Data Resolution Workflow in REDCap

Data queries are common in any project where more than one person is involved in data entry, data quality validation, or data export. Someone might question a response if it looks unusual or unexpected, for example, if a follow-up response does not match a prior entry. In this case, there might be an exchange of emails or messages between the data entry personnel and the researcher conducting the data quality check. These exchanges are often hard to refer back to afterwards, and the validation process can be lost from the record.

REDCap's data resolution workflow offers a formal method of managing and documenting data queries in REDCap. It allows queries regarding a particular data point to be initiated, responded to, and resolved by assigning point persons for each task.

Enabling and using data resolution workflow in REDCap

1. Select ‘Project Setup’ from project main page.

2. Scroll down, and in ‘Enable optional modules and customizations’ select ‘Additional Customizations.’
3. In the pop-up window, ensure that the box is checked for ‘Enable the field comment log or data resolution workflow (data queries), and next to ‘Enable’, select ‘Data resolution Workflow’ from the drop down menu.

4. Close out of the confirmation window listing the next steps.

5. Select ‘User Rights’ under ‘Applications’ on the far left on the project main page.

6. Click on the username, and then select ‘Edit User Privileges.’

7. Edit user privileges in the ‘Date Resolution Workflow’ section that now appears.
8. The conversation bubble that exists next to each survey question now has ‘query’ capabilities.

9. Begin a query and assign it to a designated user.

10. In the survey, the bubble next to the response now has a red exclamation through it indicating a query has been opened and a response is needed.
11. The new ‘Resolve issues’ section under ‘Applications’ on the far left on the project main page allows the designated user to respond to the query.

![Data Quality and Resolve Issues](image)

12. Designated user responds to the query.

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>User</th>
<th>Comments and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-12-2023 6:16pm</td>
<td><a href="mailto:su-fahmed81@illinois.edu">su-fahmed81@illinois.edu</a></td>
<td>Data Changes Made: fav. des. = 'Ice cream (2)'</td>
</tr>
</tbody>
</table>
| 12-12-2023 6:21pm | su-fahmed81@illinois.edu | **Action:** Opened query  
**Assigned to user:** su-fahmed81@illinois.edu (Fatima Ahmed)  
**Comment:** “Respondent indicated milk allergy”  
[Assign to other user](#) |
| 12-12-2023 6:22pm | su-fahmed81@illinois.edu | **Reply with response:**  
**Other:**  
**Upload file (optional):** [Upload file](#)  
**— OR —**  
**Close the query**  
**Comment:** respondent consumes non-dairy ice cream |

13. The bubble now contains a blue exclamation mark.
14. Clicking on the bubble allows a third user to close and resolve the query.

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<td>Action: Opened query&lt;br&gt;Assigned to user: <a href="mailto:su-fahmed81@illinois.edu">su-fahmed81@illinois.edu</a> (Fatima Ahmed)&lt;br&gt;Comment: “Respondent indicated milk allergy”</td>
</tr>
<tr>
<td>12-12-2023 6:23pm</td>
<td><a href="mailto:su-fahmed81@illinois.edu">su-fahmed81@illinois.edu</a></td>
<td>Response: Other&lt;br&gt;Comment: “respondent consumes non-dairy ice cream”</td>
</tr>
<tr>
<td>12-12-2023 6:25pm</td>
<td><a href="mailto:su-fahmed81@illinois.edu">su-fahmed81@illinois.edu</a></td>
<td>✋ Close the query&lt;br&gt;☑ Send back for further attention&lt;br&gt;Comment: verified</td>
</tr>
</tbody>
</table>

15. The bubble next to survey response now has a green checkmark indicating a resolved query.