

Instructions for Requesting Project Promotion to Production (version Sep 2026)

Follow these instructions to request that your project be moved from DEV to PROD so you can begin collecting real-world data.

(1) Make sure that your project is fully set up and tested thoroughly!

You should have all of your data collection instruments in the Online Designer (for example, all of your surveys and case report forms) and your overall project setup finished.

Project Home | Project Setup | **Online Designer** | Data Dictionary | Codebook

VIDEO: How to use this page | Create snapshot of instruments | Last snapshot: never

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser.
NOTE: While in development status, all field changes will take effect immediately in real time.

Data Collection Instruments

+ Create a new instrument from scratch
Import a new instrument from the official REDCap Instrument Library
Upload instrument ZIP file from another project/user or external libraries

Form options: PDF Snapshots, Form Display Logic, PDF (all instruments), Descriptive Popups
Survey options: e-Consent, Survey Queue, Auto Invitation options, Survey Login, Survey Notifications, Survey Settings

Instrument name	Fields	PDF	Enabled as survey	Instrument actions	Survey related options
Participant Details	13		Enable	Choose action	

Test your project by entering test data records to make sure everything is functioning correctly *before* you move your project into production.

Data Collection

Survey Distribution Tools
Scheduling
Record Status Dashboard
Add / Edit Records
Applications

Add / Edit Records
You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/respo below.

NOTICE: This project is currently in Development status. Real data should NOT be entered until the project has been moved to Production status.

Total records: 1

Choose an existing Participant ID
-- select record --
+ Add new record

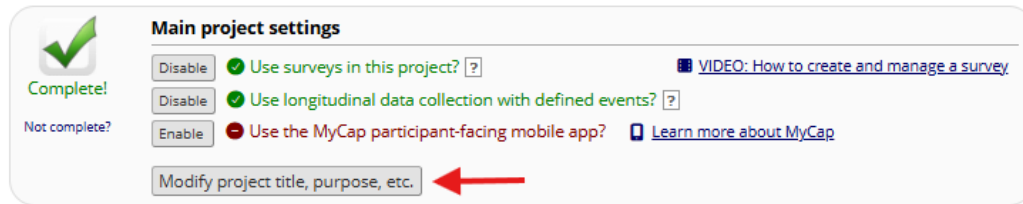
Data Search

Choose a field to search (excludes multiple choice fields)
All fields

Search query
Begin typing to search the project data, then click an item in the list to navigate to that record.

(2) **Double check that the information is correct in your main project settings.**

In your main project settings, select "Modify project title, purpose, etc." to update the information:



Main project settings

Complete! ☒ Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

Not complete? ☒ Use longitudinal data collection with defined events? [?](#)

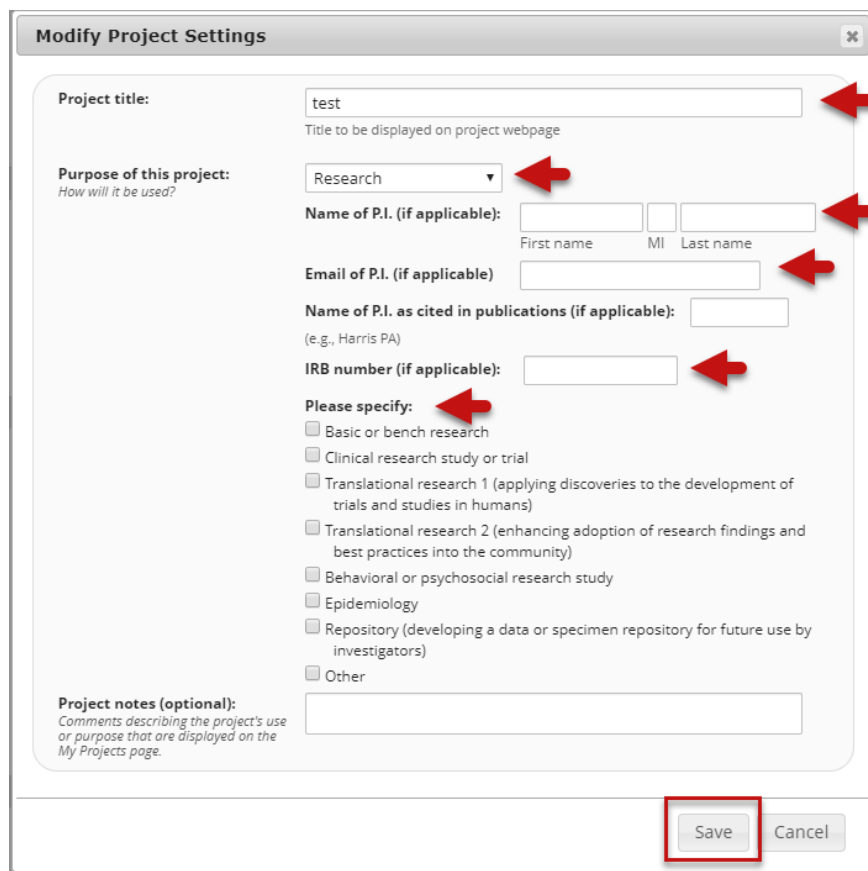
☒ Use the MyCap participant-facing mobile app? [Learn more about MyCap](#)

