



DHS REDCap User Guide & FAQs

This guide helps users navigate the REDCap registration process. If you have questions about the Wisconsin Department of Health Services (DHS) REDCap system after reviewing this guide, send a note to the [REDCap team](#).

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Terminology

Throughout this guide and in REDCap, you will find some frequently used terminology. These commonly used terms are defined for your reference.

- **REDCap Administrator:** This is a person at DHS that serves as the system administrator. This person maintains the system, access to or in the system, and maintains the forms to collect the necessary data. Email your friendly WI DHS REDCap admins @ DHSREDCap@dhs.wisconsin.gov with any questions you have.
- **Username:** The email associated with either the MyWisconsin ID or Local REDcap user account.
- **MyWisconsin ID:** MyWisconsin ID is identification that created through [Wisconsin's Department of Administration](#).

MyWisconsin ID credential system works on a hub and spoken model. The hub is where users accounts are stored and the spoke is where the applications are stored ("application" or "app" is the term for a widget that is created inside of MyWisconsin ID that the actual application uses to authenticate the user)... I know... Not confusing at all.

Imagine a house. The hub is the foyer where you first enter, the spokes are the hallways for access to the different platforms/app "rooms". When one clicks the [My Wisconsin ID] button on the REDCap sign in page, they are taken to the hub to login. Automatically upon a successful sign in, one is returned to down the spoke with access to the REDCap "room".

Leaving REDCap by either closing a tab or logging out, doesn't mean one has left the house. Users are still logged into MyWisconsin ID. They are simply waiting to the foyer. Opening a new tab and clicking the MyWisconsin ID sign in button will automatically return the user to their REDCap homepage with their full access to projects.

One can depart the house by going out a window, i.e. closing the browser window. User can also walk out the door in the foyer by after logging out of REDCap, clicking on the [Link] on the REDCap sign in page to completely log out of MyWisconsin ID. Either way terminates your MyWisconsin ID session and secures against unauthorized access.

<https://apps.wisconsin.gov> is the Production hub where new users, who do not have a MyWisconsin ID in Production, will need to go to create one. This is also be where to go for MyWisconsin ID sign out, multifactor authentication set up and other account options.

<https://dhs-apps.wisconsin.gov> is the Production spoke where all of DHS Production applications that use MyWisconsin ID are located. This is where you are logging into when you are accessing the production instance of REDCap

- **Local REDCap:** Wisconsin state employee credentials are hosted internally by the REDCap system. If your email ends in Wisconsin.gov (or some derivative like wi.gov), this is the login for you. If you have any questions about which login to use, email your friendly WI DHS REDCap admins @ DHSREDCap@dhs.wisconsin.gov.



- **Multi-Factor Authentication (MFA):** This is an enhanced security method that requires users to provide more than one form of identification to access an application.
- **Project:** The project is the entire group of data collection instruments for each topic. For example, if your work is focused on breastfeeding, this is the project name. Within the Breastfeeding project there can be one or more forms to capture data in different ways.
- **Form:** This is the actual data collection instrument located inside each project. The form is where the data is entered.
- **Site:** The site is the place where you implement activities. This is a physical place, such as "Kinder Care Day Care Center" or "Madison East High School." All information collected for the site should be all about that location only.



New Users: Set Up a MyWisconsin ID or Local REDCap Account

Route 1: Register for MyWisconsin ID (Most Users)

1. Start your MyWisconsin ID credential creation by going to <https://apps.wisconsin.gov>
2. Start by clicking on the [Sign up] link at the bottom.

3. Fill in information. Click Sign Up button.
4. Bot prevention. There might be many cycles required to verify, be patient.
5. Land at the Set up security methods page. Start with Password by clicking the [Set up] button in that section.
6. Enter a password that complies with the requirements, then re-enter the same password before clicking on the [Next] button at the bottom
7. Returns to the Set up security methods page. Continue with Email verification by clicking the [Set up] button in that section.
8. Lands on Verify with your email page. Goto your email to find link or verification code
9. Below is a copy of the email message. Click on the blue Activate MyWisconsin ID Account.

