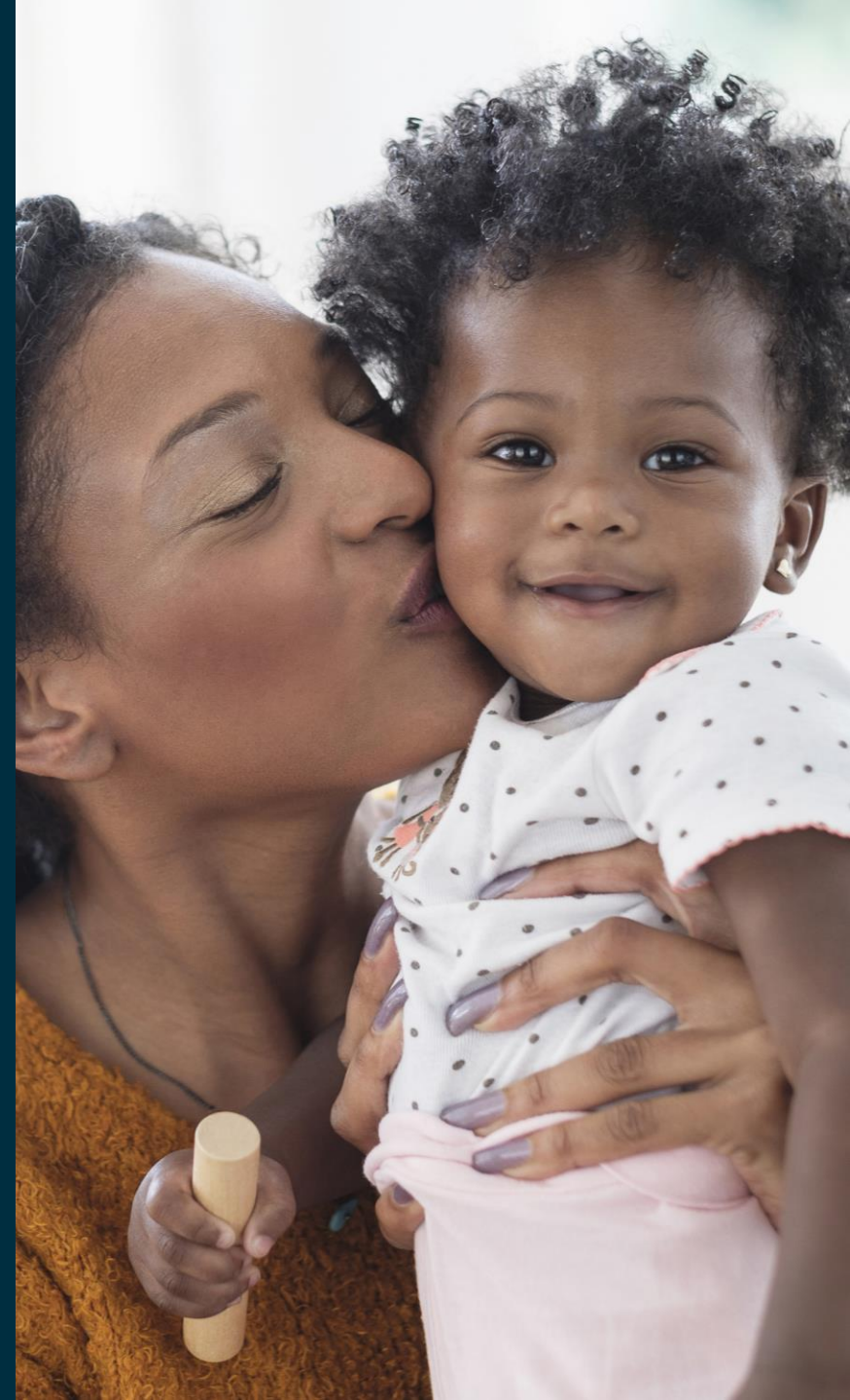


Fit Families REDCap Data Collection Training

UWPHI Evaluation Team

Last Updated: 9/28/23



Agenda



- Introduction to REDCap
- Requesting a REDCap account
- Enrolling Families
- Recording Contacts
- Graduation

REDCap

Background & Access



What is REDCap?



- Online data collection and management system
- Administered through UW-Madison Institute for Clinical and Translational Research (ICTR)
- Used to record evaluation data for Fit Families Direct Education
- Replaces old Excel tracking sheets
- Each coach will have their own log-in and password
- Houses client records from your site

REDCap Access Checklist

Request Account	REDCap Access	Project Access	Complete Training	Enter Data
Anyone who will track contacts will need to create a SMPH REDCap account .	When your REDCap account has been approved, you will receive an email and will be able to log into REDCap .	UWPHI evaluation team will add you to the Fit Families REDCap project. You will receive an email notifying you that you have access.	Review the Fit Families REDCap Data Collection Training materials to learn how to enter data on your direct ed contacts.	Use REDCap to enroll families in the program, track monthly contacts, and collect termination and graduation information.

HIPAA Training

HIPAA training is required to obtain a REDCap account:

- You will need to have proof of a completed HIPAA training ready to upload before you request a REDCap account
- If you have not already completed a HIPAA training through your own organization or don't have a record of it, you can complete one through UW.

