

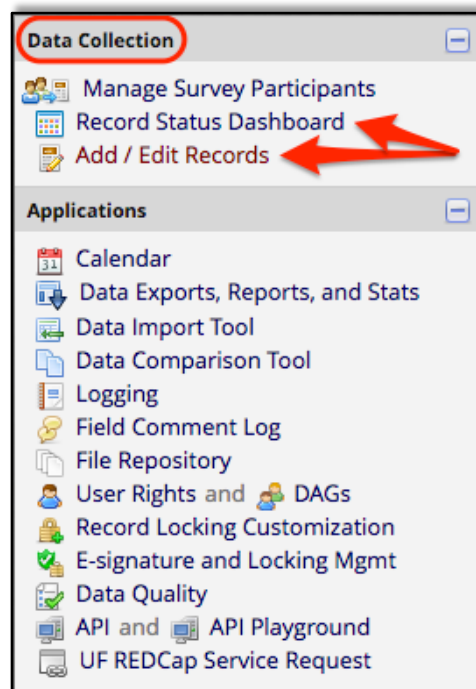
Data Entry for Longitudinal Projects in REDCap – How-To Guide

An Overview of Basic Data Entry in REDCap: How-to video:

https://redcap.vanderbilt.edu/consortium/videoplayer.php?video=data_entry_overview_01.flv&title=An%20Overview%20of%20Basic%20Data%20Entry%20in%20REDCap&referer=redcap.cts.i.ufl.edu

How do I enter / view my data?

To enter or view individual records, you can navigate to the "Data Collection" section on the left menu bar. Depending on your project type, you will see "Manage Survey Participants," "Record Status Dashboard," and "Add / Edit Records." To create a new record, click on "Add / Edit Records." To update an existing record, you can click on either "Add / Edit Records" or "Record Status Dashboard."



(Data Collection section of the left-side panel. Depending on your project configurations, your side panel may have different links.)

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down list next to "Choose an existing Study ID." To create a new record/response, type a new value in the text box next to "Enter a new or existing Study ID" and then hit [Tab] or [Enter] (if the project does not have auto-numbering enabled), or by clicking on "Add new record" (if the project has auto-numbering enabled). To quickly find an existing record without using the drop-downs, the text box will auto-populate with existing record names as you begin to type in it, allowing you to select it (if auto-numbering is not enabled).

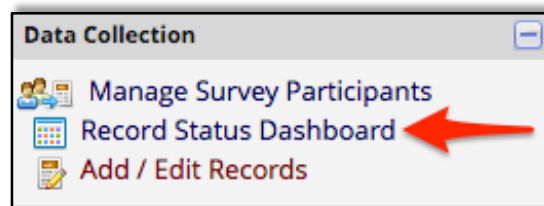
(Add / Edit Records page)

Example if auto-numbering is enabled

Example if auto-numbering is not enabled

Record Status Dashboard

The second way to view/edit existing records is to go to the “Record Status Dashboard.” If your project contains a lot of records, the Record Status Dashboard makes it easier to find the record you’re looking for. It also displays all the form statuses, making it easier to see which subjects have Incomplete or Unverified data collection forms.



What is the Record Status Dashboard?

This is a table listing all existing records/responses and their status for every data collection instrument (and for a longitudinal project, for every event). When viewing this page, form-level privileges are utilized (i.e. cannot see a form's status if user does not have access to that form), and if the user belongs to a Data Access Group, they will only be able to view the records that belong to their group.

If you follow the “Record Status Dashboard” link, you will be taken to an overview of all project records. From the Record Status Dashboard overview, you can select what particular record you want to edit or add to. For Longitudinal Studies, the layout of the table is determined by what instruments you have associated with your defined events. The Record Status Dashboard is

displayed by Record ID for every row, and an instrument as part of an Event for every column.
Note: instruments not assigned to an event are not displayed on the Record Status Dashboard.

