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- Brochures
- Software application
- Web screen shot
- No report, publication, or study
- Deliverable pending
- OTHER material

If OTHER, please describe:

Data Collection Website User Guide (RedCap)

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IMPLEMENTING PUBLIC HEALTH PREVENTION STRATEGIES FOR OBESITY, DIABETES, AND HEART  
DISEASE AND STROKE THROUGH CHRONIC DISEASE COORDINATING NETWORKS

DATA COLLECTION WEBSITE USER GUIDE

<https://redcap.mphi.org>

*FUNDED BY*

MICHIGAN DEPARTMENT OF HEALTH AND HUMAN SERVICES  
CARDIOVASCULAR HEALTH, NUTRITION AND PHYSICAL ACTIVITY SECTION



*Developed by*

CENTER FOR DATA MANAGEMENT AND TRANSLATIONAL RESEARCH AT MPHI



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## PURPOSE

This document is intended to provide instructions for the use of the REDCap data collection website developed to support a grant from the Michigan Department of Health and Human Services (MDHHS). The website, <https://redcap.mphi.org>, is hosted on a secure server at Michigan Public Health Institute (MPHI). Please address questions to Kily Buta, [ButaK@michigan.gov](mailto:ButaK@michigan.gov).

## WEBSITE ACCESS

- Each CDCN will have one user account. Usernames are not case sensitive.
- Passwords are case sensitive. Users are prompted to set up password recovery questions. These responses are needed to reset the password using the **Forgot your password** link on the log in page.
- Each CDCN will determine if more than one person will be using the account and how to share the password and password recovery responses.
- Users will receive the error message below if more than one person attempts to edit the same data collection instrument (form) for the same record. NOTE: Use caution when accessing a record at the same time as another user as only the data most recently entered is saved.

### ! Simultaneous users - Access prohibited

Another user (test1 - [Test One](#)) is currently on this data collection instrument editing the same record (121-1). To prevent data entry conflicts, you will not be allowed to view and edit this record on this form until the other user has left the page. Until then, you may click the button below at any time to check if they have left, or you may edit other forms for this record and check back later.



*Please use the navigation built in the website, NOT the browser back/forward or refresh (F5).*

