

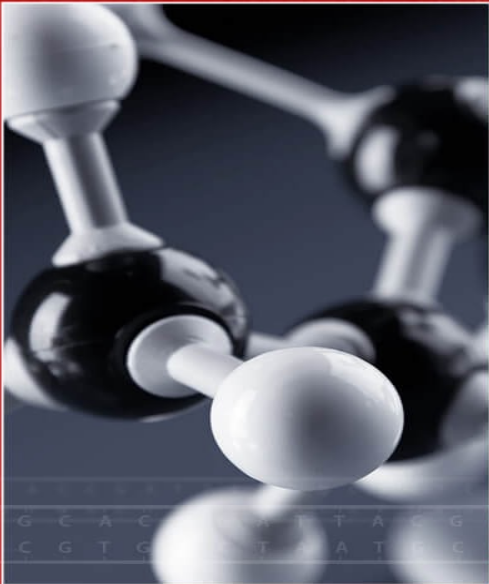
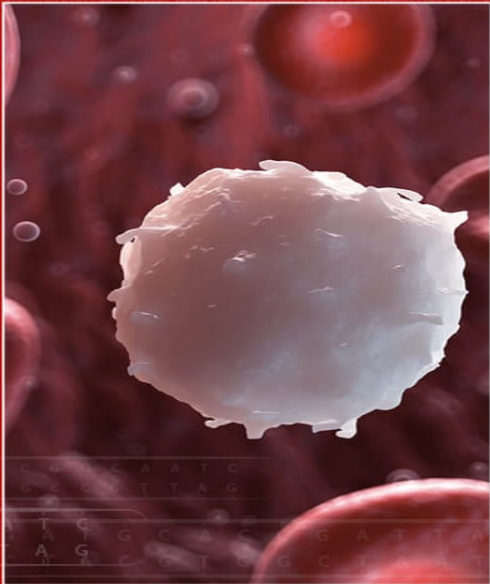
# REDCap Grand Rounds: From Users Like You 1.0

*Data/Specimen Requests and Approval Workflow*

## The James

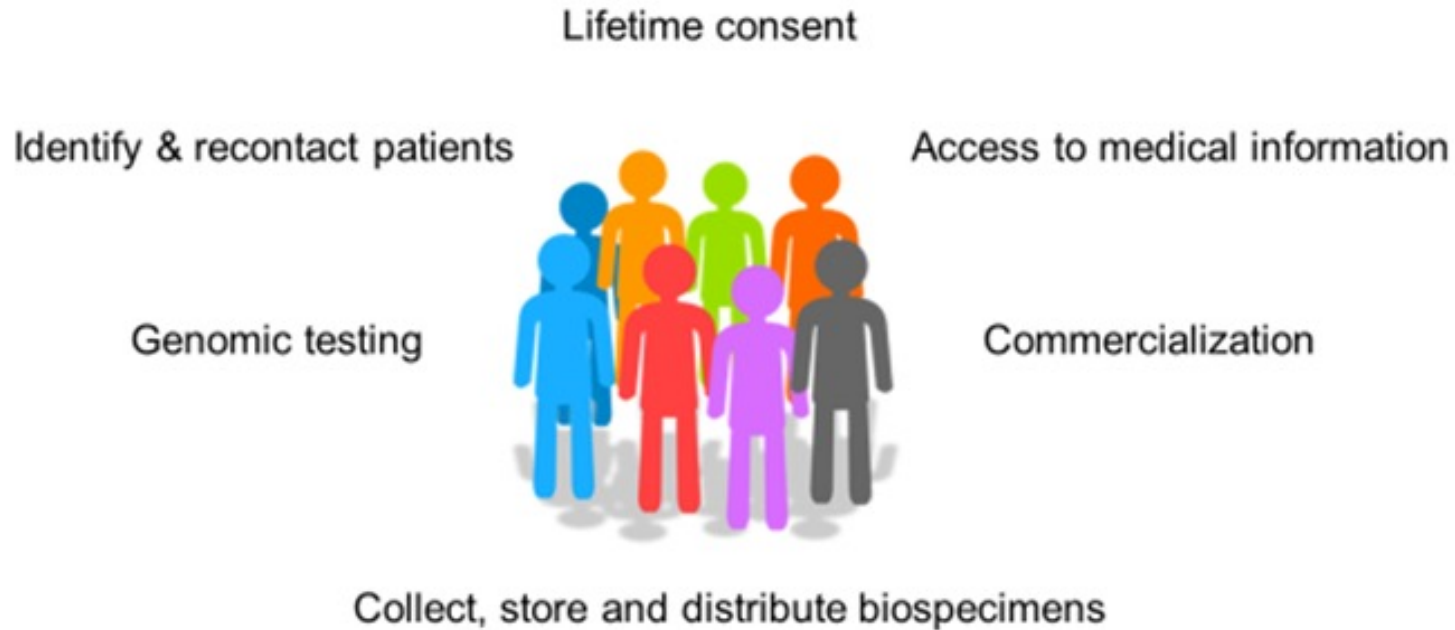


**THE OHIO STATE UNIVERSITY**  
COMPREHENSIVE CANCER CENTER



# Total Cancer Care Protocol

Total Cancer Care: *A lifetime partnership with patients of the James*



**Over 69,000 patients consented to TCC**

The James

# TCCP Data & Specimen Request Database

*(background and requirements)*

- Requests historically tracked in eRAMP (billing system)
- Our needs: *eliminate manual emails for process standards*
  - Capture additional details in the initial request
  - Link feasibility requests with data/specimen requests
  - Integrate with other REDCap databases
  - Automate some of the process...
    - Agreements
    - Approvals
    - Outcomes surveys
- Enhancements
  - Metrics/reporting (SQL)
    - Manually tracked/managed on spreadsheets → reports created in SQL to help manage the process
      - Due to the number of tables in this database, SQL became essential to pulling together the data
  - Dashboarding
    - Manually created graphs/metrics → automated updates to PowerBI dashboards (via SQL)
  - Visibility for the requesters/investigators

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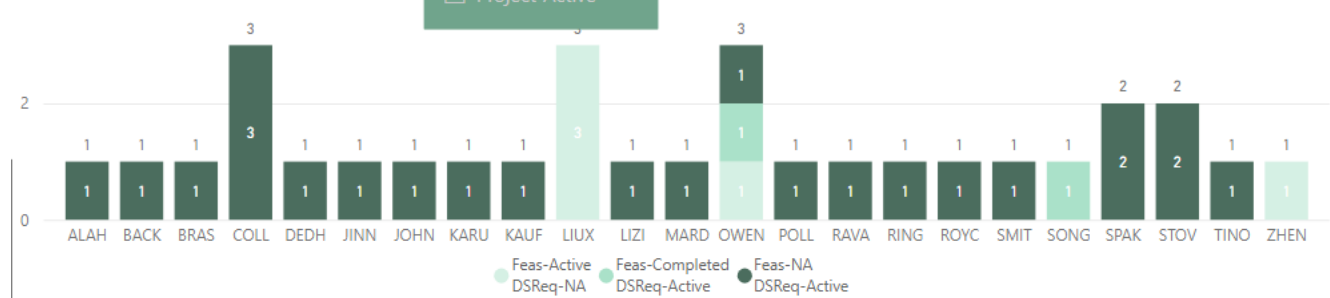


# Know what you need to track

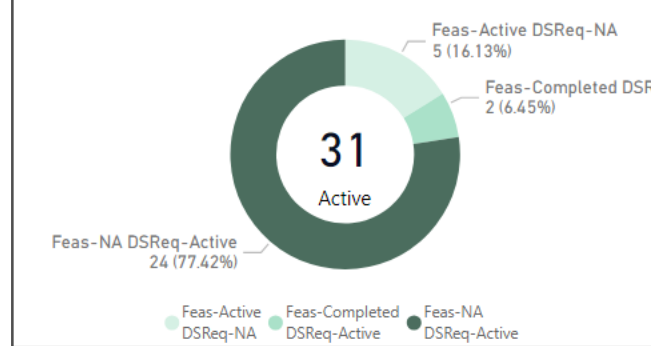
*(discretely capture with additional fields instead of summary text boxes)*

- Project counts
  - Feasibility, data/specimen, both
  - Deidentified, coded-limited, IRB approved
- Project Status
- Disease groups of interest
  - Breast, colorectal, thoracic, etc.
- Specimen types
  - Frozen tissue, blood DNA, plasma/serum, etc.
- Investigators/departments/programs
- TCC Patient counts
  - Screened
  - Final counts