Request REDCap Account

- Complete the [REDCap New User Survey](#) using the following information:

Which system(s) will you need access to?	• Select 'REDCap'
Contact Information	• Enter your name and e-mail address
Collaborator type	• Select 'External Collaborator'
Name of your Institution/Organization	• Enter your WIC site name
Comments	• Enter the following: "Fit Families Direct Ed Data Collection"
UW Project PI/Supervisor Information	• Enter "Sarah Linnan" and "linnan@wisc.edu"
HIPAA Training Proof	• Attach HIPAA Training Documentation from your organization or the UW-Madison HIPAA Training for External Users

**Detailed
instructions
can be found
[HERE](#)**

DAGs

- DAG = Data Access Group
- One DAG for each Fit Families project site
- Coaches at one site will be able to see all clients for that site
- Coaches will not be able to see records from other sites
- Mentors and coaches working at more than one site will be given access to multiple DAGs
- If you can access more than one DAG, you will need to switch between them. You can only see one at a time
- Every record you create is automatically assigned to the DAG you are using when the record is created
- If you can access multiple DAGs, *make sure you've selected the correct DAG before creating a new record!*

REDCap



Record Status Dashboard

Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend for status icons:

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Complete
- Many statuses (all same)
- Many statuses (mixed)

Dashboard displayed: [Default dashboard] v

Displaying record Page 1 of 1: "4083-1" through "4083-4" v of 4 records

ALL (4) v records per page

+ Add new record

Displaying: Instrument status only | [Lock status only](#) | [All status types](#)

Record ID	Enroll Family	Add/Update Children	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Month 13
	Add Family	Add Child(ren) and Enter Graduation Information	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact
4083-1 Hilary Joyner - Joyner, Hilary; Olsen, Niels (Active)		+													
4083-2 Hilary Joyner - Linnan, Sarah; Linnan, Frank (Active)		+													
4083-3 Hilary Joyner - Taber, Erin; Taber, Luka (Active)		+													
4083-4 Hilary Joyner - Cleo, Le; Le, Akira (Active)		+													

- Displays the records in your DAG
- One row per enrollment

Record Status Dashboard

Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend for status icons:

-  Incomplete
-  Incomplete (no data saved) ?
-  Unverified
-  Complete
-  Many statuses (all same)
-  Many statuses (mixed)

Dashboard displayed: [Default dashboard] ▼ [Create custom dashboard](#)

Displaying Data Access Group -- ALL -- ✓

Displaying record Page 1 of 1: "1" through "7" ▼ of 7 records ALL (7) ▼ records per page

[+ Add new record](#)

- Use the **Dashboard displayed** drop-down to switch to Active Families Only, Termed Only, and Graduated Only dashboard views
- Click on the [+ Add new record](#) button to enroll
 - A new family
 - An additional sibling with a later enrollment date
 - Re-enroll a family

Record Status Dashboard

- Dashboard displays **families enrolled at your site**
- Each family is displayed in one row
- Colored circles show *data entry* status:
- Click on any circle to enter/view data
- Proceed from left to right to enter enrollment and contacts

Legend for status icons:

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Complete
- Many statuses (all same)
- Many statuses (mixed)

[+ Add new record](#)

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

	Enroll Family	Add/Update Children	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Month 13
Record ID	Add Family	Add Child(ren) and Enter Graduation Information	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact
4083-1 Hilary Joyner - Joyner, Hilary; Olsen, Niels (Active)		+													
4083-2 Hilary Joyner - Linnan, Sarah; Linnan, Frank (Active)		+													
4083-3 Hilary Joyner - Taber, Erin; Taber, Luka (Active)		+													
4083-4 Hilary Joyner - Cleo, Le; Le, Akira (Active)		+													

Record Status Dashboard

- The first three events are **completed at enrollment/Month 1**
 - Enroll Family
 - Add/Update Children
 - Month 1 Monthly Contact

Record ID	Enroll Family	Add/Update Children	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Month 13
	Add Family	Add Child(ren) and Enter Graduation Information	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact
4083-1 Hilary Joyner - Joyner, Hilary; Olsen, Niels (Active)	☒	☒ +	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
4083-2 Hilary Joyner - Linnan, Sarah; Linnan, Frank (Active)	☒	☒ +	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐
4083-3 Hilary Joyner - Taber, Erin; Taber, Luka (Active)	☒	☒ +	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐
4083-4 Hilary Joyner - Cleo, Le; Le, Akira (Active)	☒	☒ +	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

- After enrollment, complete one monthly contact per calendar month.

Enrolling Families

Completed once per family per FY



Add New Record

REDCap

Logged in as hjoyner | Log out

My Projects

REDCap Messenger

Contact REDCap administrator

Project Home and Design

Project Home · Codebook

Project status: Development

Data Collection

Record Status Dashboard
- View data collection status of all records

Add / Edit Records
- Create new records or edit/view existing ones

Applications

Email Logging

File Repository

User Rights

Customize & Manage Locking/E-signatures

Resolve Issues

Project Bookmarks

View Active Families

FY23 Satisfaction Survey - English

FY23 Satisfaction Survey - Spanish

Enroll Family

Reports Search

1) Active Families with No Recent Contact Recorded

Help & Information

Help & FAQ

Video Tutorials

Suggest a New Feature

Contact REDCap administrator

1. From left menu, click Record Status Dashboard link or Add/Edit Records link

Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend for status icons:

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Complete
- Many statuses (all same)
- Many statuses (mixed)

Dashboard displayed: [Default dashboard] v

Create custom dashboard

Displaying Data Access Group -- ALL -- v

Displaying record Page 1 of 1: "1" through "7" v of 7 records

ALL (7) v records per page

+ Add new record

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, click the button below.

