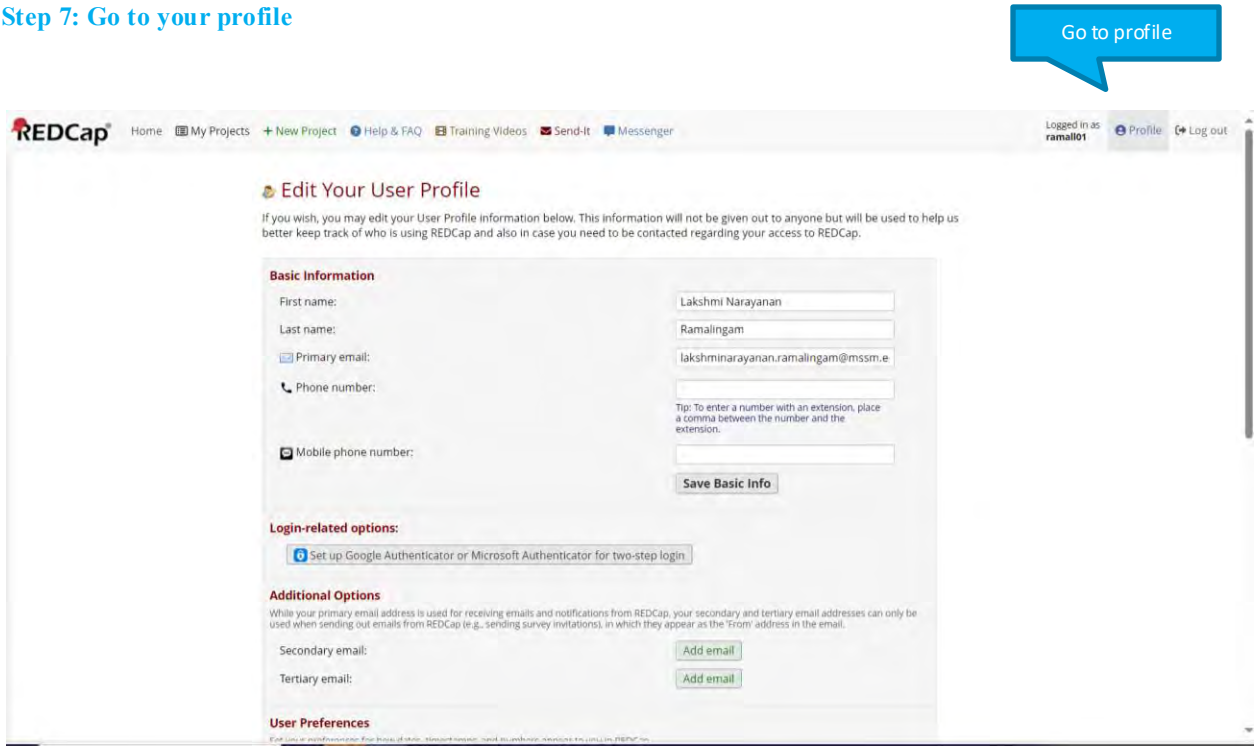


Step 6: This will enable you to enter the REDCap.

