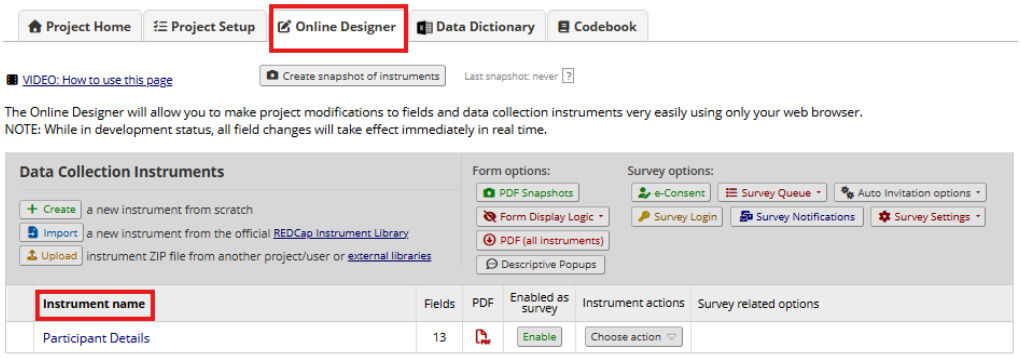
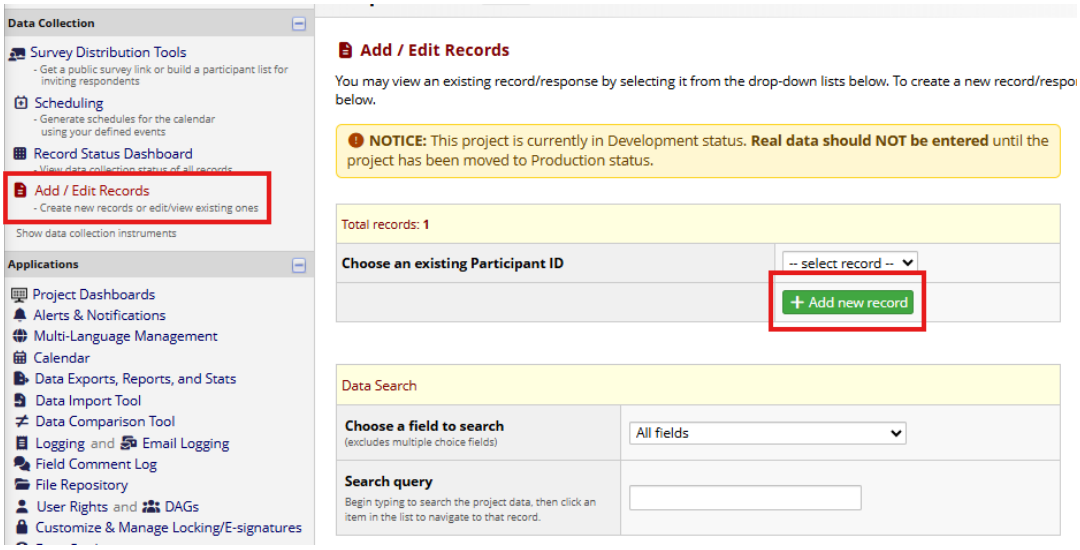
Instructions for Requesting Project Promotion to Production
(version Sep 2026)

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.

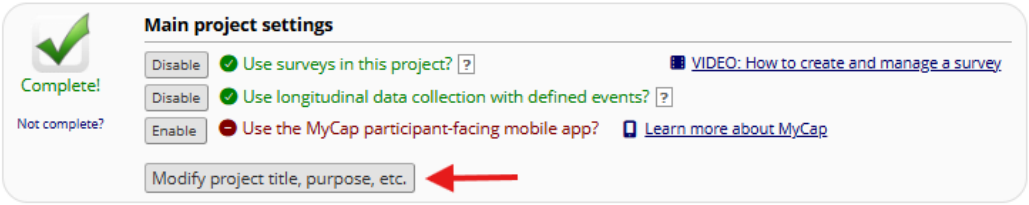


Test your project by entering test data records to make sure everything is functioning correctly *before* you move your project into production.



