Streamlining the REDCap Training and User Account Creation Process

Amanda Miller MLIS, Swan Ellert MS, Linda Carlin PhD, Jessica Bondy MSHA, Michael G. Kahn MD, PhD
Colorado Clinical & Translational Sciences Institute, University of Colorado Anschutz Medical Campus

**Situation**
We support a rapidly growing user base that stretches across nine primary institutions (all with separate domain emails) and multiple instances of REDCap.

**Problems**
1. Account administration was becoming too time-consuming
2. Training sessions were becoming crowded
3. Difficult for people from other institutions to travel to the campus where training sessions are held
4. Confusion regarding the process of getting an account due to differences by institution and instance of REDCap
5. Lack of consistency in the training of data entry personnel, who were trained by project managers

**Solution**
We developed a streamlined online training system using REDCap which uses surveys, imbedded videos, randomized quizzes, and branching logic to provide standardized online training, where the user has to demonstrate proficiency before receiving an account.

1. Potential users choose whether they need a full or basic (data entry) account
2. They view tutorial videos, 5-15 minutes in length, and answer quick check questions
3. Users answer a few demographic questions about their institution and which REDCap instance they need to access
4. After viewing all videos, users take a short comprehension quiz
5. Upon passing the quiz, users are directed to the appropriate instructions for setting up their account.

**Tutorial Structure**
- Demographics
- Watch Videos & Answer Quick Check Questions
- Pass Assessment
- Failing Score: First several attempts
  - Quiz
  - Corrections
- Passing Score: Final attempt
  - Failing score
  - Quiz
  - Corrections
- Contact REDCap Administrator

**Screenshots**

**Accounts Created Year-to-Year Comparison**
We have seen a significant increase in the number of full accounts created since implementing the online tutorial—many people who would have previously just relied on colleagues for training and received basic access are opting for full training so they can use a wider range of REDCap features.

**Primary Institutions**

**Using REDCap to teach REDCap**
- All items use base REDCap functions
- The tutorial is presented using REDCap surveys
- Videos are imbedded in the surveys
- Branching logic is used on the quick check questions, quiz corrections, and instructions for account creation

**Future Innovations and Automations**
- Develop a ticket system to automatically provide answers to common problems and elicit all necessary information for investigating complex problems
- Use our new free time to develop advanced REDCap tutorials that can be made available online or in-person
- What else can we automate?