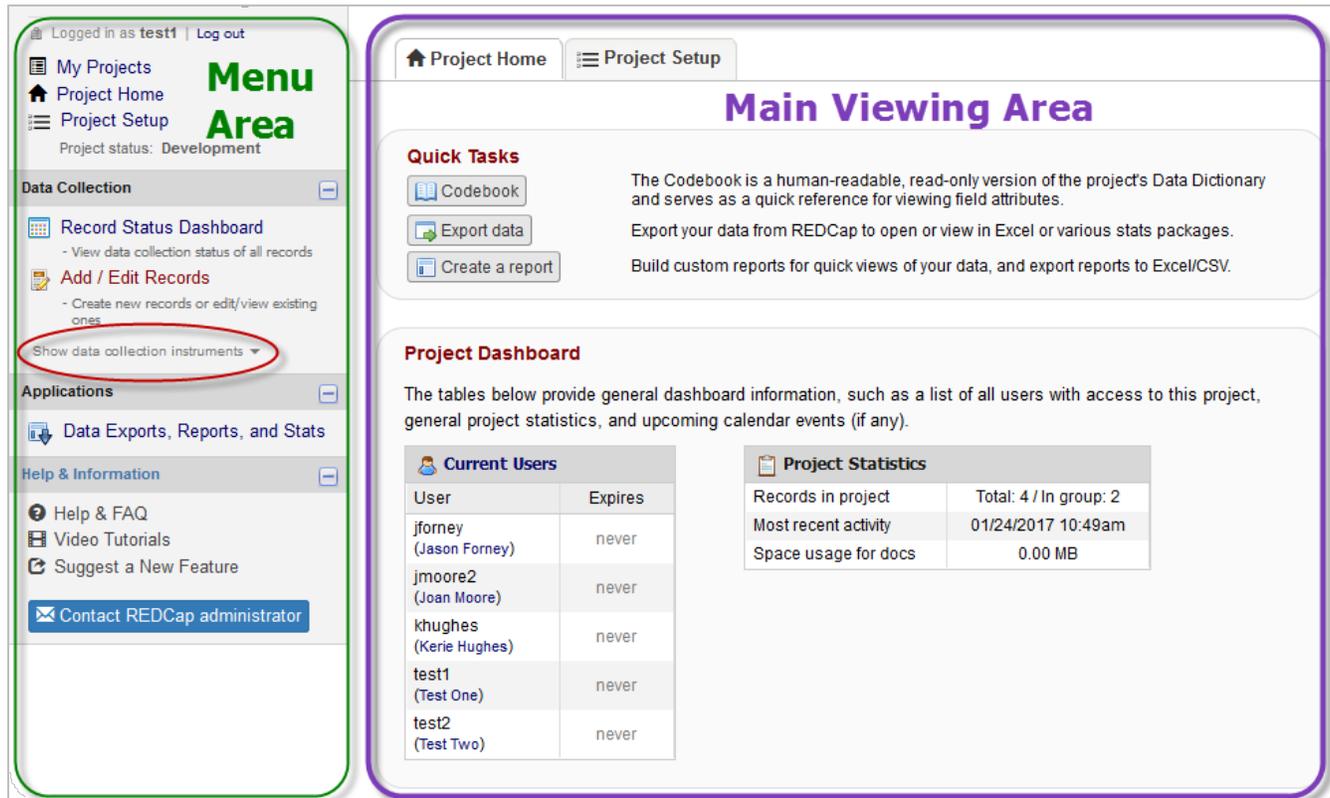
## MY PROJECTS

Project Title	Records	Fields	Instruments	Type	Status
1422 Grant	13	659	15 forms		Active

- **My Projects** – first view after log in. Select the project link under Project Title to begin data entry.
- **My Profile** link at the top right corner opens the Edit Your User Profile page. The only changes that should be made in the profile section are under the **Password-related Options** where the password can be reset and recovery questions may be edited.
- **Home** – general information pertaining to REDCap.
- **Help & FAQ** – searchable help section about REDCap.
- **Training Resources** – videos about REDCap. The video titled Data Entry Overview is a short introduction to using REDCap that may be helpful.
- **Send-It** – not applicable for this project.

# PROJECT HOME PAGE

- **Project Home** page is divided into two main sections; 1) Menu Area, and 2) Main Viewing Area.



## MENU AREA

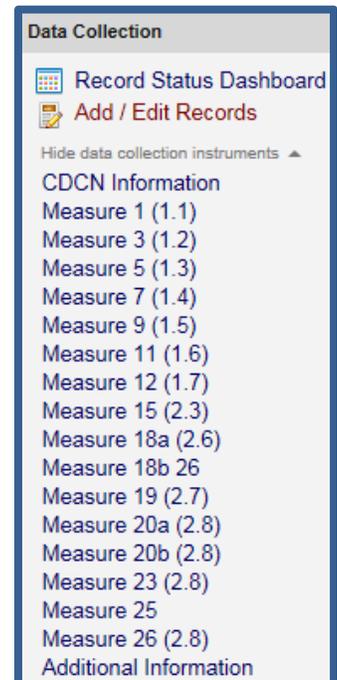
- The **Project Home** link can be used to return to this page. The other links at the top of the Menu Area (My Projects and Project Setup) are not useful for this project.

### Data Collection Section

- **Record Status Dashboard** – Displays the status of all records in table format. It is not useful for this project.
- **Add / Edit Records** – Use this link to begin a new record or open an existing one.
- **Data Collection**



- ☞ Click on the triangle to show/hide list of instruments (forms).
- ☞ A REDCap project collects data through forms and surveys.
- ☞ All instruments in this project are forms.
- ☞ This section is where all reporting is completed. Detailed instructions are provided later.
- ☞ All forms do not need to be completed at one time. Be sure to save your data before logging out as data are not saved automatically.

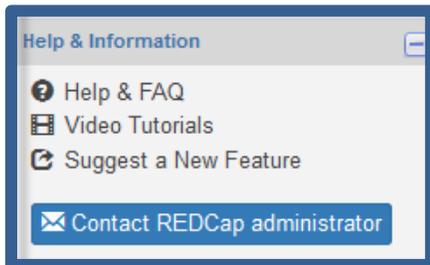


## Applications Section



- **Data Exports, Reports, and Stats** provides options for exporting all or some of your data in various formats.

