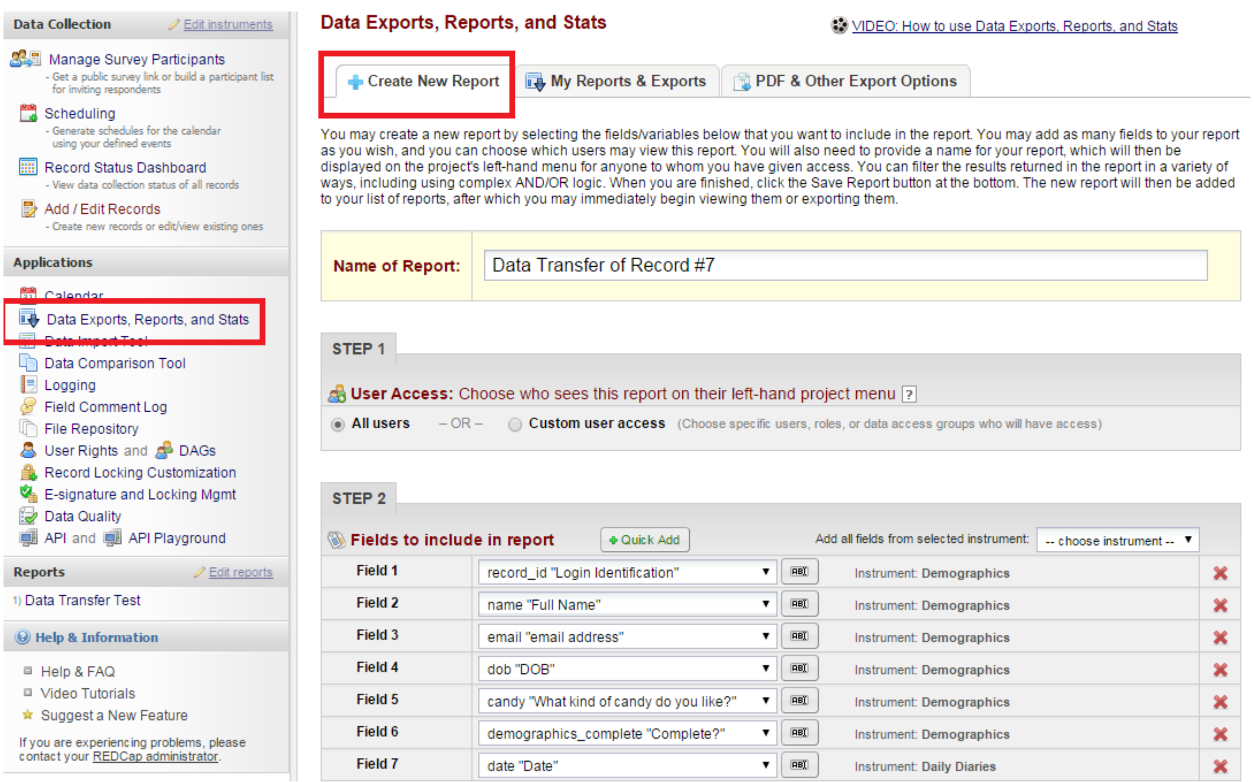
REDCap - Steps to move a record from one project to another project

