

## Protocol for IMPORTING EHR data into REDCap

Format the final spreadsheet for importing into REDCap:

- 1) File needs to be saved as CSV (comma separated values)
- 2) Sort the list by last name and first name
- 3) Include the following columns (order does not matter):
  - r\_uid (r\_site initials\_number)
  - recruitment\_method (1 – EHR list, 2 – clinic-based, 3 – community-based, 4 – relative of contact on EHR list, 5 – provider referral)
  - last\_name
  - first\_name
  - sex (1 – female, 2 – male)
  - age
  - dob (date formatted mm/dd/yyyy)
  - pcp (1 – Emory, 2 – BH, 3 – LS, 4 – MH, 5 – MR, 6 – SH, 7 – ZKD)
  - chw (1 – Hasan, 2 – Sakila, 3 – Zohra)
  - ehr\_date (date formatted mm/dd/yyyy)
  - address\_street
  - address\_city
  - address\_state
  - address\_zip
  - address\_county
  - phone\_cell
  - phone\_home
  - language1
  - language2
  - height\_inches (if reported in feet and inches, create a new variable for inches only)
  - weight\_pounds
  - hba1c
  - hba1c\_date (date formatted mm/dd/yyyy)
  - sbp
  - dbp
  - date\_bp
  - success (2)
  - unsuccessful\_responses (7)
  - screened\_yn (0)
  - session1 (0)
  - tracking\_complete (1)
- 4) Import the spreadsheet into REDCap using Data Import Tool – with records stored as rows
- 5) REDCap will give a message about BMI (it will be calculated using weight and height variables)
- 6) Double-check for accuracy, and redo import if needed