## Help & Information Section



- This section applies only to the use of REDCap, not to specifics of this project.
- **DO NOT** USE THE “Contact REDCap administrator” link. Please send inquiries to the contact person of your project.

## MAIN VIEWING AREA

### Project Home tab

#### ➤ Quick Tasks

- ☞ **Codebook** – a quick reference of the field properties in this project. It includes the coded values for checkbox fields that will be helpful when working with exported data.
- ☞ **Export Data** – provides options for exporting all or some of your data in various formats.
- ☞ **Create a report** – build and save custom reports

#### ➤ Project Dashboard

- ☞ General project statistics. It is not useful for this project.

**Project Setup tab** is not used for this project.

# GENERAL GUIDELINES FOR ALL DATA ENTRY FORMS

This section explains items that apply to all forms. Form-specific information is provided later.

## FORM STATUS

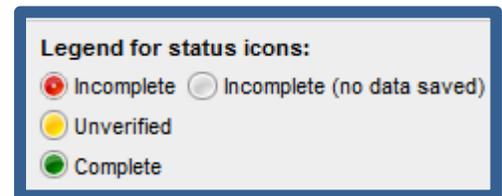
- At the end of each form is the Form Status section. The default value is Incomplete. Select Complete when data entry is finished. A third option of Unverified is not used.
- Edits can still be made in a record marked complete until locked by the administrator. The status may be changed as often as needed until the record is locked.



The screenshot shows a 'Form Status' section with a 'Complete?' label and a dropdown menu currently set to 'Incomplete'. There is a small 'H' icon to the left of the dropdown.

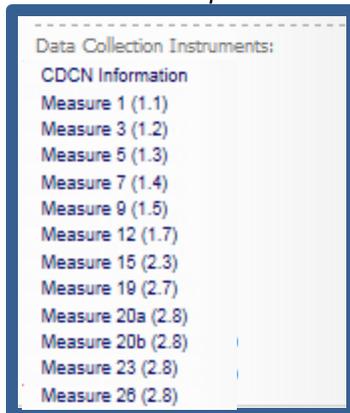
## STATUS ICON LEGEND

- Circles will display to the left of each form when a record is opened. If data has not been saved, the circle will not have any color. The color will then change based on the Form Status.



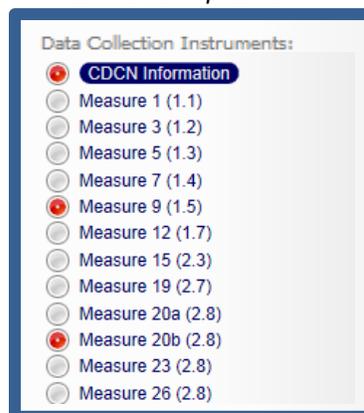
**Legend for status icons:**  
● Incomplete    ● Incomplete (no data saved)  
● Unverified  
● Complete

*View of Forms List Before Record is Opened*



Data Collection Instruments:  
CDCN Information  
Measure 1 (1.1)  
Measure 3 (1.2)  
Measure 5 (1.3)  
Measure 7 (1.4)  
Measure 9 (1.5)  
Measure 12 (1.7)  
Measure 15 (2.3)  
Measure 19 (2.7)  
Measure 20a (2.8)  
Measure 20b (2.8)  
Measure 23 (2.8)  
Measure 26 (2.8)

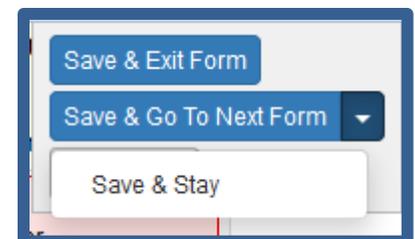
*View of Forms List After Record is Opened*



Data Collection Instruments:  
● CDCN Information  
● Measure 1 (1.1)  
● Measure 3 (1.2)  
● Measure 5 (1.3)  
● Measure 7 (1.4)  
● Measure 9 (1.5)  
● Measure 12 (1.7)  
● Measure 15 (2.3)  
● Measure 19 (2.7)  
● Measure 20a (2.8)  
● Measure 20b (2.8)  
● Measure 23 (2.8)  
● Measure 26 (2.8)

## SAVE OPTIONS

- Save links are located at the end of each form or in a floating box to the right of each form.
- Save at any time during data entry or before leaving a form.



