



Title: Moving to Production Status in REDCap	Area: REDCap
	Version No.: 3.0
	Document Type: SOP
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Owner: WE-SPARK Health Institute	Pages: 6

1.0 Procedure Description

This Standard Operation Procedure (SOP) serves as the official documentation on moving to production status.

As per the [WE-SPARK REDCap Terms of Use](#) (Section 4.0), **we require that no “real” research participant data entered into REDCap until a project has been moved into production status.**

Moving to production status signifies that a REDCap project has been thoroughly tested, reviewed and is ready for “real” participant data to be entered. “Real” participant data is data that is obtained directly from the participant. During the development phase REDCap users are to use [dummy data](#) for project testing purposes.

2.0 Persons Affected

This SOP applies to all WE-SPARK REDCap users using REDCap to collect research data.

3.0 Principal Investigator Requirement

The project Principal Investigator may have approved delegate(s) (i.e. study staff) complete required work on REDCap projects, and the delegate(s) may request move to production status on their behalf.



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4.0 Procedures

- 4.1 Once a project is ready to move to production status, they should go to the “Project Setup” page of their project.
- 4.2 Review the projects current settings and confirm each section has been completed by selecting the **“I’m done!”** button.
- 4.3 Select “move to project to production”.
- 4.4 Read the prompt, and select **“Delete ALL data, calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection.”**.
 - 4.4.1 You should not be collecting “real” research participant data prior to moving to production status; thus, you should not be selecting the **“Keep ALL data saved so far”** button.
 - 4.4.2 You can also use the link within the text to access the check for identifiers page. This will allow you to review your project for possible identifiers, as all data in REDCap should be de-identified unless you have approval from your institutional REB for the storage of specific identifiers.
- 4.5 Click “YES, Move to Production Status”.
- 4.6 This will send a notification to your local REDCap administrator(s) prompting them to review the project. The REDCap administrator may request study related documents such as REB submission, approvals, study protocol, and any partner institution approvals as applicable.
- 4.7 Upon successful review the project will be moved into Production Status. See Appendix A for instruction on how to do this in REDCap.



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5.0 Project Revisions while in Production Mode

To reduce delay time, it is important that researchers try to make sure their projects are fully completed before moving to production status. Changes that are made in production status require administrator approval.

However, it is understood that some errors will not present themselves during the drafting of the project. Users can make changes by entering “Draft Mode” (See Appendix A) and submit them for approval once they have been made.

6.0 Administrator Review

Admin review is necessary to ensure all fields in the REDCap project are adhering to REB approvals and our REDCap Terms of Use. Please refer to the [WE-SPARK REDCap Privacy Policy](#) for the types of data that can be stored within REDCap.

7.0 Links/Related Documents

[TCPS-2 \(2022\) Chapter 5: Privacy and Confidentiality](#)

8.0 Definitions

Dummy data - **dummy data** is benign information that does not contain any useful [data](#), but serves to reserve space where real data is nominally present. Dummy data can be used as a [placeholder](#) for both testing and operational purposes.



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9.0 Review/Revision History

Date	Revision No.	Revision Type (minor edit, moderate revision, complete revision)	Reference Section(s)
08-Jun-2023	3.0	Moderate Revision: 1. Language revisions throughout form to ensure clarity. 2. Grammatical and typographical revisions throughout form. 3. Production status now required	1. Updated production status to be required instead of recommended for all research projects collecting human participant data. Added Appendix A to provide clarity on how to request change to production status.
2022-Oct-24	2.0	Minor Revision	Minor grammatical changes
2021-March-11	1.0	New procedure drafted	N/A

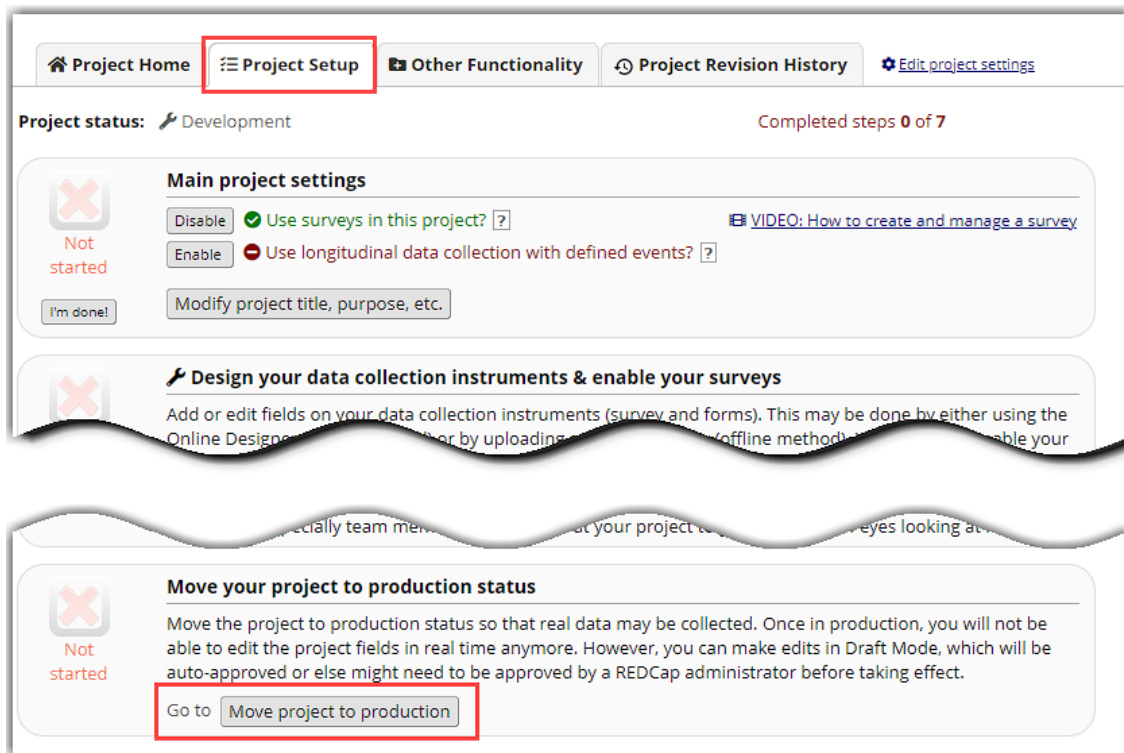
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Appendix A



