Getting Access to REDCap/HRM:
A Process Map for Health Researchers in Manitoba

REDCap is a web-based database management system developed at Vanderbilt University for clinical research data management. REDCap/HRM (Health Research in Manitoba) is an installation of REDCap by the College of Medicine/Faculty of Health Sciences Information Services (MedIT) and George & Fay Yee Centre for Healthcare Innovation (CHI).

REDCap/HRM has been implemented with the mandate of offering a resource for research data management for health researchers throughout Manitoba. REDCap meets PHIA database requirements for audit trails of data access. REDCap/HRM can only be used for Research Ethics Board (REB) approved research projects. **It cannot be used for managing clinical data systems or for healthcare quality improvement or administrative projects that are not REB-approved research projects.**

REDCap/HRM has been implemented using three servers: the Training, Production, and Surveys Servers. Each of these requires its own login information. The REDCap/HRM Training Server is intended for helping new users learn about and gain experience with REDCap as well as for users to develop project templates without entering actual data. The REDCap/HRM Production Server, housed within the College of Medicine Secure Research Environment, is where clinical research data are entered and stored. The REDCap/HRM Surveys Server is used for administering online surveys to study participants.

SUMMARY OF STEPS FOR ACCESSING REDCAP/HRM

(1) Getting Started – Training

(2) Access the REDCap/HRM Training Server

(3) Access the REDCap/HRM Production Server (non-survey research projects)

(3A) Access the College of Medicine Secure Research Environment

(3B) Obtain REDCap/HRM Production Server credentials

(3C) Put Projects into production

(3D) Exporting data out of REDCap

(4) Obtain REDCap/HRM Surveys Server credentials (survey-based research projects)

STEP 1 – Getting Started - Training

Most researchers will begin by learning about the main features of REDCap and how it has been implemented in Manitoba. You may learn about REDCap on your own by viewing training videos prepared by Vanderbilt University or attend one of the regularly scheduled hands-on workshops offered by CHI. Visit http://chimb.ca/redcap for more information about REDCap training options.

STEP 2 – Access the REDCap/HRM Training Server

Although not mandatory, it is highly recommended that you use the REDCap/HRM Training Server to become familiar with REDCap before entering actual data. For example, the Training Server can be used to design your research database prior to REB submission. Also, REDCap can be somewhat cumbersome to use for some longitudinal studies with large variability in which data are collected between subjects; exploring in the Training Server can help you determine how best to use REDCap or if you want to consider other research data management options.

The REDCap/HRM Training Server can be accessed at no charge with any commonly used computer/mobile device and web browser. Free accounts are provided on request to anyone attending a CHI REDCap workshop and for other individuals affiliated with the UM or WRHA. Send your request, with your name and affiliation to redcap@umanitoba.ca.

You are welcome to use the REDCap/HRM Training Server to set up REDCap projects for ultimate deployment on the REDCap/HRM Production Server, as long as **NO ACTUAL DATA are entered** on the Training Server. On request, CHI staff can transfer your project from the Training Server to your Production Server account.

STEP 3 – Access the REDCap/HRM Production Server (non-survey research projects)

The REDCap/HRM Production Server is where real data are entered and stored by research teams. In compliance with the UM and WRHA privacy offices, the REDCap/HRM Production Server is implemented within the College of Medicine Secure Research Environment (also known as the "virtual desktop") to protect against external threats to data security. Hence, accessing the REDCap/HRM Production Server **requires access to the College of Medicine Secure Research Environment**.

STEP 3A – Access the College of Medicine Secure Research Environment

To access the College of Medicine Secure Research Environment you require: a UMNetID, security token (aka "fob"), account, and a free client program. Depending on the network you use, you may also have to work with your IT support team to ensure your network permits access to the Secure Research Environment through its firewalls.

Please consult the document *"Getting Access to the College of Medicine Secure Research Environment"* for more information.

STEP 3B – Obtain REDCap/HRM Production Server credentials

Once you have authorization and credentials to access the Secure Research Environment, you can apply for an account on the REDCap Production Server. Send a request to redcap@umanitoba.ca with:

(1) the same application e-form you used to request access to the Secure Research Environment, including your name, affiliation, UMnetID, contact information, and research project title;
(2) PHIA certificate(s), dated no earlier than Jan 1, 2000, demonstrating completion of the UM, WRHA or equivalent PHIA training course

As well, the PI or study coordinator must send redcap@umanitoba.ca current REB approval letters for all research studies for which REDCap will be used.

Once we receive all necessary information and documents, we should have your REDCap/HRM Production Server account set up within 3 working days.

STEP 3C – Put Projects into Production

Access to REDCap will allow you to create projects in draft mode. In order to use all REDCap functionality, your project needs to be moved into production status. In REDCap/HRM this must be done by one of the REDCap staff. In REDCap, you can send a request for the project to be moved into production. We must have your updated REB approval prior to placing the project in production (send to redcap@umanitoba.ca).

STEP 3D – Exporting Data out of REDCap and the Secure Research Environment

The PI and others designated by her/him may export data out of REDCap and the Secure Research Environment. REDCap allows limits to be placed on exporting data, including the ability to limit the exporting of Personal Health Identifiers (PHI). If you will need to export PHI from REDCap, you must include this in your REB application (or amendment). Otherwise, the default will be to turn off PHI exporting for all users in the project, including the PI.

Teams intending to export data out of the Secure Research Environment should use a hardware encrypted drive – for more information, contact redcap@umanitoba.ca.

STEP 4 – Obtain REDCap/HRM Surveys Server credentials (survey-based research projects)

The REDCap/HRM Surveys Server is used for researchers who wish to invite study participants to directly complete online surveys/questionnaires.

Access to the Secure Research Environment is not required if you ONLY need access to the Surveys Server. As in Step 3b *Obtain REDCap/HRM Production Server credentials,* send a request to redcap@umanitoba.ca with:

(1) Your name, affiliation, contact information, and research project title;

(2) PHIA certificate(s), dated no earlier than Jan 1, 2000, demonstrating completion of the UM, WRHA or equivalent PHIA training course

The PI or study coordinator must send redcap@umanitoba.ca current REB approval letters for all research studies for which the REDCap Surveys Server will be used.

Once we receive all necessary information and documents, we should have your REDCap/HRM Surveys Server account set up within 3 working days.

For more information, contact redcap@umanitoba.ca.

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