

# DISSEMINATION OF **EVIDENCE-** **INFORMED.** INTERVENTIONS

User Manual  
for the  
REDCap System

Version 2.0  
3/30/2017



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## I. Introduction

The objective of this user manual is to provide an easy-to-follow, step-by-step, comprehensive guide to data entry for the REDCap data entry web system for the Dissemination of Evidence-Informed Interventions (DEII) studies, as created by the Dissemination and Evaluation Center (DEC). Note that there are multiple web systems used in the study. This user manual only addresses the REDCap system.

The REDCap URL for capturing assessments for the DEII studies is: <https://redcap.bumc.bu.edu/>

The **LIVE** project names are intervention-specific:

- DEC – Buprenorphine
- DEC – Patient Navigation
- DEC – Peer Linkage
- DEC – Transitional Care Coordination

The TEST project name is:

DEC training-FOR PRACTICE ONLY

Users will be temporarily granted access to the TEST project for training purposes, or upon special request. Otherwise, the DCC encourages users to only have access to the LIVE project to reduce potential errors in saving forms to the wrong project.

This manual provides instructions for the REDCap data entry system, only. The other systems are covered in separate manuals.

## II. Contact Information

For questions regarding the website or study data, please contact any of the following people at the Boston University Data Coordinating Center (DCC):

**Clara Chen, Project Manager [Primary Contact]**

Phone: 617.638.4058

Email: [cachen@bu.edu](mailto:cachen@bu.edu)

**Christine Chaisson, Project Director**

Phone: 617.638.5009

Email: [chaisson@bu.edu](mailto:chaisson@bu.edu)

## III. General Overview of the Project

The DEII project involves four interventions: buprenorphine, patient navigation, peer linkage, and transitional care coordination. Each intervention involves three sites.

### ***Buprenorphine***

For PLWH, office-based buprenorphine treatment delivered in HIV clinics is associated with decreased opioid use, increased ART use, higher quality of HIV care, and improved quality of life. Integrating Buprenorphine Treatment for Opioid Use Disorder in HIV Primary Care is intended to be implemented in HIV primary care settings that do not already provide on-site buprenorphine treatment services. The intervention is designed to increase the number of patients retained in

buprenorphine treatment and HIV primary care, as well as integrate buprenorphine treatment into the standard of care in the clinic setting.

### ***Patient Navigation***

The Enhanced Patient Navigation for HIV-Positive Women of Color intervention is designed to retain HIV-positive Women of Color (WoC) in HIV primary care after receiving support, education, and coaching from a patient navigator. Patient navigators are critical members of the health care team focused on reducing barriers to care for the patient at the individual, agency, and system levels. While engaging with patients, patient navigators lend emotional, practical, and social support; provide education on topics related to living with HIV and navigating the health care system; and support both patients and the health care team in coordinating services. In this intervention, patient navigators will work with HIV-positive WoC who are experiencing at least one of the following challenges: have fallen out of care for 6 months or more, have missed 2 or more appointments in the prior 6 months, are loosely engaged in care (have cancelled or missed appointments), are not virally suppressed, and/or have multiple co-morbidities.

### ***Peer Linkage***

The Peer Linkage and Re-Engagement of HIV-Positive Women of Color intervention is designed to best serve Women of Color (WoC) who are newly diagnosed with HIV or who have fallen out of HIV primary care. Trained HIV-positive WoC known as "peers" will link and re-engage patients in HIV primary care. Patients will be considered linked or re-engaged once they have attended 2 medical appointments, attended 1 case management appointment, and have completed HIV lab work (all within a 4 month period). Peers offer a unique personal perspective and can provide coaching and emotional support to patients who may need assistance in managing medical and case management appointments. In addition, peers who work closely with case managers and the clinical team can better provide individualized patient-centered services over a short time period to address immediate patient needs and build trust between the patient and the clinic team.

### ***Transitional Care Coordination***

Collaborations between public health agencies, community-based organizations, and jail health services have implications for public health and safety efforts and have been proven to facilitate linkage to care after incarceration. Medical screenings that happen for all inmates through the jail intake process offer an opportunity to implement such interventions, as do booking processes and intervention intake. Jordan et al., introduce the concept of "Warm Transitions" as an integral part of implementing the HIV Continuum of Care Model by "applying social work tenets to public health activities for those with chronic health conditions, including HIV-infection." Absent "a caring and supportive warm transition approach," pre-existing barriers to care and other stressors that come with the experience of incarceration and cycling in and out of correctional facilities will continue or be exacerbated after incarceration. Without transition assistance, people living with HIV who are released from jails are at risk of unstable housing; lack of access to health insurance and medication; overdose due to period of detoxification; exacerbation of mental health conditions due to increased stress; and lack of social supports, when exposed to the same high risk communities from which they were incarcerated. The Transitional Care Coordination intervention is designed to strengthen connections between community and jail health care systems to improve continuity of care for HIV-positive individuals recently released from jails.

## **IV. General Overview of the Websites**

The project utilizes multiple web systems: a tracking system to confirm eligibility, enter encounter forms, print chart review forms, and upload audio recordings; and a REDCap system to collect research assessments by Study ID.

All 12 sites for the 4 different interventions will use the same websites for tracking and data collection purposes, but each site will only be able to see their own site's participants and associated information. Monitors at AU, BU, and HRSA will have read-only access to these websites, and will not be able to see names if they are entered onto the participant form by sites. BU DCC will have access to all data collected from the websites as the group that created and maintain the websites, but DCC will explicitly prevent other BU DEC team members from seeing names; they will be able to see visit dates and responses to assessments and encounter forms.

### ***Tracking System***

The tracking system is used to collect and document eligibility, provides a mechanism for sites to track participants' status, enter encounter forms, print and submit chart review forms, and upload audio recordings.

### ***REDCap System***

The research assessments will be entered into the REDCap data collection system, for baseline and follow-up visits. The REDCap system will rely on the Study ID automatically created in the tracking system as the unique participant identifier. This user manual explains how to use the REDCap System.

## **V. Background about REDCap**

### ***Background***

REDCap (*Research Electronic Data Capture*) is a secure, web-based application designed exclusively to support data capture for research studies. It was developed at Vanderbilt University and includes more than 162,000 projects with 1,406 active institutional partners in 90 countries.

The main advantage to using electronic data capture is that skip patterns are built directly into the interviews, enabling the interviewer to concentrate on the participant and his/her responses, rather than trying to follow the directions on a paper questionnaire. There are also interviewer prompts to help the flow of the interviews. Alerts are programmed into the system to warn you of data entry errors. All of this will result in easier interviews and more accurate data.

### ***Additional Information about REDCap***

REDCap is fairly intuitive and easy to use. If you are interested in learning more about the software, you may like to investigate the comprehensive documentation and instructional videos available on the REDCap website (<http://project-redcap.org/>). Though much of the information is geared toward programmers, you will also find general information that may be of interest to you.

