

How to Submit Your EHDl Annual Report on REDCap

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Video Instructions

Are you brand new to REDCap, or would appreciate a “refresher” on how to provide your EHDI Annual Report information in REDCap? Visit [YouTube video \(https://www.youtube.com/watch?v=SdcFEKGDDeeE\)](https://www.youtube.com/watch?v=SdcFEKGDDeeE) for a recorded overview.

*Please note, this recording was provided by our colleague, Mohamed, in 2020 so the dates he speaks of do not apply to your report, but the content and navigation for entering your Annual Report information in REDCap does apply!

Logging In

REDCap Link: <https://redcap.health.state.mn.us/redcap/>



Log In

ATTENTION

Access to this service is for authorized personnel only.

If you do not have the express authorization of the Minnesota Department of Health division and section management you must exit now or face the consequences of violating Minnesota Statutes, Chapter 13, and other laws. The State of Minnesota prohibits unauthorized access, disclosure, duplication, modification, diversion, destruction, loss, misuse, or theft of computer information, in accordance with Minnesota Statutes, sections 609.87 to 609.89

MDH REDCap Production Environment (PROD)

Please log in with your user name and password. If you are having trouble logging in, please contact [REDCap Administrator](#).

Username:

Password:

[Forgot your password?](#)

1. Enter your username and then your password. Remember your username is similar but not the same as your email address. For example: if your email is Sara.campbell@gmail.com, your REDCap username will be Sara.campbell.gmail.com.
2. If you forget your password, click on “*forgot your password?*” to reset it. Please keep in mind that you will need your username to reset your password.
3. After you click log in, you will be directed to the REDCap home page.

What You Will See

REDCap® Home **My Projects** Help & FAQ Training Videos Send-It Logged in as: che_user1

MDH REDCap Production Environment (PROD)

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. [Read more](#) To review which users still have access to your projects, visit the [User Access Dashboard](#).

My Projects Organize Filter projects by title

Project Title	Records	Fields	Instrument	Type	Status
FY19-20 EHDI Annual Report <input type="checkbox"/>	26	32	3 forms	■	<input checked="" type="checkbox"/>

REDCap 9.8.5 - © 2020 Vanderbilt University

1. Ignore the Home, New Project, Help & FAQ, Training Videos and Send-It tabs. These tabs contain REDCap features that are not monitored by MDH.
2. Select the **My Projects** tab. From this page, you will be able to access all your EHDI Annual Reports. Click on the report you like to work on and start entering data.
3. If you are entering data for another MDH program, these projects will be listed here. For most of you, the EHDI Annual Reports should be the only projects you will see.

The Project Home Page: Navigation Bar

The screenshot shows the REDCap interface for the 'FY19-20 EHDl Annual Report' project. The left sidebar is the navigation bar, and the main content area displays project-specific information.

Navigation Bar (Left Sidebar):

- Logged in as che_user1 | Log out
- My Projects** (highlighted)
- Project Home and Design
 - Project Home · Codebook
 - Project status: **Production**
- Data Collection
 - Record Status Dashboard** (highlighted)
 - View / Edit Records** (highlighted)
 - Hide data collection instruments
 - Grantee & Project Information
 - Project Evaluation (arrow points here)
 - Change Narratives
- Applications
 - Calendar
 - Data Exports, Reports, and Stats** (highlighted)
 - Field Comment Log
 - File Repository
- Help & Information
 - Help & FAQ
 - Video Tutorials
 - Suggest a New Feature
 - Contact REDCap administrator

Main Content Area:

The tables below provide general dashboard information, such as a list statistics, and upcoming calendar events (if any).

Current Users (12)

User	Expires
beckm118.umn.edu (Kara Beckman)	never
bsaito.rainbowrese (Beki Saito)	never
che_user1 (Mohamed Hassan)	never
dverret.rainbowres (Dane Verret)	never
gyllsb1 (Beth Gyllstrom)	never
hassam1 (Mohamed Hassan)	never
ilopez.rainbowrese (Ivan Lopez)	never
kfogel.rainbowrese (Katie Fogel)	never
olmstm1	

Project Statistics

Records in project	
Most recent activity	
Space usage for docs	

Upcoming Calendar Events

Time	Date

The tabs highlighted above are all the tabs you will need to submit and export your annual report.

1. **My Projects**; whenever you click on this tab, it will bring you to the main window where you will be able to select the EHDl Annual Report projects.
2. **Record Status Dashboard**; this tab will display your existing records/responses and the status for every data that was entered. You can click on this tab to see the status of your annual report.
3. **View/Edit Records**; you will click on this tab to start a new record (annual report). Once you click, it will bring you to a window where you will be able to select and start your annual report.
4. **Right underneath this tab** (arrow), you should be able to see the annual report forms; 1, *Grantee & Project Information*, 2, *Project Evaluation*, and 3, *Change Narratives*. If you do not see these forms right away, click on **show data collection instruments** to display them.
5. **Data Exports, Reports, and Stats**; once you submit your report, you can click on this tab to export your report. Grantees will be able to export their annual report for the duration of the grant cycle.
6. In the middle of the project page, you will notice a long list of names/username. Please note that these are grantees and staff that are all assigned to this project. They will **NOT** have access to your annual report. Each grantee will **ONLY** see and access their annual report.