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

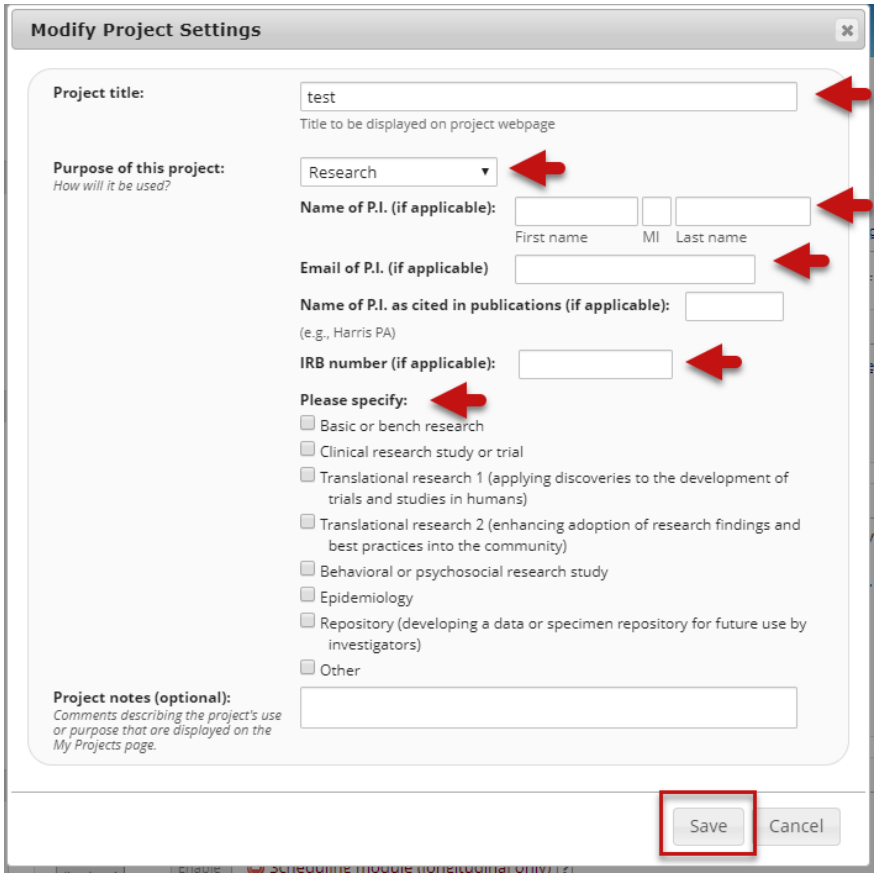
In your main project settings, select "Modify project title, purpose, etc." to update the information:



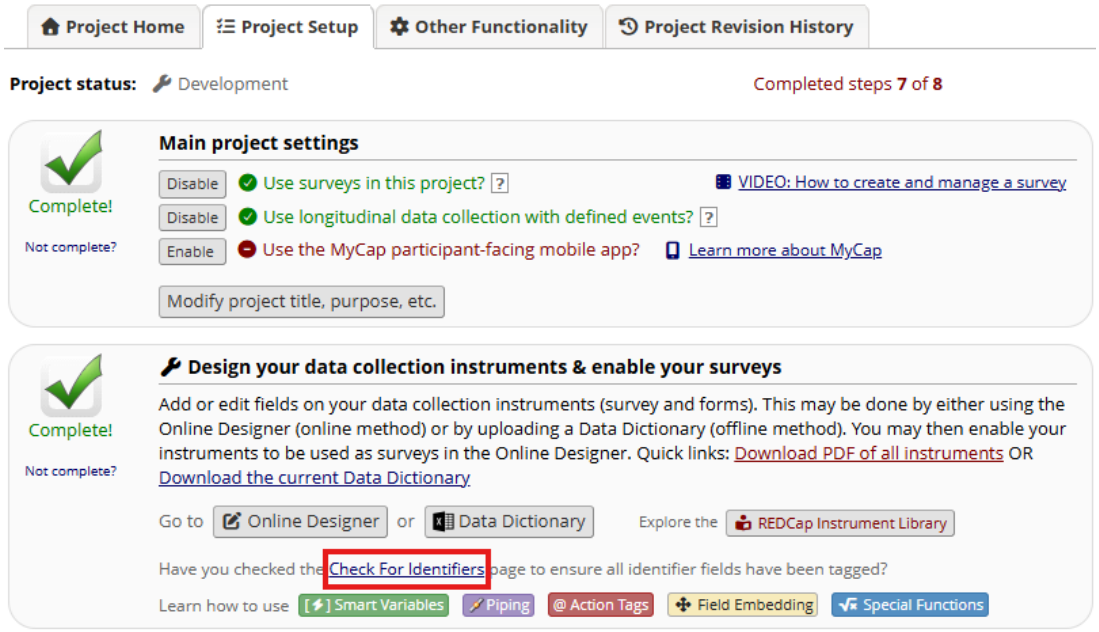
All UCH REDCap projects **must** be for **research only**, so the Project's Purpose must be selected as "Research" from the dropdown menu.

