

# Person Index Loading Instructions

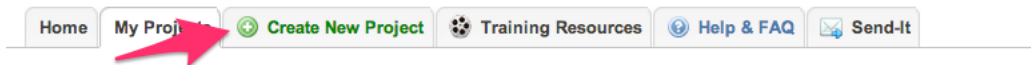
*Note: These instructions include a section for the Health System Sites Attribute*

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.

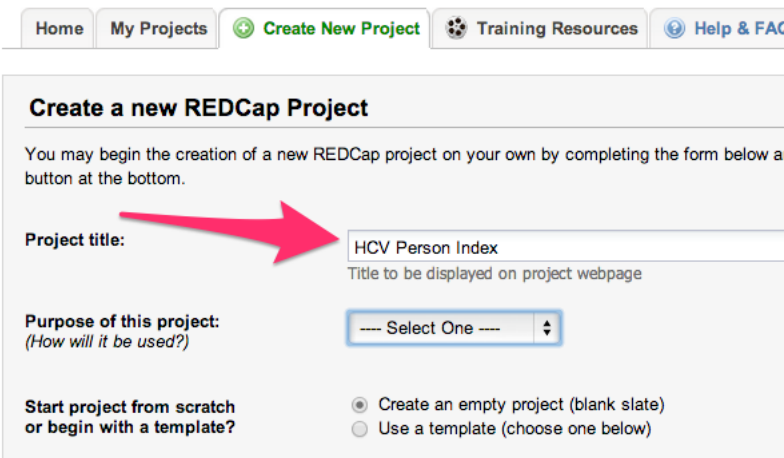
## How to Create the Person Index REDCap Project

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**.



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

### Create a new REDCap Project

You may begin the creation of a new REDCap project on your own by completing the form below and clicking the **Create Project** 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 Designer may help you get some initial fields/forms built quickly or to make quick edits, but using 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 the offline method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV (Comma Separated Values) file in which 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

1.

**Upload your Data Dictionary file (CSV file format only)**

Choose File personIndex\_DataDictionary.csv

Upload File

2.

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.

- User Rights
- Graphical Data View & Stats
- Data Quality
- API
- Report Builder
- Help & Information**
  - Help & FAQ
  - Video Tutorials
  - Suggest a New Feature

If you are experiencing problems, please contact your REDCap administrator.

You may also browse for pre-built data collection instruments in the [REDCap Shared Library](#)

**Enable optional modules and customizations**

Optional

Auto-numbering for records ?

Scheduling module (longitudinal only) ?

Randomization module ?

Designate an email field to use for invitations to survey participants ?

**Set up project bookmarks (optional)**

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

Go to

**User Rights and Permissions**

You may grant other users access to this project or edit the user privileges of current users on this project by navigating to the User Rights page. Additionally, if you wish to limit user access to certain records/responses for this project, you may want to use Data Access Groups, in which only users within a given Data Access Group can access records created by users within that group.

Go to  or

**Move your project to production status**

Move the project to production status so that real data may be collected. 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 then need to be approved by a REDCap administrator before taking effect.

Go to

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

**REDCap™**

Logged in as **pbic** | Log out

- My Projects
- Project Home
- Project Setup
- Project status: **Development**

**Data Collection** [Edit instruments](#)

- Record Status Dashboard
- Add / Edit Records

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

**UF Clinical and Translational Science Institute**  
UNIVERSITY of FLORIDA

University of Florida  
Clinical and Translational Science Institute (CTSI)

**HCV Person Index Dev Instance**

This page may be used for granting new users access to the project and for editing the rights of current project users. You may edit the rights of a current user by selecting them from the dropdown list below or add a new user by entering their user name in the text box and hitting the Tab key.

Choose existing project user

OR type a new user and hit the TAB key

New user name

**Comprehensive User Rights View**

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 nodes)	Data Quality (execute rules)	Reports & Report Builder	Record Locking Customization	Lock/Unlock Records	Project Design and Setup	Create Records	Rename Records	Delete Records	API
atommums	never	✓	Full Data Set	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓	✓	✗	✗	✗
mohan88	02/08/2015	✓	Full Data Set	✗	✗	✗	✓	✗	✗	✓	✗	✗	✓	✗	✗	✓	✓	✗	✓	Expo Impo
nmejack	never	✓	Full Data Set	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓	✓	✗	✓	Expo Impo
pbic	never	✓	Full Data Set	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓	✓	✗	✓	Expo Impo
rkandula	02/08/2015	✓	Full Data Set	✗	✗	✗	✓	✗	✗	✓	✗	✗	✓	✗	✗	✓	✓	✗	✓	Expo Impo

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

You may set the rights for the user below by checking the boxes next to the application tools to which you wish to grant them 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	<input checked="" type="checkbox"/>
Data Export Tool	<input type="radio"/> No Access <input type="radio"/> De-Identified <input checked="" type="radio"/> Full Data Set
Data Import Tool	<input checked="" type="checkbox"/>
Data Comparison Tool	<input checked="" type="checkbox"/>
Logging	<input checked="" type="checkbox"/>
File Repository	<input checked="" type="checkbox"/>
User Rights	<input checked="" type="checkbox"/>

**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 Information](#)

**Project status:** Development

Not started

**Main project settings**

☒ Use longitudinal data collection with repeating forms? [?](#)  

☒ Use surveys in this project? [?](#)
[VIDEO: How to](#)

In progress

**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 sample data collection instruments](#) OR [Download Data Dictionary](#)

Go to  or

You may also browse for pre-built data collection instruments in the [REDCap Instrument Library](#)

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

The Online Designer will allow you to make project modifications to fields an web browser. **NOTE:** While in devel

**Click to modify instrument**  
 Add new fields/questions to the instrument or modify existing ones.

Data Collection Instrument	
Instrument name	
Person Identifiers	
<a href="#">UUID Form</a>	

Within the Person Identifiers form edit the Hospital Facility field

Variable: study\_subject\_number

**Target Subject Number (TSN)**

NOTE: The field above is the record ID field and thus cannot be deleted or mo

Add Field Add Matr

Variable: study\_subject\_number\_verifier\_value

**Year of Birth**

Add Field Add Matr

**Electronic Medical Record Data**

Add Field Add Matr

Variable: mrm

**Medical Record Number**

\* must provide value

Add Field Add Matr

Variable: facility\_code

**Hospital Facility**

\* must provide value

Add Field Add Matr

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 Hospital  
20, Smallville Hospital  
30, Batcave Clinic

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

Variable Name (utilized during data export)

facility\_code

☐ Enable auto naming of variable based upon its Field Label?

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.

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[What is an E-signature?](#)

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](#)

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.






Logged in as  | [Log out](#)


 My Projects


 Project Home

 Project Setup

Project status: **Development**

Data Collection

 Record Status Dashboard

 Add / Edit Records

- View data collection status of all 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

## 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:



[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: **pb**