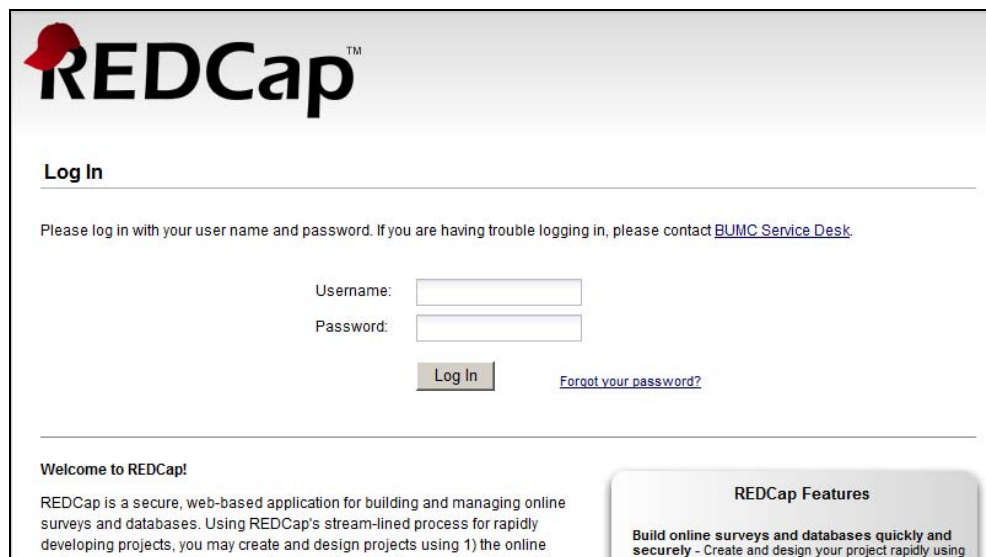
## VI. Using REDCap

### *New user requests*

Access to REDCap must be requested through the DCC (contact Clara Chen: [cachen@bu.edu](mailto:cachen@bu.edu)). For users new to REDCap, an End-User License Agreement (EULA) will be provided. Access to REDCap may be granted when the electronically signed EULA is returned to the DCC and processed. A user may then be granted access to individual REDCap projects and assigned appropriate project user roles. When a user is added to a REDCap project, an email containing login instructions will be automatically sent via REDCap to the newly assigned user.

### *Logging in*

The REDCap website may be accessed via <https://redcap.bumc.bu.edu/>.



You will be assigned a unique username and password. After you first log in, you will be prompted to change your password. Do not share your username or password with anyone. You are responsible for any data entered under your username.

If you forget your password, select the “Forgot your password?” hyperlink to the right of the “Log In” button to reset. You will be automatically logged out after 20 minutes of inactivity.

Please log out of REDCap when you leave your computer.

### *My projects*

Once you have logged in, your DEC project(s) will be available for entering, editing, viewing, or downloading participant data, depending on your user permission settings. Project appearance and functionality will be dependent on user role as well.

Your REDCap projects may include:

- DEC – Buprenorphine ← enter baseline and follow-up forms
- DEC – Patient Navigation ← enter baseline and follow-up forms

- DEC – Peer Linkage ← enter baseline and follow-up forms
- DEC – Transitional Care Coordination ← enter baseline and follow-up forms
- DEC TA tracking log ← enter technical assistance forms
- DEC training-FOR PRACTICE ONLY ← for future development and training

dcc | My Profile | Log out

# REDCap™

Home My Projects Create New Project Training Resources Help & FAQ Send-It

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. Newly created projects begin in **Development status** as you begin to build and design them. When you are ready to begin entering real data in the project, you may move it to **Production status** to designate the project as officially collecting data. When you are finished collecting data or if you wish to stop collection, the project may be set to **Inactive status**, although it may be brought back to Production status at any time when you are ready to begin collecting data again. Also listed is the project type, which designates if the project is in **classic** or **longitudinal** data collection format.

My Projects Organize Filter projects by title

Project Title	Records	Fields	Instruments	Type	Status
DEC - TA Tracking Form-FOR PRACTICE ONLY			1 form		
DEC - TA Tracking Form			1 form		

Select your project

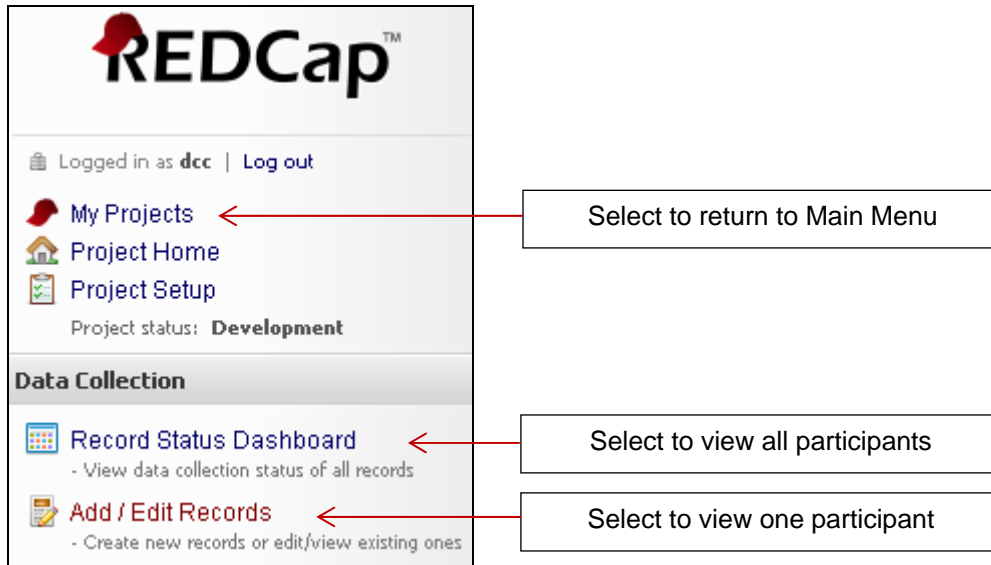
## IMPORTANT

**Prior to study start, you will be given access to the test project to conduct training sessions and enter test data. Only test data should be entered in the test projects (clearly labeled “-FOR PRACTICE ONLY”); only real data should be entered in the live projects.**

## Navigation in DEC projects

After clicking on the project name, there are two ways to access a participant's record.

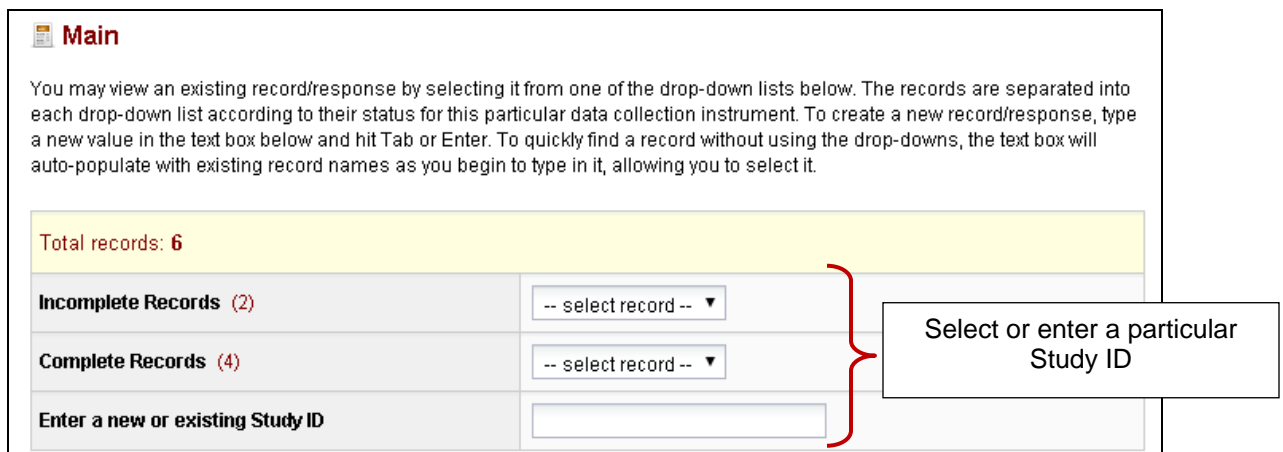
1. Select **Add/Edit Records** from the Data Collection section to access one participant's data. (You can also enter a new ID here to create a new record.)
2. Select **Record Status Dashboard** to view all participants. Double click on the participant ID of the record you want to view.