Save & Exit Form  
Save & Go To Next Form  
Save & Stay



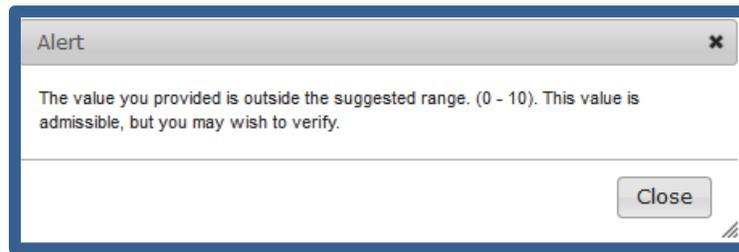
*Remember – Data are not saved automatically! Save often.*

## VALIDATION

- Some of the fields in this project include validation for either format or data type. REDCap classifies its validation into two categories.
  - ☞ Hard validation means the user cannot continue data entry until the value is either corrected or deleted. Reporting Period ID, email and phone number on the *CDCN Information* page are examples with this validation.



- ☞ Soft validation retains the value entered, allows the user to continue and displays an alert. The value is underlined in red.



## FORM SPECIFIC INFORMATION

- Select **Add / Edit Records** link in the **Menu Area** to add a new record or open an existing record.
- The **Main Viewing Area** now displays options to select a record or add a new record.

### RECORD HOME PAGE

- Displays after selecting Add new record or selecting an existing record.

#### *New Record*

- If beginning a new record as pictured below:
  - ☞ All circles in the Status column are gray.
  - ☞ Begin data entry with the *CDCN Information* form first by selecting the gray status circle beside the name.

#### **Definition of Record**

- ❖ All data collection instruments (with the same Record ID) must be completed to equal one record (e.g., one row in a spreadsheet).
- ❖ Each record equals one reporting period.

*View of Record Home Page for a New Record*

Data Collection Instrument	Status
CDCN Information	<input type="radio"/>
Measure 1 (1.1)	<input type="radio"/>
Measure 3 (1.2)	<input type="radio"/>
Measure 5 (1.3)	<input type="radio"/>
Measure 7 (1.4)	<input type="radio"/>
Measure 9 (1.5)	<input type="radio"/>

## Existing Record

- If opening an existing record as pictured to the right:
  - ☞ Green circle indicates the *CDCN Information* is complete. Gray circles in the remaining forms indicate no data has been entered yet.
  - ☞ Appended to the Record ID of an existing record is a Reporting Period ID, which is explained in the next section.
  - ☞ Select the circle beside the form you wish to open. Forms do not have to be completed in sequential order.
  - ☞ “Choose action for record” link downloads a PDF version of data entered in all forms for this record.

View of Record Home Page for an Existing Record

**Record Home Page**

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

Choose action for record ▾

Record ID **19-4** (Reporting Period ID **2017\_Feb\_NKFM**)  
NKFM

Data Collection Instrument	Status
CDCN Information	●
Measure 1 (1.1)	○
Measure 3 (1.2)	○
Measure 5 (1.3)	○
Measure 7 (1.4)	○

## CDCN INFORMATION

View of Record ID when beginning a new record.

Note that the Record ID is displayed in two places. The first two digits identify your CDCN and will always be the same.

- When beginning a new record, complete the *CDCN Information* first to identify the reporting period.
- Record ID is an auto-generated number. Each of the forms completed for a report period have the same ID.
- Verify all forms have the same Record ID when moving to a new one.

