



Standard Operating Procedure:
REDCap Invoicing & Payment

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1. PURPOSE

- 1.1 To define the procedure followed for invoicing a new BC AHSN REDCap project.

2. SCOPE

- 2.1 This procedure applies to all BC AHSN Data Management (DM) team members, Population Data BC (PopData) Operations team members and Principal Investigators (PI) or designated Project Administrators (PA) involved in a REDCap project.

3. RESPONSIBILITIES

- 3.1 The PI or designated PA is responsible for accepting the Service Agreement Resolution for a REDCap project.
- 3.2 The BC AHSN DM team is responsible for notifying the PopData Operations team that a new Service Agreement Resolution with payment has been accepted.
- 3.3 The PopData Operations team is responsible for processing the invoice.
- 3.4 The PopData Operations team is responsible for alerting the BC AHSN DM team when payment from an invoice has been received.
- 3.5 The BC AHSN DM team is responsible for updating the Life Cycle tool, including the payment details.

4. RELATED SOPS/DOCUMENTS

- 4.1 SOP 103 – BC AHSN REDCap Service Agreement & Project Creation
- 4.2 BC AHSN REDCap Project Life Cycle “Invoice for PopData Report” template

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. **Population Data BC (PopData) Operations team:** PopData operations team that is responsible for processing the REDCap invoices.
- 5.6. **REDCap Project:** A set of data entry forms, surveys, schedules and other data management tools pertaining to a specific study or research project.
- 5.7. **BC SUPPORT Unit:** Team responsible for determining whether a project is patient-oriented.
- 5.8. **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>).
- 5.9. **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.
- 5.10. **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.

6. PROCEDURE

- 6.1 Upon approval of the Service Agreement Resolution by the PI/PA (See SOP 103), the BC AHSN DM team uses the REDCap Project LifeCycle tool to access the “Invoice for PopData Report” and emails it to the PopData Operations team.
- 6.2 The BC AHSN DM team updates the “payment status” field in the “Approval and Payment” instrument to “PopData notified”.
- 6.3 The PopData Operations team uses the information in the report to generate and send the invoice to the PI or designated PA and notifies the BC AHSN DM Team, indicating the invoice number and the date. The PopData Operations team will coordinate payment with the PI/PA.
- 6.4 The BC AHSN DM team updates the “payment status” field in the “Approval and Payment” instrument to “Invoice sent”. The BC AHSN DM team also updates the “Invoice number” and “Invoice date” fields in the same instrument.
- 6.5 The PopData Operations team collects and retains payment and notifies the BC AHSN DM team, indicating the amount and payment date.
- 6.6 The BC AHSN DM team updates the “payment status” field in the “Approval and Payment” instrument to “Payment received”. The BC AHSN DM team also updates the “Payment” and the “Payment_date” fields in the same instrument.

7. REFERENCES

- CIHR definition of Patient-Oriented Research: <http://www.cihr-irsc.gc.ca/e/44000.html#a1.1>