

Patient Safety Reporting –Sign Up Instructions

During the Month of November 2016

Steps

- 1) Register with Utah Master Directory (UMD)
 - a. See instructions for Creating your UMD starting on Page 2
 - b. Once you are registered with UMD, proceed to Redcap.
 - c. Those with existing UMD can proceed to RedCAP.
- | 2) Register with RedCAP – see instructions starting on Page [6](#)
 - a. Technical assistance – Kailah Davis kdavis@utah.gov
1-801-538-7055

CREATING YOUR UMD (Utah Master Directory aka Utah ID)

First Time Users (Account Creation)

Listed below are instructions for First Time Users and Registered Users. You will be required to create an account prior to accessing any secured resources.

First, while going through the registration process, remember there will be a **validation** code that you will have to enter.

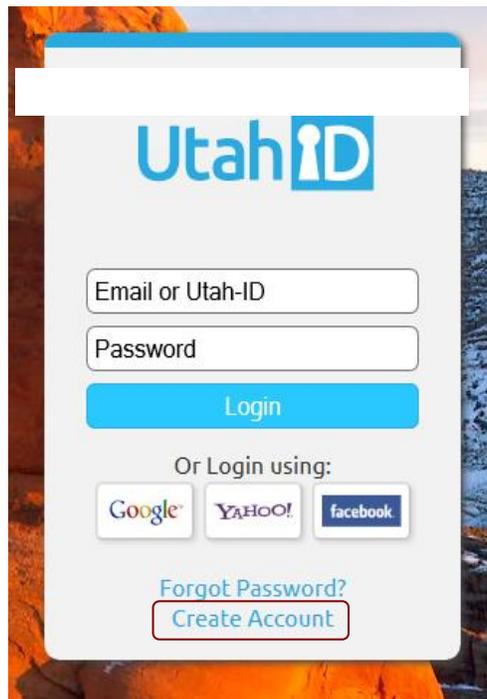
The **Validation** code will be sent via email from ?. This code validates the email address that you have provided to assure that future correspondence is sent to the correct email address.

Note: Due to possible changes occurring prior to these instructions being updated, please also read the instructions on the site as you are filling in the registration fields.

Account Creation

To create your account open an Internet browser and enter the following web address <https://login2.utah.gov/user/portal> in the address line.

Click on the **Create Account** link.



The image shows a screenshot of the Utah ID login and account creation interface. At the top, the Utah ID logo is displayed. Below the logo are two input fields: "Email or Utah-ID" and "Password". A blue "Login" button is positioned below the password field. Underneath the "Login" button, the text "Or Login using:" is followed by three social media login options: "Google", "YAHOO!", and "facebook". At the bottom of the interface, there are two links: "Forgot Password?" and "Create Account". The "Create Account" link is highlighted with a red border.

The **Utah-ID Creation** page is displayed with the following fields for you to enter your information.

To create and activate a Utah-ID account involves three steps:

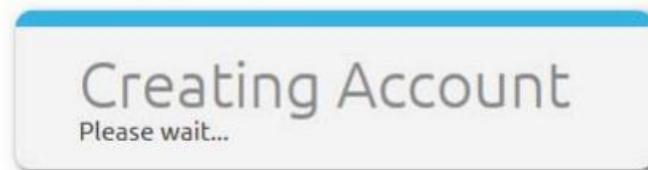
1. **Create Account**
2. **Provide Required Info**
3. **Activate Account**

The screenshot shows the Utah-ID Creation web form. The form is titled "Utah-ID Creation" and is overlaid on a scenic background of a desert landscape with a rock arch. The form includes a sidebar with "Steps needed to Access Mini Portal" listing: 1) Create Account, 2) Provide Required Info, 3) Activate Account, and a "Return to Login" link. The main form fields are: "Choose a Utah-ID" (text input), "Your Name" (First and Last text inputs), "Email Address" (text input), "Repeat Email Address" (text input), "Alternate Email Address" (Optional text input), "New Password" (text input with Password Strength indicator), "Verify Password" (text input), and "Mobile" (Optional text input and Providers dropdown menu). A blue "Create Account" button is at the bottom.