NOTICE: This project is currently in Development status. **Real data should NOT be entered** until the project has been moved to Production status.

Total records: 8

Choose an existing Record ID

-- select record -- v

+ Add new record

2. Click + Add new record button

Record Home Page

Record Home Page

Record "8" is a new Record ID. To create the record and begin entering data for it, click any gray status icon below.

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. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

Legend for status icons:

- Incomplete
- Unverified
- Complete
- Incomplete (no data saved) ?
- Many statuses (all same)
- Many statuses (mixed)

NEW Record ID 8

Data Collection Instrument	Enroll Family	Add/Update Children	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Month 13
Add Family															
Add Child(ren) and Enter Graduation Information															
Monthly Contact															

- Add new record button will create a blank record for new enrollment
- Each record has a home page that displays all events for that record
- Click on circle next to Add Family to access the **Enroll Family** event that contains the parent's contact information and demographics

Enroll Family

Once per enrollment*

1. Enter parent/guardian information
2. Indicate language in which contacts will be conducted and if an interpreter is needed
3. Enter Enrollment date to create contact schedule
4. Turn email reminders on or off
5. Set form status to Complete
6. Save & Exit Form

* If you enroll an additional sibling on a different date, complete a new enrollment

Add Family

Assign record to a Data Access Group? -- select a group --

Adding new Record ID 8.

Event: **Enroll Family**

Record ID 8

Fit Families New Enrollment Form

Parent/Caregiver Information

Parent First Name:
Last Name:
WIC ID:

Contact Information

Street Address:

City:
State: WI
ZIP Code:

Mobile Number:
Email:

Contact Notes:

Interpreter Needed?
☐ Yes
☒ No

Language:

Enroll Family

Monthly Contact Schedule

Choose the date of enrollment below. This will generate a monthly contact schedule for 13 months.

Schedule one contact per calendar month.
Enrollment is the Month 1 contact.
Graduation can happen at the same time as the Month 13 contact.

Contact	Due Date
Enrollment/ Month 1	Today M-D-Y
Month 2	
Month 3	
Month 4	
Month 5	
Month 6	
Month 7	
Month 8	
Month 9	
Month 10	
Month 11	
Month 12	
Graduation/ Month 13	

Coach Information

Coach Name: Hilary Joyner
Coach Email: hjoyner@wisc.edu

Would you like to receive reminder emails for this family?
☒ Yes
☐ No

Form Status

Complete? Incomplete

Lock this instrument?
☐ Lock

If locked, no user will be able to modify this instrument for this record until someone with Instrument Level Lock/Unlock privileges unlocks it.

Save & Exit Form
Save & Stay
Cancel

Add Children

Record Home Page

Record "8" is a new Record ID. To create the record and begin entering data for it, click any gray status icon below.

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. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

Legend for status icons:

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Complete
- Many statuses (all same)
- Many statuses (mixed)

NEW Record ID 8

Data Collection Instrument	Enroll Family	Add/Update Children	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Month 13
Add Family															
Add Child(ren) and Enter Graduation Information															
Monthly Contact															

- After parent information is added, the Enroll Family event will show a colored dot to indicate its status
- Click on the dot below Add/Update Children to **add the first child enrollee's information**
- The Add/Update Children event form will open
- All children added to a record will have the same dates for enrollment and contacts

Add/Update First Child

Adding new Record ID 9. (Instance #1)

Event: **Add/Update Children**

Record ID 9

Child Information

First Name: 	Last Name: 	Completion Status: Active ▾
WIC ID: Child's WIC ID	Birthdate: was _____ months old at enrollment on M-D-Y	

Gender: ☐ Female ☐ Male ☐ Non-binary ☐ Prefer not to respond ☐ Unknown reset	Race(s): check all that apply ☐ American Indian or Alaskan Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or Pacific Islander ☐ White ☐ Other ☐ Prefer not to respond ☐ Unknown	Is _____ Hispanic/Latino? ☐ Yes ☐ No ☐ Prefer not to respond ☐ Unknown reset Is _____ a SNAP recipient? ☐ Yes ☐ No reset
---	--	---

_____’s information and demographics verified? ☐ Yes ☐ No reset

Set Goals

4	_____’s Goals ☐ Bite ☐ Sip ☐ Move ☐ Model Parents can choose one or more goals to work on with each child. Check box(es) for the goals _____ chooses for _____.
---	--

Form Status

Complete? Incomplete ▾ 5

Lock this instrument?

If locked, no user will be able to modify this instrument for this record until someone with Instrument Level Lock/Unlock privileges unlocks it.