The screenshot shows the REDCap interface. At the top, it says "Logged in as dcc | Log out". Below that are three main navigation options: "My Projects", "Project Home", and "Project Setup". Under "Project Setup", it says "Project status: Development". The "Data Collection" section contains three options: "Record Status Dashboard" (with a sub-note "- View data collection status of all records"), "Add / Edit Records" (with a sub-note "- Create new records or edit/view existing ones"), and "My Projects". Red arrows point from text boxes to these options: "Select to return to Main Menu" points to "My Projects", "Select to view all participants" points to "Record Status Dashboard", and "Select to view one participant" points to "Add / Edit Records".

### Add/Edit Records

Select **Add/Edit Records** and select or enter a participant's Study ID (as assigned by the DEC Tracking System) to access the data of a particular participant.



The screenshot shows the "Main" page. It has a heading "Main" and a paragraph of instructions: "You may view an existing record/response by selecting it from one of the drop-down lists below. The records are separated into each drop-down list according to their status for this particular data collection instrument. To create a new record/response, type a new value in the text box below and hit Tab or Enter. To quickly find a record without using the drop-downs, the text box will auto-populate with existing record names as you begin to type in it, allowing you to select it." Below the text is a yellow bar that says "Total records: 6". Underneath are three rows: "Incomplete Records (2)" with a dropdown menu showing "-- select record --", "Complete Records (4)" with a dropdown menu showing "-- select record --", and "Enter a new or existing Study ID" with a text input field. A red bracket groups the two dropdown menus and the text input field, with a text box pointing to it that says "Select or enter a particular Study ID".

★ **TIP:** The "Incomplete Records" and the "Complete Records" dropdown lists refer to a particular data collection instrument, not the overall data collection status for a participant. Therefore, it may be most convenient to type the ID into the "Enter a new or existing Study ID" field.



After selecting an ID, the Record Home Page view is displayed: an ID-specific grid of data collection instruments and colored status icons indicating the data entry status for each instrument.

This grid is either a single row (for Transitional Care Coordination) or a grid by time point (for Peers, Patient Navigation, and Buprenorphine).

**Transitional Care Coordination:**

**Displaying:** [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Participant ID: / ID del paciente:	Baseline Section1 Demographics	Baseline Section3 HIV Adherence	Baseline Section8 Health Related Quality Of Life	Baseline Section9 Bodily Pain	Baseline Section10 Additional Info	M3 Section1 Demographics	M3 Section3 HIV Adherence	M3 Section8 Health Related Quality Of Life	M3 Section9 Bodily Pain	M3 Section10 Patient Feedback
1000										

or

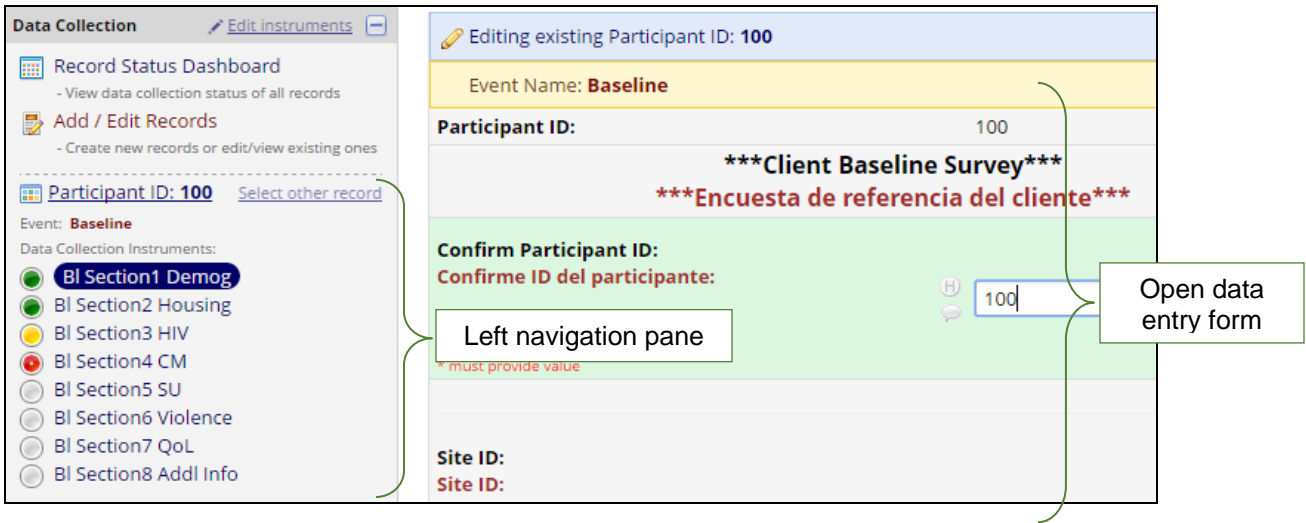
**Peers, Patient Navigation, Buprenorphine:**

Participant ID: 100

Data Collection Instrument	Baseline	M3	M6
BI Section1 Demog			
BI Section2 Housing			
BI Section3 HIV			
BI Section4 CM			
BI Section5 SU			
BI Section6 Violence			
BI Section7 QoL			
BI Section8 Addl Info			
FU Section1 Demog			
FU Section2 Housing			
FU Section3 HIV			
FU Section4 CM			
FU Section5 SU			
FU Section6 QoL			
FU Section7 Feedback			
FU Section8 Addl Info			

Click on a status icon (colored bubble) in the Record Home Page grid to open that data collection instrument.

When a data collection form is open, a menu of instruments for the selected participant is simultaneously shown in the left margin: either a list of forms for all time points (for Transitional Care Coordination) or a list of forms for the selected time point (for Peers, Patient Navigation, and Buprenorphine). This navigation pane allows users to move directly to other forms for the same participant ID.



The specific differences in how forms and time points are displayed in the Transitional Care Coordination project versus the Peer, Patient Navigation, and Buprenorphine projects are described in the “Intervention-specific Navigation Tips” section below.

### Record Status Dashboard

Alternatively, by selecting **Record Status Dashboard**, the user will be presented with a status grid that displays all IDs, all instruments for those IDs, and the data entry status for every instrument. (If an ID isn’t listed, then no record has been created for that participant. Use “Add/Edit Records” to add a new record.)

For all projects, the baseline and follow-up forms are shown in a single row per participant ID, in the Record Status Dashboard view.