Hi Okta Test,

You are receiving this email to confirm the email address for your MyWisconsin ID account. To finish verifying your email address, click the button below or enter the provided code. (Note: If this is your first time setting up your MyWisconsin ID account, then your next steps will be setting up a password and Multi-Factor Authentication (MFA) to finish enrollment. Please click the "Set Up Later" button to complete the process.) If you have additional questions or need help, please go to https://doh.wisconsin.gov/Pages/MyWisconsin_ID.aspx

Activate MyWisconsin ID Account

This link expires in 15 minutes.
To verify manually, enter this code: **677875**

If you did not request this email, please contact an administrator.

10. After clicking on the blue Activate MyWisconsin ID Account
11. Or enter the code sent in the email. If you did not receive an email, verify the correct email address is being used, then click on the [Send Again] link.
12. Return to the Set up security methods page. There are more options for MFA.



- a. For Phone MFA, click on [Set up] button. Enter a phone number and click on [Receive a code via SMS]
 - i. A SMS text will be sent with a code to the number provided. Then enter the code and click [Verify].
- b. For MFA through either the Google or Microsoft Authenticator app on a phone, click on [Set up] button in the Google Authenticator section. Open the app on the phone and scan the QR code on the screen
- c. For MFA through the Okta Authenticator app on a phone, click on [Set up] button in the Okta Verify section. Open the app on the phone and scan the QR code on the screen.
- d. For Security Key or Biometric Authenticator MFA, click on [Set up] button in the Security Key or Biometric Authenticator section. Then click on the [Set up] button after reviewing page.
 - i. Click [OK] for the Security key setup
 - ii. Click [OK] for Continue setup
 - iii. Insert Security Key or activate Biometric Authenticator
 - iv. Follow instructions to complete Security Key or Biometric Authenticator MFA.

13. Once MFA is set up. Click [Back to sign in] link at the bottom of the page. Welcome to MyWisconsin ID!

14. Email [REDCap admins](#) your completed [Form f02445a, REDCAP USER ACCESS REQUEST](#) for project access

Set up security methods

OktaTest800@gmail.com

Security methods help protect your State of Wisconsin account by ensuring only you have access.

Set up required



Google Authenticator

Enter a temporary code generated from the Google Authenticator app. Used for access

Set up



Okta Verify

Okta Verify is an authenticator app, installed on your phone or computer, used to prove your identity. Used for access

Set up



Phone

Verify with a code sent to your phone. Used for access

Set up

Route 2: Set up a Local REDCap Account (WI State Employee Only!)


1. Completed [Form f02445a, REDCAP USER ACCESS REQUEST](#)
2. Email the completed form to DHS REDCap Administrators at DHSREDCap@dhs.wisconsin.gov
3. State Employee will receive email with link to set their own account password.
 - a. Click [Set your new REDCap password] in received email
 - b. Enter password in field provided. Re-enter Password. Click [Submit] button
4. State Employee will receive email to set up account MFA
 - a. Click [View QR code in separate window] in received email
 - b. Scan QR using preferred (Google, Microsoft or Okta) authenticator app on device.
5. Go to REDCap login page – <https://redcap.wisconsin.gov/>
6. Login using email, password and then MFA by click right green [Local REDCap Login] button




Existing Users: FAQs

Q. I previously had a WILMS username for REDCap. What do I need to do?

Most users

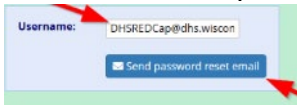
1. Most users (non-WI state employees) will need to create a new MyWisconsin ID account (see above).
2. Then login using the blue [MyWisconsin ID] button  on <https://redcap.wisconsin.gov>

WI State Employees Only!