☐ **Lock**

6

Save & Exit Form

Save & Stay ▾

- Cancel -

Once per child per enrollment

1. Enter child information and demographics
2. Collect Enrollment behavioral information
3. Enter any notes, such as specific goals
(You will be able to see these during monthly contacts.)
4. Select Goals
5. Set form status to Complete
6. Save & Exit Form

Enrollment Information

Please collect and enter behavioral information and BMI (if available) within 3 months of ____.

Thinking about the last month, on average:

2

How many 1/2-cup servings of vegetables does ____ eat per day?

(Vegetable is any canned, fresh or frozen plant product eaten as food.)

Vegetable servings per day

How often does ____ eat more than one type of vegetable each day?

How many 1/2-cup servings of fruits does ____ eat per day?

(Fruit is any canned, fresh or frozen product of a tree or other plant that contains seed and can be eaten as food.)

Fruit servings per day

How often does ____ eat more than one type of fruit each day?

How many 8 oz. servings of sweetened beverages does ____ drink per week?

(Include any sugar-sweetened beverage other than chocolate milk. Sweetened beverages include all sodas, fruit drinks, fruit cocktails, fruit drink pouches, sports drinks, energy drinks, sweetened water, sweet teas, and sweet coffee drinks.)

Sweetened beverage servings per week

How often does ____ drink plain water?

(Include tap, bottled, or sparkling water.)

How many 6 oz. servings of 100% fruit juice does ____ drink in a typical day?

(Fruit juice is any 100%, no sugar added liquid obtained from a fruit.)

Juice servings per day

How much physical activity does ____ get on a typical day?

(Physical activity is movement of the body that uses energy. Reportable minutes of child physical activities are those of moderate to vigorous intensity. (i.e., walking, running, jumping, skipping, crawling, climbing, biking, swimming, active indoor or outdoor play, etc.)

How many hours of screen time does ____ get on an average day?

(Screen time is sedentary activities done in front of a screen, such as watching TV, working on a computer, playing video games, or using a hand-held device, such as a smart phone or tablet.)

BMI at Enrollment:

Date BMI collected:

Today

M-D-Y

Enrollment Notes:

3

Enrollment information verified? ☐ Yes ☐ No

Expand

Add/Update Additional Children

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](#)

Legend for status icons:

Incomplete Incomplete (no data saved) Unverified Complete Many statuses (all same) Many statuses (mixed)

Record ID 9 Active: Joyner, Hilary (enrolled 03-28-2023)

Data Collection Instrument	Enroll Family Enter parent information	Add/Update Children Use + to enroll additional children	Month 1 March 2023	Month 2 April 2023	Month 3 May 2023	Month 4 June 2023	Month 5 July 2023	Month 6 August 2023	Month 7 September 2023	Month 8 October 2023	Month 9 November 2023	Month 10 December 2023	Month 11 January 2024	Month 12 February 2024	Month 13 March 2024
Add Family															
Add Child(ren) and Enter Graduation Information															
Monthly Contact															

Repeating Instruments

Add Child(ren) and Enter Graduation Information

Add/Update Children (1)

1		Niels Olsen: Active
+ Add new		

← Children added will appear in the Add Child(ren) and Enter Graduation Information list

- Click on **+ button** next to Add/Update Children button or the **+ Add new** button to **add another child**, up to 3 children total per family
- If you need to enroll more than 3 children in one family with the same enrollment date, contact the evaluation team at fitfamilies@med.wisc.edu

Month 1 Contact

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](#)

Legend for status icons:

● Incomplete ● Incomplete (no data saved) ?
● Unverified ● ● ● Many statuses (all same)
● Complete ● ● Many statuses (mixed)

Record ID 9 Active: Joyner, Hilary (enrolled 03-28-2023)

Data Collection Instrument	Enroll Family Enter parent information	Add/Update Children Use + to enroll additional children	Month 1 March 2023	Month 2 April 2023	Month 3 May 2023	Month 4 June 2023	Month 5 July 2023	Month 6 August 2023	Month 7 September 2023	Month 8 October 2023	Month 9 November 2023	Month 10 December 2023	Month 11 January 2024	Month 12 February 2024	Month 13 March 2024
Add Family	●														
Add Child(ren) and Enter Graduation Information		● +													
Monthly Contact			●	●	●	●	●	●	●	●	●	●	●	●	●

Repeating Instruments

Add Child(ren) and Enter Graduation Information

Add/Update Children
(1)

1	●	Niels Olsen: Active
---	---	---------------------

+ Add new

- After you have added all children for the family, complete the **Month 1 contact** to record your first monthly contact.
- Click on the Month 1 dot to open the Month 1 Contact form

Complete Month 1 Contact

Editing existing Record ID 4083-1. - , ; Olsen, Niels (Active)

Event: **Month 1**

Record ID 4083-1

Monthly Contact Recording Form

Family Contact Information

1 **Parent name:** Hilary Joyner **Contact notes from enrollment:**
WIC ID: 12345235 Prefers afternoons, texts are best
Phone number: (555) 760-3218
Email: hilary.joyner@gmail.com

Child(ren)'s Enrollment Notes

2 **Niels:** Mom wants to work on Niels eating more vegetables.