Starting Your Annual Report

The screenshot displays the REDCap interface for the 'FY19-20 EHDI Annual Report'. On the left sidebar, the 'Data Collection' section is expanded, and 'View / Edit Records' is highlighted with a red box. Below it, sub-items 'Grantee & Project Information', 'Project Evaluation', and 'Change Narratives' are listed. The main content area shows a summary of records: 'Total records: 27 / In group: 1'. Under 'Incomplete Records (1)', a dropdown menu is open, showing '-- select record --' and 'CHE USER' selected. Below this is a 'Data Search' section with a 'Choose a field to search' dropdown set to 'All fields' and a 'Search query' input field.

1. To start your annual report, you can either click on each of the three forms on the left column (in red rectangular) or click on View/Edit Records.
2. If you click on a form (Grantee & Project Info, Project Evaluation, or Change Narratives), you will choose your Record name from the drop-down menu under “*Incomplete Records.*” A record name is your organization’s name, to which your organization’s users will have access in REDCap.
3. From this dropdown, you should see your organization name. If you do NOT see your organization’s name, **STOP** and contact your grant manager.
4. Once you have selected your organization’s record name, you will see a set of questions from each form. These spaces are where you will enter data (or update data, if need to do so later).

HOW TO SUBMIT YOUR EHDI ANNUAL REPORT ON REDCAP

The screenshot displays a REDCap form with several sections:

- Project Highlights:** A text area with instructions: "Building on what you have reported, what would you consider are your key accomplishments during Year 1. Please provide a brief summary of project activity highlights, for example related to recruitment, collaboration, curriculum development, outreach or education. Please do not include evaluation highlights as they will be asked in a separate section." A red box highlights the asterisked requirement "* must provide value", with a red arrow pointing to it.
- Financial Update:** A yellow header section containing:
 - A question: "What percentage of your annual award did you spend this year?" with a text input field and a red asterisked requirement "* must provide value".
 - A question: "Was at least 10% of your grant award spent on evaluation activities?" with radio buttons for "Yes" and "No". A red 'X' is over the "Yes" button, and a red asterisked requirement "* must provide value" is present.
 - A text area for describing evaluation activities: "Please briefly describe your evaluation activities. For example, revision of evaluation documents, tool development, data collection & analysis, etc." with a red asterisked requirement "* must provide value".
- Form Status:** A yellow header section containing a "Complete?" label and a dropdown menu currently set to "Incomplete".
- Submission Buttons:** A green bar at the bottom contains buttons for "Save & Exit Form", "Save & Go To Next Form" (with a dropdown arrow), and "-- Cancel --". A dropdown menu is open under "Save & Go To Next Form", showing options: "Save & Stay", "Save & Exit Record", and "Save & Go To Next Record".

1. As you respond to questions, follow-up questions may appear depending on your initial responses.
2. Also, you must provide values for the questions with the **red asterisk***. When entering numbers or values, please leave out commas.
3. Next to each question, you will see a "Field Comment Log". Please **DO NOT USE** this feature. Comments entered in this field will be viewable to everyone.
4. It is important to save your data. We recommend that you save your data early and often. REDCap does not have an auto save function. For the open-ended questions, grantees can type up their responses in Word Document and copy and paste it in REDCap.
5. When you come to the bottom of the page you can change the form status next to the **Complete?** Prompt. Leave it as **Incomplete** if you are still working on your form. Otherwise, if you are all done, you can click on the drop down and select **Complete**.
6. Save your data by choosing any of the following:
 - **Save & Exit Form:** This saves the data and takes you back to a screen with all of your project's forms.
 - **Save & Stay:** This saves the data and keeps you on the current page.
 - **Save & Go to Next Form** (from the drop-down menu under "Save & Stay"): This saves the data and leads you to the next Form.

Record Status Dashboard / Record Home Page

FY19-20 EHDl Annual Report

■ **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 **CHE USER**
TEST

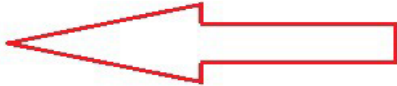
Data Collection Instrument	Status
Grantee & Project Information	●
Project Evaluation	●
Change Narratives	●

Legend for status icons:

● Incomplete ○ Incomplete (no data saved) ?

● Unverified

● Complete



1. When you click on Record Status Dashboard, this page will appear. In the middle of it you should see your organization name at the top followed by the three annual report forms (Grantee & Project Info, Project Evaluation, and Change Narratives).
2. Next to each of these forms, you will see a status indicator. This will show you whether your form is incomplete or complete.
3. To start a new form or to update a form, you can click on the status icon and that will bring you to your data.
4. Once you are done with your annual report, all the status icon should be green. You can change status icon by going to each of the forms and change the “complete prompt” at the bottom of each form.
5. For this report, we will not be using the “**unverified**” status. Grantees will only have the option to toggle between the “**incomplete**” and “**complete**” status.
6. Before you start entering data, Grantee & Project Information will be set to “**incomplete**” and Project Evaluation and Change Narratives will be set to “**incomplete (no data saved)**”.