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

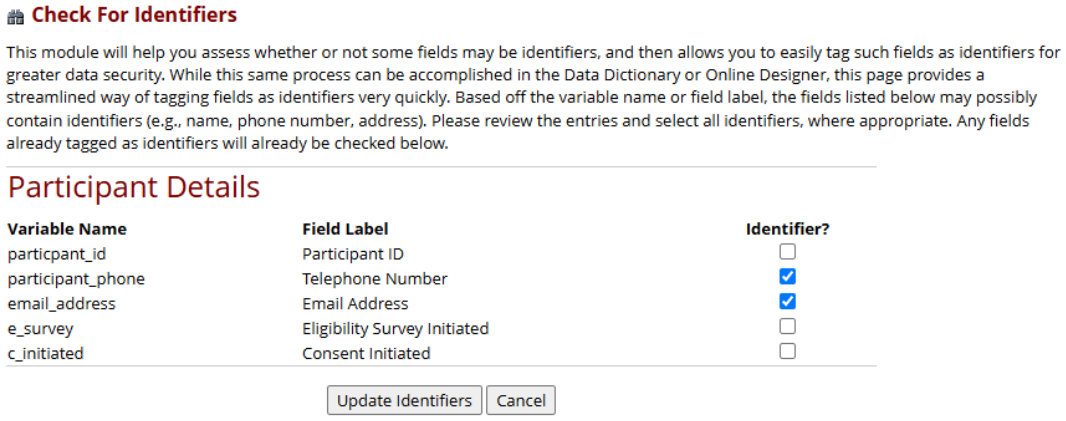
1. Project Title
2. PI Name
3. PI Email
4. IRB Number
5. Type of research



(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.

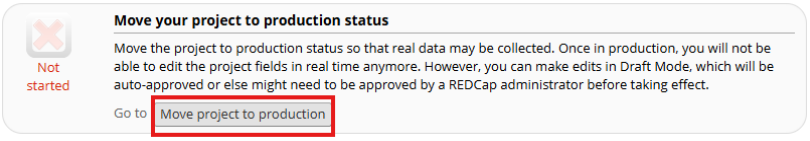


(4) **Please be sure to check for any fields that are Identifiers, mark them on the right side, then click "Update Identifiers" at the bottom.**



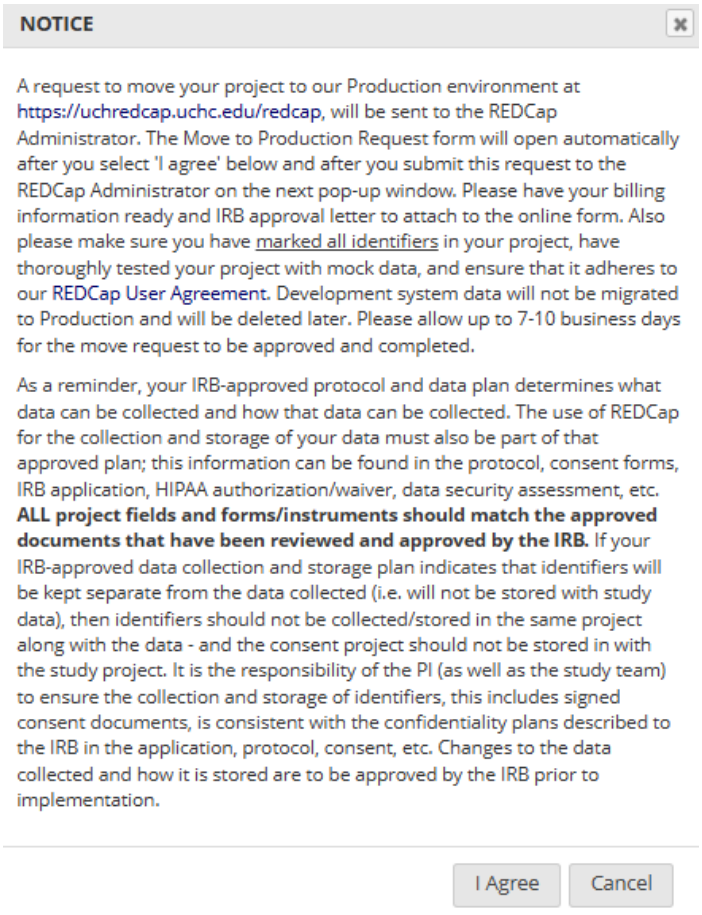
(5) **Once you have completed all these steps, you are ready to request your project to be moved to Production:**

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.