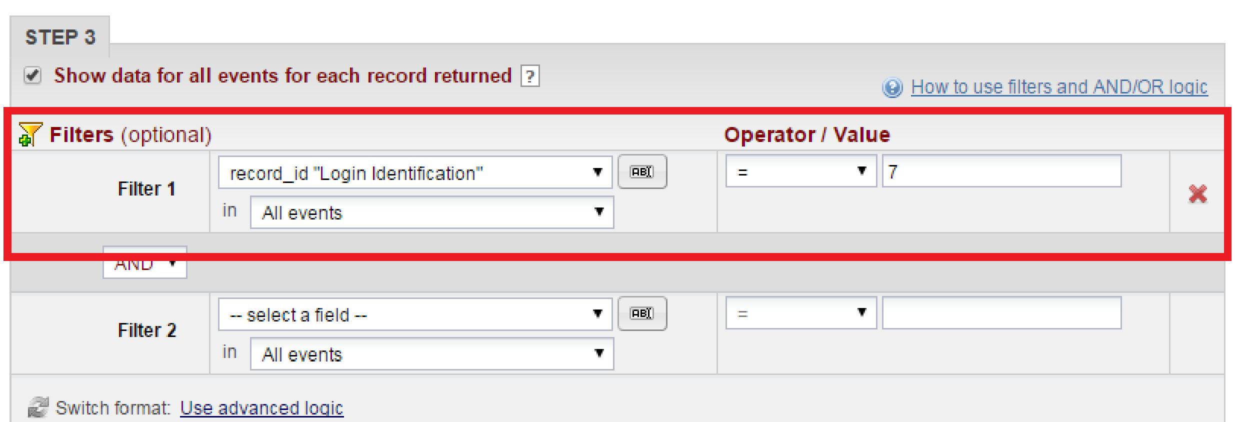
For the process detailed below, the variable names and form names must be identical

Before beginning this process, confirm the record number being transferred does NOT already exist in the new project

Step 1

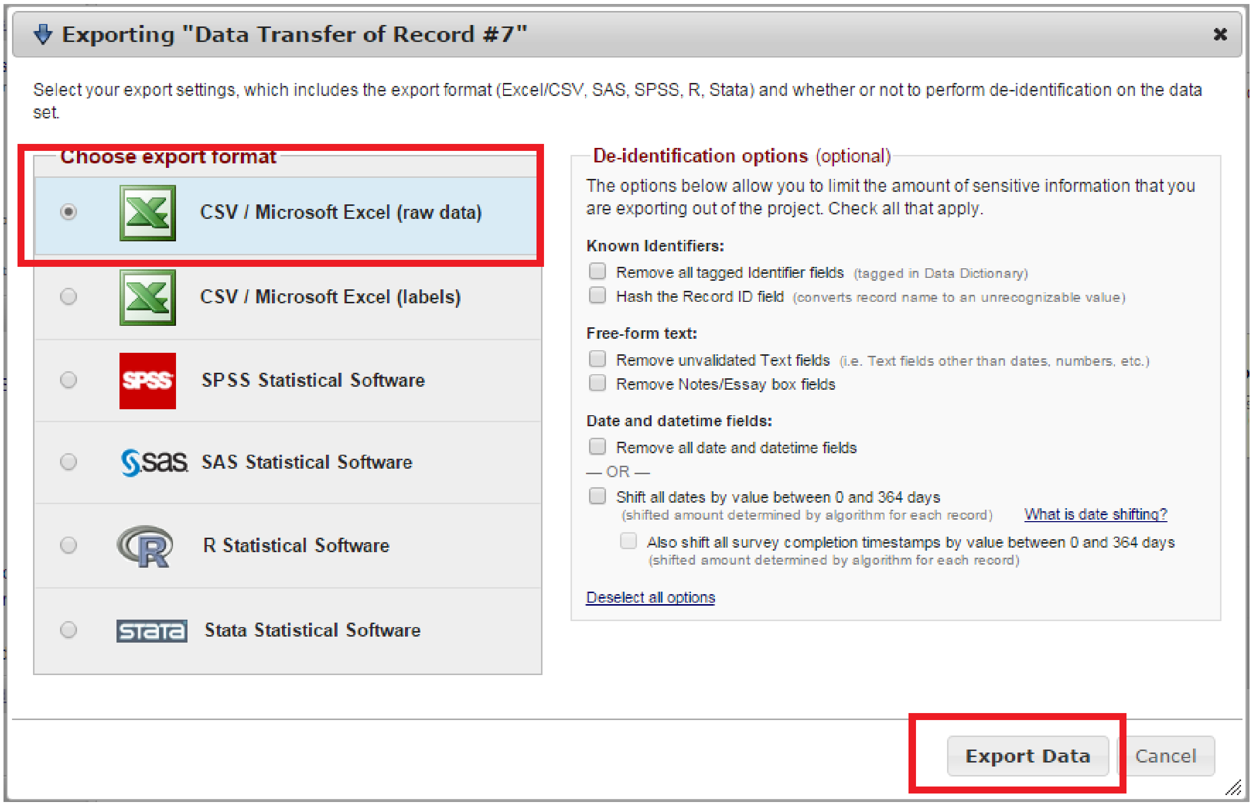
- Within the project containing the record currently, create a report for the specific record (to include all the fields to be transferred with the record). Add a filter to the report to only pull in the information for the record to be transferred. Once the report is created, click Save.





