

Person Index Loading Instructions

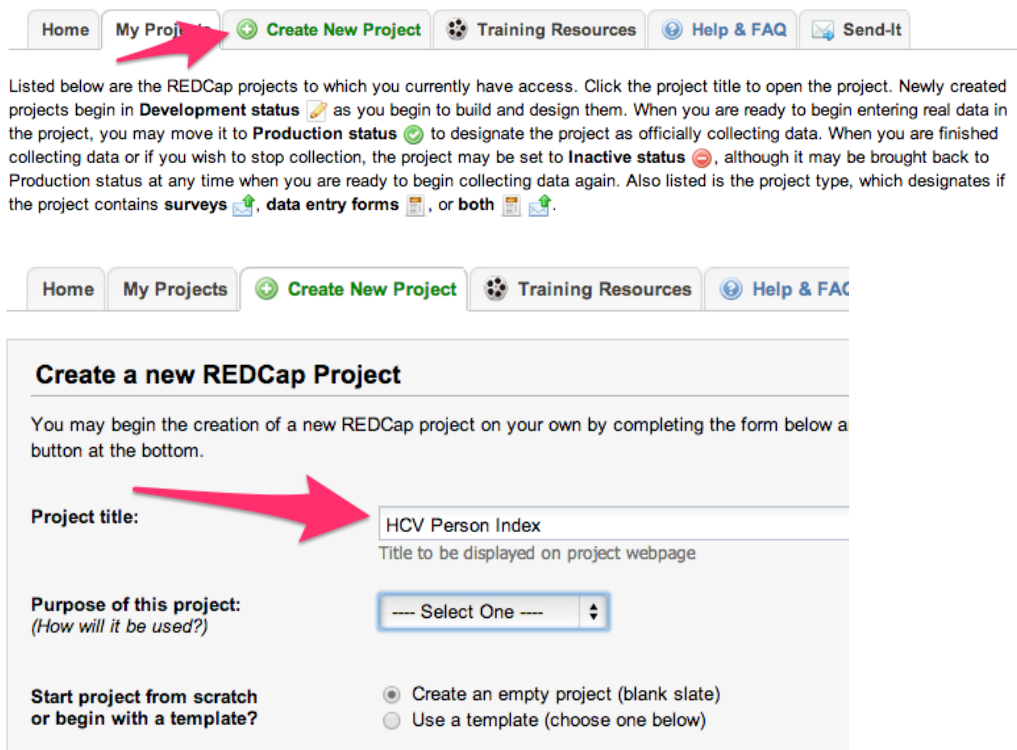
Note: These instructions include a section for the Health System Sites Attribute

The person index is a REDCap project and related components that stores research subject identifiers. This data store is designed to be populated by a human and queried by software.

The instructions below assume you have the permissions to create a new REDCap project, load a data dictionary, edit a form field, create a user, set user permissions, and create an API Token. Depending on how your REDCap server is configured you may or may not have the permissions to do these tasks yourself. Consult with your local REDCap managers for assistance if you do not see these options.

How to Create the Person Index REDCap Project

Select the “Create New Project” tab. Enter “HCV Person Index” for the project title.



Home My Projects **Create New Project** Training Resources Help & FAQ Send-It

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. Newly created projects begin in **Development status** as you begin to build and design them. When you are ready to begin entering real data in the project, you may move it to **Production status** to designate the project as officially collecting data. When you are finished collecting data or if you wish to stop collection, the project may be set to **Inactive status**, although it may be brought back to Production status at any time when you are ready to begin collecting data again. Also listed is the project type, which designates if the project contains **surveys**, **data entry forms**, or **both**.

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Create a new REDCap Project

You may begin the creation of a new REDCap project on your own by completing the form below a button at the bottom.

Project title:
Title to be displayed on project webpage

Purpose of this project:
(How will it be used?)

Start project from scratch or begin with a template?

- ☒ Create an empty project (blank slate)
- ☐ Use a template (choose one below)

Load this dictionary into a new REDCap project

Locate the supplied personIndex_DataDictionary.csv, select it with the “Choose File” button, and then click the “Upload File” button.



This module will allow you to create new data collection instruments/surveys or edit existing ones using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use the Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Upload Data Dictionary is more helpful if you will be adding a large number of fields for this project.