1. Step One: Create Your Utah-ID

- i. Choose a Utah-ID (you may use letters, numbers, and the underscore character to create this unique ID)
This will be your log-in ID. Choose something easy for you to remember
- ii. Enter your first name
- iii. Enter your last name
- iv. Enter an email address
This is the e-mail address we will respond to when accessing REDCap. *NOTE: Do not use a Yahoo e-mail address!!! We have found it is not as secure as gmail or your facility's/agency's e-mail. **ALSO if it says that you have entered an e-mail address that is already associated with an account then STOP and call the Health Informatics Program at 801-538-7055.**
- v. Repeat email address
Retype the E-mail Address you just entered.
- vi. Enter an alternate email address
This is OPTIONAL, you do not have to put anything in here if you do not want. However this is helpful for a password recovery.

- vii. Password
This will be your password for REDCap also. Make it secure and easy to remember. Your password needs to be at least 8 characters and must have at least one lower case, one upper case and one number .
- viii. Verify Password
Retype the password you just created.
- ix. Mobile (Optional)
This is OPTIONAL, you do not have to put anything in here if you do not want. However this is helpful for password recovery
- x. Click on the 'CREATE' button after all the required fields have been filled in... **and wait.**

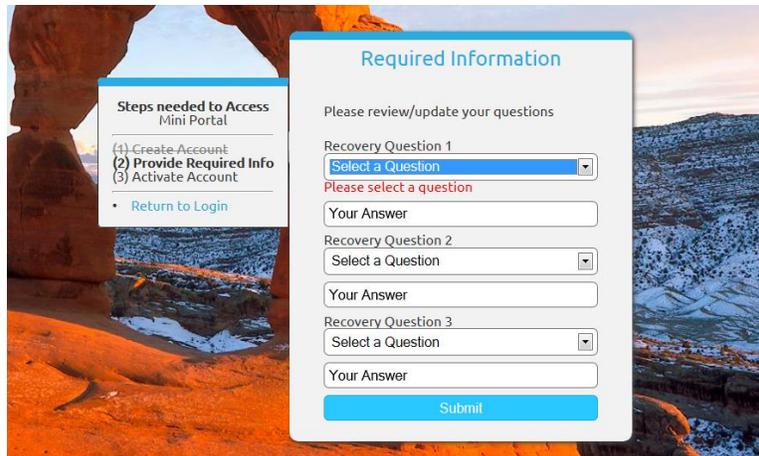


2. Step 2: Provide Required Info (Account Recovery)

Fill out your security questions. (HINT! Do not use any "Favorite" questions as our favorites change over time.)

- i. Recovery Question 1 (select a question by clicking on the drop down arrow) then Your Answer
- ii. Recovery Question 2 (select a question by clicking on the drop down arrow) then Your Answer
- iii. Recovery Question 3 (select a question by clicking on the drop down arrow) then Your Answer
- iv. Cell Phone (optional)
- v. Click Submit
- vi. Open a new window to check your e-mail for your verification code.

Note: If the security answer is forgotten, you will need to call the help desk at 801-538-3440 prompt #3 and ask them to reset your UMD password.



3. Step three: Activate Account

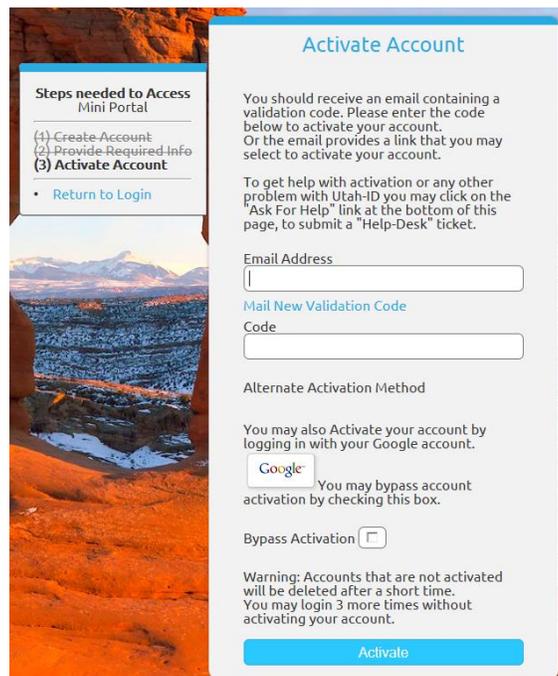
A screen asking for a validation code will display. A validation code is required to assure that future correspondence is sent to the correct email address.