How to upload a file

The screenshot displays the 'Project Evaluation' form in REDCAP. At the top, it indicates 'Editing existing Record ID CHE USER'. The 'Record ID' field contains 'CHE USER'. The 'Evaluation Measures Report' section contains the instruction: 'Please upload the evaluation measures template we sent you to report on your evaluation findings for the reporting period of July 1, 2019 to June 30, 2020.' Below this, the 'Upload your Evaluation Report.' section features a green background and a red-bordered 'Upload file' button. The 'Form Status' section shows 'Complete?' with a dropdown menu set to 'Incomplete'. At the bottom of the form are 'Save & Exit Form' and 'Save & Go To Next Form' buttons. A blue-bordered 'Upload file' dialog box is open, containing the text 'Upload your Evaluation Report. Select a file then click the 'Upload File' button'. It includes a 'Choose File' button (with 'No file chosen' text), a blue 'Upload file' button, and a note '(Max file size: 32 MB)'. Red boxes highlight the 'Upload file' button in the form and the 'Choose File' and 'Upload file' buttons in the dialog.

1. In some areas, we will ask you to upload files. To do so, click on “*upload file.*” Once you click on the *upload file* button, another box will appear (in blue). From there, select “*choose file.*” Just like any other attachment, you will be able to locate the file you are uploading and double click on it. Once you are done, you can click “*upload file.*”

How to Export Your Annual Report

The screenshot shows the REDCap interface for the 'FY19-20 EHDI Annual Report'. The left sidebar is titled 'My Projects' and includes sections for 'Project Home and Design', 'Data Collection', 'Applications', and 'Help & Information'. The 'Applications' section has 'Data Exports, Reports, and Stats' highlighted with a red box and a red arrow pointing to it. The main content area is titled 'Data Exports, Reports, and Stats' and includes a video link 'VIDEO: How to use Data Exports, Repo'. Below this are three buttons: '+ Create New Report', 'My Reports & Exports', and 'Other Export Options'. A paragraph explains the module's purpose. Below the paragraph is a section titled 'My Reports & Exports' with a table of report options. The table has two columns: 'Report name' and 'View/Export Options'. The first row is 'A. All data (all records and fields)' with buttons for 'View Report', 'Export Data', and 'Stats & Charts'. The second row is 'B. Selected instruments (all records)' with a dropdown menu for 'Instruments' (showing 'All instruments --', 'Grantee & Project Information', 'Project Evaluation', and 'Change Narratives') and buttons for 'View Report', 'Export Data', and 'Stats & Charts'. Below the table is a '+ Create report' button based on the selections above. At the bottom of the table is a '+ Create New Report' button.

1. From any screen within your project, choose “Data Exports, Reports, and Stats” from the left side of the screen, under “Applications.”
2. You should then see a screen where you can select fields and forms (or instruments).
3. **Select an export instrument:**
 - Choosing “Export Data” next to “A. All data (all records and fields)” will allow you to export data for all forms within your selected project
 - Choosing “Make custom selections” next to “B. Selected instruments (all records)” will allow you to choose the forms for which you’d like to download data
4. Choose your export format, and click “Export Data.”
 - Choosing “CSV/Microsoft Excel (raw data)” will give you coded values for questions (for example, “0” and “1” instead of “no” and “yes”)
 - Choosing “CSV/Microsoft Excel (labels)” will give you a labeled version of your data, rather than coded values
5. Depending on your internet browser, you may see a message prompting you to open or save a copy of the data file, or the file will begin to automatically download and save to your computer.

How to Print Your Annual Report

The screenshot shows the REDCap interface for the 'FY19-20 EHDI Annual Report'. The left sidebar contains navigation options such as 'My Projects', 'Project Home and Design', 'Data Collection', and 'Applications'. The main content area displays 'Total records: 28 / In group: 1' and two sections: 'Incomplete Records (1)' and 'Complete Records (0)'. A red box highlights the 'Actions' menu at the top, which includes 'Download PDF of instrument(s)', 'This data entry form (blank)', and 'All data entry forms (blank)'. Another red box highlights the dropdown menus for selecting records in the 'Incomplete Records' and 'Complete Records' sections. A red arrow points from the 'Complete Records (0)' section to the 'Grantee & Project Information' option in the sidebar.

1. In your project (arrow), choose a form for which you would like to print your data. Under either “Incomplete Records” or “Complete Records,” choose your organization’s record name.
2. At the top of the screen, click Download PDF of Instruments, and choose any of the following:
 - This data entry form (blank): Download only this data entry form, without your data
 - This data entry form with saved data: Download only this data entry form, including your data
 - All data entry forms (blank): Download all data entry forms in the current project, without your data
 - All data entry forms with saved data: Download all data entry form in the current project, including your data
3. Depending on your internet browser, you may see a message prompting you to open or save a copy of the PDF download, or the PDF will begin to automatically download and save.

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8/24/23

To obtain this information in a different format, call: 651-201-5813.