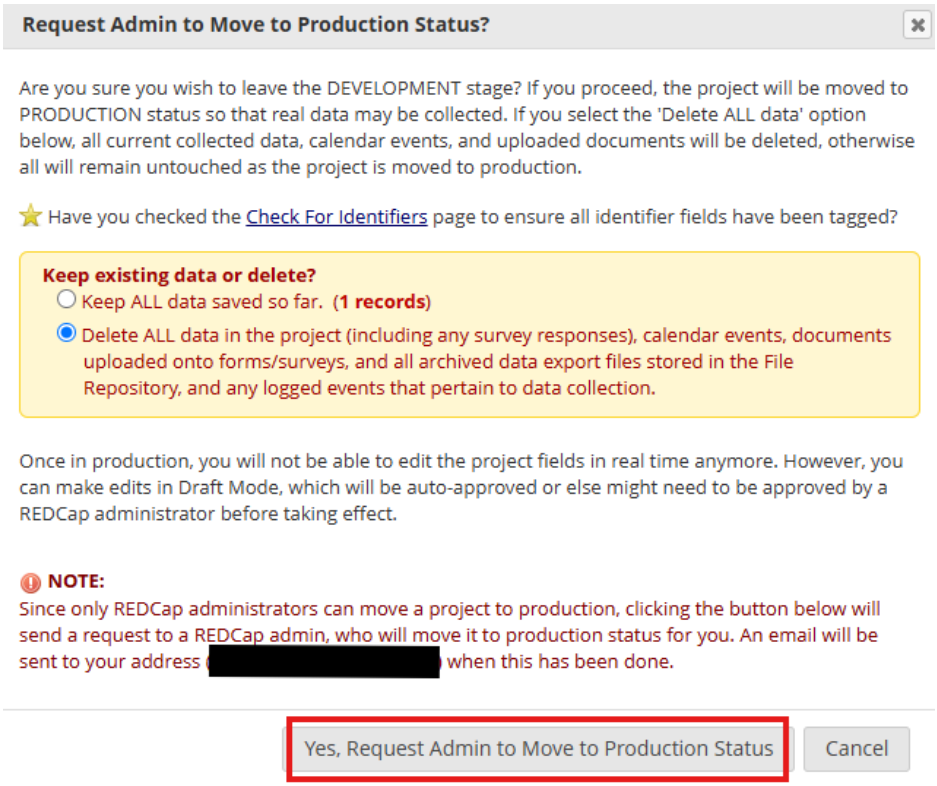
Select "Move project to production" to start the process of moving the project to Production

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”