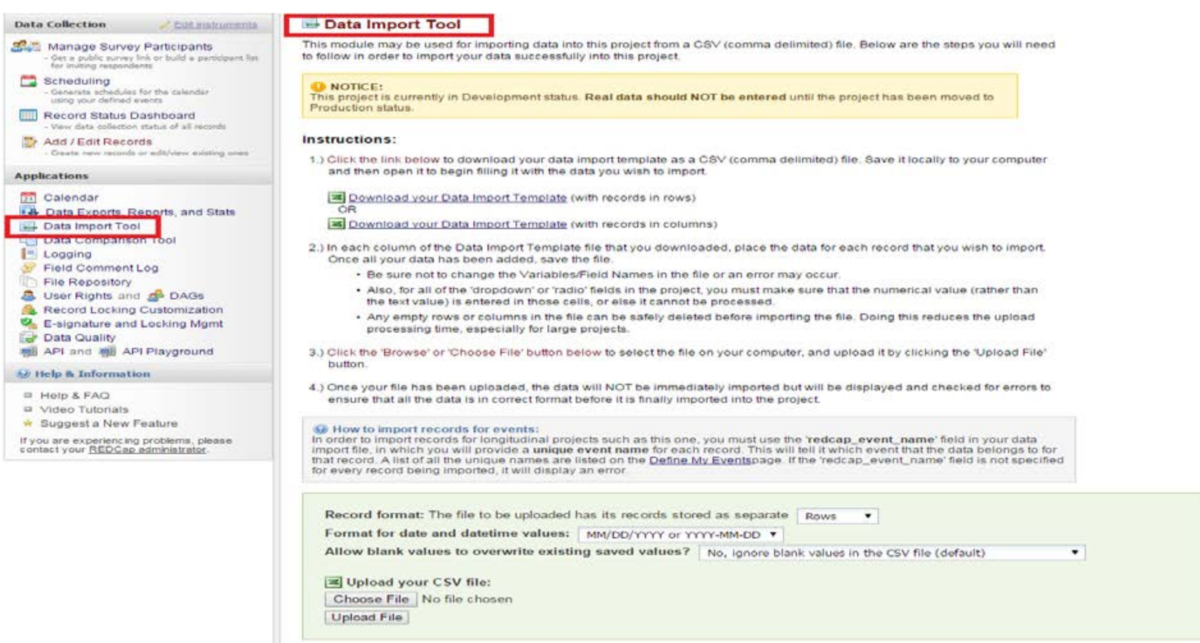
Step 2

- Once the Report is saved, click on *Export* and download the report in raw format. Save the data to your computer.



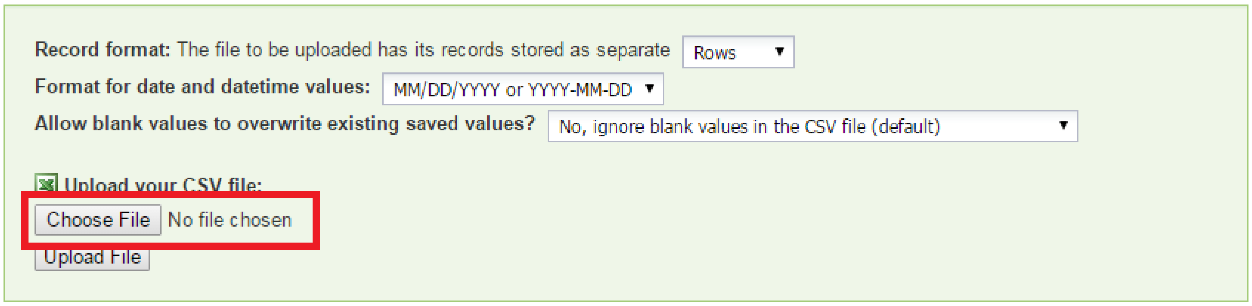
Step 3

- Log into the project that the data will be transferred into. Click on the *Data Import Tool.* Please note the instructions.