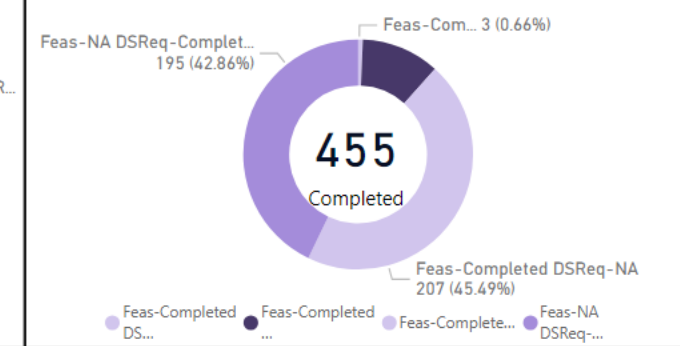
Investigators with Active Projects



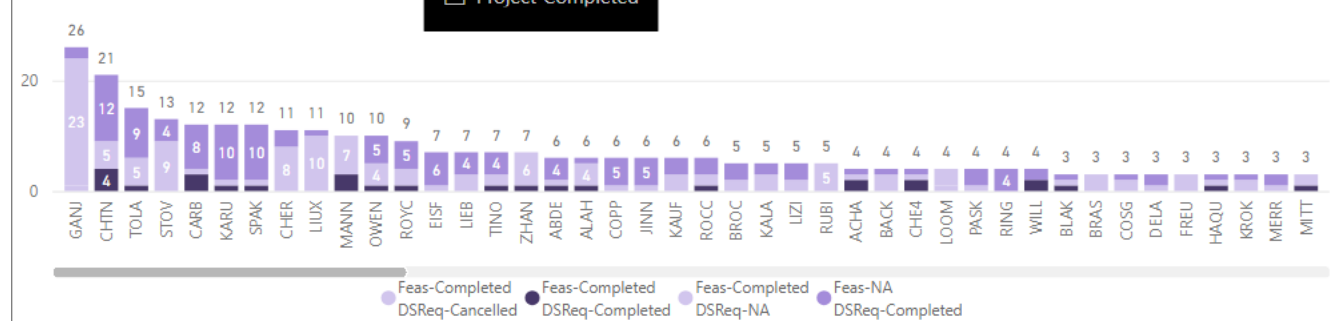
TCC Requests by Project Summary Status



TCC Requests by Project Summary Status



Investigators with Completed Projects



The James

# Instruments, Events and Survey Settings

(33 instruments, 5 events, 28 enabled as surveys)

## Initial Request

[initial\_request\_arm\_1]

### Request

completed by requester (<https://go.osu.edu/osutcc>)

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Form	82		
Feasibility Form	33		
Data/Specimen Form	120		

### Agreements

completed by investigator for data/specimen requests

Instrument name	Fields	View PDF	Enabled as survey
TCC Investigator Agreement (De-identified)	11		
TCC Investigator Agreement (Identified)	11		
TCC Data Use Agreement	11		

### Dashboard

viewable by requester/investigator

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Status Dashboards	13		
Admin	2		

## Project Survey

[project\_survey\_arm\_1]

### Project Outcomes Survey

completed by requester/investigator

Data/Specimen Survey	29		
----------------------	----	--	--

## Project Status

[project\_status\_arm\_1]

### Timeline Log

updated by TCC Admins

Project Timeline	5			<input type="button" value="Enable"/>
------------------	---	--	--	---------------------------------------

## Internal Review

[internal\_review\_arm\_1]

### Internal Review/Project Plan

completed by TCC Admins

Feasibility TCC Internal Review	3			<input type="button" value="Enable"/>
Data/Specimen TCC Internal Review	9			<input type="button" value="Enable"/>

Database set up as **longitudinal** to allow us to automate some of the process

## Committee Approval

[committee\_approval\_arm\_1]

### Approvals

completed by committee members and disease group leader(s)

TCC Research Committee Approval	72		
PI/Director Review	62		
TCC Review Member #1	68		
TCC Review Member #2	68		
TCC Review Member #3	68		
TCC Review Member #4	68		
AL MDS Approval	68		
BMT Approval	68		
Breast Approval	68		
CLL Approval	68		
CNS Approval	68		
GI Approval	68		
GU Approval	68		
Gynecologic Approval	68		
HN Approval	68		
Lymphoma Approval	68		
Melanoma Approval	68		
MM Approval	68		
Sarcoma Approval	68		
Thoracic/Lung Approval	68		
Thyroid Approval	68		

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# Initial Request

(TCC Project Form, Feasibility Form and Data/Specimen Form)

- Split the request into three separate forms to field redundancy and link current data/specimen requests with past feasibility requests.
  - TCC Project Form** – project level request data
    - applicable to both feasibility and data/specimen request*
  - Feasibility Form** – feasibility specific questions
  - Data/Specimen Form** – detailed/discrete questions related to the data and/or specimens

**Project Summary**  
(Summary of the data submitted on the project form)

**TCC Request ID #500**

**Requestor:** Jane Test

**Title:** Study the XYZ1 gene in colorectal cancer patients who are MSI-H vs wildtype.  
**Principal Investigator:** Test, John  
**Co-Investigator(s):** Jane Test and Jim Test

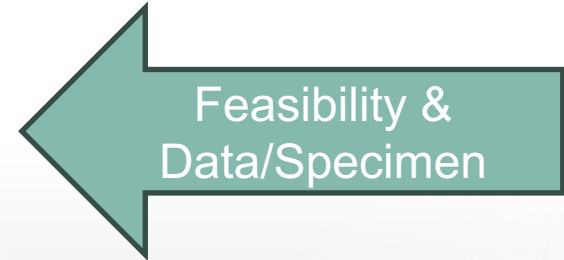
**Objectives:** Requesting tumor tissue and blood (germline) samples from 50 patients (25 from each group) who are MSI-H and MSI wildtype and do not have any sequencing data available. Requesting sequencing data from 50 additional patients (25 from each group) that do have sequencing data available.

We would like to study XYZ1 in both tumor and germline samples to see the correlation between tumors being classified as MSI-H vs wildtype.

**Project/Patient Inclusion Criteria:** stage 3 and 4  
**Project/Patient Exclusion Criteria:** stage 0, 1 & 2

**Site(s) of Interest:** Digestive System  
**Malignancy Level:** Malignant neoplasms  
**Histology Main Category(s):** Carcinoma  
**Histology ICD-O Category(s):**  
Adenomas and adenocarcinomas

**NOTES**  
Field Type = Begin New Section  
Piping Logic  
Formatting with Rich Text Editor  
No branching logic



**Feasibility Summary**

**Patient Count Minimum:** 100  
**Specimens Inclusion Criteria:** 30 mg frozen tumor  
10 curls @ 5 microns FFPE tumor  
1ug blood DNA  
**Specimens Exclusion Criteria:** \_\_\_\_\_

**Additional Requirements:** Frozen Tissue, FFPE Tissue, DNA from blood  
**Molecular Data:** WES - Tumor, WES - Germline

**LOS Application Title:** Study the XYZ1 gene in colorectal cancer patients who are MSI-H vs wildtype.

**Aggregate Counts Provided:**  
Patients with tumor tissue: 35 patients with MSI-H & 48 patients with wildtype  
Patients with sequencing available: 25 patients with MSI-H & 25 patients with wildtype

**NOTES**  
Field Type = Descriptive Text  
Piping Logic  
Formatting with Rich Text Editor  
Branching logic





# Initial Request

(TCC Project Form)

@HIDDEN-SURVEY

- Auto-numbering for records
  - Hands off and automated
- Project ID (visual cue that corresponds to a specific project)
  - Utilizing auto-numbering from REDCap
- Distinct Investigator Codes
  - Metrics/reporting
  - Filtering
  - Alerts & Notifications for committee approvals

TCC Request ID: 500  
To rename the record, see the record action drop-down at top of the Record Home Page.

TCC Project ID (Internal Field Only): TCC00500-TEST  
(TCC####-XXXX)  
'Combined' = Multiple projects submitted (v1) & were combined (v2).  
'N/A' = no project in version 1 database.  
Z to A

Distinct Investigator List (Internal Field Only): Test, John  
Last, First (department - if needed)  
A to Z

Distinct Co-Investigator List (Internal Field Only): Test, Jane | Test, Jim  
Last, First (department - if needed)  
CO PI Group = (A to Z) Last, First | Last, First  
A to Z

Part of the request completed by requester

- Purpose of Request
  - Directs requester to next appropriate form based on the request
- PHI & Data Request Type
  - Directs requester/investigator to the appropriate agreements

Purpose of Request

**Feasibility** - Select this option for TCC enrollment information, aggregate counts and/or Letter of Support (LOS) needed for study planning or grant writing purposes.  
**NOTE:** For a feasibility request, we will provide aggregate counts, not actual data or samples.

Feasibility  
 Data/Specimens

**Data/Specimens** - Select this option to request TCC data and/or biospecimens. Be as specific as possible.

\* must provide value

Will the data and/or specimens need to be received with PHI (protected health information)?

Yes  
 No

\* must provide value

Data Request Type

See below for descriptions regarding the request types.