→

All UCH REDCap projects **must** be for **research only**, so the Project's Purpose must be selected as "Research" from the dropdown menu.

In addition, make sure the following fields are filled out as seen in the screenshot below:

1. Project Title
2. PI Name
3. PI Email
4. IRB Number
5. Type of research



Modify Project Settings

Project title: →
Title to be displayed on project webpage

Purpose of this project: →
How will it be used?

Name of P.I. (if applicable): →
First name MI Last name

Email of P.I. (if applicable): →

Name of P.I. as cited in publications (if applicable):
(e.g., Harris PA)

IRB number (if applicable): →

Please specify: →

- ☐ Basic or bench research
- ☐ Clinical research study or trial
- ☐ Translational research 1 (applying discoveries to the development of trials and studies in humans)
- ☐ Translational research 2 (enhancing adoption of research findings and best practices into the community)
- ☐ Behavioral or psychosocial research study
- ☐ Epidemiology
- ☐ Repository (developing a data or specimen repository for future use by investigators)
- ☐ Other

Project notes (optional):
Comments describing the project's use or purpose that are displayed on the My Projects page.

(3) **Review the fields in your project for identifiers.**

All of the data fields that *could* be considered a PHI identifier should be marked. This includes names, dates, e-mail addresses, phone numbers, addresses or geographical information more specific than state, etc. The “Check For Identifiers” page can be found under the second check mark box in the “Project Setup” tab as seen below.

The screenshot shows the REDCap Project Setup interface. At the top, there are tabs for 'Project Home', 'Project Setup', 'Other Functionality', and 'Project Revision History'. Below the tabs, the 'Project status' is 'Development' and 'Completed steps 7 of 8'. The main content area is divided into two sections. The first section, 'Main project settings', has a 'Complete!' status and contains three toggle switches: 'Use surveys in this project?' (checked), 'Use longitudinal data collection with defined events?' (checked), and 'Use the MyCap participant-facing mobile app?' (unchecked). The second section, 'Design your data collection instruments & enable your surveys', also has a 'Complete!' status and contains a link to 'Check For Identifiers' which is highlighted with a red box. Below this link are buttons for 'Online Designer', 'Data Dictionary', and 'REDCap Instrument Library'. At the bottom of the section are buttons for 'Smart Variables', 'Piping', 'Action Tags', 'Field Embedding', and 'Special Functions'.

(4) **Please be sure to check for any fields that are Identifiers, mark them on the right side, then click “Update Identifiers” at the bottom.**

Check For Identifiers

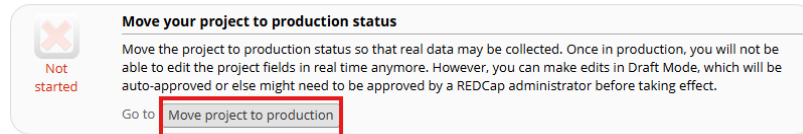
This module will help you assess whether or not some fields may be identifiers, and then allows you to easily tag such fields as identifiers for greater data security. While this same process can be accomplished in the Data Dictionary or Online Designer, this page provides a streamlined way of tagging fields as identifiers very quickly. Based off the variable name or field label, the fields listed below may possibly contain identifiers (e.g., name, phone number, address). Please review the entries and select all identifiers, where appropriate. Any fields already tagged as identifiers will already be checked below.