**DEC training-FOR PRACTICE ONLY**

[Record Status Dashboard \(all records\)](#)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Displaying Data Access Group: -- ALL --




Displaying record: "1000" through "1000" of 1 records

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Participant ID: / ID del paciente:	Baseline Section1 Demographics	Baseline Section3 HIV Adherence	Baseline Section8 Health Related Quality Of Life	Baseline Section9 Bodily Pain	Baseline Section10 Additional Info	M3 Section1 Demographics	M3 Section3 HIV Adherence	M3 Section8 Health Related Quality Of Life	M3 Section9 Bodily Pain	M3 Section10 Patient Feedback	M6 Section1 Demographics
1000	<span style="color: red;">●</span>	<span style="color: orange;">●</span>	<span style="color: green;">●</span>	<span style="color: green;">●</span>	<span style="color: green;">●</span>	<span style="color: green;">●</span>	<span style="color: green;">●</span>	<span style="color: green;">●</span>	<span style="color: green;">●</span>	<span style="color: green;">●</span>	<span style="color: green;">●</span>

(Not all forms are shown in this screenshot. One would scroll to the right to see all forms.)

**Legend for status icons:**

-  Incomplete
-  Unverified
-  Complete

**Incomplete** → Data Entry Needed

**Unverified** → Data Entry Complete But Awaiting QA

**Complete** → Data Entry and QA Complete

After selecting a status icon, the user will be presented with the specified instrument for the participant. Again, the Data Collection menu on the left-hand side of the screen will list all data collection instruments for the given participant. After completing an instrument, the user may navigate between these instruments by clicking the status icons in the data collection menu.

★ **TIP:** Set the record status to “unverified” to indicate that data entry has been completed and QA is needed. Once the QA process is complete, change the status to “Complete”.












If your site does not have a QA (Quality Assurance) process for these survey assessments, simply change the form status to “Complete” once data entry is finished for each form.

## Intervention-specific navigation tips

### Transitional Care Coordination project:

For the Transitional Care Coordination project, all forms and time points will be seen in one row in the Record Home Page:

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Participant ID: / ID del paciente:	Baseline Section1 Demographics	Baseline Section3 H I V Adherence	Baseline Section8 Health Related Quality Of Life	Baseline Section9 Bodily Pain	Baseline Section10 Additional Info	M3 Section1 Demographics	M3 Section3 H I V Adherence	M3 Section8 Health Related Quality Of Life	M3 Section9 Bodily Pain	M3 Section10 Patient Feedback	Etc...
1000											

Study ID

Baseline forms

3 month f/u forms

The Record Home Page data collection grid displays the selected ID and all data collection instruments for the given participant. Note the form lists are truncated in the graphic above.

For the Transitional Care Coordination project: the left navigation pane displays forms for all time points for the selected participant ID, once a particular data collection instrument is opened.

The screenshot shows the REDCap interface. On the left, the 'Data Collection' pane lists various instruments. The 'BI Section1 Demog' instrument is highlighted with a blue dot and a red callout box containing the text 'Warning: Multiple time points shown'. The right pane shows the 'Editing existing Participant ID: ID del participante 999' form. The form includes a 'Confirm Participant ID:' section with a text input field and a red asterisk warning '\* must provide value'. Below this is a 'Site ID:' section with radio button options for 'Cooper Health System', 'UNC at Chapel Hill', and 'Southern NV Health District'.

The first part of the form name indicates the time point (BL = baseline; D30 = 30 day post-release; M4 = 4 months post-release).

Please be cautious when nearing the end of the assessments for each time point so that surveys from the next time point are not data entered incorrectly. The initial form for each time point will have a large header at the top surrounded by 3 asterisks on either side, like this:

**\*\*\*Client Follow-Up Survey\*\*\***  
**(4 Months post release)**  
**\*\*\*Encuesta de Seguimiento del Cliente\*\*\***  
**(4 meses pos-liberación)**

This should help alert the user to the fact that the form is for a new time point.



**TIP:** By clicking on the colored dots on the record home page or left navigation pane, you can navigate between instruments without having to re-enter the subject ID.



**TIP:** By clicking on “Select other record” in the left navigation pane (next to the participant ID), you can navigate between IDs without having to return to the home page.

Peers, Patient Navigation, and Buprenorphine projects:

For the Peers, Patient Navigation, and Buprenorphine interventions, the forms in the Record Home Page are displayed in a longitudinal grid that separates the forms into columns by time point instead of displaying a single row:

Participant ID: 100

Data Collection Instrument	Baseline	M3	M6
BI Section1 Demog	<input checked="" type="radio"/>		
BI Section2 Housing	<input checked="" type="radio"/>		
BI Section3 HIV	<input checked="" type="radio"/>		
BI Section4 CM	<input checked="" type="radio"/>		
BI Section5 SU	<input type="radio"/>		
BI Section6 Violence	<input type="radio"/>		
BI Section7 QoL	<input type="radio"/>		
BI Section8 Addl Info	<input type="radio"/>		
FU Section1 Demog		<input type="radio"/>	<input type="radio"/>
FU Section2 Housing		<input type="radio"/>	<input type="radio"/>
FU Section3 HIV		<input type="radio"/>	<input type="radio"/>
FU Section4 CM		<input type="radio"/>	<input type="radio"/>
FU Section5 SU		<input type="radio"/>	<input type="radio"/>
FU Section6 QoL		<input type="radio"/>	<input type="radio"/>
FU Section7 Feedback		<input type="radio"/>	<input type="radio"/>
FU Section8 Addl Info		<input type="radio"/>	<input type="radio"/>

3 month f/u

6 month f/u

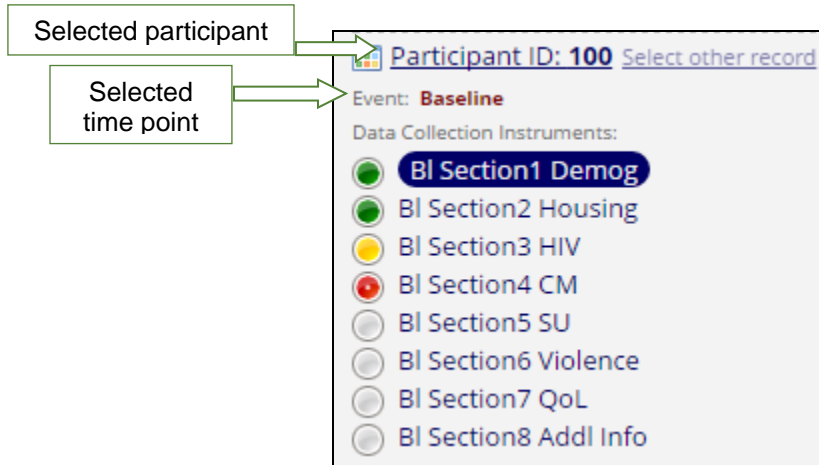
Baseline forms

Follow-up forms

Each time point has a separate column.

Click on a status icon (gray or colored bubble) in the Record Home Page grid to open that data collection instrument.

When a data collection form is opened for a particular participant and time point, the left navigation pane will only display forms for the selected time point, for the selected participant ID. The “Event” header just under the participant ID will specify which time point is currently open. This “Event” header is particularly useful at the follow-up time points, because the follow-up form names all start with “FU” without a specific time point designation.



- ★ **TIP:** By clicking on the colored dots on the record home page or left navigation pane, you can navigate between instruments without having to re-enter the subject ID.
- ★ **TIP:** By clicking on “Select other record” in the left navigation pane (next to the participant ID), you can navigate between IDs without having to return to the home page.