This module may be used for making changes to the project, such as adding new fields or modifying existing fields using an offline method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV (Comma Separated Values) file that you may construct your project fields and afterward upload the file here to commit the changes to the project.

Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it. Once your file has been uploaded, changes will NOT immediately be made but will be displayed on the project page. That all the formatting in your Data Dictionary is correct before official changes are made to the project.

Need some help?

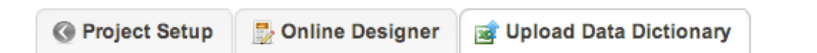
If you wish to view an example of how your Data Dictionary may be formatted, you may download the [Data Dictionary Example File](#), or you may view the [Data Dictionary Tutorial Video \(14 min\)](#). For help setting up your Data Dictionary, see the instructions listed on the [Help & FAQ](#).

Steps for making project changes:

- 1.) [Download the current Data Dictionary](#) 
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

A screenshot of the "Upload your Data Dictionary file (CSV file format only)" form. The form is light green and contains two buttons: "Choose File" and "Upload File". The "Choose File" button is highlighted with a blue border, and the "Upload File" button is highlighted with a grey border. Two red arrows point to the buttons: one labeled "1." points to the "Choose File" button, and another labeled "2." points to the "Upload File" button. The text "personIndex_DataDictionary.csv" is visible next to the "Choose File" button.

Ignore the name length errors that follow and commit the changes made by the dictionary import.



This module will allow you to create new data collection instruments/surveys or edit existing ones. using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use eit Designer may help you get some initial fields/forms built quickly or to make quick edits, but using t more helpful if you will be adding a large number of fields for this project.

- ✓ **Your document was uploaded successfully and awaits your confirmation below**
- You are now required to review any warnings below and then click the button at the t commit the field changes to the project. Follow the instructions below.
 - The uploaded data dictionary **contains 6 fields**, which will replace the 6 fields that c (excluding 'Form Status' fields, which are automatically generated by REDCap).

Allowable warnings found in your Data Dictionary:

Variables/field names are recommended to be less than 26 characters in length. You may want to names:

study_subject_number_verifier_value (A3)
study_subject_number_verifier_field (A7)

this is OK.

Are you ready to commit the changes to the project from the uploaded Data Dict
(Click the button below to submit the changes.)

Commit Changes

Adjust User Rights

To adjust user rights, access the User Rights tool via the menu on the left side of the REDCap screen.

The screenshot shows the REDCap main menu on the left with options like User Rights, Graphical Data View & Stats, Data Quality, API, and Report Builder. The main content area displays several optional modules and customizations that can be enabled, such as Auto-numbering for records, Scheduling module, Randomization module, and Designate an email field. Below these, there's a section for 'Set up project bookmarks (optional)' and a section for 'User Rights and Permissions' which is highlighted with a red arrow. The 'User Rights and Permissions' section explains that users can grant access to other users or edit privileges, and provides links to 'User Rights' and 'Data Access Groups'. At the bottom, there's a 'Move your project to production status' section.

In REDCap User Rights, revoke "Rename Records" for each user. This prevents a revision to the Subject Number after it is entered.

The screenshot shows the REDCap User Rights tool interface. The top header includes the REDCap logo and the University of Florida Clinical and Translational Science Institute (CTSI) logo. The main content area is titled 'HCV Person Index Dev Instance' and contains a 'Project Setup' tab, a 'User Rights' tab, and a 'Data Access Groups' tab. Below the tabs, there's a section for 'Choose existing project user' and a text box for 'New user name'. The 'User Rights' tab is selected, and the 'Comprehensive User Rights View' table is displayed. The table lists various permissions for different users, including 'Rename Records', which is highlighted with a red arrow and the text 'must be "X" for each user'.

Username	Expiration	Calendar	Data Export Tool	Data Import Tool	Data Comparison Tool	Logging	File Repository	User Rights	Data Access Groups	Graphical Data View & Stats	Data Quality (created/edit rules)	Data Quality (execute rules)	Reports & Report Builder	Record Locking Customization	Lock/Unlock Records	Project Design and Setup	Create Records	Rename Records	Delete Records	API
amomurra	never	✓	Full Data Set	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓	✗	✗	✗
mohan88	02/08/2015	✓	Full Data Set	✗	✗	✗	✓	✗	✗	✓	✗	✗	✓	✗	✗	✗	✓	✗	✓	Export Import
nrejack	never	✓	Full Data Set	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓	✓	✗	✗	Export Import
pbc	never	✓	Full Data Set	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓	✓	✓	✓	Export Import
rkandula	02/08/2015	✓	Full Data Set	✗	✗	✗	✓	✗	✗	✓	✗	✗	✓	✗	✗	✗	✓	✗	✓	Export Import

In REDCap User Rights, set "Data Entry Rights" to "Read Only" for the "UUID Form" to hide that form from user view.