IRB Approved Request

\* must provide value




# Survey Queue: Initial Request

*(instrument must be enabled as a survey)*

## Request

completed by requester (<https://go.osu.edu/osutcc>)



Activated

Deactivate

**"Feasibility Form" - Initial Request**


When the following survey is completed:  
 "TCC Project Form" - Initial Request

AND

When the following logic becomes true: [How to use this](#)  
`[initial_request_arm_1][purpose_of_request] = 'Feasibility'`

(e.g., [enrollment\_arm\_1][age] > 30 and [enrollment\_arm\_1][sex] = "1")

Test logic with a record: -- select record --



Activated

Deactivate

**"Data/Specimen Form" - Initial Request**

When the following survey is completed:  
 "TCC Project Form" - Initial Request

AND


When the following logic becomes true: [How to use this](#)  
`(([initial_request_arm_1][purpose_of_request] = 'DataSpecimens') or ([initial_request_arm_1][feas_finalized_dt] <> ""))`

(e.g., [enrollment\_arm\_1][age] > 30 and [enrollment\_arm\_1][sex] = "1")

Test logic with a record: -- select record --

## Agreements

completed by investigator for data/specimen requests



Activated

Deactivate

**"TCC Investigator Agreement (De-identified)" - Initial Request**


When the following survey is completed:  
 "Data/Specimen Form" - Initial Request

AND

When the following logic becomes true: [How to use this](#)  
`([initial_request_arm_1][phi_identifiers_yn] = "No" and ([initial_request_arm_1][data_request_type] = "" or [initial_request_arm_1][data_request_type] = "Deidentified" or [initial_request_arm_1][data_request_type] = "CodedLimited"))`

(e.g., [enrollment\_arm\_1][age] > 30 and [enrollment\_arm\_1][sex] = "1")

Test logic with a record: -- select record --



Activated

Deactivate

**"TCC Investigator Agreement (Identified)" - Initial Request**


When the following survey is completed:  
 "Data/Specimen Form" - Initial Request

AND

When the following logic becomes true: [How to use this](#)  
`(([initial_request_arm_1][phi_identifiers_yn] = "Yes" and ([initial_request_arm_1][data_request_type] = "" or [initial_request_arm_1][data_request_type] = "IRB")) or ([initial_request_arm_1][phi_identifiers_yn] = "No" and [initial_request_arm_1][data_request_type] = "IRB"))`

(e.g., [enrollment\_arm\_1][age] > 30 and [enrollment\_arm\_1][sex] = "1")

Test logic with a record: -- select record --



Activated

Deactivate

**"TCC Data Use Agreement" - Initial Request**

When the following survey is completed:  
 "Data/Specimen Form" - Initial Request

AND

When the following logic becomes true: [How to use this](#)  
`([initial_request_arm_1][phi_identifiers_yn] <> "" and ([initial_request_arm_1][tcc_investigator_agreement_deidentified_complete] <> "" or [initial_request_arm_1][tcc_investigator_agreement_identified_complete] <> ""))`

(e.g., [enrollment\_arm\_1][age] > 30 and [enrollment\_arm\_1][sex] = "1")

**REMINDER**  
 Include the [event-name] in front of the variable for **logic** to work correctly.

The James

# Survey Settings

(instrument must be enabled as a survey)

- Survey Instructions & Survey Completion Text
  - Font/formatting
  - Piping logic
- NOTE: The investigator can complete the agreements required for the request from the **survey queue** if the investigator is the one who completed the request.

## TCC Project Form

You will need to complete two surveys to complete your request.

1. General project information (current survey)
2. Specific request information; depending on request type, one of the following surveys will be available:
  - Feasibility (aggregate counts only, with the option to request a LOS)
  - Data/Specimen

*\*If your initial request is for Feasibility, and you wish to proceed with requesting specimens or data from the Feasibility results, a Data/Specimen request survey link will be provided to complete the project.\**

You will receive an email once the request is successfully submitted.

If you have any questions contact us as [TCC.Requests@osumc.edu](mailto:TCC.Requests@osumc.edu)

Thank you!

Thank you for completing a TCC Data/Specimens request.

The designated PI for the request, **Test, John** must sign and submit the following agreements.

An email with the link to the agreements has been sent to the requester - please forward if needed.

Have a nice day!

### Survey Queue

[Get link to my survey queue](#)

Listed below is your survey queue, which lists any other surveys that you have not yet completed. To begin the next survey, click the 'Begin survey' button next to the title.

Status	Survey Title
✓ Completed	Feasibility Form - Initial Request
✓ Completed	Data/Specimen Form - Initial Request
<a href="#">Begin survey</a>	TCC Investigator Agreement (Identified) - Initial Request
<a href="#">Begin survey</a>	TCC Data Use Agreement - Initial Request

#### NOTES

Survey Settings = Survey Instructions  
Piping Logic  
Formatting with Rich Text Editor

#### NOTES

Survey Settings = Survey Completion Text  
Piping Logic  
Formatting with Rich Text Editor

The James



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# Alerts & Notifications

## (Requester Alert: New Feasibility Request Summary)

Edit Alert #48 (Unique Alert ID: A-432) ✕

You may define the settings for your alert in Steps 1-3 below. After clicking the Save button at the bottom, your alert will immediately become active and may be triggered at any time thereafter. If you would like to remove or stop using an alert, it may be deactivated at any time. You may modify an existing alert at any time, even after some notifications have already been sent or scheduled.

Title of this alert:

### STEP 1: Triggering the Alert

- A) How will this alert be triggered?
- When a record is saved on a specific form/survey\*
  - If conditional logic is **TRUE** when a record is saved on a specific form/survey\*
  - When conditional logic is **TRUE** during a data import, data entry, or as the result of time-based logic ?

### B) Trigger the alert...

when "Feasibility Form" (Initial Request) ▼ is saved with Complete status only ▼ (excludes data imports)

while the following logic is true:

(e.g., [enrollment\_arm\_1][age] > 30 and [enrollment\_arm\_1][sex] = "1")

[How to use 'stop logic' to disable a scheduled alert](#)

Ensure logic is still true before sending notification? ?

C) Trigger Limit: Trigger the alert... ▼ only once per record (i.e., never re-trigger)

(The trigger limit determines where and to what extent within a record that the alert will be triggered.)

\* The alert will not be re-triggered if the form/survey is saved again, unless it is set to send Every time in Step 2 below.

### REMINDER

Adding fields to your project to initiate/inhibit Alerts & Notifications from triggering will help prevent unwanted notifications when working in a record and saving changes.

**NOTES**  
Field Type = Checkboxes or Radio Buttons  
Formatting with Rich Text Editor  
Action Tag

Variable: feasibility\_confirmation\_alert\_stop

Yes

Stop Confirmation Alert (Feasibility)  
(Internal Field Only)

This stops the confirmation email to requester for request submission.  
(Select 'Yes' when the feasibility request is first opened).

@HIDDEN-SURVEY

Field Type: Checkboxes (Multiple Answers) ▼ Codebook

Question Number (optional)

Displayed only on the survey page

Field Label Use the Rich Text Editor ?

`<div class = "blue" style = "text-align :left;"><span style="color: #FF0000;"><i>Stop Confirmation Alert (Feasibility)  
<i>(Internal Field Only)</i></div>`

Choices (one choice per line) [Copy existing choices](#)

Yes, Yes

Variable Name (utilized in logic, calcs, and exports)  
feasibility\_confirmation\_alert\_ Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#) [Field Embedding](#)

Required?\*  No  Yes  
\* Prompt if field is blank

Identifier?  No  Yes  
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV) ▼  
Align the position of the field on the page

Field Note (optional)   
Small reminder text displayed underneath field

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

How do I manually code the choices?

The James

# Alerts & Notifications

## (Requester Alert: New Feasibility Request Summary)

### STEP 2: Set the Alert Schedule

When to send the alert?

- Send immediately
- Send on next  at time
- Send the alert:  days  hours  minutes  
after  the exact time that the alert was triggered
- Send at exact date/time:

Send it how many times?

- Just once
- Every time the form/survey in Step 1B is    
(excludes data imports)
- Multiple times on a recurring basis:
- Send every  days after initially being sent.  
Tip: A monthly recurrence can be approximated as 30.44 days.
  - Send up to  times total (including the first time sent).  
Leave blank to continue sending forever.

Alert expiration:  
(optional)

This alert will be auto-deactivated at the specified date/time above. Note: This will cause any already-scheduled notifications not to be sent after the expiration time.

### STEP 3: Message Settings

Email From: \* must provide value

Email To: \* must provide value    
Or manually enter emails:

Email CC:    
Or manually enter emails:

Email BCC:    
Or manually enter emails:

Email to send email-failure errors:

Subject \* must provide value

Message: \* must provide value

Paragraph

[requester\_name].

Thank you for completing the TCC Feasibility Request Form for your project. "[project\_study\_title]". The request ID is #[initial\_request\_arm\_1][tcc\_request\_id].

To view the status of your request, visit [initial\_request\_arm\_1][survey-link:tcc\_project\_dashboards:TCC Project Status Dashboard]

Thank you,

Total Cancer Care Operations Team

Prevent piping of data for Identifier fields

In the subject or message, you may use Piping and Smart Variables

Example:  
Hi [first\_name]! Please complete this survey: [survey-link:followup\_survey]

Learn about [Data Collection Strategies for Repeating Surveys](#)

Example of a repeating survey using recurring alerts:  
Please complete your daily survey: [survey-link:daily\_repeating\_survey][new-instance]

The James



# TCC Project Status Dashboard

(REDCap Extension)

## TCC Project Status Dashboard

Feasibility Dashboard      [Data/Specimen Dashboard](#)

### TCC Feasibility Project Dashboard

Request Number: 500  
TCC00500-TEST  
Submitted: 01-08-2024

**Feasibility Status:** Completed

**Feasibility Status Comments:** \_\_\_\_\_

**Project/Study Title:** Study the XYZ1 gene in colorectal cancer patients who are MSI-H vs wildtype.  
**Investigator:** Test, John  
**Co-Investigator:** Jane Test and Jim Test  
**Requester:** Jane Test  
**Letter of Support Required:** Yes

**Project Objectives:** Requesting tumor tissue and blood (germline) samples from 50 patients (25 from each group) who are MSI-H and MSI wildtype and do not have any sequencing data available. Requesting sequencing data from 50 additional patients (25 from each group) that do have sequencing data available.

We would like to study XYZ1 in both tumor and germline samples to see the correlation between tumors being classified as MSI-H vs wildtype.