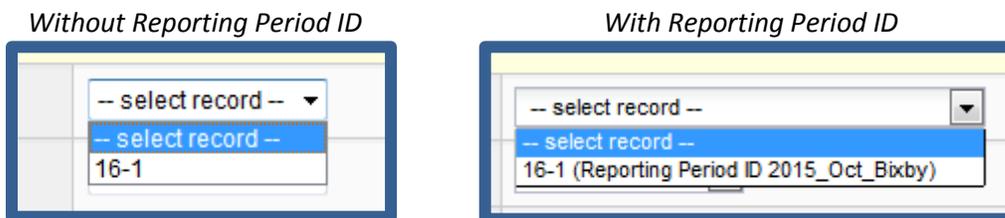
Data Entry Section of CDCN Information

<b>Reporting Period ID</b> * must provide value	<input type="text"/> Please use format of YYYY_report due_CDCN name.
<b>Reporting Year</b> * must provide value	<input type="text"/> YYYY
<b>Month Report Due (Feb or Aug)</b> * must provide value	<input type="text"/>
<b>Name of Person Entering Data</b> * must provide value	<input type="text"/>
<b>Email of Person Entering Data</b> * must provide value	<input type="text"/>
<b>Phone Number of Person Entering Data</b> * must provide value	<input type="text"/>
<b>Form Status</b>	
Complete?	Incomplete ▾

- The Record ID is displayed in both the Main Viewing Area and above the list of forms in the Menu Area.
- The record ID will be further enhanced with the Reporting Period ID as described below.

## Reporting Period ID

- A secondary unique field used with the Record ID to identify a unique record.
  - ☞ The Reporting Period ID contains three pieces of data:
    1. Year
    2. Month report is due (abbreviate as **Feb** or **Aug** ONLY). Please do not spell out the month or change the case to ensure correct data export.
    3. CDCN name
  - ☞ Use “YYYY\_month\_CDCN name” format.
  - ☞ It is very important that the information is entered EXACTLY as demonstrated in the Feb 2017 reporting examples below.
    - 2017\_Feb\_Bixby
    - 2017\_Feb\_GDAHc
    - 2017\_Feb\_GRYMCA
    - 2017\_Feb\_NKFM
  - ☞ After selecting a save option, the Reporting Period ID is displayed beside the Record ID. This does not change the Record ID, but describes the time period of the record.



- **Reporting Year** and **Month Report Due** are provided to assist with data analysis when working with exported data.
- **Name of Person Entering Data, Email of Person Entering Data, and Phone Number of Person Entering Data**
  - ☞ Person who can be contacted for questions about the report.
  - ☞ Phone Number: only need to enter numbers only – no hyphens needed.
- **Form Status**
  - ☞ Select Complete when finished with data entry.
  - ☞ Data may be edited when selecting Complete for the status until the record locked by the administrator. The status may be changed as often as needed until the record is locked.

## MEASURE 1 (1.1)

### ➤ Number of Locations

- ☞ Enter the number of locations needed to include in the report. A corresponding number of textbox groups will then display.
- ☞ The number of items may be changed at any time should more/less groups be needed. Reducing the number after data has been entered for all groups will trigger a message that data will be deleted.

#### *Measure 1 (1.1) Before Number of Locations is Entered*

 Editing existing Record ID 19-4 (Reporting Period ID 2017\_Feb\_NKFM)

Record ID 19-4

**CDC Measure 1 (1.1)**  
Key community locations that implement nutrition and beverage standards.

\*\*\* DATA ARE NOT SAVED AUTOMATICALLY. Remember to Save and Continue often. \*\*\*

**Number of Locations**

Please enter the number of key community locations where you worked on implementing nutrition and beverage standards during this reporting period. A corresponding number of textbox groups will then display. The number of locations may be changed should more/less groups be needed.

\* must provide value

maximum of 20

**Form Status**

Complete?

### Measure 1 (1.1) After Number of Locations is Entered

#### Measure 1 (1.1)

Editing existing Record ID 19-4 (Reporting Period ID 2017\_Feb\_NKFM)

Record ID 19-4

**CDC Measure 1 (1.1)**  
Key community locations that implement nutrition and beverage standards.

\*\*\* DATA ARE NOT SAVED AUTOMATICALLY. Remember to Save and Continue often. \*\*\*

**Number of Locations**

Please enter the number of key community locations where you worked on implementing nutrition and beverage standards during this reporting period. A corresponding number of textbox groups will then display. The number of locations may be changed should more/less groups be needed.