This Month's Contact

Due in June 2023

Contact Details (required)	Contact Attempts (optional)								
4 Date: 06-06-2023 Contact Type: In person 5 Which children did you discuss during this contact? ☒ Niels Olsen (Goals: Bite) Contact Notes: Niels is very excited to try some of the recipes I shared with Mom. Expand	<table><thead><tr><th>Attempts</th><th>Attempt notes</th></tr></thead><tbody><tr><td>☐ 1</td><td></td></tr><tr><td>☐ 2</td><td></td></tr><tr><td>☐ 3</td><td></td></tr></tbody></table> NERI Tracking (optional) NERI Distributed:	Attempts	Attempt notes	☐ 1		☐ 2		☐ 3	
Attempts	Attempt notes								
☐ 1									
☐ 2									
☐ 3									

Complete at first contact

1. Parent information and children's enrollment notes from 'Enroll Family' event will appear at top
2. Child(ren)'s enrollment notes from Add/Update Children form
3. Record contact attempts (optional)
4. Enter date of contact, type, and notes
5. Use check boxes to indicate which children you discussed during the contact

Complete Month 1 Contact

Complete at first contact

1. Optional: add notes about NERI owed/distributed
2. Optional: record date and type of next contact
3. Mark form status as **Complete**
4. **Save** the form!

Contact Notes:
Niels is very excited to try some of the recipes I shared with Mom.
Expand

NERI Tracking (optional)
NERI Distributed:

Next Month's Contact
Due in July 2023

Next contact scheduled on (optional): M-D-Y **Next contact type (optional):** ☐ In Person ☒ Virtual reset

Form Status

Complete?

4

Recording Contacts

Monthly data entry



Monthly Contacts

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](#) ▼

Legend for status icons:

● Incomplete ● Incomplete (no data saved) ?
● Unverified ● ● ● Many statuses (all same)
● Complete ● Many statuses (mixed)

Record ID 1 Active: Joyner, Hilary (enrolled 03-09-2023)

Data Collection Instrument	Enroll Family Enter parent information	Add/Update Children Use + to enroll additional children	Month 1 March 2023	Month 2 April 2023	Month 3 May 2023	Month 4 June 2023	Month 5 July 2023	Month 6 August 2023	Month 7 September 2023	Month 8 October 2023	Month 9 November 2023	Month 10 December 2023	Month 11 January 2024	Month 12 February 2024	Month 13 March 2024
Add Family	●														
Add Child(ren) and Enter Graduation Information		● +													
Monthly Contact			●	●	●	●	●	●	●	●	●	●	●	●	●

Repeating Instruments

Add Child(ren) and Enter Graduation Information

Add/Update Children
(1)

1	●	Niels Olsen: Active
---	--------------------------------------	---------------------

+ Add new

- **Monthly schedule** displayed in table header
- Click on the **dot** below the month to open the contact form
- Complete one contact per calendar month

Monthly Contact Form

Record ID 4083-2

Monthly Contact Recording Form

Family Contact Information

Parent name: Sarah Linnan
WIC ID: 32498132
Phone number: (608) 555-1233
Email: _____

Contact notes from enrollment: _____

Child(ren)'s Enrollment Notes

Frank: Mom's goal is to swap healthier beverages for sweetened drinks.
Hank: Mom would like to work on getting Hank comfortable eating more vegetables.

This Month's Contact

Due in January 2023

Contact Details (required)

Date: 01-15-2023
Today M-D-Y

Contact Type: Phone

Which children did you discuss during this contact?
☒ Frank Linnan (Goals: Sip)
☒ Hank Linnan (Goals: Bite)

Contact Notes:
The boys loved the recipes. Frank is drinking soda every other day, rather than every day.

Expand

Contact Attempts (optional)

Attempts	Attempt notes
3 ☒ 1	Left message
☐ 2	Connected with Mom by phone
☐ 3	

NERI Tracking (optional)

NERI Distributed: _____

Next Month's Contact

Due in February 2023

Next contact scheduled on (optional): 02-20-2023 Today
M-D-Y

Next contact type (optional):
☐ In Person ☒ Virtual

Previous Contacts

Month (Due)	Date	Type	Contact Notes	NERI
1: 12-02-2022	12-15-2022	In person	The boys are excited to try spa water and new recipes.	Coloring books
2: January 2023	01-15-2023	Phone	The boys loved the recipes. Frank is drinking soda every other day, rather than every day.	_____
3: February 2023	02-20-2023	Email/Text	Family is going on trip for spring break next month. Scheduled contact for before their trip.	Will distribute 3 months of NERI at in-person appointment next month.
4: March 2023	03-05-2023	In person	Family is doing well on goals. Working on more variety in vegetables.	Gardening set, cutting board, tumblers

Once per month

1. Parent information and enrollment notes appear in **Family Contact Information** section
2. Record contact date, type, and notes in **This Month's Contact** section
3. Optional: track contact attempts
4. Optional: enter date and type of next scheduled contact

Monthly Contact Form

1

Next Month's Contact

Due in February 2023

Next contact scheduled on (optional): 02-20-2023 Today Next contact type (optional): ☐ In Person ☒ Virtual [reset](#)