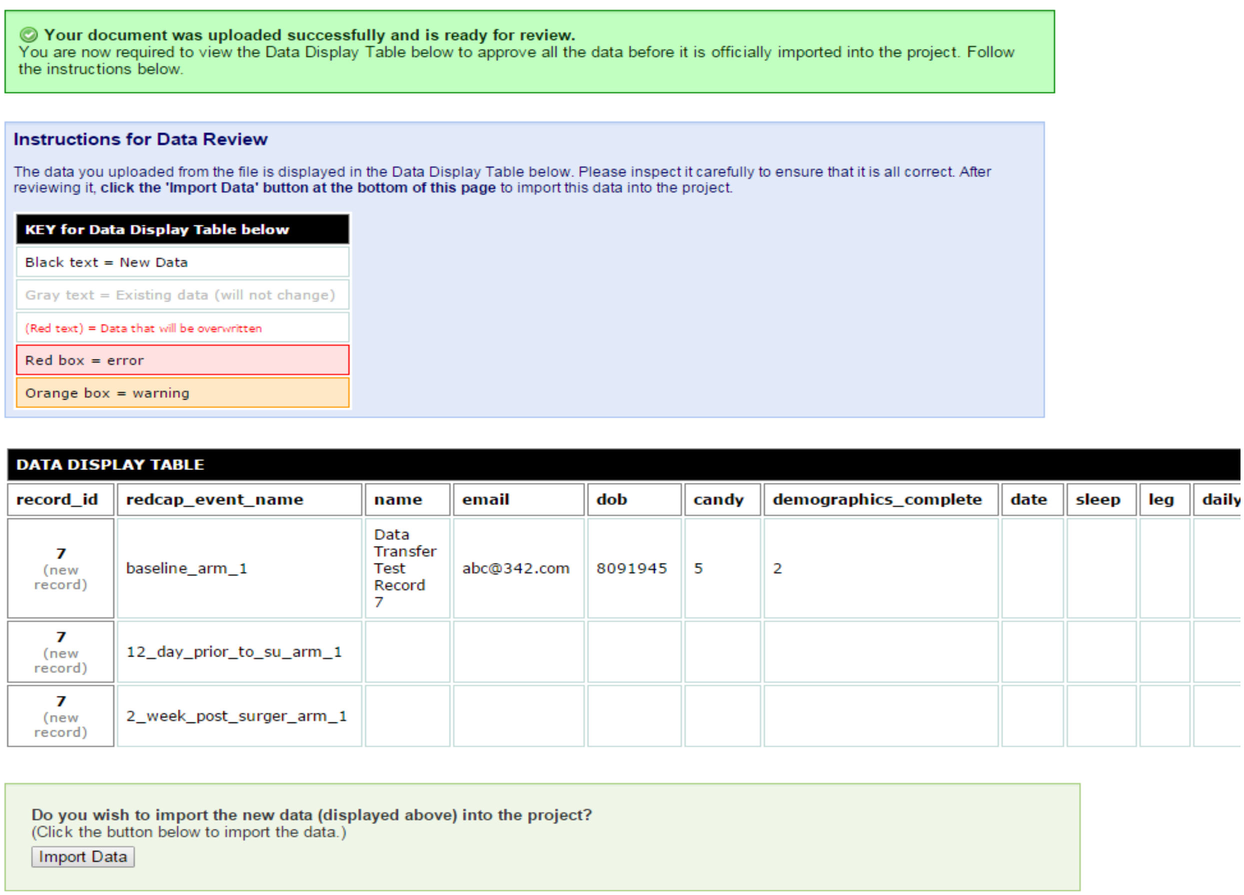
Step 4

- If the project that the data is being transferred from has the same variable names and form names as the project the data is being transferred into, then click on *choose file* to upload the data you extracted in Step 2. Once the file is selected, click on *upload file*.