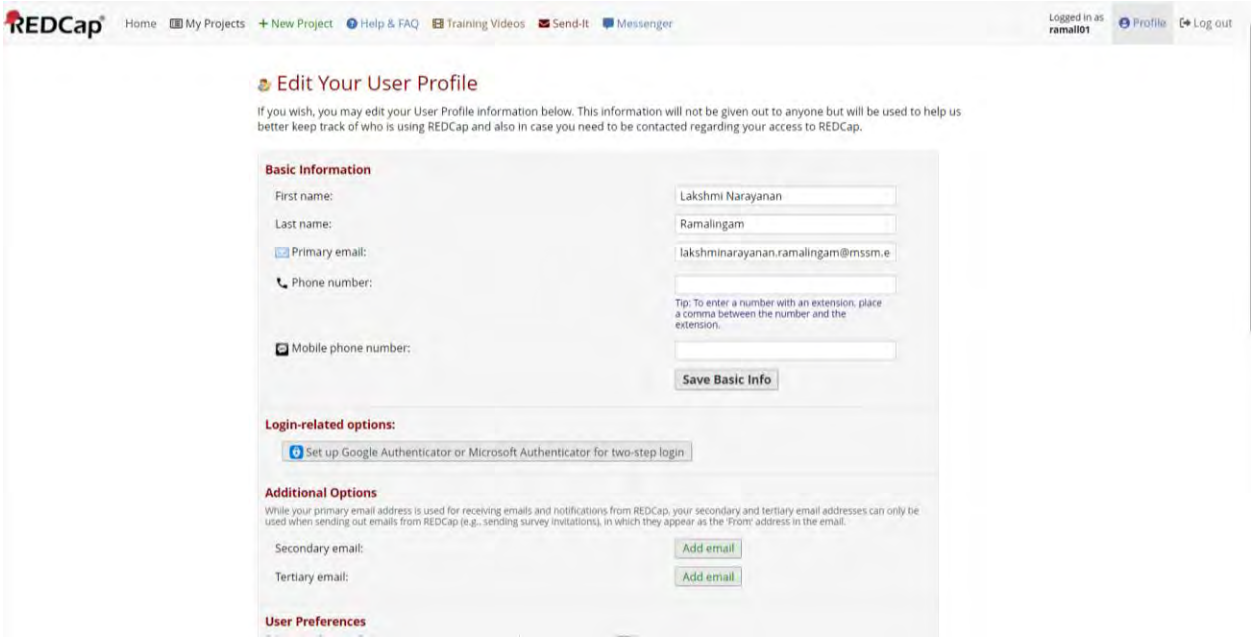


If you want to avoid using your email and prefer to use Google or Microsoft Authenticator:

