



Standard Operating Procedure:
REDCap Software Upgrade

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Department/System:	BC AHSN/BC SUPPORT Unit
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Document History

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Approver Name	Approver Signature	Date
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1. PURPOSE

- 1.1. To outline the procedure used to validate and upgrade the BC AHSN REDCap software.

2. SCOPE

- 2.1. This procedure applies to the BC AHSN Data Management (DM) team, the BC AHSN Programmer Lead and the BC AHSN Systems Administrator(s) responsible for the upgrade of BC AHSN REDCap software.
- 2.2. The REDCap Consortium maintains an active development cycle, releasing patches and bug fixes according to a weekly cycle. The BC AHSN REDCap instance uses the long-term support (LTS) release, which is a major release supported with patches only (i.e., new features are not added) for an extended period of 6 months.
- 2.3. The BC AHSN DM team performs REDCap software upgrades of the system after the BC Children's Hospital (BCCH) Research Institute has done so on their own system (see BCCH Research DM SOP 513 and 516).

3. RESPONSIBILITIES

- 3.1. The BC AHSN DM team is responsible for overseeing the upgrade of BC AHSN REDCap.
- 3.2. The DM Coordinator is responsible for notifying the Systems Administrator(s) whenever there is an LTS version upgrade available (about every six months).
- 3.3. The BC AHSN DM team is responsible for notifying active users through communication channels (email and/or banner post on the REDCap login page).
- 3.4. The Systems Administrator(s) is responsible for following the Population Data BC IT Change Management Procedure

4. RELATED SOPS/DOCUMENTS

- 4.1. BCCH Research DM SOP 513 REDCap Validation
- 4.2. BCCH Research DM SOP 516 REDCap Software Upgrade

5. DEFINITIONS

- 5.1. **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.
- 5.2. **BC AHSN Data Management (DM) team:** team that is responsible for managing projects in BC AHSN REDCap and assisting research teams in conducting research studies.

- 5.3. **BC Children’s Hospital Research (BCCHR) DM team:** team that is responsible for managing projects in BCCHR REDCap and assisting research teams in conducting research studies.
- 5.4. **REDCap Long Term Support (LTS) Branch:** Long Term Support is a major release by the REDCap Consortium and is supported with patches only (i.e., new features are not added) for an extended period of six months.

6. PROCEDURE

- 6.1. The BC AHSN DM team notifies the Systems Administrator whenever there is a new REDCap Consortium Long Term Support (LTS) version, including minor upgrades of current LTS versions or newly released LTS branch after validation.
- 6.2. Major LTS upgrades occur 6-8 weeks after a new LTS Branch is released by the REDCap Consortium described in the BCCH Research REDCap Validation SOP.
- 6.3. After BCCHR REDCap is successfully validated and upgraded, the BCCHR DM team informs the BC AHSN Systems Administrator that they can now upgrade the BC AHSN REDCap and schedules the maintenance date.
- 6.4. BC AHSN DM team notifies active users of the upgrade via email. A banner with relevant information (including date and time of upgrade) is also posted to the BC AHSN REDCap login page.
- 6.5. BC AHSN Systems Administrator performs the upgrade on the scheduled maintenance day. During the upgrade, the system is taken offline and the software is upgraded following REDCap Consortium Upgrade Guidelines.
- 6.6. Systems Administrator records and informs the BC AHSN DM team after successful completion of the upgrade of the BC AHSN REDCap software.
- 6.7. After successful completion of the upgrade, the system is made available to users.

6. REFERENCES

- N/A