Project Setup User Rights Data Access Groups

You may set the rights for the user below by checking the boxes next to the application tools to which you wish to grant their access. You may also grant them or deny them access to individual data collection instruments, if so desired. To save your selections, click the Save Changes button at the bottom of the page.

Editing existing User "pbc"

Basic User Rights

Calendar

☒

Data Export Tool

No Access

De-Identified

☒ Full Data Set

Data Import Tool

☒

Data Comparison Tool

☒

Logging

☒

File Repository

☒

User Rights

☒

Data Entry Rights

*NOTE: The data entry rights *only* pertain to a user's ability to view or edit data on the web page. It has no effect on what data is included in data exports.*

	No Access	Read Only	View & Edit
Person Identifiers	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
UUID Form	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Add Health System Sites

On 'Person Identifiers' form, revise 'Hospital Facility' field to use an accurate list of facility codes and names for your health care system. Follow these screen shots for an example of how to make those changes.

In your REDCap project, open the Online Designer

Project Home Project Setup Other Functionality Project I

Project status: Development

Not started

I'm done!

Main project settings

Enable

Use longitudinal data collection with repeating forms?

Enable

Use surveys in this project?

VIDEO: How to

Modify project title, purpose, etc.

In progress

I'm done!

Design your data collection instruments

Add or edit fields on your data collection instruments. This may be done by (online method) or by uploading a Data Dictionary (offline method), in which Quick links: [Download PDF of data collection instruments](#) OR [Download](#)

Go to

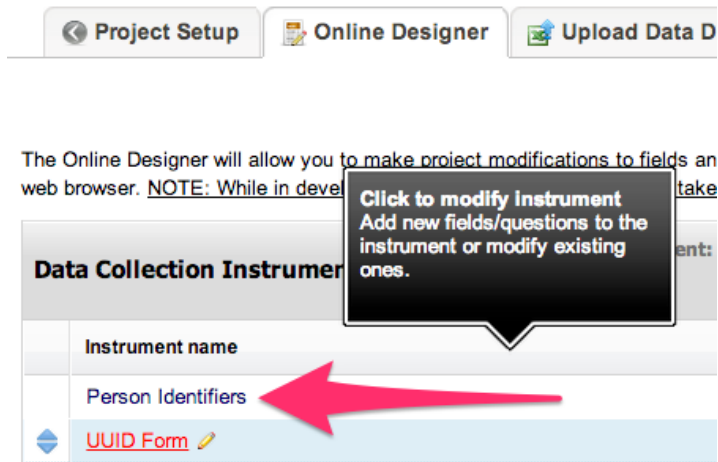
Online Designer

 or

Upload Data Dictionary

You may also browse for pre-built data collection instruments in the REDC

In the REDCap Online Designer, select the Person Identifiers form.



Within the Person Identifiers form edit the Hospital Facility field

The screenshot shows the 'Person Identifiers' form in the REDCap Online Designer. The form is divided into several sections. The first section is 'Target Subject Number (TSN)' with a variable of 'study_subject_number'. Below this is a note: 'NOTE: The field above is the record ID field and thus cannot be deleted or mo'. The second section is 'Year of Birth' with a variable of 'study_subject_number_verifier_value'. The third section is 'Electronic Medical Record Data' with a variable of 'mrn'. The fourth section is 'Medical Record Number' with a variable of 'mrn' and a red asterisk indicating it is required. The fifth section is 'Hospital Facility' with a variable of 'facility_code' and a red asterisk indicating it is required. A red arrow points to the 'Hospital Facility' field.

Replace the list of choices with the names and facility codes relevant to your site. Contact your EMR reporting team to get a list of codes that identify the different facilities within your Health System.