## TCC Project Status Dashboard

[Feasibility Dashboard](#)      **Data/Specimen Dashboard**

### TCC Data/Specimen Project Dashboard

Request Number: 500  
TCC00500-TEST  
Submitted: 01-08-2024

**Specimen Status:** In Progress  
**Specimen Sub-Status:** Specimen being pulled by bank

**Clinical Data Status:** N/A  
**Molecular Data Status:** SLIDs Identified

**Data/Specimen Status Comments:**  
\_\_\_\_\_

**Project/Study Title:** Study the XYZ1 gene in colorectal cancer patients who are MSI-H vs wildtype.  
**Investigator:** Test, John  
**Co-Investigator:** Jane Test and Jim Test  
**Requester:** Jane Test

**Project Objectives:** Requesting tumor tissue and blood (germline) samples from 50 patients (25 from each group) who are MSI-H and MSI wildtype and do not have any sequencing data available. Requesting sequencing data from 50 additional patients (25 from each group) that do have sequencing data available.

We would like to study XYZ1 in both tumor and germline samples to see the correlation between tumors being classified as MSI-H vs wildtype.

# TCC Project Status Dashboard

(REDCap Extension request)

\* = would like the code description populated, not the code

## TCC Feasibility Project Dashboard

Request Number: 306 [tcc\_request\_id]

TCC Project ID: (TCC00306-KIMA) [tcc\_project\_id]

Submitted: 8/29/2022 [feas\_date\_submitted]

Only available if  
[feas\_project\_status] = "InProgress"

**Feasibility Status:** In Progress [feas\_project\_status]\*  
**Feasibility Sub-Status:** Generating Counts [feas\_project\_sub\_status]\*

**Feasibility Status Comments:** *text field* [feas\_status\_comment]

From feasibility\_form

**Project/Study Title:** The role of TWIST1 in colorectal peritoneal metastasis [project\_study\_title]

**Investigator:** Kim, Alex [pi\_last\_name], [pi\_first\_name]

**Co-Investigator:** Dan Spakowicz, Dwight Owen [co\_investigator]

**Requester:** Alex Kim [requester\_name]

Letter of Support Requested: Yes [los\_yn]

From  
tcc\_project\_form

**Project Objectives:** *large notes field* [project\_objective]

Dashboard visible when [feasibility\_form\_complete] = "2"

The James

# TCC Project Status Dashboard

(REDCap Extension request)

\* = would like the code description populated, not the code

## TCC Data/Specimen Project Dashboard

Request Number: 306 [tcc\_request\_id]  
 (TCC00306-KIMA) [tcc\_project\_id]  
 Submitted: 8/29/2022 [data\_specimen\_date\_submitted]

Only available if [specimen\_project\_status] = "InProgress" OR [specimen\_project\_status] = "PartialCompleted" OR [specimen\_project\_status] = "OnHold" OR [specimen\_project\_status] = "ClarificationInvestigator"

If [request\_type] = "Specimens" or [request\_type] = "SpecimensData" then these fields available?

If [request\_type] = "Data" or [request\_type] = "SpecimensData" then these fields available?

**Specimen Status:** In Progress [specimen\_project\_status]\*  
**Specimen Sub-Status:** Processing for shipment [specimen\_project\_sub\_status]\*  
**Clinical Data Status:** Query Created [clinical\_data\_project\_status]\*  
**Molecular Data Status:** Requested [molecular\_data\_project\_status]\*

**Data/Specimen Status Comments:** text field [data\_specimen\_status\_comment]

From dataspecimen\_form

**Project/Study Title:** The role of TWIST1 in colorectal peritoneal metastasis [project\_study\_title]  
**Investigator:** Kim, Alex [pi\_last\_name], [pi\_first\_name]  
**Co-Investigator:** Dan Spakowicz, Dwight Owen [co\_investigator]  
**Requester:** Alex Kim [requester\_name]  
**Project Objectives:** large notes field [project\_objective]

From tcc\_project\_form

Dashboard visible when [dataspecimen\_form\_complete] = "2"

The James

# Instruments, Events and Survey Settings

(33 instruments, 5 events, 28 enabled as surveys)

## Initial Request

[initial\_request\_arm\_1]

### Request

completed by requester (<https://go.osu.edu/osutcc>)

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Form	82		
Feasibility Form	33		
Data/Specimen Form	120		

### Agreements

completed by investigator for data/specimen requests

Instrument name	Fields	View PDF	Enabled as survey
TCC Investigator Agreement (De-identified)	11		
TCC Investigator Agreement (Identified)	11		
TCC Data Use Agreement	11		

### Dashboard

viewable by requester/investigator

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Status Dashboards	13		
Admin	2		

## Project Status

[project\_status\_arm\_1]

### Timeline Log

updated by TCC Admins

Project Timeline	Fields	View PDF	Enabled as survey
Project Timeline	5		

## Internal Review

[internal\_review\_arm\_1]

### Internal Review/Project Plan

completed by TCC Admins

Instrument name	Fields	View PDF	Enabled as survey
Feasibility TCC Internal Review	3		
Data/Specimen TCC Internal Review	9		

## Committee Approval

[committee\_approval\_arm\_1]

### Approvals

completed by committee members and disease group leader(s)

Instrument name	Fields	View PDF	Enabled as survey
TCC Research Committee Approval	72		
PI/Director Review	62		
TCC Review Member #1	68		
TCC Review Member #2	68		
TCC Review Member #3	68		
TCC Review Member #4	68		
AL MDS Approval	68		
BMT Approval	68		
Breast Approval	68		
CLL Approval	68		
CNS Approval	68		
GI Approval	68		
GU Approval	68		
Gynecologic Approval	68		
HN Approval	68		
Lymphoma Approval	68		
Melanoma Approval	68		
MM Approval	68		
Sarcoma Approval	68		
Thoracic/Lung Approval	68		
Thyroid Approval	68		

Database set up as **longitudinal** to allow us to automate some of the process

## Project Survey

[project\_survey\_arm\_1]

### Project Outcomes Survey

completed by requester/investigator

Instrument name	Fields	View PDF	Enabled as survey
Data/Specimen Survey	29		

The James



# Alerts & Notifications

## (Internal Alert: New Feasibility Request Summary)

Edit Alert #1 (Unique Alert ID: A-201)

You may define the settings for your alert in Steps 1-3 below. After clicking the Save button at the bottom, your alert will immediately become active and may be triggered at any time thereafter. If you would like to remove or stop using an alert, it may be deactivated at any time. You may modify an existing alert at any time, even after some notifications have already been sent or scheduled.

Title of this alert: (NEW) TCC Feasibility Request Summary

### STEP 1: Triggering the Alert

- A) How will this alert be triggered?
- When a record is saved on a specific form/survey\*
  - If conditional logic is TRUE when a record is saved on a specific form/survey\*
  - When conditional logic is TRUE during a data import, data entry, or as the result of time-based logic

### B) Trigger the alert...

when "Feasibility Form" (Initial Request) is saved with Complete status only (excludes data imports)

while the following logic is true:

```
[initial_request_arm_1][purpose_of_request] = "Feasibility" and [initial_request_arm_1][feas_new_req_summary_alert_stop(Yes)] = "0" and (not_contain([initial_request_arm_1][tcc_request_id], "H")
```

(e.g., [enrollment\_arm\_1][age] > 30 and [enrollment\_arm\_1][sex] = "1")

[How to use 'stop logic' to disable a scheduled alert](#)

Ensure logic is still true before sending notification?

C) Trigger Limit: Trigger the alert... only once per event in a record and also on every instance of a repeating instrument/event

(The trigger limit determines where and to what extent within a record that the alert will be triggered.)

\* The alert will not be re-triggered if the form/survey is saved again, unless it is set to send Every time in Step 2 below.

### REMINDER

Adding fields to your project to initiate/inhibit Alerts & Notifications from triggering will help prevent unwanted notifications when working in a record and saving changes.

### NOTES

Field Type = Checkboxes or Radio Buttons  
Formatting with Rich Text Editor  
Action Tag

Variable: feas\_new\_req\_summary\_alert\_stop

Stop New Request Summary Alert (Feasibility)  
(Internal Field Only)

Yes

This stops the alert email to TCC Admins that contains the request summary. (Select 'Yes' when the feasibility request is first opened).

@HIDDEN-SURVEY

Field Type: Checkboxes (Multiple Answers)

Question Number (optional)

Field Label (Feasibility)  Use the Rich Text Editor

<div class = "blue" style = "text-align :left; "><span style="color: #FF0000;"><i>Stop New Request Summary Alert (Feasibility)</i></div>

Choices (one choice per line) [Copy existing choices](#)

Yes, Yes

Variable Name (utilized in logic, calcs, and exports)

feas\_new\_req\_summary\_alert  Enable auto naming of variable based upon its Field Label?