From here you can click on a single bubble to go to the corresponding event & instrument's Data Entry Form. Otherwise, you can click on a record number which will take you to its Record Home Page.

Displaying: Instrument status only | [Lock status only](#) | [All status types](#)

Record ID	Preliminary					Daily				Exit
	Preliminary Survey	Mood	Diet	Caffeine Intake	Exercise	Mood	Diet	Caffeine Intake	Exercise	Exit Survey
1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(The Record Status Dashboard. There may be multiple columns of the same instrument, but they will be grouped by event.)

Record Home Page

The Record Home Page shows instruments associated with a record for every event. The instruments are organized into columns based on the events they are assigned to. The display includes the standard color scheme for the instrument response (red for “Incomplete,” yellow for “Unverified,” green for “Complete,” or grey for “Incomplete (no saved data)”). If you click on any of the bubbles, you will be taken the associated Data Entry Form for that event. Only instruments assigned to events are displayed.

Record ID 1

Data Collection Instrument	Preliminary	Daily	Exit
Preliminary Survey (survey)	<input type="radio"/>		
Mood	<input type="radio"/>	<input type="radio"/>	
Diet	<input type="radio"/>	<input type="radio"/>	
Caffeine Intake	<input type="radio"/>	<input type="radio"/>	
Exercise	<input type="radio"/>	<input type="radio"/>	
Exit Survey			<input type="radio"/>
Delete all data on event	✕		

Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

Choose action for record ▾

Study ID **002**

Data Collection Instrument	Baseline	1 week followup	1 month followup	6 months followup
Demographics	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical Exam	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Labs	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
GDS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
GCSI	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Concomitant Medications	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adverse Events	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delete all data on event:	<input checked="" type="checkbox"/>			

Legend for status icons:

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response

(Record Home Page)

Once you click on a bubble, you will be taken to that form for that particular record to enter new data or to change existing data.

Demographics Information

First Name

Last Name

Date of Birth Today Y-M-D

Age View equation

Phone number

Address

E-mail Address

Gender Female Male

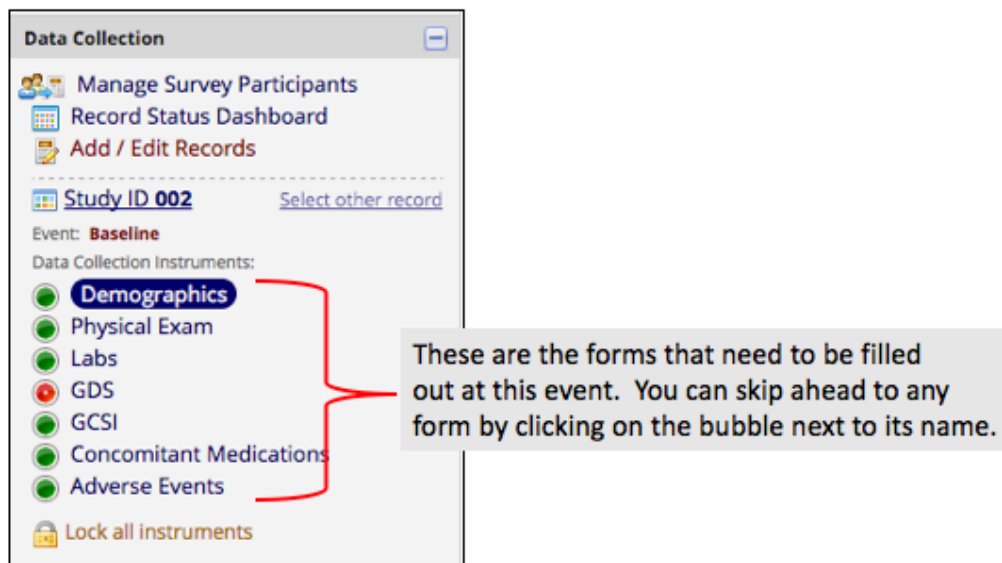
Race American Indian Asian Native Hawaiian or Pacific Islander Black or African American White More than one race / Other race (specify below) Unknown

To enter dates, you can type the date into the cell, use the calendar icon to select a date or click on [Today] and modify the date in the cell.