### ***Data entry tips***

- ★ **TIP:** Use your mouse or “Tab” key to move from field to field  
(Note: pressing “Enter” will save your data but kick you out of the form).
- ★ **TIP:** Do NOT use the keyboard arrow keys to try to move from field to field; arrow keys will instead move within answer options in the selected question.
- ★ **TIP:** Do not use the browser arrows to move back and forth between screens/forms or you will lose data.
- ★ **TIP:** Confirm that you are entering data for the correct participant by checking the ID at the top of each page.



**TIP:** If you need to clear a radio button, use the “reset” button to the right of the question.

2. Currently, which do you consider yourself to be? [Interviewer: Read responses.]  
En la actualidad, ¿qué se considera ser? [Entrevistador: Lea las respuestas.]

\* must provide value

- Male / Hombre
- Female / Mujer
- Transgender / Transgénero
- Gender Non-conforming / Género no confirmado
- Other (specify): / Otro (especifique):
- Refused / Rehusó

reset

If resetting a field invalidates some of your later responses (the skip pattern has been compromised), then you will receive an ugly REDCap pop-up warning asking for confirmation of the change, and warning you that your previous entry will be deleted. If you intentionally changed your response, then click “OK” and continue. An example of such a warning:

redcap.bumc.bu.edu says:

ERASE CURRENT VALUE OF THE FIELD "language\_othsp" ?

The current field for which you just entered data requires that the field named "language\_othsp" be hidden from view. However, that field already has a value, so its value might need to be reset back to a blank value.

Click OK to HIDE this field and ERASE its current value. Click CANCEL if you DO NOT wish to hide this field or erase its current value.

OK Cancel

Please specify other language  
Por favor especifique el otro idioma

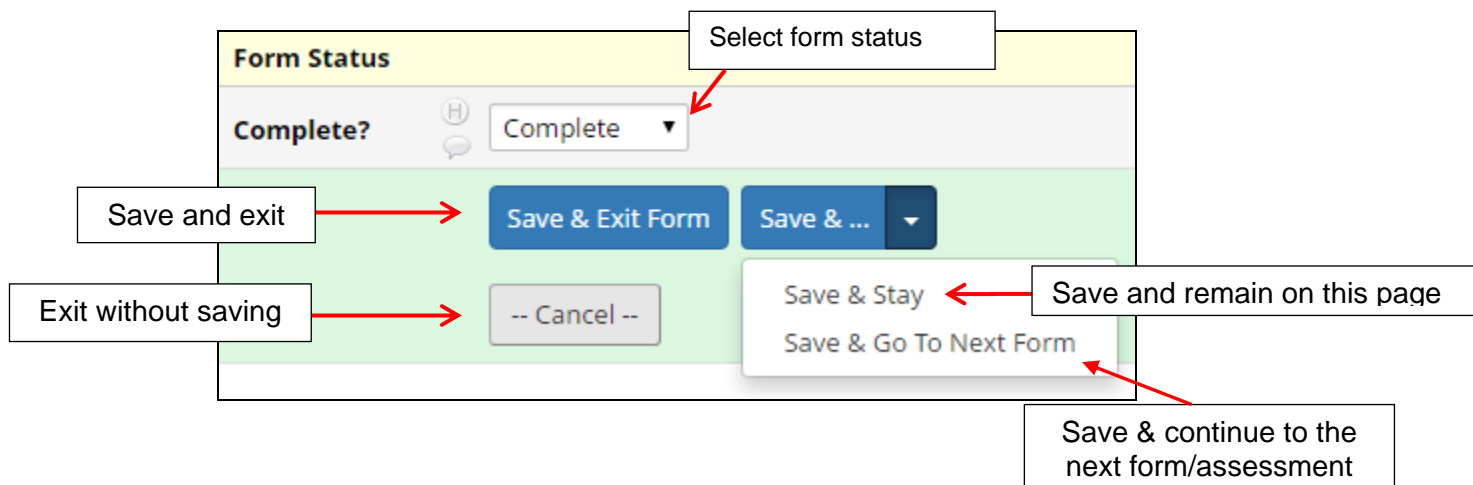
some language

## Saving data

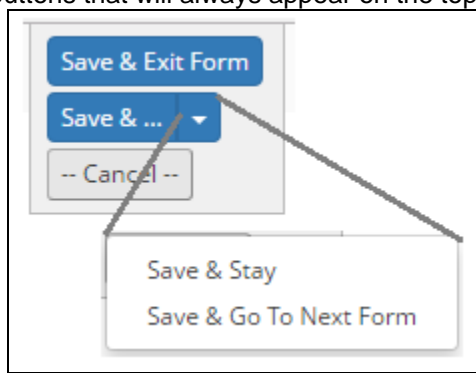
Note that REDCap does not save data until you either use your keyboard’s “Enter” key, or you click on a “Save” button in the form status section. Using the “Enter” key on your keyboard will save your data; it will also close the data entry screen, so it is best to **TAB** between fields, instead of using the “Enter” key.

Select the status of the form—incomplete, unverified, or complete. The status icon color on the menu will change to reflect the change in status.

Select a “Save” button to save your data. Save buttons appear at the bottom of each form.



Alternatively, use the save buttons that will always appear on the top right of the screen.



**TIP:** Set the form status to “unverified” to indicate that data entry has been completed and QA is needed. Once the QA process is complete, change the status to “Complete”. (If there is no QA process at your site, immediately set the form status to “Complete” once data entry is complete.)

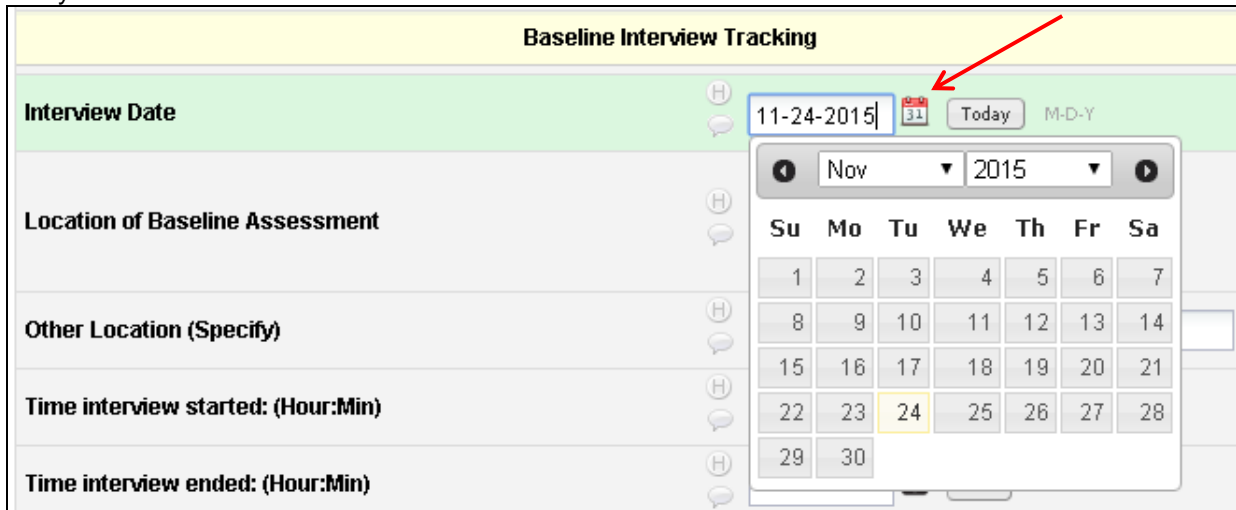
After saving a form, a pop-up box will appear if a required response is missing. REDCap will save incomplete data, but if possible, return to the form and finish entering the data.