1. Go to REDCap login page – <https://redcap.wisconsin.gov/>
2. Returning State Employee users (any Wisconsin.gov emails) signing in for the first time after the My Wisconsin ID / Local REDCap Logon implementation will need to start with clicking the right green Local REDCap Logon button 
3. Then click on [Forgot your password?] link to the right of the Log In button



4. Emails will now replace the old Usernames. Enter the account's email into the Username field.

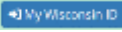


5. An email with the password recovery link will be sent.
6. Click on the [Set your new REDCap password] link in email
7. Type and re-type new password. Click [Submit] button
8. Choose MFA authorization method. First time logins should use Email MFA option.



9. Copy the verification code from email
10. Paste (or type) the code into the field provided and click submit.

Q. I have created MyWisconsin ID. How do I sign in to REDCap?

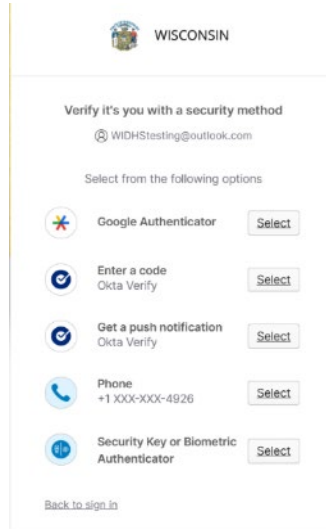
1. Go to REDCap sign in page and click on the blue [MyWisconsin ID] button 



- Automatically be taken to the MyWisconsin ID Sign In page. Enter email and click [Next] button



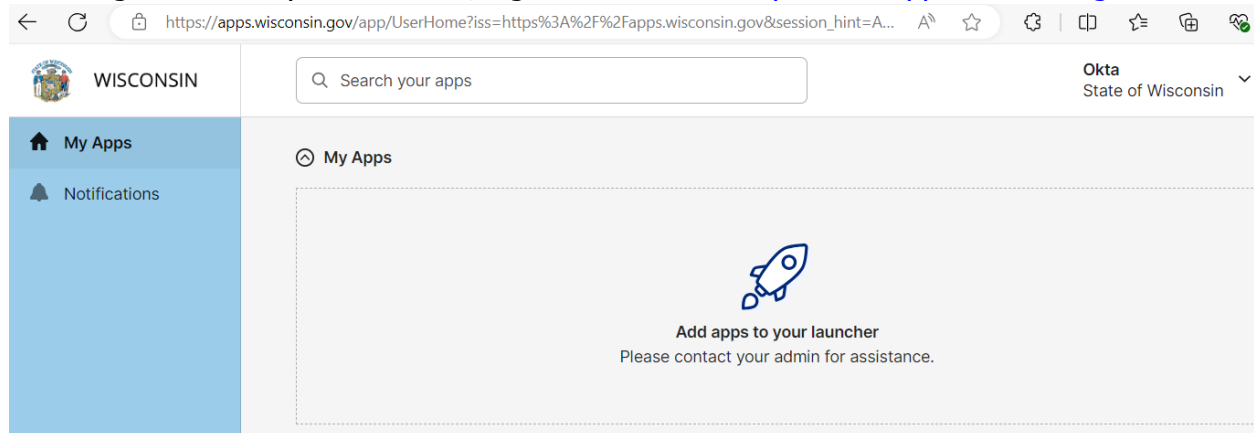
- Enter password and click [Verify] button
- Choose from available MFA that have been set up for the credentials.



- Enter the supplied code and click the [Verify] button
- Or send a push notification
- Or complete Security Key or Biometric Authenticator MFA.
- Once signed in, MyWisconsin ID send to right back the REDCap home page.