maximum of 20

\* must provide value

**Measure 1 (1.1) Location 1**

**Measure 1 (1.1) Location 1**  
Name of Venue

\* must provide value

**Measure 1 (1.1) Location 1**  
Street Address

\* must provide value

**Measure 1 (1.1) Location 1**  
City

\* must provide value

**Measure 1 (1.1) Location 1**  
Zip

\* must provide value

**Measure 1 (1.1) Location 1**  
Notes

Expand

**Form Status**

Complete? Incomplete ▼

### REMAINING FORMS

- On all of the remaining forms, the first or second field requires entry of a number similar to the **Number of Locations** on Measure 1 (1.1). A corresponding number of textbox groups will then display.
- The number of items may be changed at any time should more/less groups be needed.
- The forms do not have to be completed in any order and do not have to be done in one sitting.



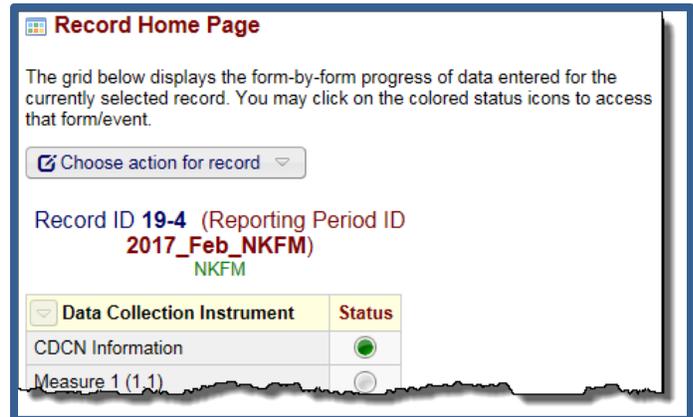
*Remember – Data are not saved automatically! Save often.*

# DATA REPORTS & EXPORT

## PDF FORMAT

### ➤ Option 1 – Record Home Page

- ☞ Select Add / Edit Records link in Menu Area.
- ☞ Select a record to open.
- ☞ Download data for all forms from link titled *Choose action for record*.



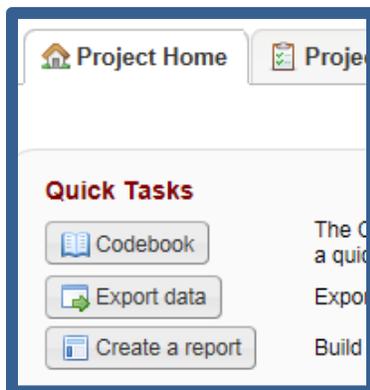
### ➤ Option 2 – Selected Record

- ☞ Select Add / Edit Records link in Menu Area.
- ☞ Select a record to open.
- ☞ Select a form.
- ☞ Select desired option from the link titled *Download PDF of instrument(s)* at the top of each form.



### ➤ Option 3 – Quick Tasks

- ☞ Select *Export data* link in Quick Tasks on the Project Home page,
- ☞ OR *Data Exports, Reports, and Stats* under Applications section in the Menu Area. and
- ☞ Then the PDF & Other Export Options tab.



## SPREADSHEET/STATISTICAL FORMAT

- Custom reports created using the Create New Report tab or My Reports & Exports tab produce the information in a spreadsheet format.
- Information may be viewed online or exported using one of the export formats shown below.

Exporting "All data (all records and fields)"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and whether or not to perform de-identification on the data set.

**Choose export format**

-  CSV / Microsoft Excel (raw data)
-  CSV / Microsoft Excel (labels)
-  SPSS Statistical Software
-  SAS Statistical Software
-  R Statistical Software
-  Stata Statistical Software

**De-identification options (optional)**

The options below allow you to limit the amount of sensitive information that you are exporting out of the project. Check all that apply.

**Known Identifiers:**

- Remove all tagged Identifier fields (tagged in Data Dictionary)
- Hash the Record ID field (converts record name to an unrecognizable value)

**Free-form text:**

- Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.)
- Remove Notes/Essay box fields

**Date and datetime fields:**

- Remove all date and datetime fields
- OR —
- Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record) [What is date shifting?](#)

[Deselect all options](#)

**Export Data** **Cancel**