## Useful data entry features

**Calendars:** A calendar function is available for entering dates. Click on the calendar icon to display a calendar. (You may also type the dates.) The “Today” button allows instant entry of today’s date.



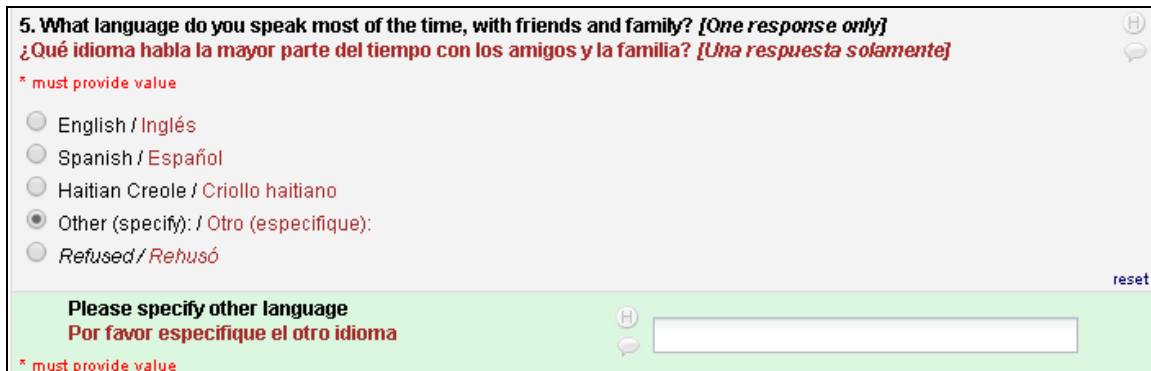
The screenshot shows a form titled "Baseline Interview Tracking". The first field is "Interview Date", which contains the text "11-24-2015". To the right of this field is a calendar icon (a small red square with a white 'x') and a "Today" button. A red arrow points to the calendar icon. A calendar pop-up is displayed, showing the month of November 2015. The calendar grid has columns for days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and rows for weeks. The date 24 is highlighted in yellow. Below the calendar are several other form fields: "Location of Baseline Assessment", "Other Location (Specify)", "Time interview started: (Hour:Min)", and "Time interview ended: (Hour:Min)". Each of these fields has a help icon (a small 'H' in a circle) and a speech bubble icon.

**Warnings:** Warning messages have been programmed to alert you to data inconsistencies and other information important to the user. REDCap system messages will appear if text is entered into a numeric field, for example.



The screenshot shows an alert dialog box with a title bar that says "Alert" and a close button (a blue square with a white 'x'). The main text of the dialog reads: "This value you provided is not an integer. Please try again." At the bottom right of the dialog is a "Close" button.

**Skip patterns:** Certain responses may trigger additional questions. In this example, “Other” is selected for sexual orientation. The user is then prompted to specify in a text response.



The screenshot shows a survey question: "5. What language do you speak most of the time, with friends and family? [One response only]". Below the question is the Spanish translation: "¿Qué idioma habla la mayor parte del tiempo con los amigos y la familia? [Una respuesta solamente]". There is a red asterisk and the text "\* must provide value" below the question. The response options are radio buttons: "English / Inglés", "Spanish / Español", "Haitian Creole / Criollo haitiano", "Other (specify): / Otro (especifique):", and "Refused / Rehusó". The "Other (specify): / Otro (especifique):" option is selected. There is a "reset" button at the bottom right. Below the options is a green bar with the text "Please specify other language" and "Por favor especifique el otro idioma". There is a help icon (a small 'H' in a circle) and a speech bubble icon to the left of a text input field. There is a red asterisk and the text "\* must provide value" below the input field.

**Logic checks:** Where possible, data are compared and warnings are displayed if the logic fails.

**12. What kind(s) of health insurance do you have? [Check all that apply]**  
**¿Qué tipo(s) de seguro tiene? [Marque todas las que apliquen]**

\* must provide value

Medicaid / Medicaid  
 Medicare / Medicare  
 A health plan through my state marketplace / Un plan médico a través del Mercado de Seguros Médicos  
 Private insurance through my employer or a family member's employer / Seguro médico privado a través de mi patrón o el patrón de un miembro de mi familia  
 Other private insurance / Otro seguro médico privado  
 Tricare / Tricare  
 Veterans Administration / Administración de Veteranos  
 Other (specify): / Otro (especifique):  
 Don't know / No sabe  
 Refused / Rehusó  
 None / Ninguno

**Please specify other health insurance**  
**Por favor especifique otro seguro medio**

\* must provide value

**WARNING: Please make sure "None" is NOT checked if any other health insurance is selected.**  
**AVISO: Por favor asegúrese que "Ninguno" no este marcado si cualquier otro seguro médico fue seleccionado.**

## IMPORTANT

**REDCap will warn you when you have not answered required fields and when your data are out of range, but it cannot prevent you from saving your data with these errors.**

### Other useful features

Additional features are accessible from the main menu. If you do not see the menu, select **Project Home** to open the home page.

**REDCap™**

Logged in as **dcc** | [Log out](#)

**My Projects**

[Project Home](#)

[Project Setup](#)

Project status: **Development**

**Data Collection**

[Record Status Dashboard](#)  
- View data collection status of all records

[Add / Edit Records](#)  
- Create new records or edit/view existing ones

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Data Collection Instruments:

[Baseline Section1 Demographics](#)

[Baseline Section3 H I V Adherence](#)

[Baseline Section9 Health Related](#)

**Applications**

[Calendar](#)

[Data Exports, Reports, and Stats](#)

[Field Comment Log](#)

[File Repository](#)

**Help & Information**

[Help & FAQ](#)

[Video Tutorials](#)

[★ Suggest a New Feature](#)

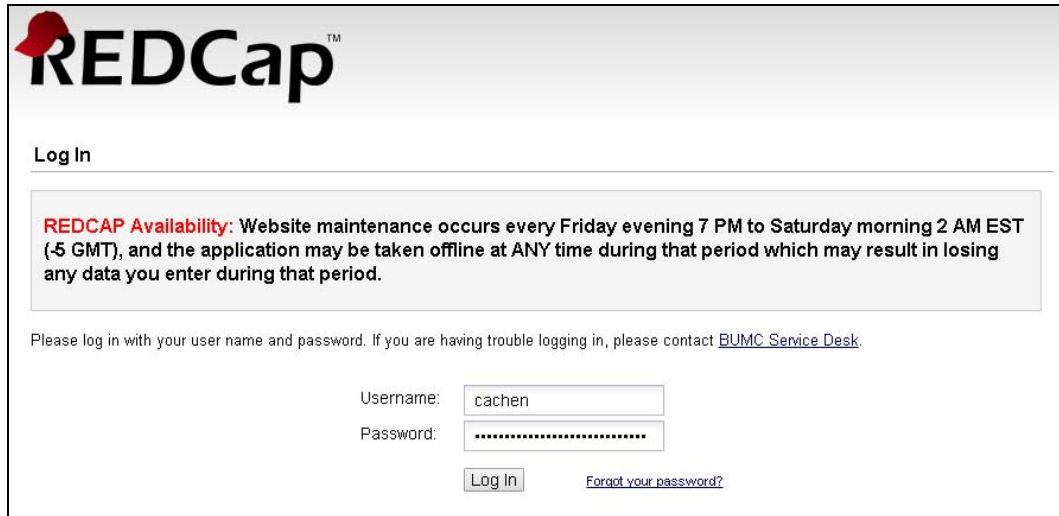
If you are experiencing problems, please contact your [REDCap administrator](#).