Required?  No  Yes

Identifier?  No  Yes

Custom Alignment Right / Vertical (RV)

Field Note (optional) This stops the alert email to TC

Action Tags / Field Annotation (optional)

@HIDDEN-SURVEY

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# Instruments, Events and Survey Settings

(33 instruments, 5 events, 28 enabled as surveys)

## Initial Request

[initial\_request\_arm\_1]

### Request

completed by requester (<https://go.osu.edu/osutcc>)

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Form	82		
Feasibility Form	33		
Data/Specimen Form	120		

### Agreements

completed by investigator for data/specimen requests

Instrument name	Fields	View PDF	Enabled as survey
TCC Investigator Agreement (De-identified)	11		
TCC Investigator Agreement (Identified)	11		
TCC Data Use Agreement	11		

### Dashboard

viewable by requester/investigator

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Status Dashboards	13		
Admin	2		

## Project Survey

[project\_survey\_arm\_1]

### Project Outcomes Survey

completed by requester/investigator

Instrument name	Fields	View PDF	Enabled as survey
Data/Specimen Survey	29		

## Project Status

[project\_status\_arm\_1]

### Timeline Log

updated by TCC Admins

Project Timeline	Fields	View PDF	Enabled as survey
Project Timeline	5		

## Internal Review

[internal\_review\_arm\_1]

### Internal Review/Project Plan

completed by TCC Admins

Instrument name	Fields	View PDF	Enabled as survey
Feasibility TCC Internal Review	3		
Data/Specimen TCC Internal Review	9		

Database set up as **longitudinal** to allow us to automate some of the process

## Committee Approval

[committee\_approval\_arm\_1]

### Approvals

completed by committee members and disease group leader(s)

Approval	Fields	View PDF	Enabled as survey
TCC Research Committee Approval	72		
PI/Director Review	62		
TCC Review Member #1	68		
TCC Review Member #2	68		
TCC Review Member #3	68		
TCC Review Member #4	68		
AL MDS Approval	68		
BMT Approval	68		
Breast Approval	68		
CLL Approval	68		
CNS Approval	68		
GI Approval	68		
GU Approval	68		
Gynecologic Approval	68		
HN Approval	68		
Lymphoma Approval	68		
Melanoma Approval	68		
MM Approval	68		
Sarcoma Approval	68		
Thoracic/Lung Approval	68		
Thyroid Approval	68		

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# Committee Approval Process

- Fields from initial request and internal review arms are piped to create the project plan (yellow screen shot).
- TCC Admin selects the disease chairs needed for approval
- Send and then stop the alert & notification

**TCC Project ID**  
[initial\_request][tcc\_project\_id]

**Date of Request:** [initial\_request\_arm\_1][data\_specimen\_date\_submitted]  
**Requestor:** [initial\_request\_arm\_1][requester\_name]  
**Principal Investigator:** [initial\_request\_arm\_1][pi\_last\_name], [initial\_request\_arm\_1][pi\_first\_name]  
**Co-Investigator(s):** [initial\_request\_arm\_1][co\_investigator]

**Title:** [initial\_request\_arm\_1][project\_study\_title]

**Objectives:** [initial\_request\_arm\_1][project\_objective]

**Site(s) of Interest:** [initial\_request\_arm\_1][site\_of\_interest]  
**Malignancy Level:** [initial\_request\_arm\_1][malignancy\_level]  
**Histology Main Category(s):** [initial\_request\_arm\_1][histo\_main\_cat]  
**Histology ICD-O Category(s):**  
 [initial\_request\_arm\_1][carcinoma\_histo\_cat]  
 [initial\_request\_arm\_1][lymphleukmyeloma\_histo\_cat]  
 [initial\_request\_arm\_1][repreneoplasm\_histo\_cat]  
 [initial\_request\_arm\_1][sarcoma\_histo\_cat]

**Request Type:** [initial\_request\_arm\_1][request\_type]  
**Patient Counts:**  
 [internal\_review\_arm\_1][patient\_counts]  
**Specimens Requested:** (will not deplete unless noted below)  
 [internal\_review\_arm\_1][specimen\_summary]  
**Clinical Data Requested (if applicable):**  
 [internal\_review\_arm\_1][clinical\_data\_identified]  
**Molecular Data Requested (if applicable):**  
 [internal\_review\_arm\_1][molecular\_data\_req]

**TCC Notes:** [internal\_review\_arm\_1][data\_specimen\_tcc\_review\_notes]

**NOTES**  
Field Type = Begin New Section  
Piping Logic  
Formatting with Rich Text Editor  
No branching logic

Variable: disease\_chair\_approve\_list

Disease chair approval needed:

- Acute Leukemia + MDS
- BMT
- Breast
- CLL
- CNS
- Gastrointestinal (GI)
- Genitourinary (GU)
- Gynecologic/Oncology
- Head and Neck
- Lymphoma
- Melanoma
- Multiple Myeloma
- Sarcoma
- Thoracic/Lung
- Thyroid/NET +

**NOTES**  
Field Type = Checkboxes or Radio Buttons  
Formatting with Rich Text Editor  
Action Tag

Variable: send\_vote\_request

**Send Vote Request Alert**  Yes

This sends the email to the reviewers to begin the voting process.  
(Select 'Yes' when the data/specimen project is ready to be reviewed).

Variable: stop\_vote\_request

**Stop Vote Request Alert**  Yes

This stops the alert email to the reviewers for this request.  
(Select 'Yes' after the vote requests go out).



# Instruments, Events and Survey Settings

(33 instruments, 5 events, 28 enabled as surveys)

## Initial Request

[initial\_request\_arm\_1]

### Request

completed by requester (<https://go.osu.edu/osutcc>)

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Form	82		
Feasibility Form	33		
Data/Specimen Form	120		

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completed by investigator for data/specimen requests

Instrument name	Fields	View PDF	Enabled as survey
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TCC Data Use Agreement	11		

### Dashboard

viewable by requester/investigator

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Status Dashboards	13		
Admin	2		

## Project Survey

[project\_survey\_arm\_1]

### Project Outcomes Survey

completed by requester/investigator

Instrument name	Fields	View PDF	Enabled as survey
Data/Specimen Survey	29		

## Project Status

[project\_status\_arm\_1]

### Timeline Log

updated by TCC Admins

Instrument name	Fields	View PDF	Enabled as survey
Project Timeline	5		

## Internal Review

[internal\_review\_arm\_1]

### Internal Review/Project Plan

completed by TCC Admins

Instrument name	Fields	View PDF	Enabled as survey
Feasibility TCC Internal Review	3		
Data/Specimen TCC Internal Review	9		

Database set up as **longitudinal** to allow us to automate some of the process

## Committee Approval

[committee\_approval\_arm\_1]

### Approvals

completed by committee members and disease group leader(s)

Instrument name	Fields	View PDF	Enabled as survey
TCC Research Committee Approval	72		
PI/Director Review	62		
TCC Review Member #1	68		
TCC Review Member #2	68		
TCC Review Member #3	68		
TCC Review Member #4	68		
AL MDS Approval	68		
BMT Approval	68		
Breast Approval	68		
CLL Approval	68		
CNS Approval	68		
GI Approval	68		
GU Approval	68		
Gynecologic Approval	68		
HN Approval	68		
Lymphoma Approval	68		
Melanoma Approval	68		
MM Approval	68		
Sarcoma Approval	68		
Thoracic/Lung Approval	68		
Thyroid Approval	68		

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# Committee Approval Process (Alerts & Notifications)

- TCC PI, director and standing committee members receive approval email request for all projects, except projects they are involved in.
  - investigator codes allow us to stop the alerts.
- Approval process set up to handle the initial project as well as two supplemental requests.

## Initial project approval

```
Logic Editor

Use the text box below to compose your logic, calculation, action tags, etc. If you need more space, click the Fullscreen Mode button to enlarge the text box. When you are finished, click the 'Update' button to minimize the Editor window. Learn how to use [f] Smart Variables [v] Special Functions [a] Action Tags or open the [c] Codebook

[[committee_approval_arm_1][send_vote_request(Yes)] = "1"]

AND ([initial_request_arm_1][distinct_investigator_list] <> "SPAK")

AND (not_contain([initial_request_arm_1][distinct_coinvestigator_list], "SPAK"))

AND
([committee_approval_arm_1][stop_vote_request(Yes)] = "0"
OR [committee_approval_arm_1][member_1_request_approval] = "")
```

**From:** tcc.requests@osumc.edu

**To:** daniel.spakowicz@osumc.edu

**Subject:** TCC Request Ready for Review (TCC00500-TEST)

**Message:** Hello Dr. Spakowicz,

We have a TCC **Data and Specimens** request from **Test, John** that is ready for your vote on fulfilling this request.

Project Title: **Study the XYZ1 gene in colorectal cancer patients who are MSI-H vs wildtype.**

Co-Investigators (if applicable) for the request include:

**Jane Test and Jim Test**

You may open the survey in your web browser by clicking the link below:

[TCC Review Member #1](#)

If the link does not work, try copying the link below into your web browser:

<https://redcap.osumc.edu/redcap/surveys/?s=KcmUjzheWC4XY7Dj>

Please provide us with your vote for or against fulfilling this request. If you have any questions that you would like the investigator to clarify please provide them in the designated comment field.

Thank you,

Total Cancer Care Operations Team

## Supplemental request approval

```
Logic Editor

Use the text box below to compose your logic, calculation, action tags, etc. If you need more space, click the Fullscreen Mode button to enlarge the text box. When you are finished, click the 'Update' button to minimize the Editor window. Learn how to use [f] Smart Variables [v] Special Functions [a] Action Tags or open the [c] Codebook

(((committee_approval_arm_1)[sup_1_vote_trigger(Send)] = "1")
AND (((committee_approval_arm_1)[sup_1_vote_trigger(Stop)] = "0")
OR ((committee_approval_arm_1)[member_1_request_approval_sup_1] = "")))

OR
(((committee_approval_arm_1)[sup_2_vote_trigger(Send)] = "1")
AND (((committee_approval_arm_1)[sup_2_vote_trigger(Stop)] = "0")
OR ((committee_approval_arm_1)[member_1_request_approval_sup_2] = "")))

AND [initial_request_arm_1][distinct_investigator_list] <> "SPAK"

AND [not_contain([initial_request_arm_1][distinct_coinvestigator_list], "SPAK")]
```

Paragraph

Hello Dr. Spakowicz,

We have a TCC **[initial\_request\_arm\_1][request\_type]** request from **[initial\_request\_arm\_1][pi\_last\_name], [initial\_request\_arm\_1][pi\_first\_name]** that is ready for your vote on fulfilling this request.

