

Beginner REDCap Training

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Brief Intro to REDCap at the University of Pittsburgh

Goals:

- Provide context for REDCap's use at Pitt
- How users can get help
- Encourage users to reach out when assistance is required



What is REDCap used for?

- Secure, web-based application for data collection & surveys
- Used for research studies, clinical trials, quality improvement projects, and registries
- Pitt supports both standard and Part 11 (compliant) REDCap for different regulatory needs



How to access REDCap at Pitt

- Request a Pitt Standard REDCap account here:
<https://redcap.link/REDCapAssistanceRequest>
 - Outside users (non-Pitt/UPMC) can request accounts (include IRB or QI/QA approval number)
- This can also be used for project creation
 - HSIT will create a project for you with full design and user rights
- Feel free to submit a request for a practice/just for fun project after this training session
 - Just put Beginner REDCap webinar in the IRB field

How to request assistance from the REDCap support team

- Submit support tickets via to hs.appsupport@hs.pitt.edu
OR “Contact the REDCap Administrator” on the left side of every project
- Things HSIT CANNOT do:
 - Accept Gmail or similar email address for account requests. Must be a work email
 - Add users to projects: the admin or owner of the project will need to add you
- **We CAN help with pretty much anything else**



Best Practices for Submitting a Ticket

- Include the REDCap PID (red number right next to the title of your project)
- Send screenshots for error messages
- If submitting a question for someone else on your study team, please include their REDCap name and username
- HSIT- Research Application Support Jan-June 2025 ticket stats
 - 3,343
 - Average working hour response time of 2 hours and 35 minutes
 - 14,795 non-practice projects
 - 4,048 active users
- **Bottom line: We get a ton of tickets but will get to your ticket quickly as possible**

Basic Navigation & Finding Your Project

Goals:

- Help users locate their projects
- Understand REDCap's layout



My Projects

- Dashboard Overview
 - Projects are listed under **My Projects**
 - You can organize with folders
- Project Statuses:
 - *Development*: Changes allowed
 - *Production*: Requires change request
 - If collecting live data and the project in Production, it is **REQUIRED** to be in Production status.
 - Data loss because of the project being in Development status **WILL NOT** be recovered
 - Analysis/Cleanup: Used once data collection is completed
 - Completed: Used when data collection and analysis is completed



Navigating to Forms and Records

- **Data Collection Instruments:** How to access and edit forms
- **Records Status Dashboard:** Viewing and adding participant records
- **Opening and creating a record**

How to request a new project

- **Standard REDCap:** To create a new project simply complete this survey: <https://redcap.link/REDCapAssistanceRequest>
 - What to include in the request
 - IRB number
 - PI name
 - PI email
 - Name of Project
- **Part 11 REDCap**
 - Reserved for FDA IND/IDE studies
 - More complicated process
 - All instruments and surveys must be built by HSIT
 - Requests for additional users must be requested by PI or Study Coordinator

REDCap Field Types

Goals:

- Explain commonly used field types
- Best use cases
- Pitfalls to avoid
- Required and Identifier





Text Box

- **Use for:** Free-text responses (names, dates, short descriptions)
- Validation types:
 - Date
 - Date/Time
 - Date/Time with seconds
 - Time (only military time)
 - Integers
 - Numbers
 - Email address
 - Phone Number
 - Zip code (US)
 - SSN numbers



Notes field

- Allows multiple lines of text for detailed responses
- No validation like text box
- Good for comments
- Options for any field except Descriptive Text and
 - Required- if you want the answer to be required to save the form or survey
 - Identifier- For PHI/PII. Can export data and assign permissions to only see de-identified data, if needed.



Multiple Choice (Single Answer)

- Drop-Down vs. Radio Buttons:
 - Drop-down = cleaner look for long lists
 - Enable auto-complete for this drop-down
 - Radio buttons = easier selection for short lists
 - Other- Branching logic



Checkboxes (Multiple Answers)

- Use for “**select all that apply**” questions:
 - Branching logic for Checkboxes



Simple binary choices

- True/False
 - 1, True
 - 2, False
 - Values cannot be changed
- Yes/No
 - 1, Yes
 - 2, No
 - Values cannot be changed



Other Field Types

- Signature Field
 - Use for **electronic signatures** (consent forms, approvals)
- File Upload
 - Attach documents, images, or PDFs
- Descriptive Text (For Display Only – No Data Entry)
 - Instructions for users
 - **Embedding media:** Images, videos, file attachments, or audio clips

Surveys vs. Forms

Goals:

Explain when to use surveys vs. forms and how to set up survey flow.

When to use which one



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Entering and Editing Records

- Forms
 - Manual data entry by study staff
- Surveys
 - Participant-submitted data
- Editing responses:
 - Forms: Able to be edited by study team
 - Surveys: Can be restricted to prevent edits



How to Save Responses (Forms)

- **Complete? (forms)**
 - Complete
 - Incomplete
 - Unverified

- **Avoiding accidental loss**
 - Save and Exit Form
 - Save & Stay
 - Save & Exit Record
 - Save & Go to Next Form
 - Save and Exit Record
 - Save and Go to Next Record



Survey Options

- Surveys are always saved as complete if submitted as a survey
 - Edits can only be made with applicable study permissions
- Auto-Continue to the Next Survey
 - Survey Queue: Triggers next survey based on conditions
 - Auto-Continue: Immediately loads the next survey when a participant submits the current one

REDCap is used at over 7500 institutions across 160 countries.

**Please complete the survey, so we
can learn how to better support you**



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Questions?

hs.appsupport@pitt.edu