Participant Details

Variable Name	Field Label	Identifier?
participant_id	Participant ID	☐
participant_phone	Telephone Number	☒
email_address	Email Address	☒
e_survey	Eligibility Survey Initiated	☐
c_initiated	Consent Initiated	☐

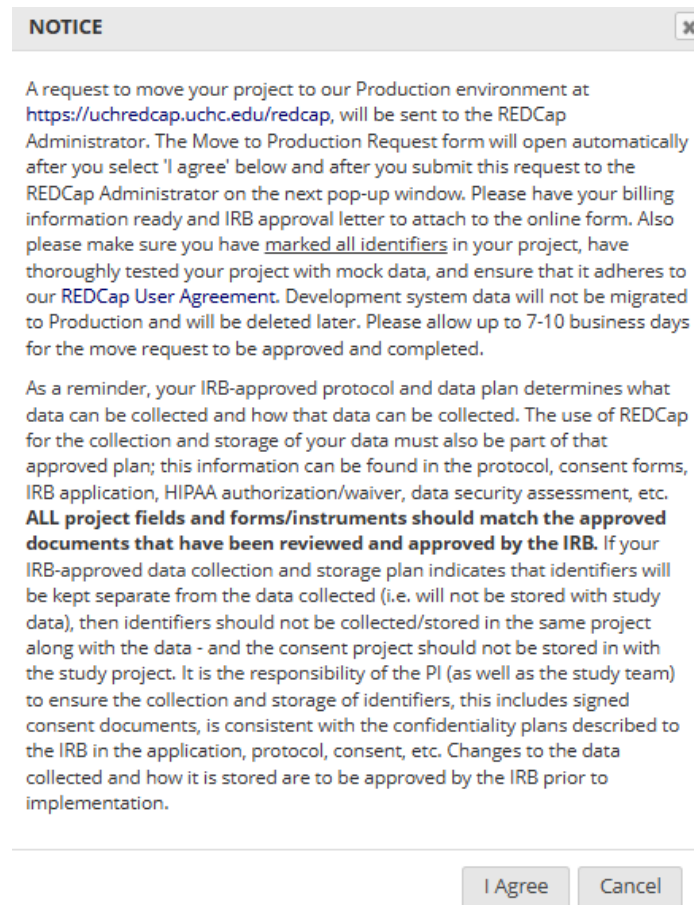
(5) **Once you have completed all these steps, you are ready to request your project to be moved to Production:**

- a. To request that a REDCap project be moved to Production, open the project, and select the “*Project Setup*” tab. At the bottom of the screen, click the 'Move to Production' button as seen in the screenshot on the following page.



Select "Move project to production" to start the process of moving the project to Production

- b. Once you select “Move project to production”, a “Notice” pop-up box will appear to ask you to agree to the steps involved in moving your project to the Production environment to ensure it adheres to our REDCap User Agreement, as well as reviewing the responsibilities of the PI.



- c. After you click the “I Agree” button, you will have the option to decide if you wish to Keep ALL data or Delete ALL of the data that has been entered.

- d. Given that the Development system is only for testing, and NO real data should have been entered, you will select “Delete ALL data”

Request Admin to Move to Production Status? ✕

Are you sure you wish to leave the DEVELOPMENT stage? If you proceed, the project will be moved to PRODUCTION status so that real data may be collected. If you select the 'Delete ALL data' option below, all current collected data, calendar events, and uploaded documents will be deleted, otherwise all will remain untouched as the project is moved to production.

★ Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Keep existing data or delete?
☐ Keep ALL data saved so far. **(1 records)**
☒ Delete ALL data in the project (including any survey responses), calendar events, documents uploaded onto forms/surveys, and all archived data export files stored in the File Repository, and any logged events that pertain to data collection.

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.

NOTE:
Since only REDCap administrators can move a project to production, clicking the button below will send a request to a REDCap admin, who will move it to production status for you. An email will be sent to your address [REDACTED] when this has been done.

Yes, Request Admin to Move to Production Status

Cancel

Next Click 'YES, Request Admin to Move to Production Status'

- (6) Once this button has been clicked, the ‘**UCH REDCap Move Project to Production Form**’ will automatically pop up with information and instructions on what is needed to complete the online Move to Production request form, most notably providing the appropriate IRB documentation.
- a. Once you have reviewed the information on this page, scroll down the bottom to click “Next Page >>” to proceed with the form as seen below.

Please note that you can return to the previous page(s) throughout the form or cancel in the bottom right corner at any time*

Complete the survey

UCH REDCap Move Project to Production Form

[View survey instructions](#)

Usage & Project Eligibility

REDCap usage is limited to non-commercial **research purposes only**, as defined by DHHS - systematic investigation, designed to develop or contribute to generalizable knowledge. For more information, please see Appendix A/Research Determination.

REDCap may not be used in the conduct of clinical care or by for-profit entities, for-profit work. Nor can it be used as a registry and/or repository. Projects (forms or surveys) that are not being used for research purposes only or are related to commercial research (including industry-sponsored clinical trials) must be administered using an alternate service (e.g., Qualtrics).