M-D-Y

Previous Contacts

Month (Due)	Date	Type	Contact Notes	NERI
1: 12-02-2022	12-15-2022	In person	The boys are excited to try spa water and new recipes.	Coloring books
2: January 2023	01-15-2023	Phone	The boys loved the recipes. Frank is drinking soda every other day, rather than every day.	—
3: February 2023	02-20-2023	Email/Text	Family is going on trip for spring break next month. Scheduled contact for before their trip.	Will distribute 3 months of NERI at in-person appointment next month.
4: March 2023	03-05-2023	In person	Family is doing well on goals. Working on more variety in vegetables.	Gardening set, cutting board, tumblers
5: April 2023	04-11-2023	No Contact	—	—
6: May 2023	05-15-2023	Phone	Kids are enjoying making all kinds of spa water.	—
7: June 2023	—	—	—	—
8: July 2023	—	—	—	—
9: August 2023	—	—	—	—
10: September 2023	—	—	—	—
11: October 2023	—	—	—	—
12: November 2023	—	—	—	—

Form Status

Complete? Complete

3

Once per month

1. Previous Contacts section contains details of previous contact(s) and NERI tracking
2. Mark **Complete**
3. **Save** the form

View Upcoming Contacts



Logged in as **hjoyner** | [Log out](#)

[My Projects](#)

[REDCap Messenger](#)

[Contact REDCap administrator](#)

Data Collection

[Record Status Dashboard](#)

[Add / Edit Records](#)

Project status: **Production**

Project Bookmarks

[View Active Families](#)

[FY23 Satisfaction Survey - English](#)

[FY23 Satisfaction Survey - Spanish](#)

[Enroll Family](#)

Reports

[Search](#)

[Organize](#)

[Edit](#)

1) Active Families: View upcoming contacts

2) Active Families nearing graduation

3) Active Families with No Recent Contact Recorded

- Reports Section: click **Active Families: View upcoming contacts**
- Contact date and type are from last recorded contact
- **Next contact due** is based on scheduled generated at enrollment
- Can use **arrows** in header to sort information.

Active Families: View upcoming contacts

This report shows the most recent contact for all Active families, along with when the next contact is due.

- The Event Name column displays the Month number for the last recorded monthly contact (e.g. Month 3).
- The Date and Contact Type columns provide the date and type of the last recorded monthly contact.
- The Next Contact Due reflects the month and year the next monthly contact was due, based on the schedule created at enrollment.
- The Next Contact Scheduled Date displays the date entered as a tentative next contact date during the last completed monthly contact.

If you were unable to contact a family in a given calendar month, please enter a 'No Contact' type for that month.

Record ID	Event Name	Contact Date	Contact type:	Contact Notes	Next Contact Due	Next contact scheduled for:
4083-3 Hilary Joyner - Taber, Erin; Taber, Luka (Active)	Month 4	05-11-2023	In person	Luka is doing great on his goals! He loves playing with the squeak toy and eating from his new bowl. 10/10 good boy.	June 2023	06-08-2023
4083-2 Hilary Joyner - Linnan, Sarah; Linnan, Frank (Active)	Month 6	05-15-2023	Phone	Kids are enjoying making all kinds of spa water.	June 2023	06-10-2023
4083-4 Hilary Joyner - Cleo, Le; Le, Akira (Active)	Month 3	06-01-2023	Phone	Akira doesn't like the diluted juice as much, but is asking for it less often.	July 2023	07-05-2023
4083-1 Hilary Joyner - Joyner, Hilary; Olsen, Niels (Active)	Month 1	06-06-2023	In person	Niels is very excited to try some of the recipes I shared with Mom.	July 2023	07-15-2023

Graduation

And re-enrollment



Fit Families REDCap Data Collection Training

At Month 13

1. Enter Month 13 contact info

2. Mark Complete

3. Click **Save & Stay**

4. Instructions appear in the **Graduation** section

5. Click on the link(s) to begin entering graduation data for each child in Add/Update Children form(s)

Graduate a Child

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. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

[Choose action for record](#)

Legend for status icons:

● Incomplete ● Incomplete (no data saved) ● Unverified ● Complete ● Many statuses (all same) ● Many statuses (mixed)

Record ID 1 Active: Joyner, Hilary (enrolled 03-09-2023)

Data Collection Instrument	Enroll Family Enter parent information	Add/Update Children Use + to enroll additional children	Month 1 March 2023	Month 2 April 2023	Month 3 May 2023	Month 4 June 2023	Month 5 July 2023	Month 6 August 2023	Month 7 September 2023	Month 8 October 2023	Month 9 November 2023	Month 10 December 2023	Month 11 January 2024	Month 12 February 2024	Month 13 March 2024
Add Family	●														
Add Child(ren) and Enter Graduation Information		● +													
Monthly Contact			●	●	●	●	●	●	●	●	●	●	●	●	●
Delete all data on event:	×	×	×	×	×	×	×	×	×	×	×	×	×	×	×

Repeating Instruments

Add Child(ren) and Enter Graduation Information

Add/Update Children (1)

1	●	Niels Olsen: Active
+ Add new		

- You also can graduate children from the Record Home Page
- Use the dashboard or click on the link in the Month 13 contact form (see previous slide) to open the Add Child(ren) and Enter Graduation Information form
- Complete the steps on the next slide for each graduating child

Graduate a Child

Fit Families REDCap
Data Collection Training

Editing existing Record ID 1. (Instance #1) Active: . (enrolled)

Event: **Add/Update Children**

Record ID 1

Child Information

First Name: Niels Last Name: Olsen Completion Status: Graduated 1

WIC ID: 6843218 Birthdate: 06-19-2019 Niels was 44 months old at enrollment on 03-09-2023

M-D-Y

Graduation Information for Niels

Please collect and enter behavioral information and BMI (if available) within 3 months of ____.

