

**Standard Operating Procedure:  
REDCap Service Agreement & Project Creation**

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<b>Approver Name</b>	<b>Approver Signature</b>	<b>Date</b>
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## **1. PURPOSE**

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

## **2. SCOPE**

- 2.1. This procedure applies to all Health Research BC 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 Health Research BC 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 Health Research BC 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 Health Research BC DM team reserves the right to consult with REB for any research project submitted to Health Research BC 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. Health Research BC REDCap Project Request form
- 4.2. Health Research BC REDCap Approval and Payment form
- 4.3. SOP 100 – Health Research BC REDCap New Project Request
- 4.4. SOP 101 – Health Research BC REDCap Adding New Users
- 4.5. SOP 102 – Health Research BC REDCap User Training
- 4.6. SOP 104 – Health Research BC 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. **Health Research BC 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. **Population Data BC:** Population Data BC (PopData) is a multi-university, data and education resource facilitating interdisciplinary research on the determinants of human health, well-being and development. The Health Research BC REDCap database server is located here.
- 5.7. **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>).
- 5.8. **Project Lifecycle Tool:** An active, internal project used by the Health Research BC DM team to track the lifecycle of projects and to assist in REDCap data management.
- 5.9. **Service Agreement:** The joint contract agreed to by both the Health Research BC 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 Health Research BC 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 Health Research BC” 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/account/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.
- c) 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 Health Research BC DM team and signed by the PI/PA.*

- a) The Health Research BC DM Coordinator creates the new project according to the data in the “Request a New Project” form (See SOP 100) using template “New Project Template with Suggested User Roles”.
  - The Health Research BC 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 adds themselves to the role “REDCap Support Team” and adds the PI/PI/Requester’s PopData username to the PA role (see SOP 101)
- c) Upon project creation, the DM Coordinator emails the PA/PI from [redcap@healthresearchbc.ca](mailto:redcap@healthresearchbc.ca) with instructions on how to access their project (can include PDF “Welcome to Health Research BC REDCap”).

### 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

- 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/account/register/>