All projects must involve a PI who is a faculty member, employed and paid, by UConn Health or UConn. All projects must show proof of research by providing the appropriate IRB documentation:

- a UConn/UCHC approval letter or exempt determination letter, or
- a letter from the UConn/UCHC IRB agreeing to rely on another IRB for oversight, or
- a Human Subjects Research Determination form signed by the UConn/UCHC Human Subjects Protections Office indicating that the project is "NOT human subjects research"

The approved IRB documentation must be provided to the REDCap administrator along with the online Move to Production request form. The PI information listed on the request form must match the approved IRB documentation.

If collecting Personal Identifiable Information (PII) or Protected Health Information (PHI), all members of the research project team, including PIs, should complete the [CITI Basic Course Requirement](#) before utilizing REDCap.

Next Page >>

Cancel

- On the next page, select your role related to the Project. Depending on your role, additional fields may appear asking for additional information related to you, such as Name, Email, Institution and Department.
- Next select "Next Page >>".

UCH REDCap Move Project to Production Form

Requestor Information

Role on Project
* must provide value

Principal Investigator

Designated REDCap Project Manager

Other

reset

<< Previous Page

Next Page >>

- On the next page, enter the Principal Investigator's information which **MUST** match the approved IRB documentation. Then proceed to the Next Page.

UCH REDCap Move Project to Production Form

PI Information	
MUST match approved IRB documentation	
PI's First Name * must provide value	
PI's Last Name * must provide value	
PI's Institution * must provide value	UConn (Storrs or Other Campus) UConn Health reset PI must be a faculty member, employed and paid, by UConn Health or UConn
PI Department * must provide value	
PI's Email * must provide value	
<< Previous Page Next Page >>	

- e. This will lead to the Project Information page which will ask multiple questions related to the project as seen in the screenshots below. Depending on your answers, pop ups may appear within the form to gather further information. Once completed, continue to the next page.

Project Information	
Name of the REDCap project being deployed: * must provide value	
Please provide a brief description of the study/project: * must provide value	Expand
Do you have any project settings and/or external modules such as randomization, double data entry, multi-signature, Mosio/Twilio, etc., that are enabled in this development project that need to be enabled in production? * must provide value	Yes No reset
Have you completed the project setup checklist (via project setup tab) and thoroughly tested your project - creating test records, taking the surveys as if you were a participant (if applicable), and tried exporting and reviewing the data? * must provide value	Yes No reset

Please indicate identifiers used in project - please check **ALL** that apply.

If additional potential identifiers are being used, please make sure to select 'other' and specify.

* must provide value

- ☐ None
- ☐ Name and/or Initials
- ☐ Signature
- ☐ E-mail address
- ☐ Phone Number
- ☐ Any geographic subdivisions smaller than a State, including street address, city, county, precinct/neighborhood, zip code, and their equivalent geocodes
- ☐ Any element of dates (except year) for dates directly related to an individual, including admission date, and discharge date, date of death, etc -- * see field note for full description
- ☐ Date of Birth
- ☐ Mother's Maiden names
- ☐ Account numbers
- ☐ Social Security number
- ☐ Medical Record number
- ☐ Health Plan number
- ☐ Certificate or License numbers

- ☐ IP address
- ☐ Financial/PCI data
- ☐ Vehicle identifiers
- ☐ Biometric ID
- ☐ Full face/identifying photo
- ☐ Audio & Video Files
- ☐ Other

*All elements of dates (except year) for dates directly related to an individual, including birth date, admission date, discharge date, date of death; and all ages over 89 and all elements of dates (including year) indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older.

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Next Page >>

- f. The next page of the form will ask for IRB Information related to your project. Please ensure that all information entered matches the IRB approved documents provided and that you upload the appropriate files in the spaces provided. For example, the first upload asks for the IRB-approved protocol.

IRB INFORMATION

ALL project fields and forms/instruments should match the approved documents that have been reviewed and approved by the IRB

Your IRB-approved protocol and data plan determines what data can be collected and how that data can be collected. The use of REDCap for the collection and storage of your data must also be part of that approved plan.

Do you verify that you are collecting and storing data consistent with your IRB approval?

* must provide value

Yes

No

reset

IRB # Test

* must provide value

Please upload your IRB-approved protocol.
* must provide value

[Upload file](#)

- g. For the next section “IRB Documentation”, select the option that is applicable to the IRB documentation relevant to your project and complete the fields and upload the documentation that populate based on this chosen option. Please ensure the “Expected Project End Date” matched the IRB Expiration date. Proceed to the next page.