An email with a validation code and a link to validate your email address will be sent to you. The code and the link provide for the following two different ways of validating your email address:

- i. The validation code can be copied and pasted to the email validation field on the screen that displayed when registering.

Do not click Bypass Activation!

- ii. Or, click on the link in the email.



Once you have validated your Utah-ID account, send an email to xxx, [xxx](#) (Is this supposed to say 'xxx' or can you insert an example.) containing the email address used when registering your account.

Registered Users

If you have previously entered your registration information, enter your Email Address or User ID and Password then click the “Login” button.

Accessing REDCap

2.1 Login URL

UDOH employees have access to REDCap using the same username/password as their UDOH login: <https://redcap.health.utah.gov/redcap/>.



REDCap can be accessed from anywhere, outside the UDOH network and from any encrypted mobile device (laptop, iPod, iPad).

Which browser?

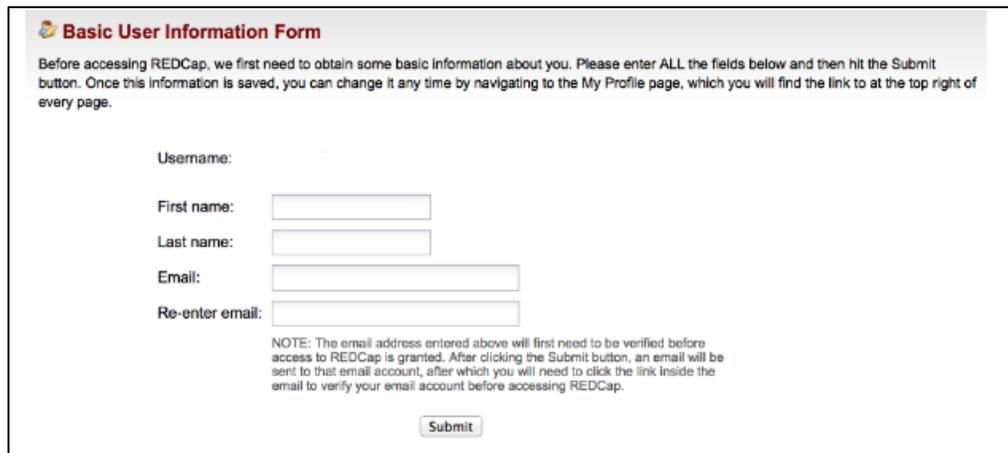
Good
OK, but slow

Firefox, Chrome, Opera, Safari, IE8+
Internet Explorer 6 / 7

Do not have a Utah Master Directory ID, Utah or UMD ID? Please refer to the document “UMD Instructions.”

2.2 Signing in for the First Time

The first time you log in to <https://redcap.health.utah.gov/redcap/>, it will prompt you for your basic information in order to verify your account.



Basic User Information Form

Before accessing REDCap, we first need to obtain some basic information about you. Please enter ALL the fields below and then hit the Submit button. Once this information is saved, you can change it any time by navigating to the My Profile page, which you will find the link to at the top right of every page.

Username:

First name:

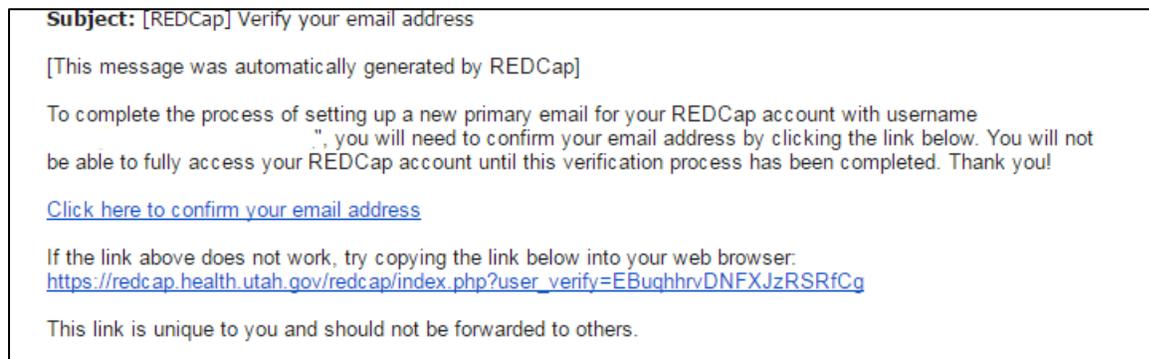
Last name:

Email:

Re-enter email:

NOTE: The email address entered above will first need to be verified before access to REDCap is granted. After clicking the Submit button, an email will be sent to that email account, after which you will need to click the link inside the email to verify your email account before accessing REDCap.