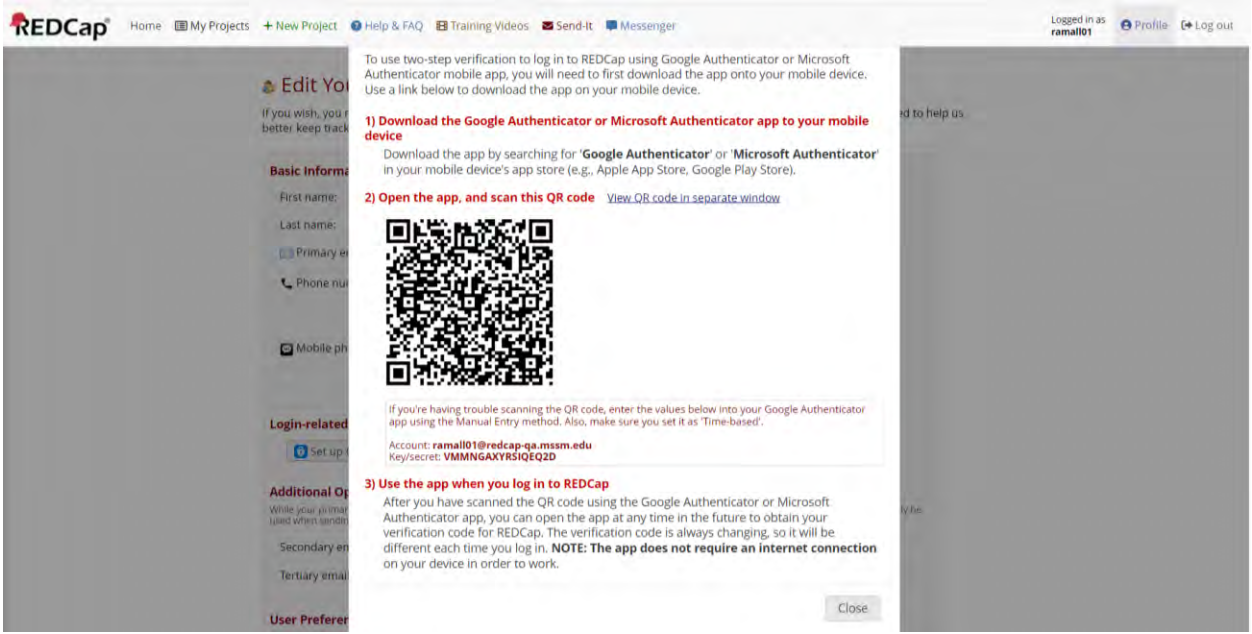
Step 7: Go to your profile



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

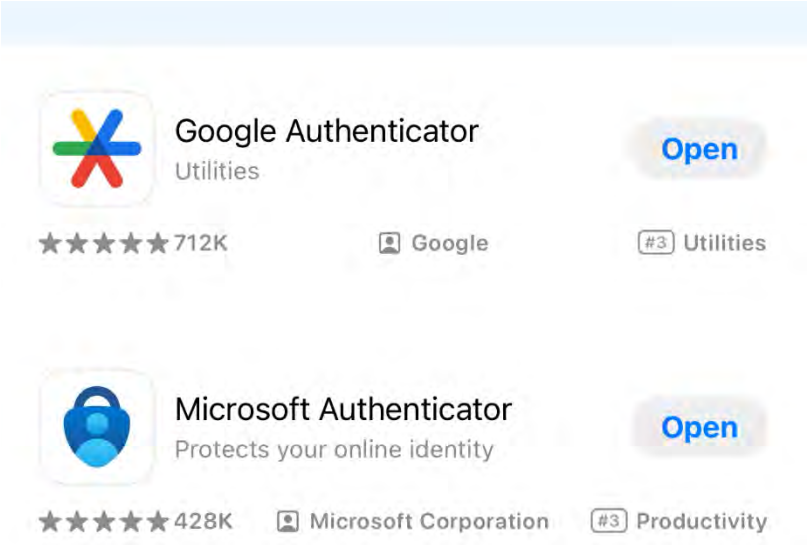


Step 9: A pop-up message will appear with the steps to enable Google or Microsoft Authenticator.

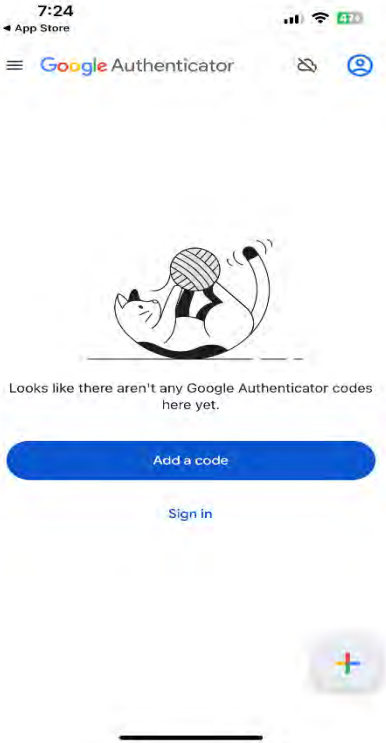


Step 10: Follow step 1 of the pop-up message: Download the Google Authenticator or Microsoft Authenticator app to your mobile device.

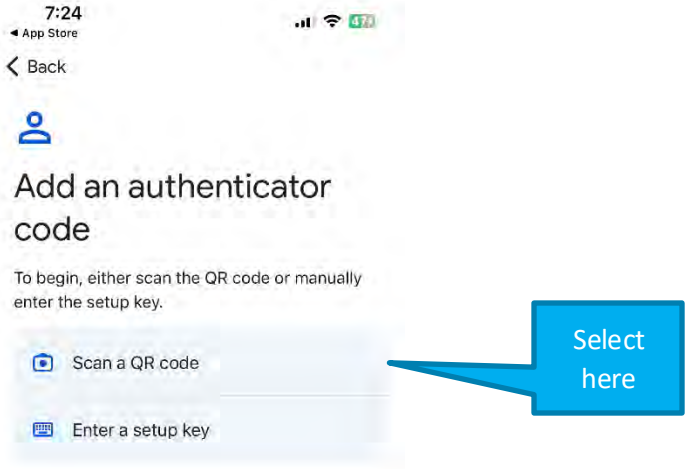
Download the app by searching for 'Google Authenticator' or 'Microsoft Authenticator' in your mobile device's app store (e.g., Apple App Store, Google Play Store).



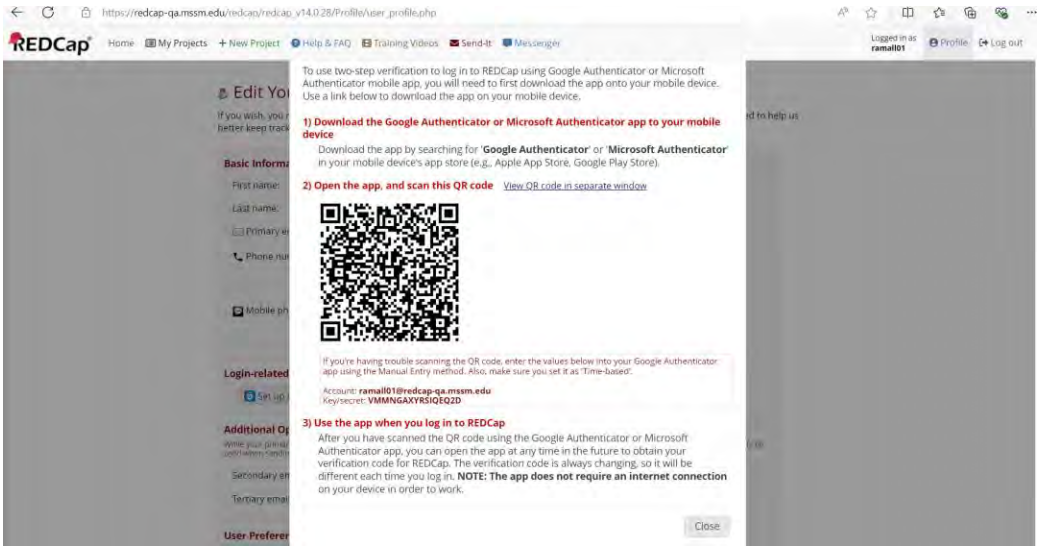
Step 11: Select “Add a Code.”