Project Title: **[initial\_request\_arm\_1][project\_study\_title]**

Co-Investigators (if applicable) for the request include:

**[initial\_request\_arm\_1][co\_investigator]**

You may open the survey in your web browser by clicking the link below:

[\[committee\\_approval\\_arm\\_1\]\[survey-link:tcc\\_review\\_member\\_1\]](#)

If the link does not work, try copying the link below into your web browser:

[\[committee\\_approval\\_arm\\_1\]\[survey-url:tcc\\_review\\_member\\_1\]](#)

Please provide us with your vote for or against fulfilling this request. If you have any questions that you would like the investigator to clarify please provide them in the designated comment field.

Thank you,

Total Cancer Care Operations Team

# Committee Approval Process

## (Alerts & Notifications)

- 2 additional reminders are set up following the first email if a vote has not been cast.

**STEP 2: Set the Alert Schedule**

When to send the alert?

Send immediately

Send on next  at time  H:M

Send the alert  days  hours  minutes  
after  ?

Send at exact date/time:  📅🕒

Send it how many times?

Just once

Every time the form/survey in Step 1B is  (excludes data imports)

Multiple times on a recurring basis:

Send every  days after initially being sent.  
*Tip: A monthly recurrence can be approximated as 30.44 days.*

Send up to  times total (including the first time sent).  
*Leave blank to continue sending forever.*

Alert expiration: (optional)  📅🕒

This alert will be auto-deactivated at the specified date/time above. Note: This will cause any already-scheduled notifications not to be sent after the expiration time.











































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# Committee Approval Process

- Each approval group has their own designated form for the initial request as well supplemental.
  - 1 PI and director
  - 4 Standing members
  - 15 Disease groups
- Forms and variable names were created to allow for changes in members and disease group leaders.

TCC Research Committee Approval	72		
PI/Director Review	62		
TCC Review Member #1	68		
TCC Review Member #2	68		
TCC Review Member #3	68		
TCC Review Member #4	68		
AL MDS Approval	68		
BMT Approval	68		
Breast Approval	68		
CLL Approval	68		
CNS Approval	68		
GI Approval	68		
GU Approval	68		
Gynecologic Approval	68		
HN Approval	68		
Lymphoma Approval	68		
Melanoma Approval	68		
MM Approval	68		
Sarcoma Approval	68		
Thoracic/Lung Approval	68		
Thyroid Approval	68		

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COMPREHENSIVE CANCER CENTER



# Committee Approval Process

- Approval section:
  - Status and member name are always required
  - Comment only required if approval status is not "Approve" (*branching logic*).
  - Date only required if approval status is not "Defer" (*branching logic*).
  - Section duplicated for each of the three approval types
    - Branching logic applied to entire sections so they are only visible when needed

The screenshot displays a web form titled "Request Approval Status" with a light green header. It contains several input fields and a "reset" button. The form is divided into sections by horizontal lines. The first section is for "Request Approval Status" with radio buttons for "Approve", "Approve with reservation" (selected), "Defer (require further information)", and "Disapprove". Below this is a "TCC Review Member #1 Comments" text area, followed by a "TCC Review Member #1" dropdown menu, and a "Date Approval Request Completed" date picker. The second section is for "Request Approval Status" with the same radio buttons. The third section is for "TCC Review Member #1 Comments" with a text area. The fourth section is for "TCC Review Member #1" with a dropdown menu. The fifth section is for "Date Approval Request Completed" with a date picker. Each section has a "Variable" label and a "Branching logic" label. The "Branching logic" labels are: "[member\_1\_request\_approval] = 'ApproveWR' or [member\_1\_request\_...]", "[member\_1\_request\_approval] = 'ApproveWR' or [member\_1\_request\_...", and "[member\_1\_request\_approval] <= 'Defer'".

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COMPREHENSIVE CANCER CENTER

# Committee Approval Process

- Comments from committee members section:
  - Branching logic is applied to each field so they are only visible when applicable to the request.
  - Section duplicated for each of the three approval types

*Without branching logic*

Comments from other committee members (if applicable)
TCC Review Member 2 Approval Status: _____
TCC Review Member 2 Comment: _____
TCC Review Member 3 Approval Status: _____
TCC Review Member 3 Comment: _____
TCC Review Member 4 Approval Status: _____
TCC Review Member 4 Comment: _____
Acute Leukemia + MDS Approval Status: _____
Acute Leukemia + MDS Comment: _____
BMT Approval Status: _____
BMT Comment: _____
Breast Approval Status: _____
Breast Comment: _____
CLL Approval Status: _____
CLL Comment: _____
CNS Approval Status: _____
CNS Comment: _____
GI Approval Status: _____
GI Comment: _____

*With branching logic*

Comments from other committee members (if applicable)
TCC Review Member 2 Approval Status: _____
TCC Review Member 2 Comment: _____
TCC Review Member 3 Approval Status: _____
TCC Review Member 3 Comment: _____
TCC Review Member 4 Approval Status: _____
TCC Review Member 4 Comment: _____
GI Approval Status: _____
GI Comment: _____

Variable: member\_1\_comment\_from\_member\_2

**TCC Review Member 2 Approval Status:**  
[committee\_approval\_arm\_1][member\_2\_request\_approval]

**TCC Review Member 2 Comment:**  
[committee\_approval\_arm\_1][member\_2\_comment]

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Variable: member\_1\_comment\_from\_member\_3

**TCC Review Member 3 Approval Status:**  
[committee\_approval\_arm\_1][member\_3\_request\_approval]

**TCC Review Member 3 Comment:**  
[committee\_approval\_arm\_1][member\_3\_comment]

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Variable: member\_1\_comment\_from\_member\_4

**TCC Review Member 4 Approval Status:**  
[committee\_approval\_arm\_1][member\_4\_request\_approval]

**TCC Review Member 4 Comment:**  
[committee\_approval\_arm\_1][member\_4\_comment]

Variable: member\_1\_comment\_from\_gi *Branching logic: [committee\_approval\_arm\_1][disease\_chair\_approve\_list(gi)] = "1"*

**GI Approval Status:**  
[committee\_approval\_arm\_1][gi\_request\_approval]

**GI Comment:**  
[committee\_approval\_arm\_1][gi\_comment]

# Committee Approval Process

- The main TCC Research Committee Approval form also has the summary of approvals and comments to review the progress of the requests through the approval process.

<b><u>Comments from other committee members (if applicable)</u></b>
<b>TCC Review Member 1 Approval Status:</b> Approve
<b>TCC Review Member 1 Comment:</b> _____
<b>TCC Review Member 2 Approval Status:</b> Approve with reservation
<b>TCC Review Member 2 Comment:</b> ensure 30 mg is necessary for the proposed project
<b>TCC Review Member 3 Approval Status:</b> Approve
<b>TCC Review Member 3 Comment:</b> _____
<b>TCC Review Member 4 Approval Status:</b> Approve
<b>TCC Review Member 4 Comment:</b> _____
<b>GI Approval Status:</b> Approve
<b>GI Comment:</b> _____

- Forms are locked once the approval process has completed.
  - Must have user rights to lock/unlock forms.

# Instruments, Events and Survey Settings

(33 instruments, 5 events, 28 enabled as surveys)

## Initial Request

[initial\_request\_arm\_1]

### Request

completed by requester (<https://go.osu.edu/osutcc>)

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Form	82		
Feasibility Form	33		
Data/Specimen Form	120		

### Agreements

completed by investigator for data/specimen requests

Instrument name	Fields	View PDF	Enabled as survey
TCC Investigator Agreement (De-identified)	11		
TCC Investigator Agreement (Identified)	11		
TCC Data Use Agreement	11		

### Dashboard

viewable by requester/investigator

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Status Dashboards	13		
Admin	2		

## Project Survey

[project\_survey\_arm\_1]

### Project Outcomes Survey

completed by requester/investigator

Instrument name	Fields	View PDF	Enabled as survey
Data/Specimen Survey	29		

## Project Status

[project\_status\_arm\_1]

### Timeline Log

updated by TCC Admins

Instrument name	Fields	View PDF	Enabled as survey
Project Timeline	5		

## Internal Review

[internal\_review\_arm\_1]

### Internal Review/Project Plan

completed by TCC Admins

Instrument name	Fields	View PDF	Enabled as survey
Feasibility TCC Internal Review	3		
Data/Specimen TCC Internal Review	9		

Database set up as **longitudinal** to allow us to automate some of the process

## Committee Approval

[committee\_approval\_arm\_1]

### Approvals

completed by committee members and disease group leader(s)

Instrument name	Fields	View PDF	Enabled as survey
TCC Research Committee Approval	72		
PI/Director Review	62		
TCC Review Member #1	68		
TCC Review Member #2	68		
TCC Review Member #3	68		
TCC Review Member #4	68		
AL MDS Approval	68		
BMT Approval	68		
Breast Approval	68		
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GI Approval	68		
GU Approval	68		
Gynecologic Approval	68		
HN Approval	68		
Lymphoma Approval	68		
Melanoma Approval	68		
MM Approval	68		
Sarcoma Approval	68		
Thoracic/Lung Approval	68		
Thyroid Approval	68		

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# Data/Specimen Survey

## (Automated Survey Invitations)

- This survey gets automatically sent to the requester after the designated # of days in the **Automated Survey Invitations (ASI)** configuration.