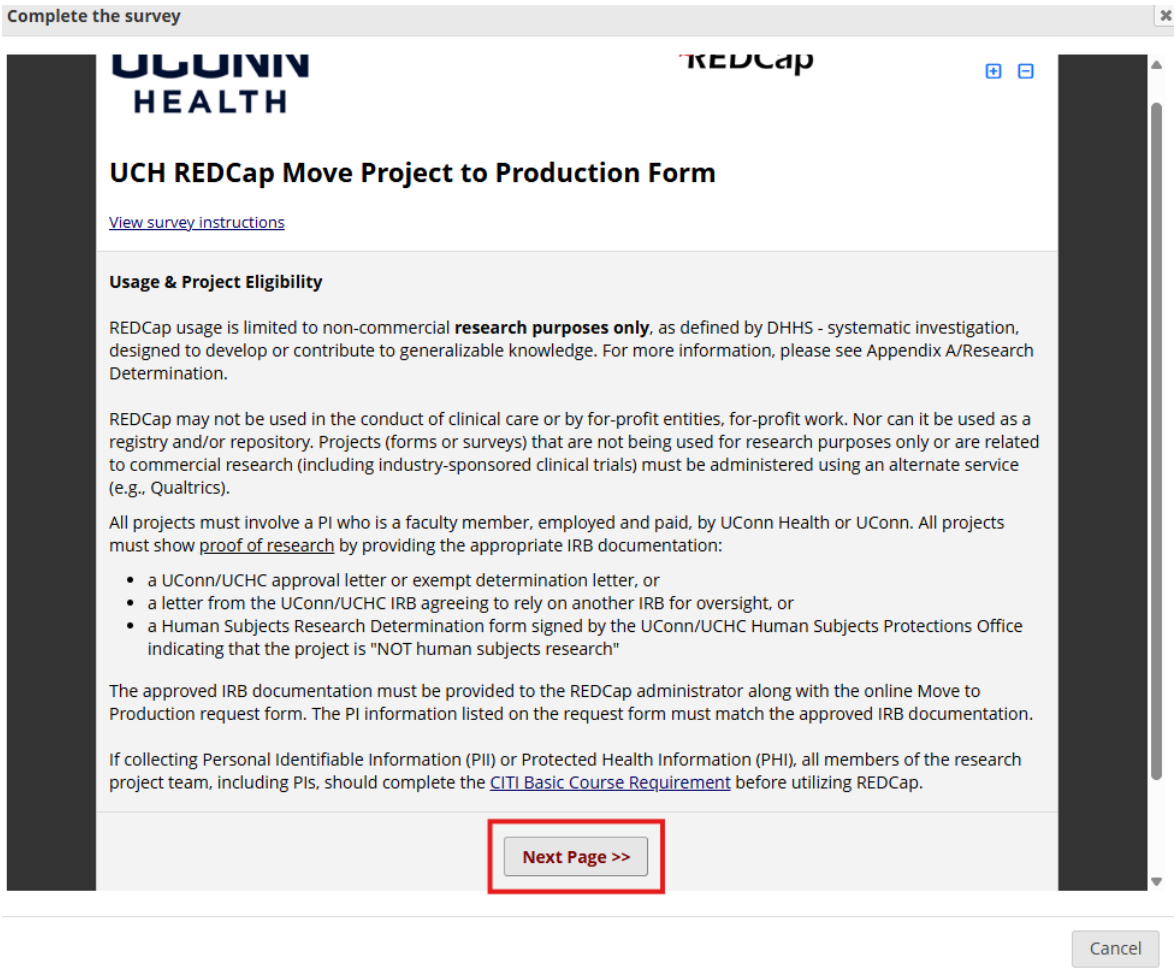


Next Click 'YES, Request Admin to Move to Production Status'

(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*

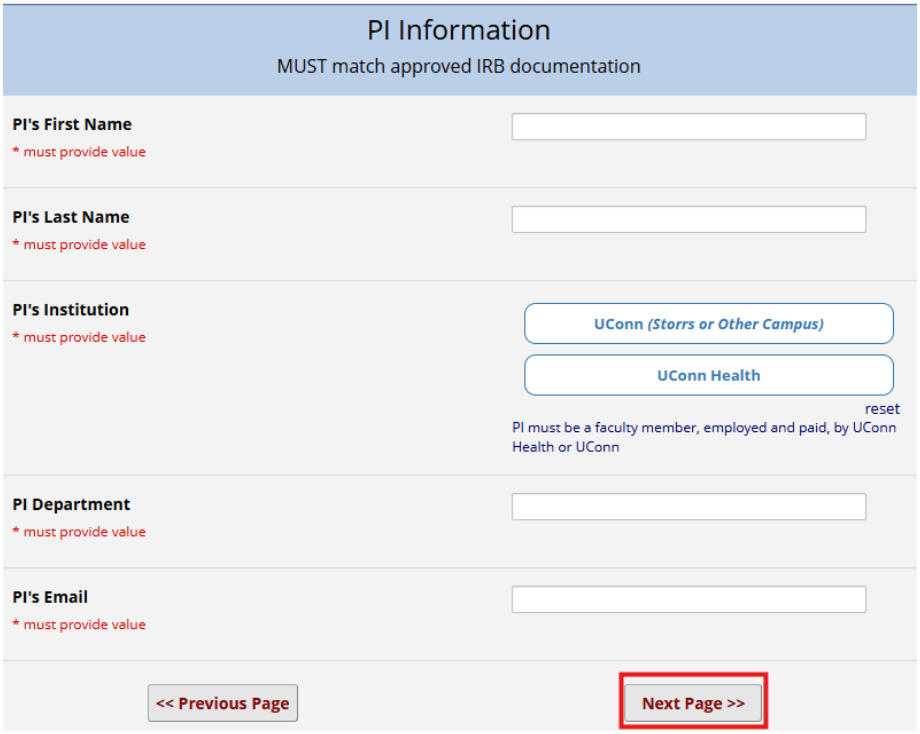


b. On the next page, select your role related to the Project. Depending on your role, additional fields may appear to asking for additional information related to you, such as Name, Email, Institution and Department.
c. Next select “Next Page >>”.