Q. How do I change my Multi-Factor Authentication (MFA) for MyWisconsin ID?

- To change MFA for MyWisconsin ID, login to the hub at <https://dhs-apps.wisconsin.gov>

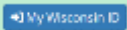


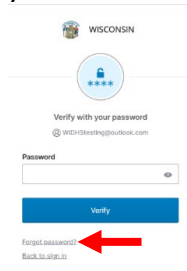
- Click [State of Wisconsin – (...)] in the upper right hand corner of screen
- Click [Settings] link in drop down menu



4. Choose desired action
 - a. Enable a MFA – Click [Set up] button to right of desired MFA
 - b. Disable a MFA – Click [Remove] button to right of undesired MFA
5. Enter password and click [Verify]
6. Complete MFA
 - a. This will complete the removal of a MFA option for the user
 - b. User returned to MyWisconsin ID Setting menu upon completion.
7. Click [Set up] button on Set up security methods page.
8. Follow the instructions on the following page(s) to complete MFA set up.
9. User returned to MyWisconsin ID Setting menu upon completion.

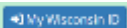
Q. How do I reset MyWisconsin ID Password?

1. Go to REDCap sign in page and click on the blue [MyWisconsin ID] button 
2. Automatically be taken to the MyWisconsin ID Sign In page. Enter email and click [Next] button
3. Click [Forgot Password?] link under the Verify button



4. Click [Send me an email] button
5. Open email to click on [Reset MyWisconsin ID Password] or copy code from the email
 - a. Click [Enter a verification code instead] to enter code on MyWisconsin ID website
 - b. Enter code and click [Verify]
6. Select preferred MFA by clicking on the appropriate [Select] link
7. Complete MFA
8. Enter New password, Re-enter password and the click [Reset Password]

Q. How do I unlock MyWisconsin ID account?

1. Go to REDCap sign in page and click on the blue [MyWisconsin ID] button 
2. Click [Unlock account?] link on MyWisconsin ID Sign In page
3. Enter email address in field provided and click [Select]
4. Click [Send me an email] button
5. Open email to click on [Reset MyWisconsin ID Password] or copy code from the email
 - a. Click [Enter a verification code instead] to enter code on MyWisconsin ID website
 - b. Enter code and click [Verify]
6. Undergo MFA with your preferred method
 - a. Please note Microsoft Authenticator can be enter on MyWisconsin ID Google Authenticator page
7. Enter password and click [Verify]



Q. I am MyWisconsin ID user. How do I securely sign out? (MUST READ)

1. Click [Log out] on the top right-hand corner of any REDCap page.
2. Click [Click Here to Logout Properly] on the REDCap sign in page to complete sign out of MyWisconsin ID


-OR-

1. Goto MyWisconsin ID hub at <https://apps.wisconsin.gov>
2. Click [State of Wisconsin – (...)] in the upper right hand corner of screen
3. Click [Sign out] link in drop down menu


-OR-

1. Close browser window.

Q. How do WI State Employees reset their Local REDCap Password? (State Employees Only!)

1. Go to REDCap login page – <https://redcap.wisconsin.gov/>
2. Click the right green [Local REDCap Logon] button 
3. Then click [Forgot your password?] link to the right of the Log In button
4. Emails now replace the old Usernames. Enter the account's email into the Username field.
5. An email with the password recovery link will be sent.
6. Click [Set your new REDCap password] link in email
7. Type and re-type your new password

Q. How can WI State Employees set up MFA? (State Employees Only!)

1. Go to REDCap login page – <https://redcap.wisconsin.gov/>
2. Login via the green [Local REDCap Login] button 
3. Click [Profile] in the upper right hand next to Log Out
4. Click [Set up Google or Microsoft Authenticator for two-step login] button
5. Follow the instructions on the page
6. Future logins will start with clicking the right green Local REDCap Logon button
7. Enter your email for your Username and your password. Then click Log In
8. Choose your MFA and enter the code

-OR-

1. Email DHS REDCap Admins at DHSREDCap@dhs.wisconsin.gov to receive an email with with MFA instructions and links

Q. How do I download an authenticator app to my phone?

There are too many phone models and operating systems to give definitive guidance to all possible users. There are resources to help:

Download apps and games on your iPhone or iPad – <https://support.apple.com/en-us/102590>

Download apps to your Android device – <https://support.google.com/android/answer/9457058?hl=en>

The following apps are approved for use with MyWisconsin ID



Google Authenticator – [Google Play](#) / [Apple Store Preview](#)

OKTA Verify – [Google Play](#) / [Apple Store Preview](#)

Microsoft Authenticator – [Google Play](#) / [Apple Store Preview](#)

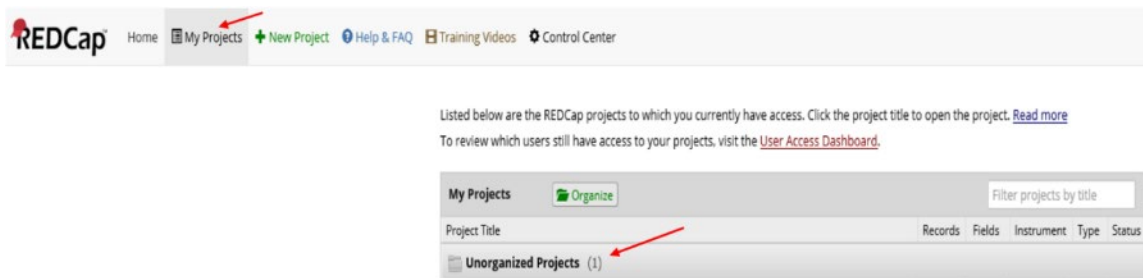
WI state employees should follow their standard operating procedures to request that one or more authentication apps downloaded to their state devices.

Q. How do I remove a user from REDCap?

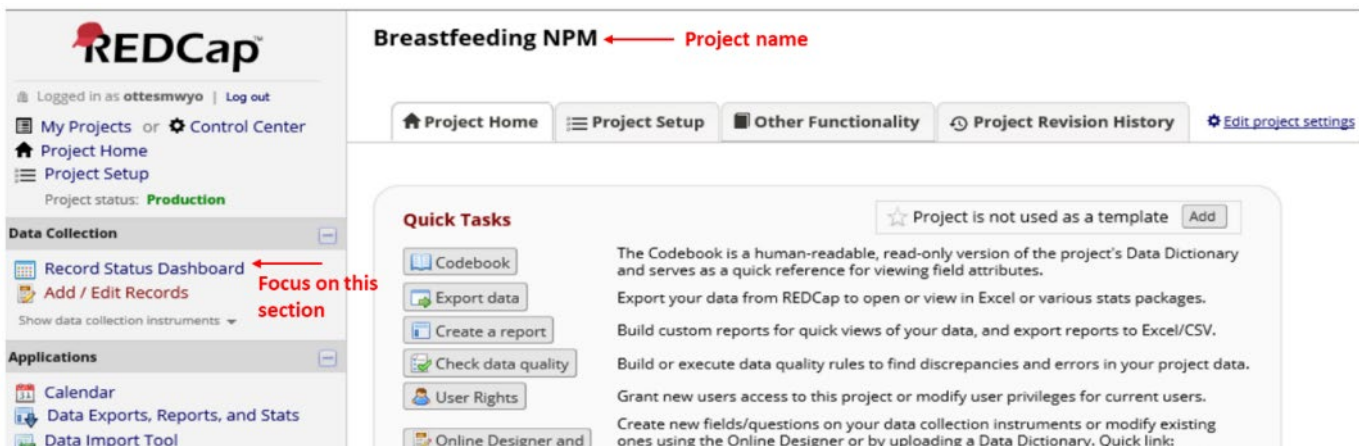
Send an email to dhsredcap@wi.gov with the subject line "Remove User." Provide the email of the person to be removed. If you don't know their email, providing their name should work.

Q. How do I enter data for my site?

- After logging onto REDCap, the "My Projects" tab appears at the top of the page. If you have access to projects in REDCap, they will appear when you click the "My Projects" tab. Click on the project that you wish to edit.