Edit Field ✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#)

Field Type: Multiple Choice - Drop-down List (Single Answer) ⌵

Field Label
Hospital Facility

Choices (one choice per line)
10, Gotham Hosital
20, Smallville Hospital
30, Batcave Clinic


Variable Name (utilized during data export)
facility_code ☐ Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

Required?* ☐ No ☒ Yes
* Prompt if field is blank

Identifier? ☒ No ☐ Yes
Does the field contain identifying information (e.g. name, SSN, address)?

Custom Alignment Right / Vertical (RV) ⌵
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

Looking for Branching Logic? Try clicking the  icon for this field after clicking the Save or Cancel button below.

[How do I manually code the choices?](#)

Save **Cancel**

Create API Token

For the data in your site's Person Index to be used by programs, those programs will need access through REDCap's API interface. You will need to create an API Token to allow those programs to authenticate and get the correct permissions on your Person Index.

This token can be created on any account, but for automated processes a *service account* will provide a more reliable authentication. Add a user in this REDCap project with the permissions shown here

Adding new User "hcv_svc"

Basic User Rights

Calendar

☒

Data Export Tool

☐ No Access

☒ De-identified

☐ Full Data Set

Data Import Tool

☐

Data Comparison Tool

☐

Logging

☐

File Repository

☐

User Rights

☐

Data Access Groups

☐

Graphical Data View & Stats

☐

Data Quality

☐ Create & edit rules

☐ Execute rules

What is Data Quality?

Reports & Report Builder

☐

Project Design and Setup

☐

API

☒ API Export

☐ API Import

What is the REDCap API?

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?

☐

Settings pertaining to project records: [Explain these settings](#)

Create Records

☐

Rename Records

☐

Delete Records

☐

Expiration Date

(if applicable)

Data Entry Rights

NOTE: The data entry rights **only** pertain to a user's ability to view or edit data on the web page. It has no effect on what data is included in data exports.

	No Access	Read Only	View & Edit
Person Identifiers	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
UUID Form	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

After you have created the new user, login as that user and request an Read-only API button on the left hand toolbar.

The screenshot displays the REDCap web interface. On the left is a sidebar with navigation links: 'My Projects', 'Project Home', 'Project Setup', 'Data Collection', 'Applications', and 'Help & Information'. The 'Data Collection' section is active, showing 'Record Status Dashboard' and 'Add / Edit Records'. The 'Applications' section lists various tools, including 'API'. The main content area shows the 'HCV Person Index Dev Instance' project page. It includes a description of the REDCap API, a section for the 'Your API token for project "HCV Person Index Dev Instance"', and buttons to 'Delete token' and 'Regenerate token'. The API token is displayed as a masked string. Below the token, it states 'The following user(s) have API tokens for this project: pbc'.

REDCap™

Logged in as [user] | Log out

My Projects
Project Home
Project Setup
Project status: Development

Data Collection [Edit instruments](#)

Record Status Dashboard
- View data collection status of all records

Add / Edit Records
- Create new records or edit/view existing ones

Data Collection Instruments:
Person Identifiers
UUID Form

Applications

Calendar
Data Export Tool
Data Import Tool
Data Comparison Tool
Logging
File Repository
User Rights
Graphical Data View & Stats
Data Quality
API
Report Builder

Help & Information
Help & FAQ
Video Tutorials

UF Clinical and Translational Science Institute
UNIVERSITY of FLORIDA
University of Florida
Clinical and Translational Science Institute (CTSI)

HCV Person Index Dev Instance

API

The REDCap API is an interface that allows external applications to connect to REDCap remotely, and is used for programmatically retrieving or modifying data or settings within REDCap, such as performing automated data imports/exports from a specified REDCap project. For details on the capabilities of the REDCap API and how to use it, please see the [REDCap API help page](#).

Your API token for project "HCV Person Index Dev Instance"

The API token below is **ONLY** for you and will work **ONLY** with this project. This token allows special access to REDCap data and **should NOT be shared with others**. If you think your token has been compromised, then please contact your REDCap administrator immediately **AND** either delete or regenerate your token by using the buttons below.

API Token:
[Masked Token]

Delete token Finished using the API for this project? If so, please delete your token for security reasons.

Regenerate token Think someone else knows your token? If so, please regenerate your token for security reasons.

The following user(s) have API tokens for this project: pbc