Once you submit this information, an e-mail will be sent to your Utah (UMD) ID account.



Subject: [REDCap] Verify your email address

[This message was automatically generated by REDCap]

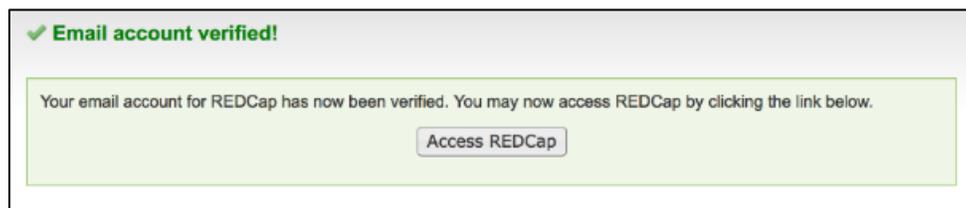
To complete the process of setting up a new primary email for your REDCap account with username " ", you will need to confirm your email address by clicking the link below. You will not be able to fully access your REDCap account until this verification process has been completed. Thank you!

[Click here to confirm your email address](#)

If the link above does not work, try copying the link below into your web browser:
https://redcap.health.utah.gov/redcap/index.php?user_verify=EBuqhhrvDNFXJzRSRfCg

This link is unique to you and should not be forwarded to others.

Click the link in that e-mail to verify your account, and you'll be all set to use REDCap!



✓ Email account verified!

Your email account for REDCap has now been verified. You may now access REDCap by clicking the link below.

2.3 Home Screen

The **Home screen** is the front page of the application: the first page you will see when you log in.

kdavisutahgov@gmail.com | My Profile | Log out




[Home](#)
[My Projects](#)
[Request New Project](#)
[Training Resources](#)
[Help & FAQ](#)
[Send-It](#)

Welcome to REDCap!

REDCap is a mature, secure web application for building and managing online surveys and databases. Using REDCap's stream-lined process for rapidly developing projects, you may create and design projects using 1) the online method from your web browser using the Online Designer; and/or 2) the offline method by constructing a 'data dictionary' template file in Microsoft Excel, which can be later uploaded into REDCap. Both surveys and databases (or a mixture of the two) can be built using these methods.

REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, ad hoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

Learn more about REDCap by watching a [brief summary video \(4 min\)](#). If you would like to view other quick video tutorials of REDCap in action and an overview of its features, please see the [Training Resources](#) page.

NOTICE: If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact [Kailah Davis \(801-538-7055\)](#).

REDCap Features

Build online surveys and databases quickly and securely - Create and design your project rapidly using secure web authentication from your browser. No extra software is required.

Fast and flexible - Conception to production-level survey/database in less than one day.

Export data to common data analysis packages - Export your data to Microsoft Excel, PDF, SAS, Stata, R, or SPSS for analysis.

Ad Hoc Reporting - Create custom queries for generating reports to view or download.

Scheduling - Utilize a built-in project calendar and scheduling module for organizing your events and appointments.

Easily manage a contact list of survey respondents or create a simple survey link - Build a list of email contacts, create custom email invitations, and track who responds, or you may also create a single survey link to email out or post on a website.

Send files to others securely - Using 'Send-It', upload and send files to multiple recipients, including existing project documents, that are too large for email attachments or that contain sensitive data.

Save your data collection instruments as a PDF to print - Generate a PDF version of your forms and surveys for printing to collect data offline.

Advanced features - Auto-validation, calculated fields, file uploading, branching/skip logic, and survey stop actions.

REDCap API - Have external applications connect to REDCap remotely in a programmatic or automated fashion.

Note the following features...

2.3.1 Log Out

As with any web-based application it is recommended that you always log out using the **Log out** button after completing your tasks.

Your session will time out after 30 minutes of inactivity, requiring you to log in again to continue.

2.3.2 My Profile

Go to **My Profile** to change your name, email address or password. You can add additional email addresses to your REDCap account that you can use; a verification process is enforced to ensure that you have access to all of the email accounts you enter.