- The project page will appear. The project name is at the top of the page and the Data Collection, Record Status Dashboard, and Add/Edit Records sections are on your left.





Q. What is the Record Status Dashboard?

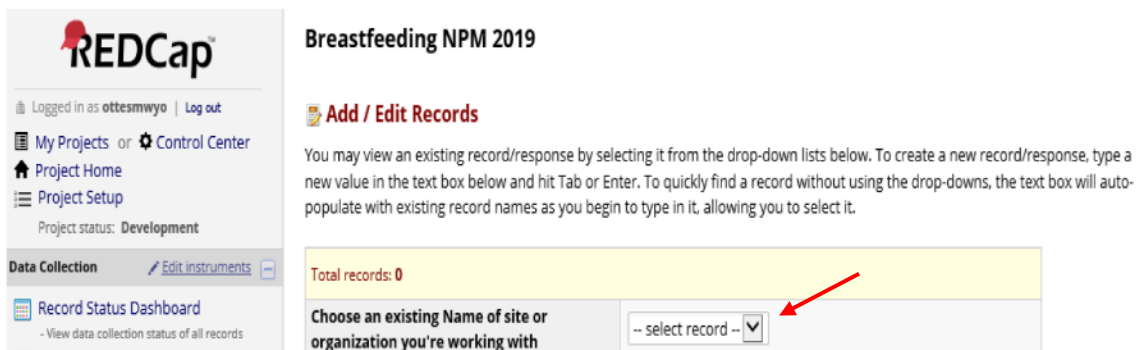
Clicking on "Record Status Dashboard" will show you an image that displays the data that you are permitted to view. The image is useful because the radio buttons show what data has been entered and what data needs entry. Green means data entry is complete, red means it is incomplete, grey means data is incomplete or there is no data, yellow means data is unverified. It will look like this:

Breastfeeding Site summary	Breastfeeding 2018	Historical data 2016-2017
<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- When you are ready to enter data, click on a radio button on this page. Doing so will take you directly to the data entry form page. For example, a red button indicates that some data is entered but data entry is not complete. Once data entry is complete, red buttons will change to green the next time you visit the Record Status Dashboard.

Q. How do I Add/Edit Records?

- To add/edit records, select "Add/Edit Records" from the main project page. The page that opens will look



like this:

- On the Add/Edit Records page, there is a drop-down menu that lists all the sites/organizations that have been added to the project. Sites/organizations use this naming convention: County_ Name of site_ City of site. An example of this is: Dane_ Kinder Care Day Care_ Madison.

Select the site that you want to edit, and the entry form will open. Each form contains different information depending on the project, but they all look like typical data collection forms. For example:



The screenshot shows a REDCap form titled "Activities and Outputs". It contains three questions, each with radio button options and a "reset" link. The first question is "Did you contact this site about the 2018 MCH breastfeeding objectives?" with options "Yes" and "No". The second question is "Did the site agree to participate in 2018 objective activities?" with options "Yes", "No", and "Not applicable". The third question is "Was the site breastfeeding friendly certified prior to 2018?" with options "Yes" and "No". A "Save & Exit Form" button is visible in the top right corner.

Q. How do I know if a form is complete or incomplete in REDCap?

For the answer to this question, please review the "How do I Add/Edit Records?" and "What is Record Status Dashboard?" questions above.

Q. When do I check all that apply vs. best option?

Radio buttons only allow for one option to be selected, while checkboxes indicate more than one option may be checked.

This close-up shows two parts of a REDCap form. The top part has radio buttons for "Yes" (selected) and "No", with a "reset" link below. The bottom part has checkboxes for "Active" and "Passive" (checked), with a "reset" link to the right. Below the checkboxes is a legend: "Active = phone call, in-person meeting, personal email, etc.;" and "Passive = letter, brochure, etc.". Red arrows point to the "Yes" radio button and the "Passive" checkbox.

Note: Forms may look different for different sites.