### Define Conditions for Automated Survey Invitations (ASI)

In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. [Tell me more](#)

Activate automated invitations for this survey?

**Survey title:** Data/Specimen Survey  
**Event:** Project Survey

"Active" must be selected in order for automated survey invitations to be triggered and sent using the conditions specified in this popup. You may make it Not Active (and vice versa) at any point in the future. [?](#)

Active  Not Active

---

**STEP 1: Compose message**

**From:**   (select any project user to be the "Sender")

**To:** [All participants who meet the conditions defined]

**Subject:** TCC Data and/or Specimen Survey ([[initial\_request\_arm\_1]][tcc

Send test email

Paragraph  **B** *I* U [Link](#) `</>`

Hello [[initial\_request\_arm\_1]][requester\_name],

Thank you for using Total Cancer Care (TCC). I am following up on the data/specimen request for your project titled, "[[initial\_request\_arm\_1]][project\_study\_title]" ([[initial\_request\_arm\_1]][tcc\_project\_id]). Our records indicate TCC data and/or specimens were provided on [[initial\_request\_arm\_1]][data\_specimen\_finalized\_dt] for this project.

We are gathering data related to any research utilizing TCC data and/or specimens. This information is important for us to have for the NCI Cancer Center Support Grant.

To assist us with this process, we kindly ask that you please complete the Data/Specimen Survey following the link/URL below.

You may open the survey in your web browser by clicking the link below:  
[survey-link]

If the link above does not work, try copying the URL below into your web browser:  
[survey-url]

Please email tcc.requests@osumc.edu if you have any questions.

Thank you.

**NOTE:** You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.

[How to use Piping in the survey invitation](#) Reminder: Never pipe private info (e.g., PII, PHI) into emails.

---

**STEP 2: Conditions**

**Specify conditions for sending invitations:**

When the following survey is completed:

**AND**

When the following logic becomes true:

```
[[initial_request_arm_1]][specimen_project_status] = "Completed" or  
[[initial_request_arm_1]][clinical_data_project_status] = "Completed" or  
[[initial_request_arm_1]][molecular_data_project_status] = "Completed" and  
[[initial_request_arm_1]][data_specimen_finalized_dt] <> "" and  
[project_survey_arm_1][dataspecimen_survey_complete] <> "2" and  
(not contain([[initial_request_arm_1]][tcc_request_id], "H")) and  
[[initial_request_arm_1]][data_specimen_auto_surveys_stop(Yes)] = "0"
```

(e.g., [[enrollment\_arm\_1]][age] > 30 and [[enrollment\_arm\_1]][sex] = "1")

[How do I use special functions?](#)

Test logic with a record:

Ensure logic is still true before sending invitation? [?](#)

[How to use "stop logic" to disable an automated invite](#)

---

**STEP 3: When to send invitations AFTER conditions are met**

Send immediately

Send on next  at time  H:M

Send the invitation  days  hours  minutes  
after  (Initial Reque [?](#))

Send at exact date/time:  M/D/Y H:M

---

**OPTIONAL: Enable reminders**

Re-send invitation as a reminder if participant has not responded by a specified time? (Times below refer to AFTER original invitation time.)

Send every  at time  H:M

Send every  days  hours  minutes

Send at exact date/time:  M/D/Y H:M

- AND -

Recurrence:

# Instruments, Events and Survey Settings

(33 instruments, 5 events, 28 enabled as surveys)

## Initial Request

[initial\_request\_arm\_1]

### Request

completed by requester (<https://go.osu.edu/osutcc>)

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Form	82		
Feasibility Form	33		
Data/Specimen Form	120		

### Agreements

completed by investigator for data/specimen requests

Instrument name	Fields	View PDF	Enabled as survey
TCC Investigator Agreement (De-identified)	11		
TCC Investigator Agreement (Identified)	11		
TCC Data Use Agreement	11		

### Dashboard

viewable by requester/investigator

Instrument name	Fields	View PDF	Enabled as survey
TCC Project Status Dashboards	13		
Admin	2		

## Project Survey

[project\_survey\_arm\_1]

### Project Outcomes Survey

completed by requester/investigator

Instrument name	Fields	View PDF	Enabled as survey
Data/Specimen Survey	29		

## Project Status

[project\_status\_arm\_1]

### Timeline Log

updated by TCC Admins

Instrument name	Fields	View PDF	Enabled as survey
Project Timeline	5		

## Internal Review

[internal\_review\_arm\_1]

### Internal Review/Project Plan

completed by TCC Admins

Instrument name	Fields	View PDF	Enabled as survey
Feasibility TCC Internal Review	3		
Data/Specimen TCC Internal Review	9		

Database set up as **longitudinal** to allow us to automate some of the process

## Committee Approval

[committee\_approval\_arm\_1]

### Approvals

completed by committee members and disease group leader(s)

Instrument name	Fields	View PDF	Enabled as survey
TCC Research Committee Approval	72		
PI/Director Review	62		
TCC Review Member #1	68		
TCC Review Member #2	68		
TCC Review Member #3	68		
TCC Review Member #4	68		
AL MDS Approval	68		
BMT Approval	68		
Breast Approval	68		
CLL Approval	68		
CNS Approval	68		
GI Approval	68		
GU Approval	68		
Gynecologic Approval	68		
HN Approval	68		
Lymphoma Approval	68		
Melanoma Approval	68		
MM Approval	68		
Sarcoma Approval	68		
Thoracic/Lung Approval	68		
Thyroid Approval	68		

The James

# Record Status Dashboard

Dashboard displayed: In Progress (All) Modify

Displaying record Page

- [Default dashboard]
- Data/Specimens (Completed)
- Data/Specimens (In Progress/Not Started/Partially Completed/Blank)**
- DNA from blood (In Progress)
- Feasibility (Completed)
- Feasibility (In Progress/Not Started/Blank)
- FFPE Tissue (In Progress)
- Frozen Tissue (In Progress)
- In Progress (All)
- Meeting Topic
- ORIEN Intermember Projects (All)
- Outcomes Survey Complete
- Plasma/Serum Specimen Projects (In Progress)
- Potential Outcomes Survey - Not Completed
- Projects by investigator
- Specimen Involved Projects (In Progress)
- TCC Requests (Newest to Oldest)

# Custom Record Label

**500** TCC00500-TEST | PI: Test, John | Req by: Jane Test | OSU Internal

FEASIBILITY (01-08-2024) | LOS: Yes  
Status = **Completed**

DATA/SPECIMEN (01-08-2024) | **Data and Specimens**  
Specimen Status: **In Progress Specimen being pulled by bank**  
Clinical Data Status: **N/A**  
Molecular Data Status: **SLIDs Identified**

FRZN: Tumor | FFPE: Tumor | DNA: Yes | Plasma: No | Serum: No








**Custom Record Label:** `<b><font style="font-size:160%;" color = red>[meeting_topic]</font></b> <b><font color = "black">[tcc_project_id]</b> | PI: <b>[pi_last_name], [pi_first_name]</b> | Req by: [requester_name] <b>[project_type]</b> <br><br><div style="margin-left:10%">FEASIBILITY ([feas_date_submitted]) | LOS: <b>[los_yn]</b></div><div style="margin-left:12%">Status =</font> <b>[feas_project_status]</b> <font color = "black">[feas_project_sub_status] </div> <br><div style="margin-left:10%">DATA/SPECIMEN ([data_specimen_date_submitted]) | [request_type] </font></b></div><div style="margin-left:12%"><font color = "black">Specimen Status: <b>[specimen_project_status] <font color = "black">[specimen_project_sub_status]</b><br>Clinical Data Status:</font> <b>[clinical_data_project_status]</b><br><font color = "black">Molecular Data Status:</font> <b>[molecular_data_project_status]</b></div><br><b>FRZN:</b> <i>[tissue_type_frozen]</i> | <b>FFPE:</b> <i>[tissue_type_ffpe]</i> | <b>DNA:</b> <i>[dna_blood]</i> | <b>Plasma:</b> <i>[plasma]</i> | <b>Serum:</b> <i>[serum]</i></br>`

## Field Choices:

NotStarted, <font color = darkorange>Not Started</font>  
 PendingCommitteeApproval, <font color = "slateblue">Pending Committee Approval</font>  
 InProgress, <font color = "limegreen">In Progress</font>  
 ClarificationInvestigator, <font color = "limegreen">Clarification Needed from Investigator</font>  
 OnHold, <font color = "gray">On Hold</font>  
 PartiallyCompleted, <font color = "lightseagreen">Partially Completed</font>  
 Completed, <font color = "dodgerblue">Completed</font>  
 CancelledTCC, <font color = "firebrick">Cancelled - TCC Admin</font>  
 CancelledPI, <font color = "firebrick">Cancelled - PI/Requester</font>  
 UnableToFill, <font color = "firebrick">Unable To Fill</font>  
 Duplicate, <font color = "black">Duplicate</font>  
 NA, <font color = "black">N/A</font>