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



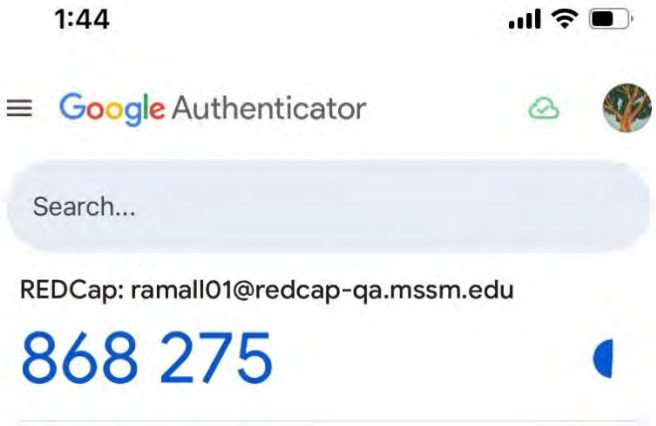
Step 13: Scan the QR code displayed in REDCap on your computer using your mobile device.



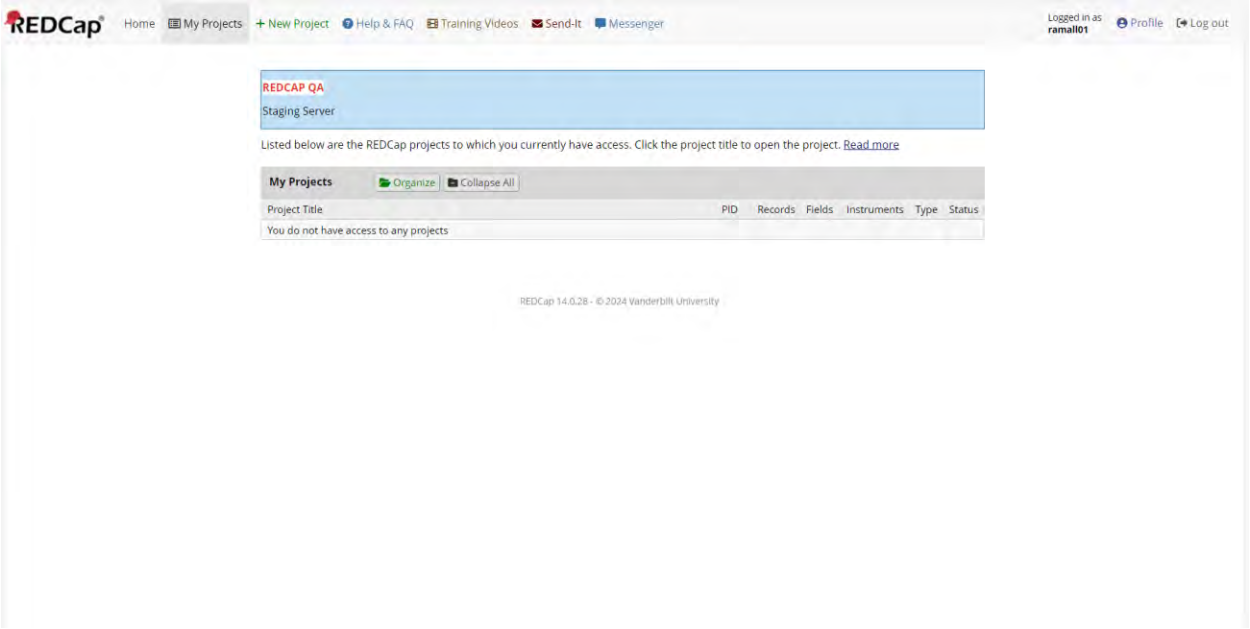
If you're having trouble scanning the QR code, enter the values below into your Google Authenticator app using the Manual Entry method. Also, make sure you set it as 'Time-based'.