For multiple choice questions, select the bubble next to the correct answer choice

(Data Entry Form)

The menu to the left of the data entry form contains a list of all the forms to be filled out for that subject at the selected event.



Do I need to re-select the record number each time I change data entry forms while in a record?

No. To navigate between forms within a given record, select the colored dots indicating form status (i.e. incomplete, unverified, and complete) which appear to the left of the form name when a record is open. Note that moving to a new form by selecting the form status indicator will close the current form without saving entries. In order to save entries, select the “Save and Continue” button located at the bottom of the form before using the form status indicators to move to a new form. Alternatively, you can select the “Save and go to Next Form” button if you wish to move to the next form for the current record.

Once you have finished entering data on a form, be sure to save your work by clicking on one of the save options.

Saving Data

“Save & Exit Form” will save your work and take you back to the Record Home Page. “Save & Go To Next Form” will save your work and take you to the next form to be filled out for that event, i.e., Physical Exam data collection form. “Save & Stay” will save your work but keep you on this data entry form. If your project contains surveys, data entry form(s) that are enabled as surveys will have a third option in the dropdown, “Save & Mark Survey as Complete.” This will save your work, take you back to the Record Home Page and make the form’s status turn green (Complete).

REDCap will remember the save option you chose previously and that option will be at the top of the dropdown list each time you access that record.

Form Completion Status

Although not required, it can be helpful to mark data collection forms with one of the completion statuses: *Incomplete*, *Unverified* or *Incomplete*. Marking a form as *Incomplete* or *Unverified* may signify to other members of your team that further data entry is needed. Marking a form as *Complete* may signify that data entry is complete for that form, even if values are missing. What these completion terms mean is specific to your project and does not affect data exports or viewing the data. Nor does it stop someone from changing data. To make sure data is not changed once a form is complete, see the section **Locking Records**.

Legend for status icons:

- Incomplete ● Incomplete (no data saved) ?
- Unverified ✔ Partial Survey Response
- Complete ✔ Completed Survey Response

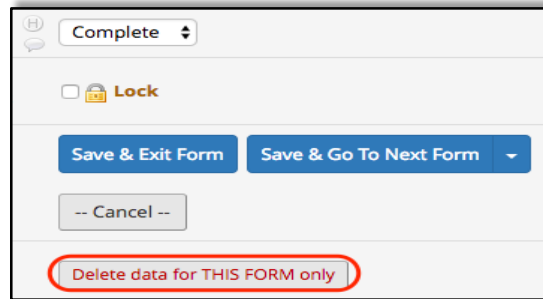
Deleting Data

From a field:

To delete data in a text field, simply delete the data in the field by highlighting it and hitting [delete] on your keyboard. To delete data from a radio button or checkbox field type, click on “reset” next to the field on the right-hand side or click the new answer choice. For checkbox field types, uncheck the option(s) or click on “reset” to uncheck all options.

For an entire form:

Go to the bottom of the form you want to delete the data from and click on “Delete data for THIS FORM only” at the bottom of the page.



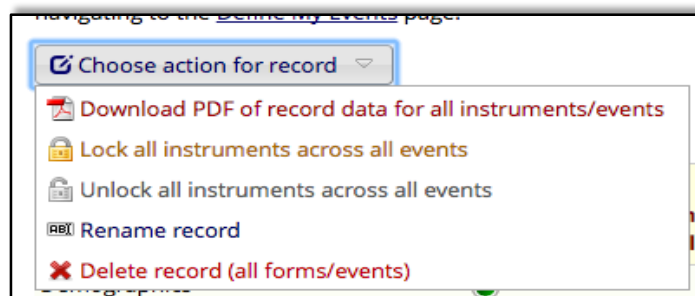
For an entire event:

Go to the Record’s Home page. At the bottom of the event names there is an option to delete all data from an event (see below).