In each form, there is logic embedded specific to the project. Based on the answers you provide, the logic determines what the following questions will be. For example, if you choose X response, there will be questions that come up about X; if X and Y are selected, there will be questions that come up in the form about both X and Y. This happens live, so questions appear while you are entering data. There may be more questions in a form than what you originally predicted.



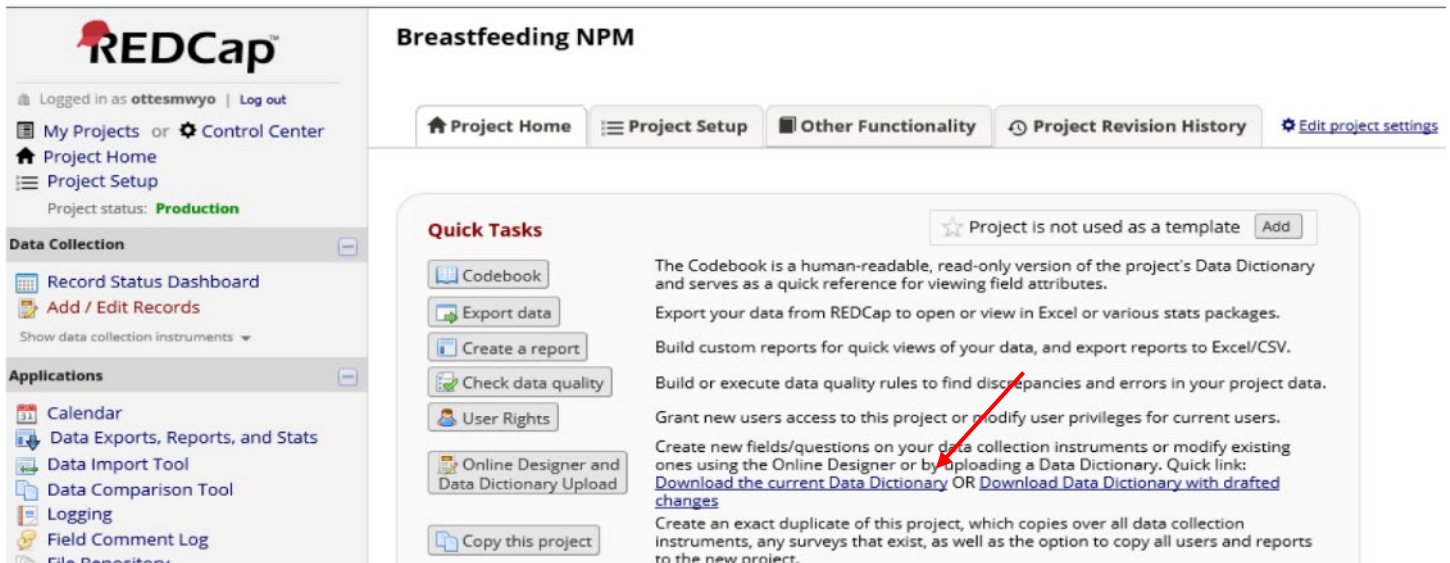
Q. How do I download reports for each agency?

On the "My Projects" page, click on the project title of interest. Near the bottom of the page on the left side there is a section titled Data Exports, Reports, and Stats. On the reports page you can click on the title of the agency for which you want to pull a report, and REDCap will generate a report based on the data currently in the system. If the form does not have data entered, it will not appear in the report. You can print or save the report as a PDF for your reference or records. This is a sample list of reports:



Q. How do I view the current data dictionary for each project?

From the project home page, click on the quick link: Download the Current Data Dictionary. This information will be useful for understanding the data and what data is being collected. In most cases, this information will not be useful for anyone except the epidemiologists that are building or re-designing the



forms.

Q. What do I do if I have questions?

Contact your local health department or DHS contract administrator for further clarification. If they cannot answer your question, email dhsredcap@wi.gov for further assistance.