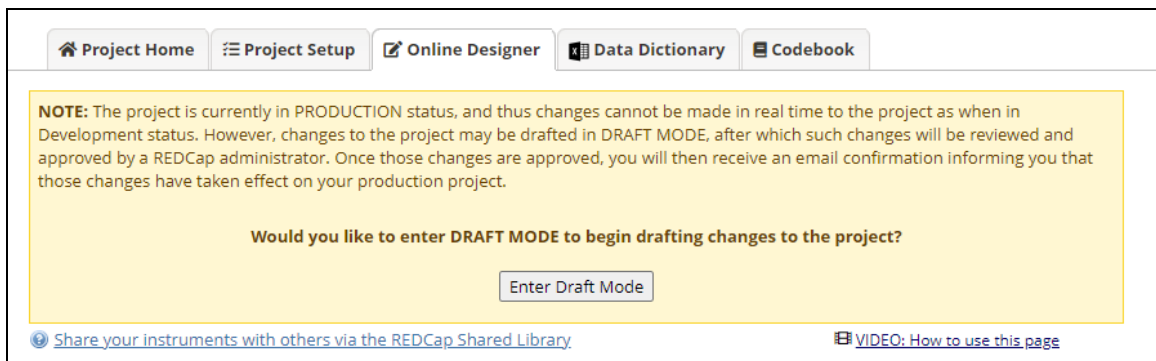
The screenshot shows the REDCap Project Setup interface. The 'Project Setup' tab is selected and highlighted with a red box. The 'Project status' is 'Development' and 'Completed steps 0 of 7'. The 'Main project settings' section includes options to 'Use surveys in this project?' (checked) and 'Use longitudinal data collection with defined events?' (unchecked). The 'Design your data collection instruments & enable your surveys' section is partially visible. The 'Move your project to production status' section is highlighted with a red box and contains the text: 'Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.' Below this text is a button labeled 'Move project to production'.

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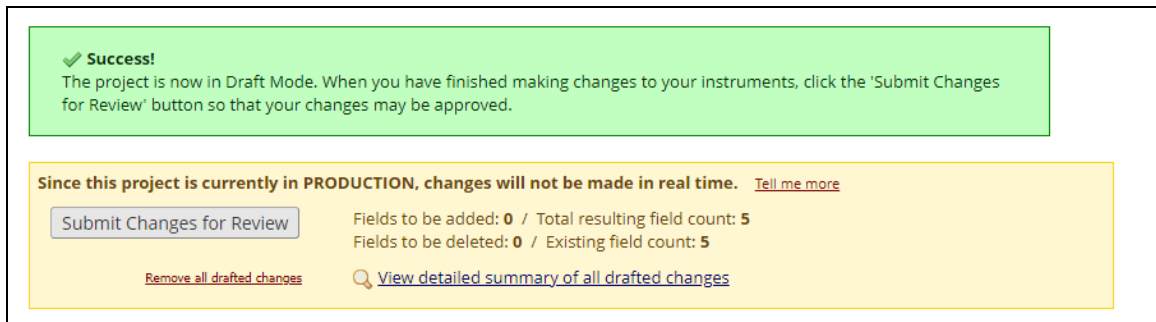
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Appendix B



The screenshot shows the REDCap Online Designer interface. At the top, there are navigation tabs: Project Home, Project Setup, Online Designer (active), Data Dictionary, and Codebook. Below the tabs, a yellow box contains a note about the project's current status (PRODUCTION) and the process for making changes in DRAFT MODE. The note asks, "Would you like to enter DRAFT MODE to begin drafting changes to the project?" and includes a button labeled "Enter Draft Mode". At the bottom of the yellow box, there are two links: "Share your instruments with others via the REDCap Shared Library" and "VIDEO: How to use this page".

Figure 1. Draft Mode located in the Online Designer when in Production Status



The screenshot shows the REDCap Online Designer interface after selecting Draft Mode. A green box at the top contains a success message: "Success! The project is now in Draft Mode. When you have finished making changes to your instruments, click the 'Submit Changes for Review' button so that your changes may be approved." Below this, a yellow box contains information about the project's current status (PRODUCTION) and the process for making changes. It includes a button labeled "Submit Changes for Review" and a link labeled "Tell me more". Below the button, there are two links: "Remove all drafted changes" and "View detailed summary of all drafted changes".

Figure 2. Once Draft Mode is selected, any changes will be tracked and then can be submitted by pressing "Submit Changes for Review"