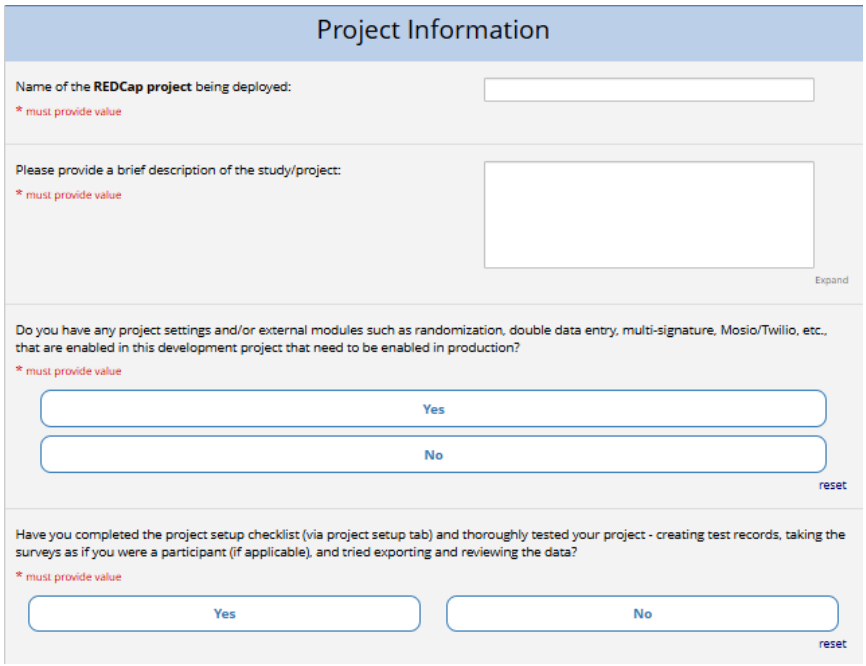


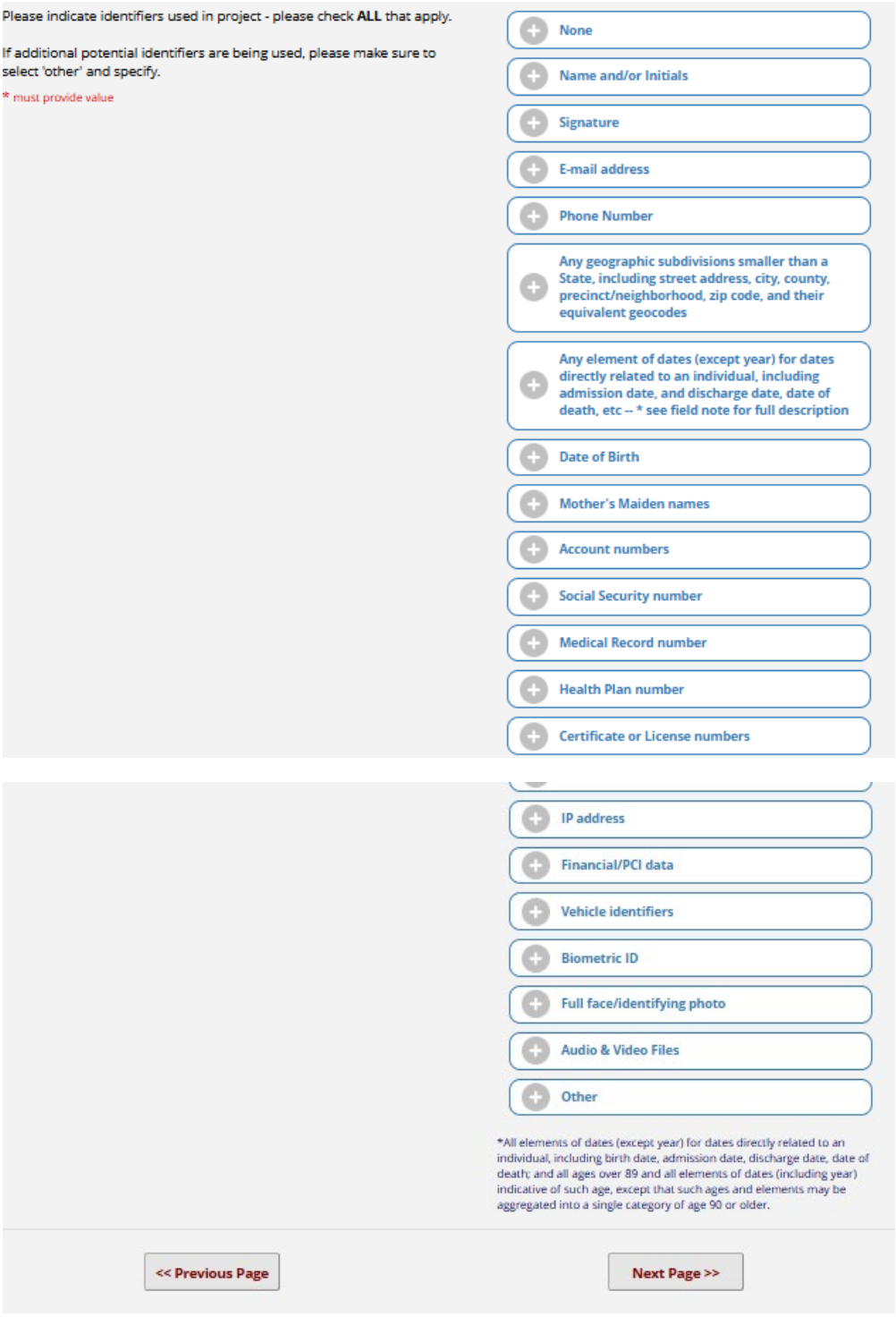
d. On the next page, enter the Principal Investigator’s information which MUST match the approved IRB documentation. Then proceed to the Next Page.

