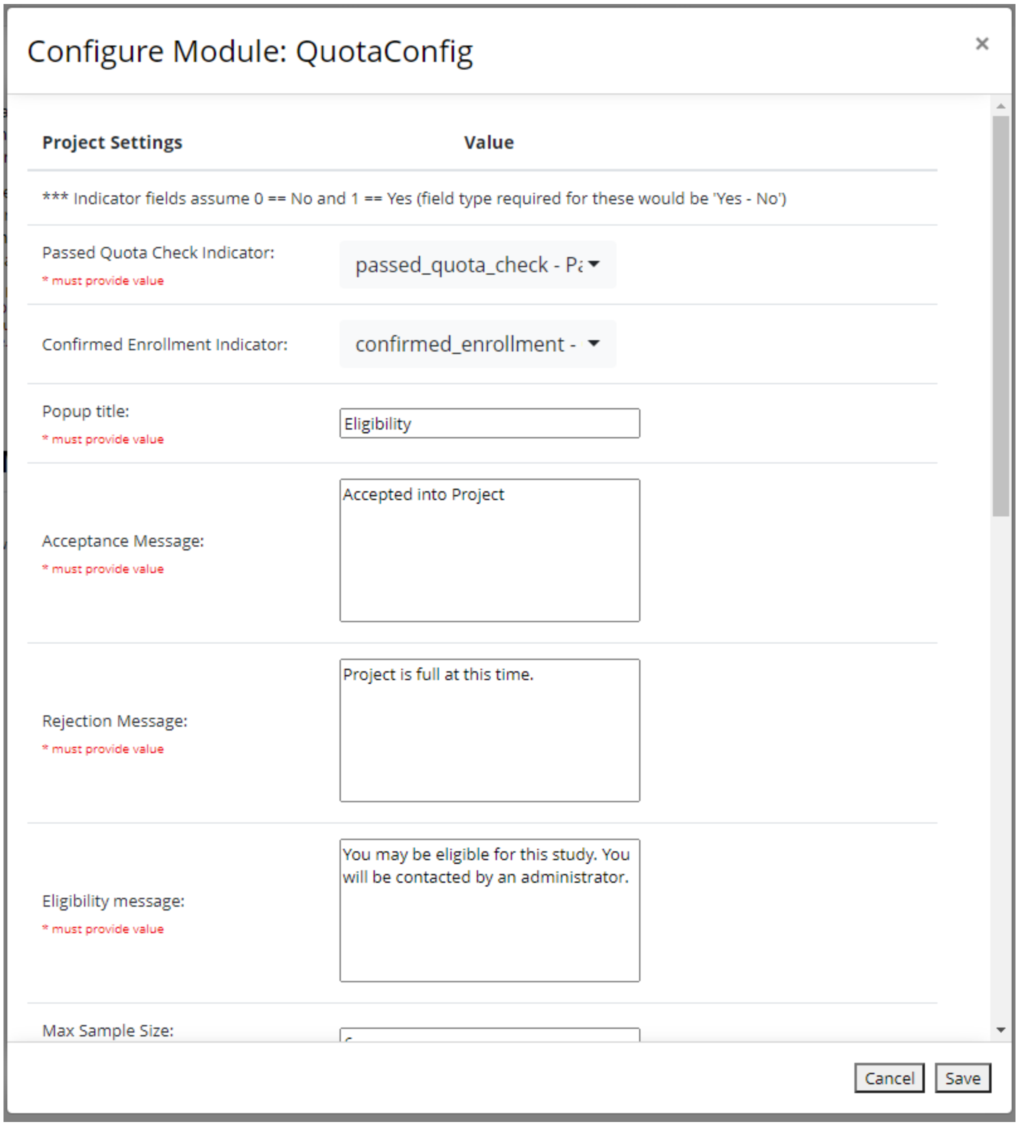
SOPs for REDCap External Module: QuotaConfig

First, add the module to your REDCap project:

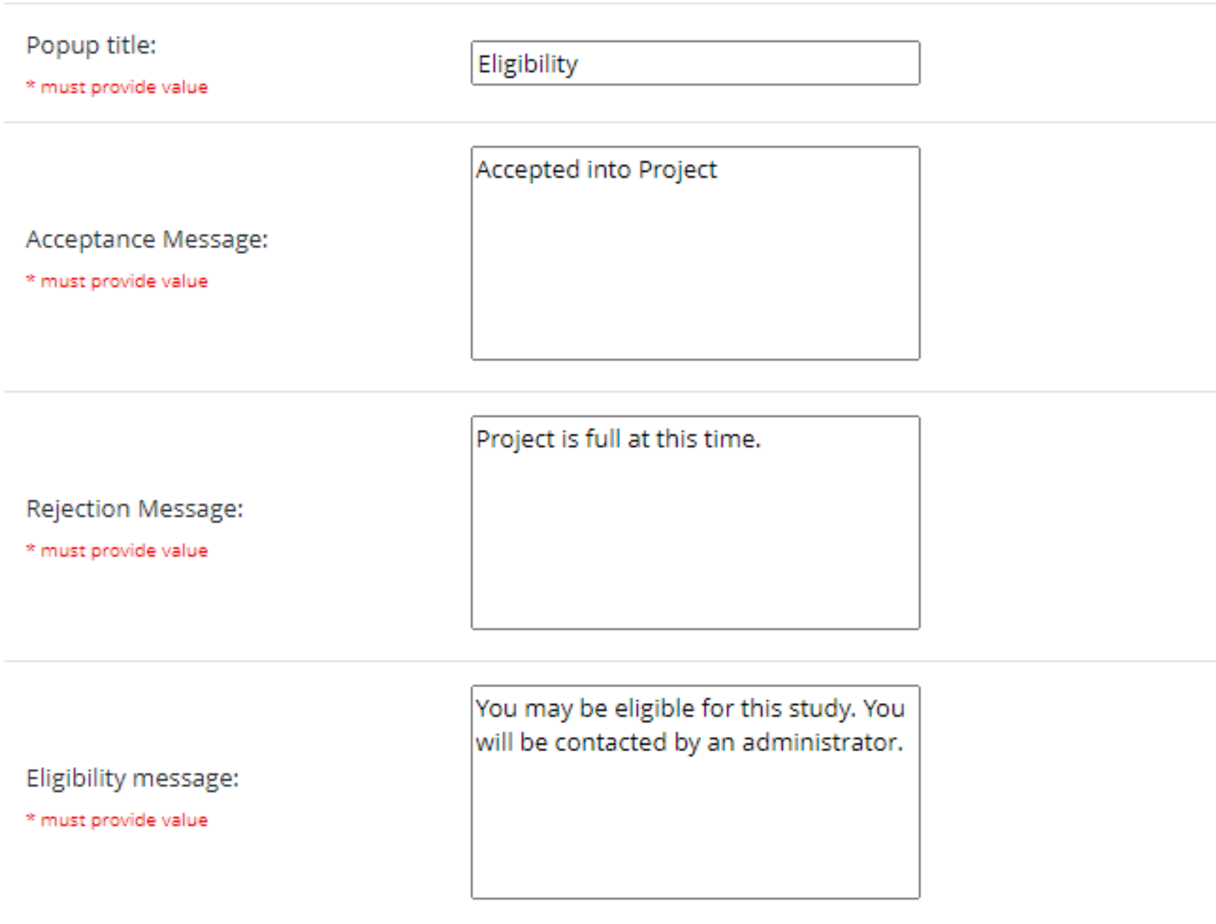
1. Open your project. Underneath the “Applications” header on the left-hand sidebar, click “External Modules.”
2. Click the green button that says, “Enable a Module.”
3. Search for “QuotaConfig” and Select the “Enable” button.
4. Click the “Configure” button, which will take you to the screen below:

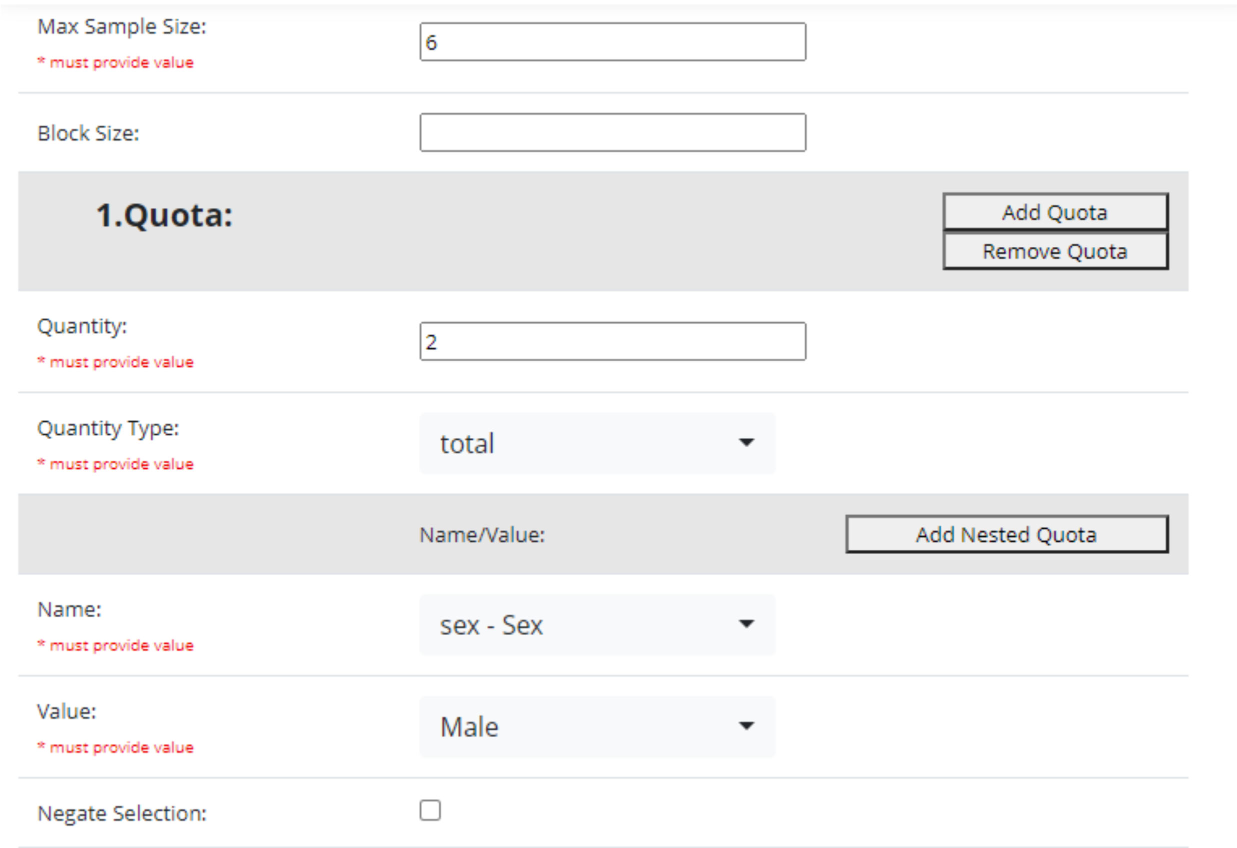


Next, customize the module for your project:

1. Select the variable you would like to use for the “Passed Quota Check Indicator.” This must be a yes/no variable already created in your project. If an appropriate field does not exist in your project, you will need to create a new field in online designer first. This field will automatically be answered by the module to tell you if a participant passed the quota check or not.
2. If your project has a delay between screening and consent/enrollment, select a variable for the “Confirmed Enrollment Indicator.” Again, this should be a yes/no field already in your project. Study staff will answer this question to indicate that a participant was fully consented/enrolled in the project. In such projects, a participant only counts toward a quota once they have been fully enrolled.

3. Customize the title and messages that pop up when someone completes the survey to let them know if they passed the quota or not and if they are eligible for the study or not (screenshot of the default messages below). If you are using the “Confirmed Enrollment Indicator,” you will want to use the “Eligibility message.” *[Sherly: do we want all three of these messages to be mandatory --Acceptance, Rejection, and Eligibility?]*





Finally, add your desired quotas to the project:

1. Start by adding your max sample size for the study in the “Max Sample Size” box.
2. Optionally, you can also add “Block Sizes” which will split the quota checks into blocks of participants to ensure equal enforcement of your quotas throughout the study.
3. Below this you will add your desired quotas, by clicking the “Add Quota” button on the right.
4. Add the quantity for the quota and the quantity type -- you can select quantity to be a set number of participants or a percentage of the participants.
    a. In the example above, we have it set to only allow 2 males into the project.
5. Then you will select the field that you want the quota based on. Above, you can see we have it based on Sex and limited the number of Male (value field) entries into the project.
6. You can also add select “Add Nested Quota” to add additional criteria to your main level quota.
    a. In this example, if we want only 2 White Males in our study, we would add the variable “Race” as a nested quota under Sex and select “White” as the value. Nested criteria are “AND” statements.
7. To add a second quota (an “OR” statement), you would click the “Add Quota” button to the right of 1. Quota above.
8. You can add as many quotas as needed.