IRB Documentation:
* must provide value

A UConn/UCHC approval letter or exempt determination letter

A letter from UConn/UCHC IRB agreeing to rely on another IRB for oversight must be provided

A Human Subjects Research Determination form signed by UConn/UCHC Human Subjects Protections Office indicating that the project is “NOT human subjects research” -- project must still be for research purposes only

reset

Please upload you UConn/UCH IRB documentation (as indicated above):
* must provide value

[Upload file](#)

Expected Project End Date:
* must provide value

MM/DD/YY

End date MUST match IRB Expiration Date

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Next Page >>

- h. The next page will ask for Billing Information related to the project. It will first ask if this project is related to a student project.

- If your project is a student project, check “Yes” then provide the supporting documentation and read that Fee-related and study length information for student projects. Once this is completed click “Submit” to fully submit your student project to Production.
- i. In most cases, if your project is NOT a student project, select “No” and enter the appropriate billing information

BILLING INFORMATION

Is this project:

- **ONLY** for a **current UConn undergraduate or graduate student**, AND
- **ONLY** being used as a **thesis, dissertation, or capstone project**, AND
- **NOT** part of a grant-funded study/project

Only answer yes if **ALL** conditions are met

Student academic projects are only for current UConn undergraduate/graduate students projects which are solely for the purpose of a thesis, dissertation, or capstone project. Only those projects that meet that all 3 criterion definition should be marked as such in the move-to-production request form, and supporting documentation will have to be provided. Please note: Fees are not waived for Resident or Fellow projects.

* must provide value

reset

- j. Next, review the fees associated with REDCap projects, with the initial fee being \$158 for the first year, and then an annual fee of \$79 per year.
- k. Select the applicable “Payment Type” then complete the corresponding fields, ensuring that all the information matches that of the account holder.

Payment Type:

* must provide value

reset

Please enter FOAPAL Account Number:

* must provide value

Billing Contact Name

* must provide value

MUST be name on FOAPAL / KFS account

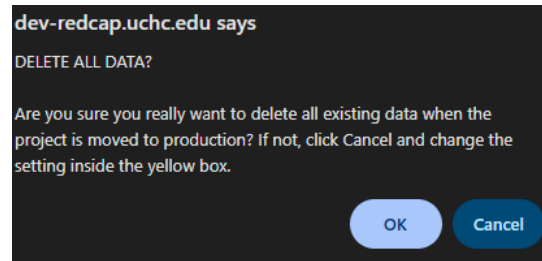
Billing Contact Email

* must provide value

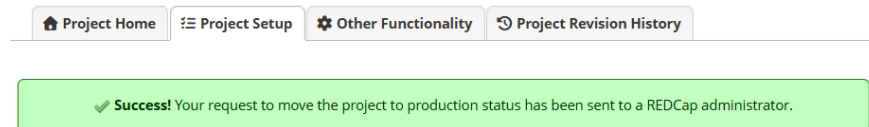
MUST correspond with FOAPAL / KFS account holder

- l. Once all the billing information has been entered, click ‘Submit’

- m. As a final step, you will receive a pop up message confirming if you really want to delete all your data.



- n. Once you click OK above, you will be brought back to the Project Setup and a green message will appear indicating your request to move the project to production status has been sent to a REDCap administrator.
- If you select “Cancel” above, you will be directed back to the Project Setup page with the pop up “Request Admin to Move to Production Status” asking to keep or delete data as found on Page 6 of this guide.



Upon submission, the REDCap Administrator will begin processing the move to production.

After the project has been approved and moved to the production system by the REDCap Administrator, the PI, and the requestor will be added as users to the project. The REDCap Administrator will then ask the requestor to verify and inspect the project one last time in Production; upon confirmation, the project will be finalized in production status and the PI will be notified when it is locked in production status. **Real data collection cannot begin until the project is locked in production status.**

It is the responsibility of the PI or their designated project manager for adding additional users and assigning privilege access. If the project is using REDCap to collect PHI/PII, the PI must ensure that study personnel either entering or accessing data stored with REDCap have been given the appropriate authority to do so.

As a reminder, **ONLY the Production system can be used for live “real” data collection.** The Development (*test/sandbox*) system is strictly used for design, development, testing, and training with simulated mock data. Live data collection and/or storage of **“real” data is strictly prohibited in the Development system.** REDCap users are allowed to only create a new project in the Development system. The development project must be moved to the production system so that data collection can begin.