UCH REDCap Move Project to Production Form

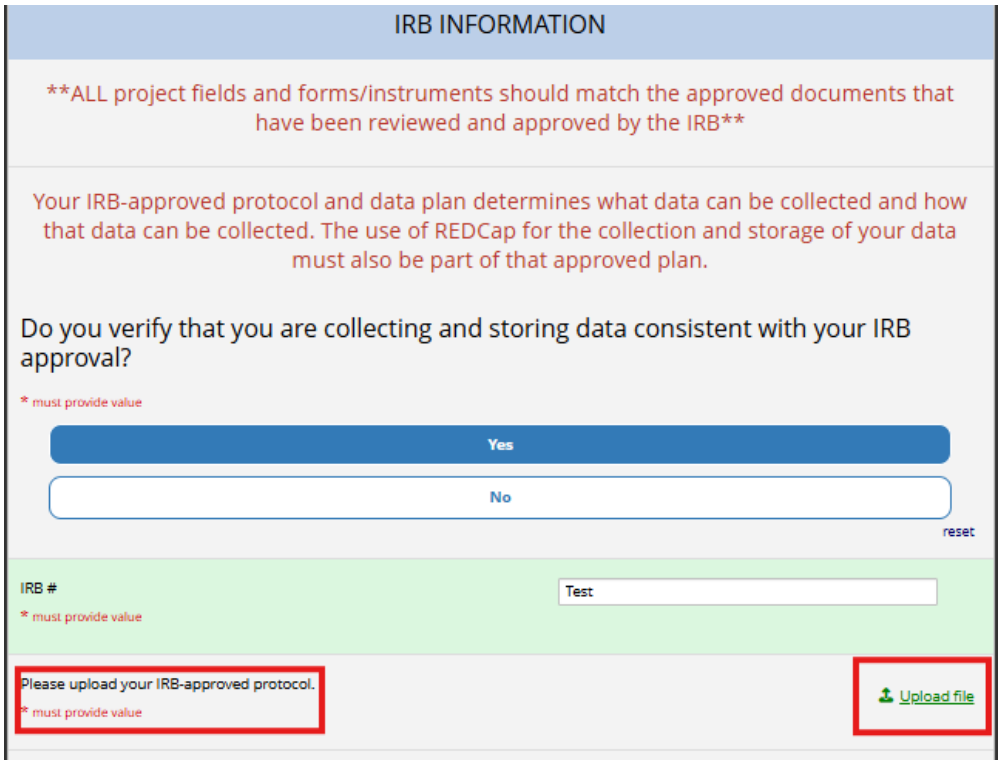


e. This will lead to the Project Information page which will ask multiple questions related to the project as seen in the screenshots below. Depending on your answers, pop ups may appear within the form to gather further information. Once completed, continue to the next page.

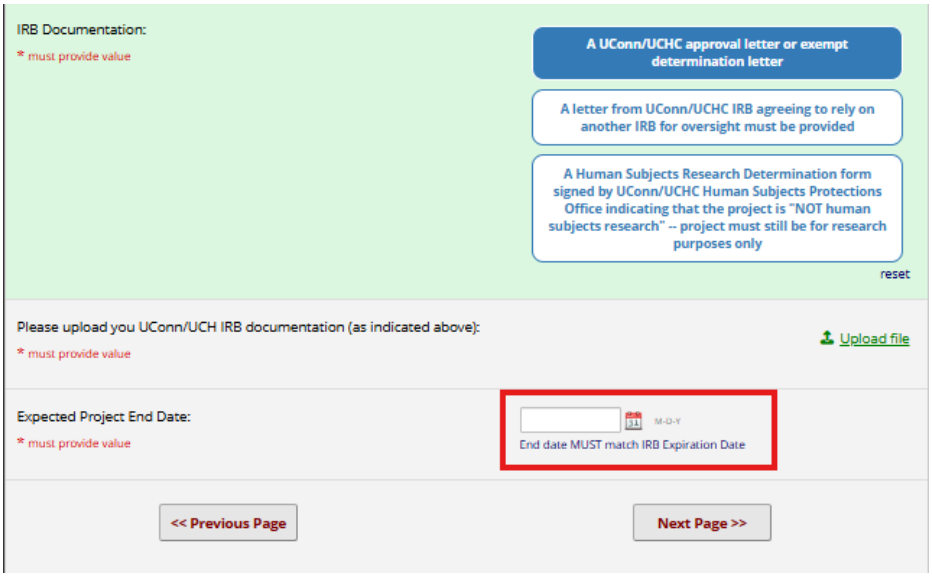




f. The next page of the form will ask for IRB Information related to your project. Please ensure that all information entered matches the IRB approved documents provided and that you upload the appropriate files in the spaces provided. For example, the first upload asks for the IRB-approved protocol.



