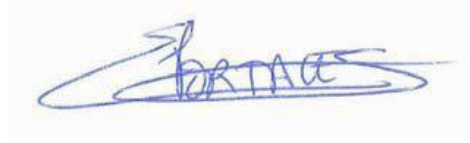



Standard Operating Procedure:
REDCap Service Agreement & Project Creation

SOP Number:	103
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Document History

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1	New document	April 9, 2018

Approver Name	Approver Signature	Date
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1. PURPOSE

- 1.1. To define the procedure used for the distribution and approval of a Service Agreement between the BC AHSN Data Management (DM) team and a research team.
- 1.2. To define the procedure used for project creation and initiation in BC AHSN REDCap by the DM team and research team, following signature of the service agreement.

2. SCOPE

- 2.1. This procedure applies to all BC AHSN DM team members, designated Project Administrators (PA) and Principal Investigators (PI) involved in the Service Agreement and project creation processes.

3. RESPONSIBILITIES

- 3.1. The BC AHSN DM Coordinator supervises the REDCap project requests and the Service Agreement processes. They are responsible for sending the Service Agreement, managing the progress of the Service Agreement and documenting the outcomes in the Approval and Payment form in the Project Life Cycle. The BC AHSN DM Coordinator makes the final approval of the project request by sending the Service Agreement to the PA/PI.
- 3.2. The PA/PI is responsible for reviewing and approving the Service Agreement. If additional services are requested, the PI/PA is also responsible for approving any additional services documented in the Service Agreement form. Additional services may incur a fee and by signing the Service Agreement Resolution survey, the PI/PA agrees to pay this fee.
- 3.3. The BC AHSN DM team reserves the right to consult with REB for any research project submitted to BC AHSN REDCap.
- 3.4. The DM Coordinator is responsible to create the REDCap project and provide proper access and instructions once the service agreement is signed.

4. RELATED SOPS/DOCUMENTS

- 4.1. BC AHSN REDCap Project Request form
- 4.2. BC AHSN REDCap Approval and Payment form
- 4.3. SOP 100 – BC AHSN REDCap New Project Request
- 4.4. SOP 101 – BC AHSN REDCap Adding New Users
- 4.5. SOP 102 – BC AHSN REDCap User Training

4.6. SOP 104 - BC AHSN REDCap Invoicing & Payment

5. DEFINITIONS

- 5.1. **Principal Investigator (PI):** Primary individual in charge of and responsible for the proper conduct of a research project.
- 5.2. **Project Administrator (PA):** Person responsible for the development of REDCap data instruments and the overall management of the project data.
- 5.3. **Research team:** Research assistants/nurses, data entry personnel and other personnel involved in the clinical research study and granted access to REDCap projects. The Research team members report to the PI but are generally supervised by the PA.
- 5.4. **BC AHSN Data Management (DM) team:** team that is responsible for managing projects in REDCap and assisting research teams in conducting research studies.
- 5.5. **REDCap Project:** A set of data entry forms, surveys, schedules and other data management tools pertaining to a specific study or research project.
- 5.6. **Patient-oriented research:** Research done in partnership with patients, answers research questions that matter to patients, and aims to improve health care (See <http://www.cihr-irsc.gc.ca/e/44000.html#a1.1>).
- 5.7. **Project Lifecycle Tool:** An active, internal project used by the BC AHSN DM team to track the lifecycle of projects and to assist in REDCap data management.
- 5.8. **Service Agreement:** The joint contract agreed to by both the BC AHSN DM team and the PI or PA for commencement of work and services related to REDCap project data management as outlined.
 - The service agreement process uses two forms: (1) Service Agreement form that summarizes project requirements based on discussions with the PI and/or their research team to create a project; (2) Service Agreement Resolution (SAR) survey that is sent to the PI for review and signature.

6. PROCEDURE

6.1. Service Agreement Preparation

- a) Upon project approval by the BC AHSN DM and the BC SUPPORT Unit, the DM Coordinator completes the "Service Agreement" form and selects "Yes" for the question "Does this project qualify for BC AHSN" saves the form. This triggers the Service Agreement Resolution (SAR) survey to send to the PA/PI.
- b) If the project requires additional services or is not a POR project (See SOP 100), the DM Coordinator documents this in the Service Agreement form and adds up the estimated cost.

6.2. Approval of Service Agreement

- a) The PA/PI receives the Service Agreement Resolution which contains instructions to create a Population Data BC (PopData) account (<https://my.popdata.bc.ca/accounts/register/>). The SAR cannot be submitted until a PopData username is provided.
- b) The PA and/or PI then approves the Service Agreement Resolution via electronic signature and submits the survey.
 - Approval is required to create the project.
- b) The date the survey was submitted is the client approval date for the Service Agreement – documented in the “Approval and Payment” form (variable client_date_accept_terms).

6.3. Project Creation

This applies to projects with a Service Agreement that has been approved by the BC AHSN DM team and signed by the PI/PA.

- a) The BC AHSN DM Coordinator creates the new project according to the data in the “Request a New Project” form (See SOP 100).
 - The BC AHSN DM Coordinator completes the data entry form “Approval and Payment” with details of the new project.
 - If there are additional costs involved, the DM Coordinator also fills out the Payment section of this form (See SOP 104).
- b) In the newly created REDCap project, the DM Coordinator creates the role ‘REDCap Support Team’ and adds themselves to the role (with the User Rights recommended for the ‘Project Administrator’ role).
- c) The DM Coordinator creates the following user roles in User Rights: ‘Project Administrator’, ‘Principal Investigator’ and ‘Data Entry’, per the user roles recommendations.
- d) Upon project creation, the DM Coordinator emails the PA/PI from redcap@bcahsn.ca with instructions on how to access their project. The Coordinator also adds the PA/PI’s PopData username to the new project in the appropriate user roles (See SOP 101).

6.4. Additional Project Development Support

- a) If additional services are requested, the DM Coordinator refers the research team to various training materials and/or sets up meetings with the PI/PA (See SOP 102).

7. REFERENCES

BCAHSN

ACADEMIC HEALTH
SCIENCE NETWORK

- CIHR definition of Patient-Oriented Research: <http://www.cihr-irsc.gc.ca/e/44000.html#a1.1>
- Sign up for a Population Data BC account here: <https://my.popdata.bc.ca/accounts/register/>