Thinking about the last month, on average:

 How many 1/2-cup servings of vegetables does Niels eat per day? 2
(Vegetable is any canned, fresh or frozen plant product eaten as food.)
Vegetable servings per day

How often does Niels eat more than one type of vegetable each day?

 How many 1/2-cup servings of fruits does Niels eat per day?
(Fruit is any canned, fresh or frozen product of a tree or other plant that contains seed and can be eaten as food.)
Fruit servings per day

How often does Niels eat more than one type of fruit each day?

 How many 8 oz. servings of sweetened beverages does Niels drink per week?
(Include any sugar-sweetened beverage other than chocolate milk. Sweetened beverages include all sodas, fruit drinks, fruit cocktails, fruit drink pouches, sports drinks, energy drinks, sweetened water, sweet teas, and sweet coffee drinks.)
Sweetened beverage servings per week

How often does Niels drink plain water?

How many 6 oz. servings of 100% fruit juice does Niels drink in a typical day?
(Fruit juice is any 100%, no sugar added liquid obtained from a fruit.)
Juice servings per day

 How much physical activity does Niels get on a typical day?
(Physical activity is movement of the body that uses energy. Reportable minutes of child physical activities are those of moderate to vigorous intensity. (i.e., walking, running, jumping, skipping, crawling, climbing, biking, swimming, active indoor or outdoor play, etc.)

How many hours of screen time does Niels get on an average day?
(Screen time is sedentary activities done in front of a screen, such as watching TV, working on a computer, playing video games, or using a hand-held device, such as a smart phone or tablet.)

BMI at Graduation: Date BMI collected: Today

M-D-Y

1. Change the **Completion Status** dropdown to Graduated

2. Complete Graduation behavioral information and BMI, if available

3. **Save** the form

4. Repeat steps 1-3 with any remaining children using each graduating child's Add/Update Children and Enter Graduation Information form

5. Send Satisfaction Survey link to the parent/guardian

How do I...

Other necessary tasks



Term a Child

Editing existing Record ID 1. (Instance #1) Active: , (enrolled)

Event: **Add/Update Children**

Record ID 1

Child Information

First Name: Niels **Last Name:** Olsen **Completion Status:** Termed ▼

WIC ID: 6843218 **Birthdate:** 06-19-2019 31 Niels was **44 months** old at enrollment on 03-09-2023

M-D-Y

Termination Date: 31 Today M-D-Y **Termination Reason:** ▼

- Each child in a family will need to be termed individually
- Open the Add Child(ren) and Enter Graduation Information form for the child you wish to term
- Change the **Completion Status** drop-down to Termed
- Enter Termination Date and Termination Reason
- Save the form

Update Contact Info

	Enroll Family	Add/Update Children	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Month 13
Record ID	Add Family	Add Child(ren) and Enter Graduation Information	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact	Monthly Contact
1 Active: Mulligan, Sarah (enrolled 10-03-2022)		+													
2 Termed: Badger, Bucky (enrolled 07-03-2022)		+													
3 Graduated: Martinez, Layla (enrolled 09-15-2022)		+													
4 Active: Linnan, Sarah (enrolled 10-03-2022)		+													
5 Graduated: Joyner, Hilary (enrolled 02-08-2023)		+													
6 Active: Testing, Mom (enrolled 02-09-2023)		+													
7 Termed: McDonald, Wendy (enrolled 10-15-2022)		+													



- From the Record Status Dashboard, open the Add Family form for parent whose contact information has changed
- Update Parent/Caregiver Information as needed
- Save the Add Family form



Parent/Caregiver Information

Parent First Name:

Last Name:

WIC ID:

Contact Information

Street Address:

City:

Mobile Number:

Contact Notes:

State:

ZIP Code:

Email:

Interpreter Needed?

☐ Yes
☒ No

Language:

reset

Expand

Add Goals

Set Goals

Niels's Goals

☒ Bite
☐ Sip
☐ Move
☒ Model

Parents can choose one or more goals to work on with each child. Check box(es) for the goals Hilary chooses for Niels.