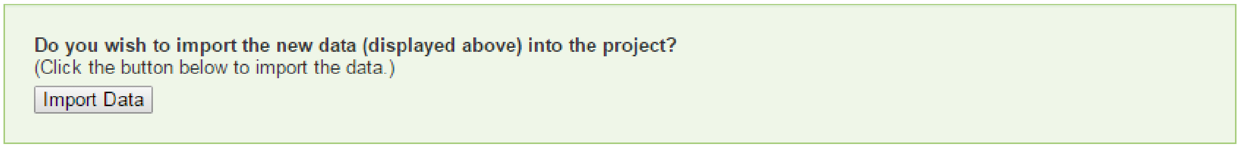
Step 5

- You should receive a notice saying: 'Your document was uploaded successfully and is ready for review.' The Instructions for data review are noted on this REDCap screen. Review the import of data and confirm the import is to the correct variable names.

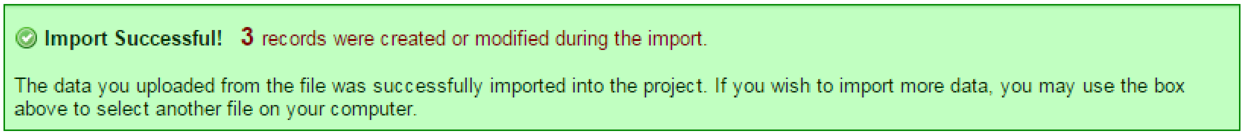


Step 6

- If the import is correct, click on *Import Data* to complete the process.

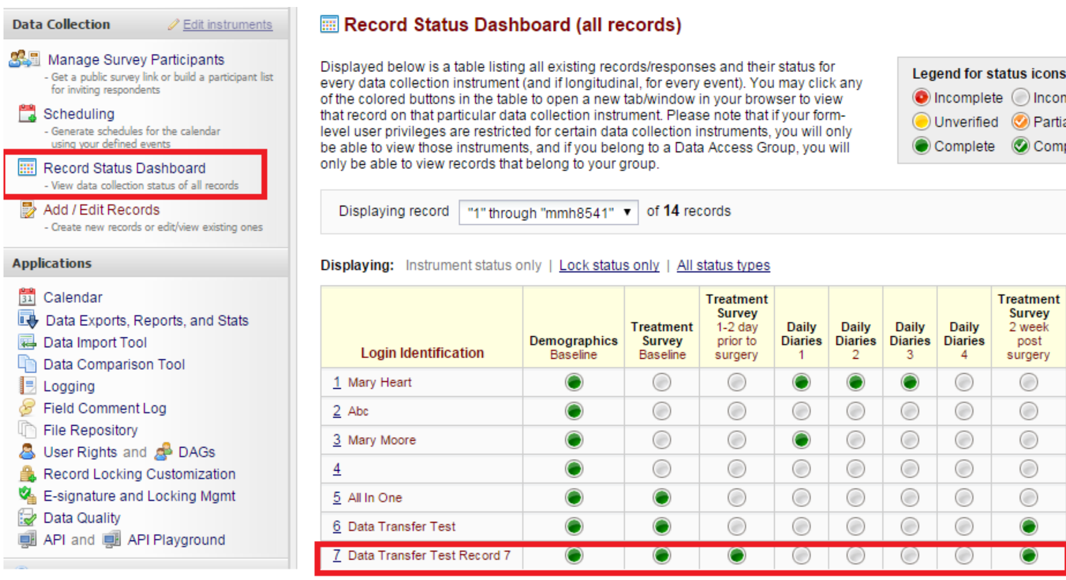


If the import was successful, you will receive a successful notice.



Step 7

- Navigate to the Record Status Dashboard and locate the imported record. Verify the information was imported to the correct variable names and forms.



Contact ctsiredcap@wakehealth.edu immediately if the information was imported incorrectly.