Account: xxxxxxxx**@xxxxxxx.mssm.edu**
Key/secret: **xxxxxxxxxxxxxxx**

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



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



Development vs Production

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

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	✗	
Changes that may cause unintentional data loss or data corruption are reviewed by a REDCap Administrator.	✗	
Snapshots of data dictionary are logged before and after change	✗	
Changes require draft mode to safeguard data	✗	

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

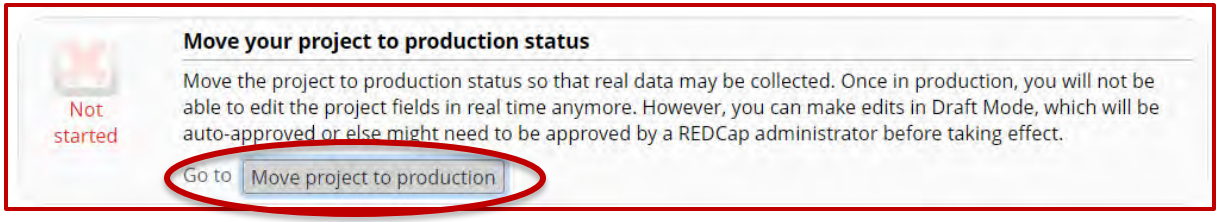
Collect real-time data in Production mode only!

How do I move data from Development to Production?

Carefully!

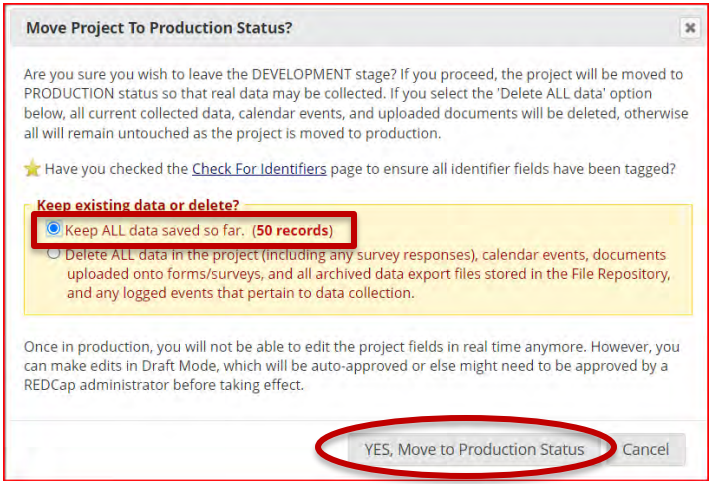
You can move real-time data from Development to Production without data loss by following a two-step process.

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



How do I move data from Development to Production?

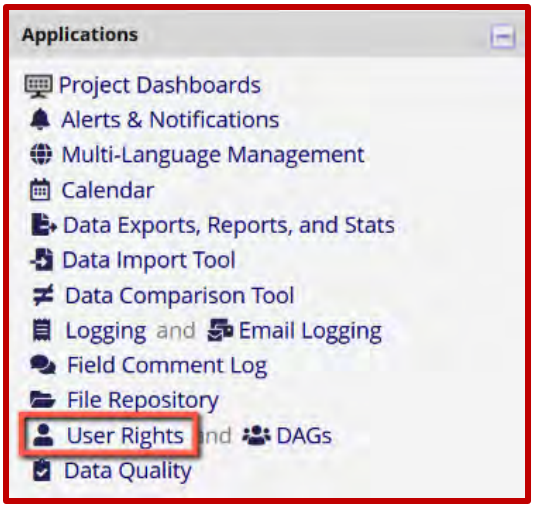
2) Move your project to production status-> Keep existing data or delete?



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?

