

**Standard Operating Procedure:  
 REDCap Invoicing & Payment**

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1	New Document	April 12, 2018
2	Update/Refresh	March 9, 2021
3	Change of legal name and logo from BC AHSN to Health Research BC	March 18, 2022
4	Deprecated – changes to project request fees	November 28, 2022

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

- 1.1 To define the procedure followed for invoicing a new Health Research BC REDCap project where appropriate.
  - Effective as of November 2022, general (non-POR) research projects can use REDCap free of charge. There is no longer a one-time \$500 fee.

## 2. SCOPE

- 2.1 This procedure applies to all Health Research BC 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 Health Research BC 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 Health Research BC DM team when payment from an invoice has been received.
- 3.5 The Health Research BC DM team is responsible for updating the Life Cycle tool, including the payment details.

## 4. RELATED SOPS/DOCUMENTS

- 4.1 SOP 103 – Health Research BC REDCap Service Agreement & Project Creation
- 4.2 Health Research BC 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. **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. **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.
- 5.6. **Population Data BC (PopData) Operations team:** PopData operations team that is responsible for processing the REDCap invoices.
- 5.7. **REDCap Project:** A set of data entry forms, surveys, schedules and other data management tools pertaining to a specific study or research project.
- 5.8. **BC SUPPORT Unit:** Team responsible for determining whether a project is patient-oriented.
- 5.9. **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>).
- 5.10. **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.
- 5.11. **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.

## 7. PROCEDURE

- 6.1 Upon approval of the Service Agreement Resolution by the PI/PA (See *SOP 103*), the Health Research BC DM team uses the REDCap Project Life Cycle tool to access the “Invoice for PopData Report” and emails it to the PopData Operations team.
- 6.2 The Health Research BC 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 Health Research BC DM Team, indicating the invoice number and the date. The PopData Operations team will coordinate payment with the PI/PA.
- 6.4 The Health Research BC DM team updates the “payment status” field in the “Approval and Payment” instrument to “Invoice sent”. The Health Research BC 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 Health Research BC DM team, indicating the amount and payment date.

- 6.6 The Health Research BC DM team updates the “payment status” field in the “Approval and Payment” instrument to “Payment received”. The Health Research BC 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>

DEPRECATED