Form Status

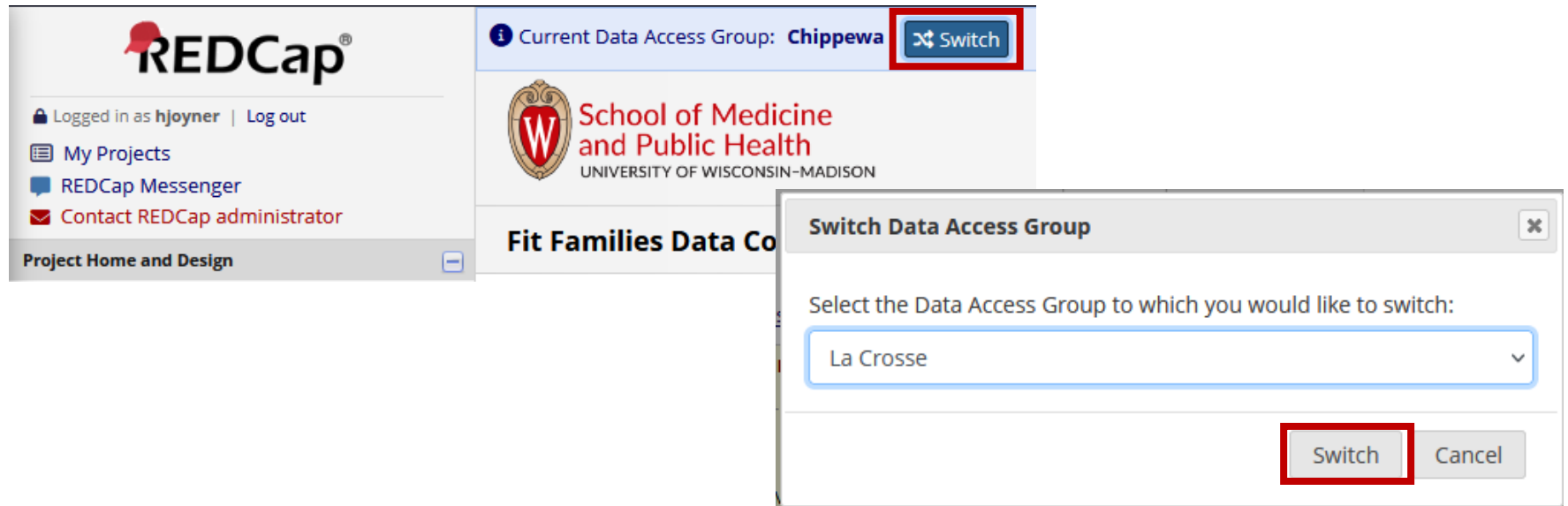
Complete? H Complete ▾

Save & Exit Form Save & Stay ▾

- Cancel -

- If a family wants to add a new goal, update the Add/Update Children form for each child
- Open the record for the child whose goals have changed
- Use the Set Goals checkboxes to indicate their current goals
- Update the enrollment notes with new goal(s), if desired
- Save the Add/Update Children form

See Another Site's Data



- If you have permission to view more than one site's data, you will be assigned to more than one DAG
- You can only view data from one site at a time
- To switch to another site, use the DAG Switcher tool
- Click the Switch button at the top of the screen
- Select a DAG and click Switch

Transfer a Family

- To transfer a family, contact the Evaluation team at fitfamilies@med.wisc.edu
- All information should be up-to-date for the family before they are transferred
- Evaluation staff will reassign the record to the new site
- All data will be retained and appear for coaches at the new site
- The record will be visible to the new site, but not to the site the family transferred from

Enroll a Sibling at a Later Date

- To enroll a sibling from a family that is already enrolled, you will need to repeat the process described in the “Enrolling Families” section.
- You only need to do this if the siblings have different enrollment dates
- All siblings in one record will have the same enrollment and contact dates
- Siblings with different enrollment dates should have separate records
- Parent information should be entered in each record
- For assistance, please contact Hilary (hjoyner@wisc.edu)

Re-Enroll a Family

- To re-enroll a family, you will need to repeat the process described in the “Enrolling Families” section.
- If you are re-enrolling a family during a monthly contact, you can leave some fields blank and return to the record to complete them later.
- Leave the record status drop-downs in each form set to “Incomplete” until you have finished copying information to new enrollment forms.

Change a Child's Information

Event: **Add/Update Children**

Record ID: 4083-1

Child Information

First Name: Niels	Last Name: Olsen	Completion Status: Active
WIC Participant ID: 3216548	Birthdate: 06-19-2019 M-D-Y	Niels was 47 months old at enrollment on 06-06-2023
Gender: ☐ Female ☒ Male ☐ Non-binary ☐ Prefer not to respond ☐ Unknown	Race(s): check all that apply ☐ American Indian or Alaskan Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or Pacific Islander ☒ White ☐ Other ☐ Prefer not to respond ☐ Unknown	Is Niels Hispanic/Latino? ☐ Yes ☒ No ☐ Prefer not to respond ☐ Unknown Is Niels a SNAP recipient? ☒ Yes ☐ No

Niels's information and demographics verified? ☒ Yes ☐ No [reset](#)

- Child Information will appear as read only if **[Name]'s information and demographics verified?** button set to Yes
- Set button to No and click **Save & Stay** to edit fields
- Update information, change button to Yes, and Save form

Change Enrollment or Graduation Information

Yes = read only

Enrollment information verified? ☒ Yes ☐ No [reset](#)

Graduation information verified? ☐ Yes ☒ No [reset](#)

No = editable

- Child Enrollment and Graduation Information sections will appear as read only if Enrollment/Graduation information verified button set to Yes
- Set button to No and click **Save & Stay** to edit fields
- Update information, change button to Yes, and Save form

Evaluation Team

Email the Team

fitfamilies@med.wisc.edu



Sarah Linnan
linnan@wisc.edu



Hilary Joyner
hjoyner@wisc.edu



Erin Taber
etaber2@wisc.edu