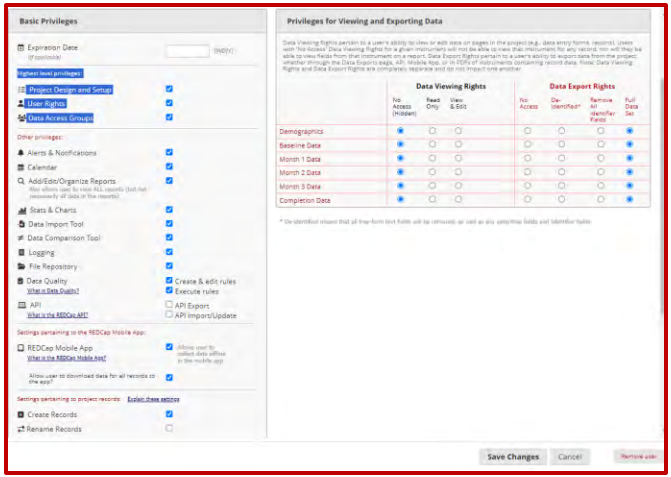
- Project owner has **USER RIGHTS** under Applications
- Project owner has full administrative rights of REDCap project.
- Oversees the project
- Ensures all project users have appropriate privileges
- Grant permissions and user rights (project ownership)
- Transfers ownership to others when they leave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



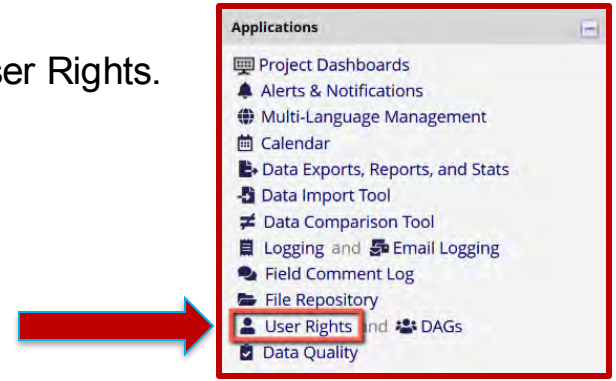
How can I add users to my REDCap project?

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.

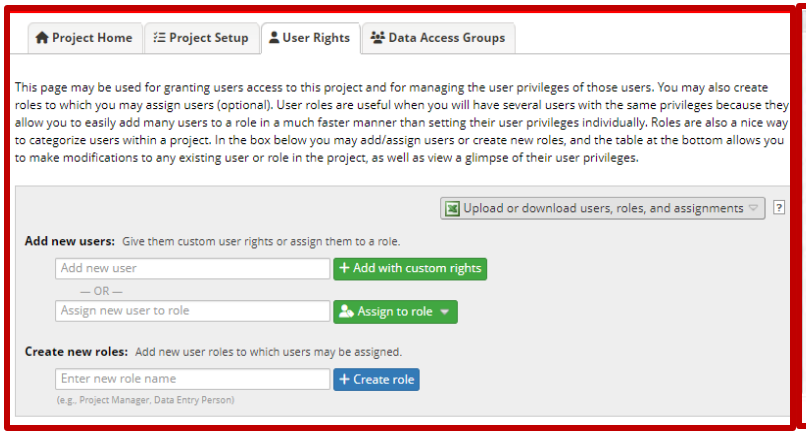


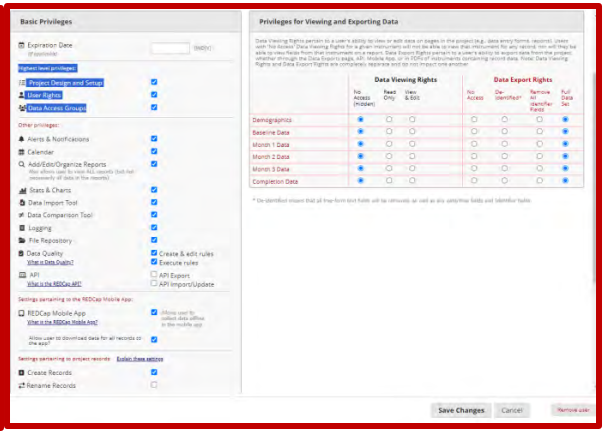
How can I add users to my REDCap project?

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.





Orphaned projects and transferring ownership

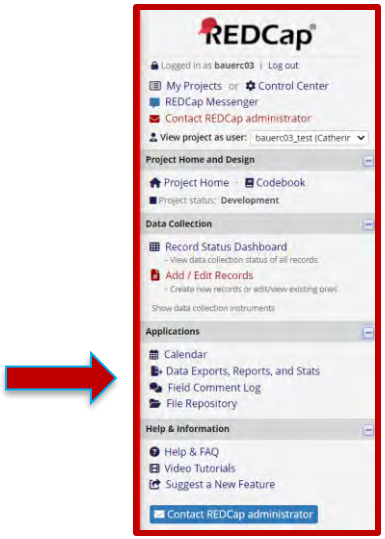
What happens if the project owner leaves and does not transfer User Rights, project ownership?

- 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 <u>two active project owners</u> 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.