**Note:** This screen capture may show menu items that are not available to you, depending on your user permissions.

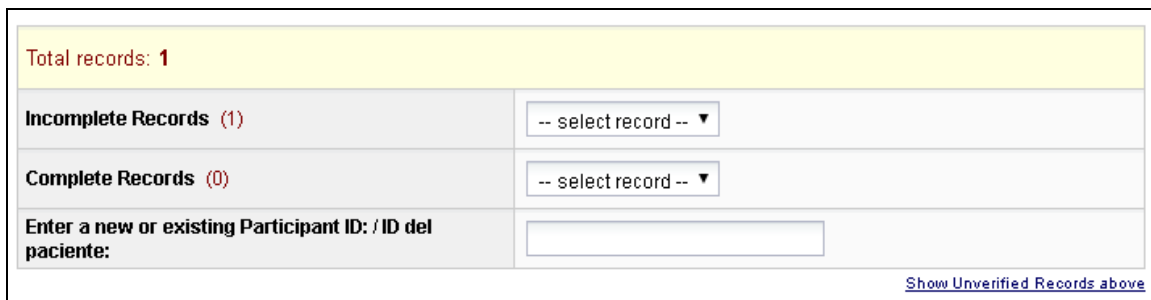
**File repository:** A file repository is accessible from the **Applications** section of the main menu. Documents such as user manuals may be placed here for your reference.

## Enter a new record in DEC assessments

1. Log in to REDCap. (See Section IV.)



2. Select the project for your intervention. (See Section IV.)
3. On the left side of the screen under “Data Collection,” click **Add / Edit Records**. You will be brought to the screen below. Enter the participant’s ID number (as assigned by the DEC Tracking system).



If a new participant is added under an incorrect participant ID number, this is not something users can change themselves. Please contact Clara Chen at BU ([cachen@bu.edu](mailto:cachen@bu.edu)) for assistance.

4. The selected participant’s Record Home Page will open. On the Record Home Page, click on the gray circle next to the first (topmost) form of the appropriate time point to begin entering data.

For Transitional Care Coordination users: remember that the first letters of each form name will indicate the time point. BL is baseline, D30 is the first follow-up within 30 days post-release, and M4 is the second follow-up 4 months post-release.

For Peers, Patient Navigation, and Buprenorphine users: the column headers of the Record Home Page grid will indicate which time point is which. M3 is the 3 month follow-up, M6 is the 6 month follow-up, etc.

If the participant ID already exists in the REDCap project, the Record Home Page may show colored dots (based on the form status entered by the user during data entry) where forms were previously entered.

- Click on the circle next to the form name and time point of interest to open the data collection form. If the form was already data entered, the previously entered data will be displayed. If the participant ID is new to the REDCap project, a blank form will open for that participant ID.

The selected participant's ID is shown in two places on the form, as noted in the screenshot below. However, because the participant's ID is so crucial, users must confirm the participant's ID by entering it one more time.

- Answer all questions. When you have finished entering data, set the status at the bottom of the form to “Complete” (or “Unverified” if your site uses this in quality assurance). If your data entry is interrupted, leave the status as “incomplete” as a prompt for later completion.
- Click on “Save & Go to Next Form.” The next form will automatically open.

- Continue through the baseline research assessments. Remember to set the status to “Complete” (or “Unverified”) at the bottom of each form and click on “Save and go to Next Form” if you would like the next form to open automatically.

One could also click on “Save & Stay” which will save the data but stay on the same form, or “Save & Exit” which will save the data and then display the Record Home Page. Clicking “Cancel” will exit the form **without** saving the data and return to the Record Home page.

## Printing Forms

Forms may be printed from REDCap, both as blank forms and with data entered for a specific form. There are two ways one can print REDCap forms, each with different advantages and disadvantages. Note that depending on your user permissions, you may only be able to download a blank version of the form and would only be able to print using the first method.

### Printing directly from open form

This is the faster option, but may not print out all data in the comments boxes if a lot of text has been entered there. If more data has been entered into a comments box than can be viewed in the box on the screen without scrolling, only the visible part of the comment will print using this method.

<b>Description</b> <small>* must provide value</small>	  Lorem ipsum dolor sit amet, consectetur adipiscing elit
---	---

To print directly from an open form, simply press “Ctrl” and “p” together and follow the pop-up window directions to print the web page to a printer. No data is saved to the computer, in this case.

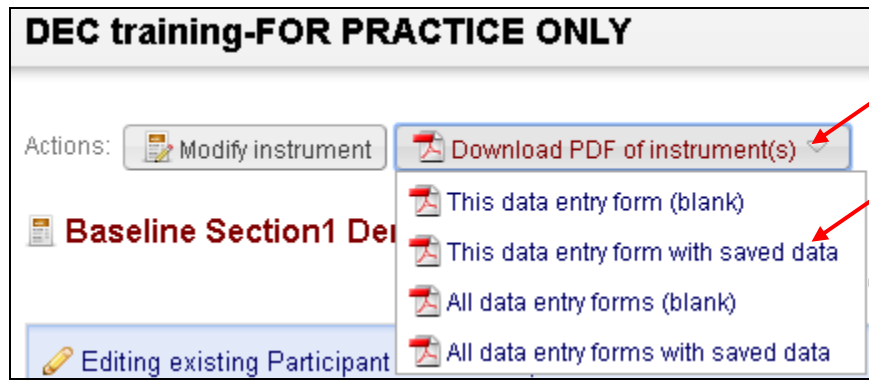
### Downloading and printing PDF of data

This method results in a prettier and more complete printout of the data, but requires a few extra steps. All text in the comments boxes should print out using this method, even if there is more text than displays on the screen.

<b>Description</b>	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
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Note this method also causes skip patterns to print including ones that are based on site. This may be confusing when viewing the downloaded form.

To download and print a PDF of the entered data, scroll to the top of the desired form and click on the “Download PDF of instrument(s)” button. Select the “This data entry form with saved data” option, unless you want to print a blank copy of the form.

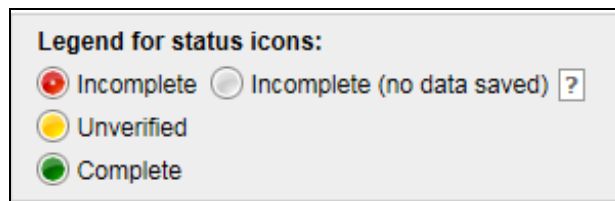


This will automatically download a PDF with the data saved on the open form to the download folder of your computer. Navigate to the download folder in order to open the PDF file and print it. After printing the PDF, **be sure to delete the downloaded PDF** from your computer and purge your computer's trash can of deleted files.

## VII. Quality Assurance

### Using status icons to indicate status of form

The form status icons (the colored bubbles) provide a quick visual check of the data entry completion status of each form. When a user sets the form status (incomplete, unverified, or complete) and saves the form, the form status icon changes color.



