How to Move a Project into Production Status

All projects begin in Development Status and should be moved into Production Status before real data is collected. Requests to move a project into production are approved by the IHSI REDCap team.

The IHSI REDCap team does not review how projects are built or make changes to project builds prior to moving projects to production. Research teams are expected to have tested the design and functionality of all forms and surveys prior to requesting a project be moved into production.

To move a project into production:

1. After you have finished building your project, thoroughly test and review the project.
   - The amount of testing you need to do will depend on the complexity of your project. Some, but not all, functions to test include: branching logic, validations, piping, action tags, survey invitations, survey functionality, data export functionality, and alerts and notifications.
     - Test any surveys as if you are the worst-behaving survey participant.
   - Some, but not all, items to review include: user rights and access privileges, coding schemas, and longitudinal events.
   - Always check the following security and privacy requirements:
     - All fields that contain identifying information (e.g. any of the 18 HIPAA identifiers) are marked as identifiers. You must do this, even if your data is not regulated by HIPAA.
     - That the “Save & Return” survey feature is turned off unless it is a one-time, short-term survey (≤ 1 month in duration). Respondents should never be allowed to return without a return code. This policy is outlined in the Protecting High Risk Data document.
   - While changes can be made after a project is moved to production, the project should be as close to completely built as possible before active data collection begins. Some things cannot be changed after a project is moved to production, including moving between a classical and longitudinal project, deleting events in a longitudinal project, and changing variable names.

2. Once you are confident your project has been thoroughly tested and all items, including privacy and security settings, have been reviewed, use the “Move project to production” button at the bottom of the “Project Setup” tab to move the project into production.
3. A pop-up window will appear asking whether you would like to keep or delete all test data. Select your data retention preference. You must select an option for the survey in step 4 to submit correctly.

4. Once you submit your move to production request, you will be prompted to take a short survey to collect project information. The survey must be submitted to move forward with the request.

5. The IHSI REDCap team will follow up via email with any needed adjustments or questions. Requests or questions may be about:
   - Marking identifiers
   - Adjusting survey settings
   - A student’s faculty or staff supervisor
   - Data retention preferences

6. The research team must respond to the IHSI REDCap Team via email to confirm any requested changes have been made. The REDCap software does not notify us when such changes are made.

7. A confirmation email that the project has successfully been moved to production will be sent to the user requesting the move. It is up to the individual user to communicate updates to their supervisor/team.

As a reminder, you will not be able to edit the project fields in real time once the project is in production. However, if necessary, edits may be made in Draft Mode (see Making Changes in Production).