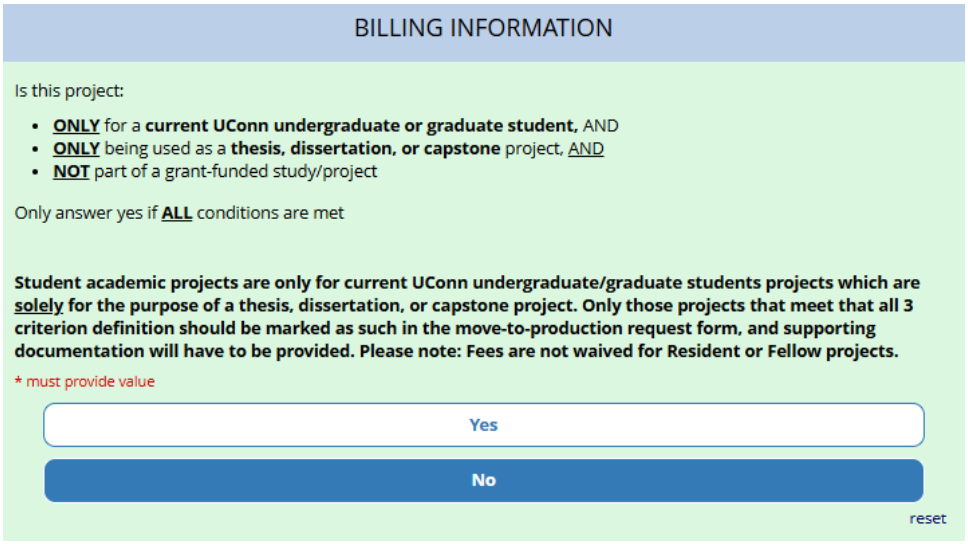
g. For the next section “IRB Documentation”, select the option that is applicable to the IRB documentation relevant to your project and complete the fields and upload the documentation that populate based on this chosen option. Please ensure the “Expected Project End Date” matched the IRB Expiration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



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.

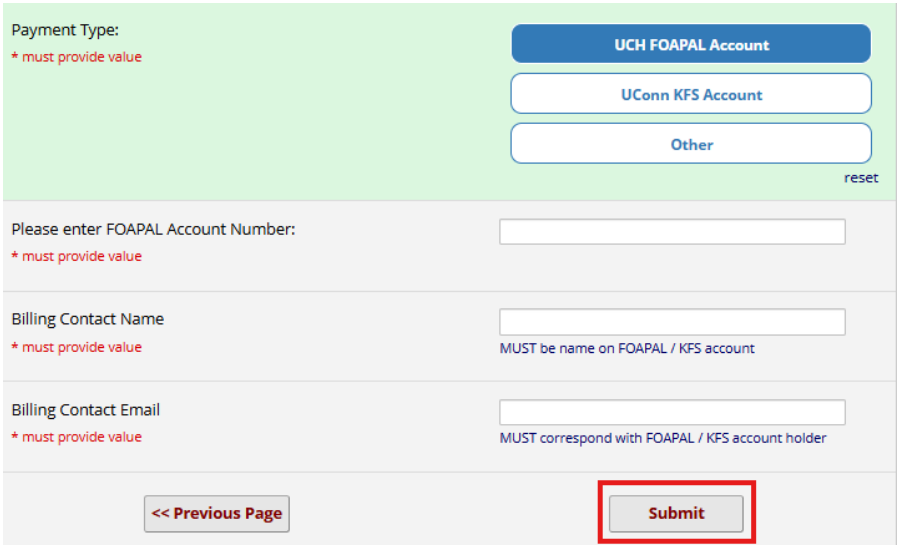
- If your project is a student project, check “Yes” then provide the supporting documentation and read that Fee-related and study length information for student projects. Once this is completed click “Submit” to fully submit your student project to Production.

i. In most cases, if your project is NOT a student project, select “No” and enter the appropriate billing information



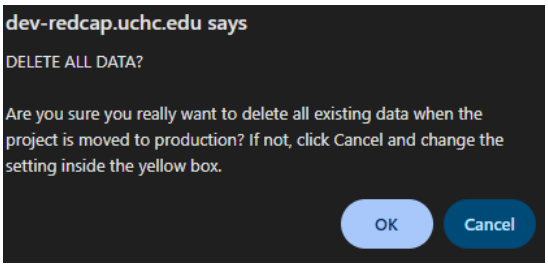
j. Next, review the fees associated with REDCap projects, with the initial fee being $158 for the first year, and then an annual fee of $79 per year.

k. Select the applicable “Payment Type” then complete the corresponding fields, ensuring that all the information matches that of the account holder.

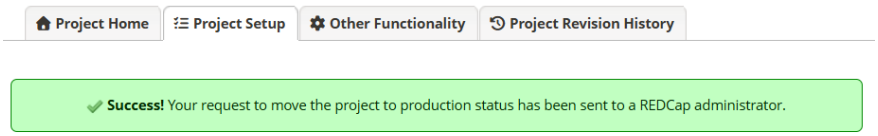


l. Once all the billing information has been entered, click ‘Submit’

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.