For a quick overview of data entry status, select the Record Status Dashboard from the Main Menu and you will see a list of all form IDs and the data entry status of each form. Each row displays a separate ID. Clicking on a status icon will open that instrument.

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Participant ID: ID del participante	BI Section1 Demog	BI Section2 Housing	BI Section3 HIV	BI Section4 CM	BI Section5 SU	BI Section6 QoL	BI Section7 Addl Info
<a href="#">999</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
<a href="#">1000</a>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Similarly, one could select a specific participant ID and view the Record Home Page showing the data entry status of each form for the selected participant. Again, clicking on a status icon will open that form.

Participant ID: ID del participante 999

Data Collection Instrument	Status
BI Section1 Demog	
BI Section2 Housing	
BI Section3 HIV	
BI Section4 CM	
BI Section5 SU	
BI Section6 QoL	
BI Section7 Addl Info	

Forms should be marked “Complete” when data entry and any QA has been completed. Forms that contain data but are not marked as “Complete” will appear in the monthly data cleaning query reports generated by the DCC.

### Using field comments for QA

Field comments are a useful way to capture additional information about a particular response, questions you have, notes about things to follow up on, or anything else on which you wish to comment.



The field comment icon is the same gray background color if there are no field comments on that variable for that form ; it is yellow if a field comment has been entered .


To create a comment, click on the comment icon next to the question.

**9. How many children under the age of 18 live in your house? [One response only]**  
**¿Cuántos niños menores de 18 años viven en su casa? [Una respuesta solamente]**

\* must provide value

None / Ninguno  
 One / Uno  
 Two / Dos  
 Three / Tres  
 Four or More / Cuatro o más  
 Refused / Rehusó





A window will open, showing the date/time of the comment, the user entering the comment, and a place to enter your comment.

**Field Comment Log**

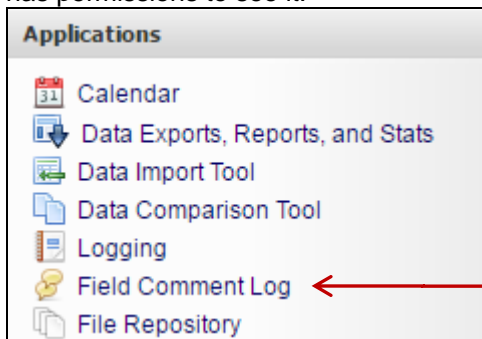
This pop-up displays all the field comments for the record and field specified below. Users with access to data entry forms may leave one or more comments on any field on a data collection instrument, after which the balloon icon will stay lit up to signify that comments exist for that field for this record. All field comments for all records/fields can also be viewed, keyword searched, and filtered on the [Field Comment Log](#) page in this project. NOTE: If you wish to prevent all users in this project from editing or deleting field comments below, see the Additional Customizations popup on the Project Setup page.

Participant ID: / ID del paciente: **1000**  
Field: **totalpeople\_age18** ("9. How many children under the age of 18 live in your house? [One response only] ¿Cuántos niños menores de 18 años viven en su casa? [Una respuesta solamente]")

	Date/Time	User	Comments
	08/17/2016 2:44pm	cachen	Example comment here.
	08/17/2016 2:46pm	cachen	<input type="text"/>

Click on the “Comment” button to save the comment. The comment icon will then turn yellow if this is the first comment added to this field on this particular form. If you do not wish to save the comment, click “Cancel” to return to the form without saving the comment.

A list of all comments is available by selecting the “Field Comment Log” in the Main Menu, if one has permissions to see it.



The log is searchable and can be exported as an Excel file.

**Field Comment Log**

This page displays the Field Comment Log for all records/events/fields in this project. You may use the controls below to perform keyword searches in the comments as well as filter the comments by record, event, field, or data access group. Keep in mind that if you do not have user privileges to view some data collection instruments, then comments for any fields on those instruments will not be displayed in the table. Also, if you belong to a data access group, then you will only see results for records that belong to your group. The entire Field Comment Log is downloadable as a file in Excel/CSV format.

**Field Comment Log**

Results returned: **1**

Filters: All records ▾  
 All fields  
 All users ▾  
 Keyword search  [Search tips](#)

Click button to view comment log	Record	Field	Comments
1 comment	1	site_id (2. Site that you provided TA to: (Select one))	cachem (07/27/2016 2:58pm): "Enter your comment here."

The field comment log lists all field comments for all forms in this project, although filters can be applied to show only a subset based on user or variable of interest. Users may also search the comment logs for keywords of interest.

**Review history of data edits**

To view the history of all data edits for a particular field, click on the history icon.

**8. Including yourself, how many people live in your household? [One response only]**  
**Incluyéndose usted, ¿Cuántas personas viven en su casa? [Una respuesta solamente]**

\* must provide value

One / Una  
 Two / Dos  
 Three / Tres  
 Four / Cuatro  
 Five or More / Cinco o más  
 Refused / Rehusó

The history log will open, displaying the date/time of each change, the user who made the change, and the data edits that were made.

**Data History for variable "totalpeople" for record "1000"** ✕


Listed below is the history of all data entered for the variable "totalpeople" for Participant ID: / ID del paciente: "1000". The data history results are sorted from earliest to most recent.

Date/Time of Change	User	Data Changes Made
08/17/2016 1:53pm	dcc	Two / <span style="color: BROWN;">Dos</span> (2)
08/17/2016 2:49pm <span style="color: red;">(most recent data change)</span>	cachem	Three / <span style="color: BROWN;">Tres</span> (3)

Close

## Using Data Quality Rules

With the appropriate user permissions, you can use the Data Quality function to run data cleaning queries, which REDCap calls "Data Quality Rules." There are default Data Quality Rules, such as checks for missing values, out of range values, and data outliers.

 **Data Quality**

This module will allow you to execute data quality rules upon your project data to check for discrepancies in your data. Listed below are some pre-defined data rules that you may utilize and run. You may also create your own rules or edit, delete, or reorder the rules you have already created. To find discrepancies for a given rule, simply click the Execute button next to it, or click the Execute All Rules button to fire all the rules at once. It will provide you with a total number of discrepancies found for each rule and will allow you to view the details of those discrepancies by clicking the View link next to each. [Read more detailed instructions.](#)

**Data Quality Rules** Execute rules: All All except A&B All custom Clear

Apply to: -- All records --

Rule #	Rule Name	Rule Logic (Show discrepancy only if...)	Real-time execution <span>?</span>	Total Discrepancies	Delete rule?
A	Missing values*	-		<span>Execute</span>	
B	Missing values* (required fields only)	-		<span>Execute</span>	
C	Field validation errors (incorrect data type)	-		<span>Execute</span>	
D	Field validation errors (out of range)	-		<span>Execute</span>	
E	Outliers for numerical fields (numbers, integers, sliders, calc fields)	-		<span>Execute</span>	
F	Hidden fields that contain values**	-		<span>Execute</span>	
G	Multiple choice fields with invalid values	-		<span>Execute</span>	
H	Incorrect values for calculated fields	-		<span>Execute</span>	

Other Data Quality Rules may be created, if one has permission to do so. For information on how to create new Data Quality Rules, select "Help & FAQ" from the bottom of the Main Menu.

From within the Data Quality Rule display, one can click on the data to open the form for editing in another window. You also have the option of selecting "exclude" to exclude the record from future reports for this particular Data Quality Rule.