Study ID 001				
Data Collection Instrument	Baseline	1 week	1	6
		followup	month	months
		folowup	followup	followup
Demographics	<input checked="" type="radio"/>			
Physical Exam	<input checked="" type="radio"/>		<input type="radio"/>	<input type="radio"/>
Labs	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
GDS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
GCSI	<input checked="" type="radio"/>			<input type="radio"/>
Concomitant Medications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adverse Events	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delete all data on event:	<input checked="" type="radio"/>			

For an entire record (all forms and all events):

Go to the Record’s Home Page and click on “Choose action for record.” Then select “X Delete record (all forms/events).” Note: to delete an entire record, a user must have the User Right of “Deleting Records.”



Locking Records

Locking records prevents users from changing or deleting data from a form. Only those with permission to unlock the form can make changes to the form/record once it has been locked. Locking a record should only be done if data entry is complete. If you make changes to the database, such as adding new data fields, the records that are locked will need to be unlocked before data can be entered into those new fields. This includes calculated fields. If a calculated field is added to the form, the calculation will not calculate on the locked forms until they are unlocked.

To be able to Lock and Unlock records, a user must have the User Right of “Lock/Unlock Records.”

Lock/Unlock Records	Grants user access to lock/unlock a record from editing. Users without this right will not be able to edit a locked record. User will need “Read Only” or “View&Edit” to lock/unlock a data collection instrument.
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Settings pertaining to record locking and E-signatures:

- Record Locking Customization
- Lock/Unlock Records Disabled
 - Locking / Unlocking
 - Locking / Unlocking with E-signature authority
- Users with locking privileges also have access to the E-signature and Locking Mgmt page on the left-hand Applications menu. [Watch video about locking](#) [What is an E-signature?](#)
- Allow locking of all forms at once for a given record?

You can lock data entry forms individually or an entire record (all forms/events) at once.

Individual Form:

To lock an individual form, click on Lock under the Form Completion Status.

Form Status

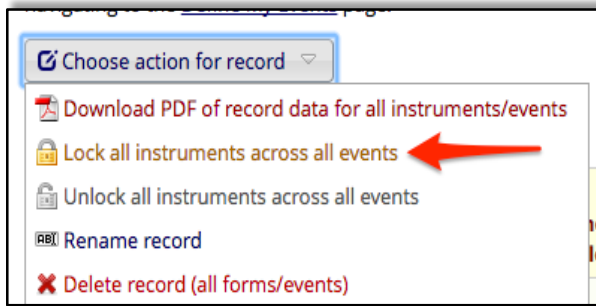
Complete?

Lock this record for this form?

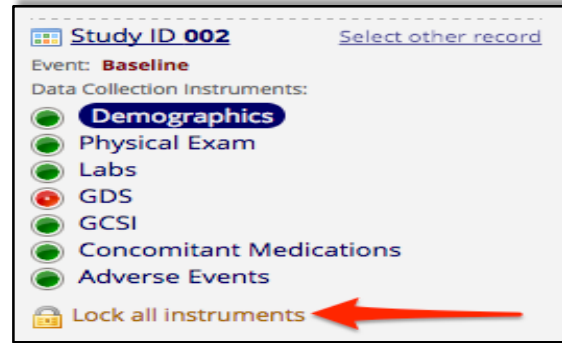
If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it. **Lock**

All forms:

To lock all forms for a subject, you can go to the Record Home page and select “Lock all instruments across all events” under Choose action for record (Figure 1). Or you can click on “Lock all instruments” while accessing a data collection form for that subject (Figure 2).



(Figure 1)



(Figure 2)

Who can unlock a record?

Any user with Locking/Unlocking privileges can unlock a record, regardless of who originally locked the record.