## RGB Color Codes Chart

([https://www.rapidtables.com/web/color/RGB\\_Color.html](https://www.rapidtables.com/web/color/RGB_Color.html))

Color	Color Name	Hex Code #RRGGBB	Decimal Code R,G,B
	dark slate gray	#2F4F4F	(47,79,79)
	teal	#008080	(0,128,128)
	dark cyan	#008B8B	(0,139,139)
	aqua	#00FFFF	(0,255,255)
	cyan	#00FFFF	(0,255,255)
	light cyan	#E0FFFF	(224,255,255)
	dark turquoise	#00CED1	(0,206,209)

The James

# REDCap Reports

## Data Exports, Reports, and Stats

[VIDEO: How to use Data Exports, Reports, and Stats](#)

+ Create New Report

My Reports & Exports

Other Export Options

View Report: Request by PI

Number of results returned: 1

Total number of records queried: 1,990

('records' = total available data across all designated events)

Report execution time: 0.2 seconds

Stats & Charts

Export Data

Print Page

Edit Report

Live filters:

Test, John

[ Distinct Co-Investigator List (Inter

Reset

## Request by PI

TCC Request ID tcc_request_id	Event Name redcap_event_name	Repeat Instrument redcap_repeat_instrument	Repeat Instance redcap_repeat_instance	TCC Project ID (Internal Field Only) tcc_project_id	Distinct Investigator List (Internal Field Only) distinct_investigator_list	Distinct Co-Investigator List (Internal Field Only) distinct_coinvestigator_list	TCC Project File Name (Internal Field Only) tcc_project_file_name	Requester's Name requester_name	Requester's email requester_email	Requester's phone number requester_phone_number	Project/Study Title project_study_title	Project Objectives Briefly describe the objectives/hypothesis of the project. project_objective
<a href="#">500</a> TCC00500-TEST   PI: Test, John   Req by: Jane Test   OSU Internal  FEASIBILITY (01-08-2024)   LOS: Yes Status = Completed  DATA/SPECIMEN (01-08-2024)   Data and Specimens Specimen Status: In Progress Specimen being pulled by bank Clinical Data Status: N/A Molecular Data Status: SLIDs Identified  FRZN: Tumor   FFPE: Tumor   DNA: Yes   Plasma: No   Serum: No	Initial Request			TCC00500-TEST (TCC00500-TEST)	Test, John (TEST)	Test, Jane   Test, Jim (TES2-TES3)		Jane Test	<a href="mailto:brittney.sharick@osumc.edu">brittney.sharick@osumc.edu</a>		Study the XYZ1 gene in colorectal cancer patients who are MSI-H vs wildtype.	Requesting tumor tissue and blood (germline) samples from 50 patients (25 from each group) who are MSI-H and MSI wildtype and do not have any sequencing data available. Requesting sequencing data from 50 additional patients (25 from each group) that do have sequencing data available.  We would like to study XYZ1 in both tumor and germline samples to see the correlation between tumors being classified as MSI-H vs wildtype.

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THE OHIO STATE UNIVERSITY  
COMPREHENSIVE CANCER CENTER



# REDCap Reports

P1694 -- TCCP Data & Specimen Request (DSR) PID 2313

[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
- Partial Survey Response
- Complete
- ✓ Completed Survey Response
- Many statuses (mixed)
- Many statuses (all same)

TCC Request ID **500** **TCC00500-TEST** | PI: **Test, John** | Req by: Jane Test | **OSU Internal**

FEASIBILITY (01-08-2024) | LOS: **Yes**  
Status = **Completed**

DATA/SPECIMEN (01-08-2024) | [Data and Specimens](#)  
Specimen Status: **In Progress Specimen being pulled by bank**  
Clinical Data Status: **N/A**  
Molecular Data Status: **SLIDs Identified**

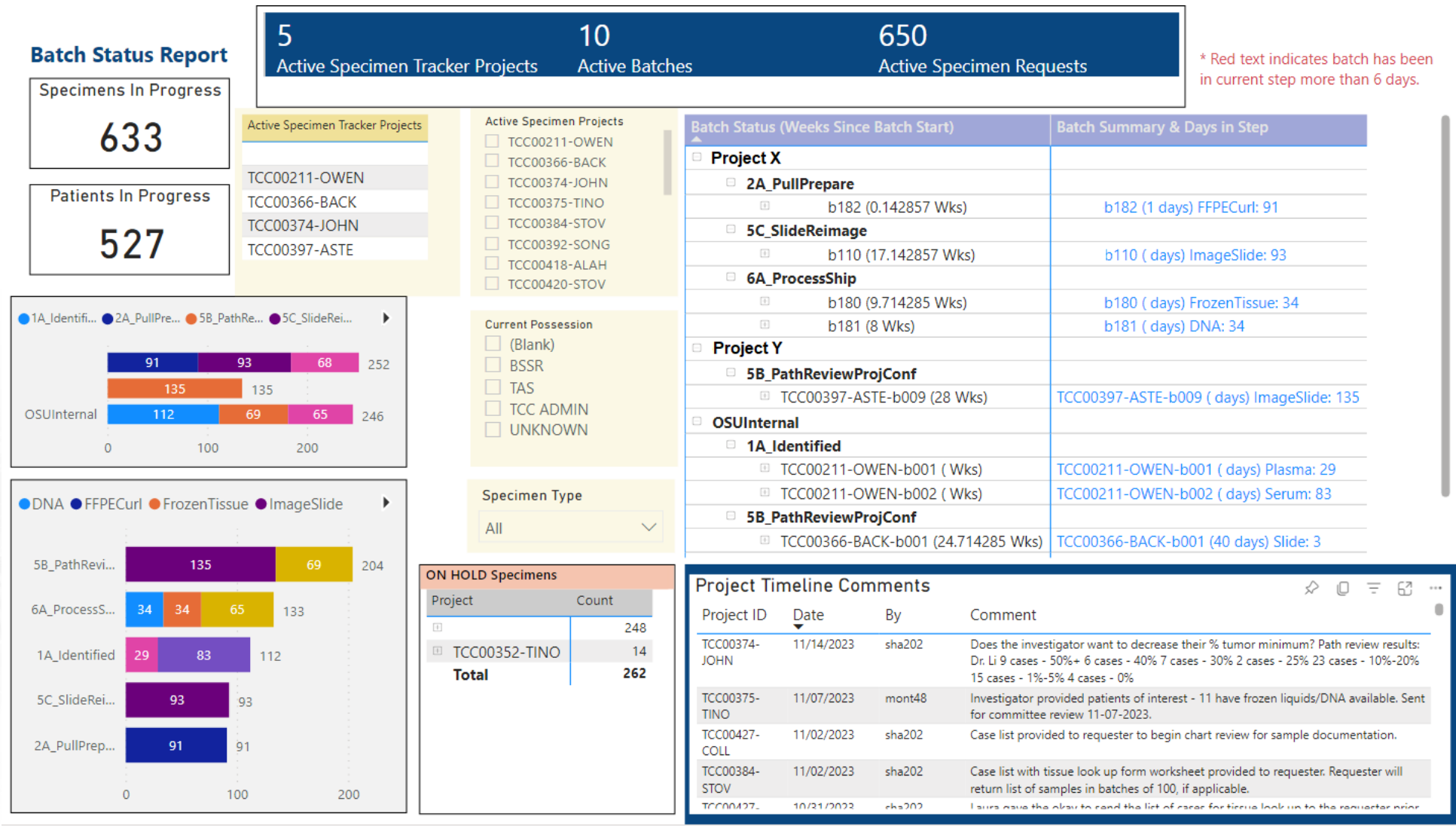
FRZN: *Tumor* | FFPE: *Tumor* | DNA: *Yes* | Plasma: *No* | Serum: *No*

Data Collection Instrument	Initial Request initial_request	Project Status project_status	Internal Review internal_review	Project Survey project_survey	Committee Approval committee_approval
TCC Project Form (survey)	●				
Feasibility Form (survey)	●				
Data/Specimen Form (survey)	✓				
TCC Investigator Agreement (De-identified) (survey)	○				
TCC Investigator Agreement (Identified) (survey)	●				
TCC Data Use Agreement (survey)	●				
Feasibility TCC Internal Review			●		
Data/Specimen TCC Internal Review			●		
TCC Research Committee Approval (survey)					● 🔒
PI/Director Review (survey)					● 🔒
TCC Review Member #1 (survey)					● 🔒
TCC Review Member #2 (survey)					● 🔒
TCC Review Member #3 (survey)					● 🔒
TCC Review Member #4 (survey)					● 🔒
AL MDS Approval (survey)					○
BMT Approval (survey)					○
Breast Approval (survey)					○
CLL Approval (survey)					○
CNS Approval (survey)					○
GI Approval (survey)					● 🔒
GU Approval (survey)					○
Gynecologic Approval (survey)					○
HN Approval (survey)					○
Lymphoma Approval (survey)					○
Melanoma Approval (survey)					○
MM Approval (survey)					○
Sarcoma Approval (survey)					○
Thoracic/Lung Approval (survey)					○
Thyroid Approval (survey)					○
Data/Specimen Survey (survey)				●	

We utilize the status icon color to monitor the project.

# Dashboarding (PowerBI)

- Pulling together multiple REDCap databases (in SQL) + SQL reports to create detailed dashboards.



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# Questions?

