



ALLIANCE FOR INNOVATION  
ON MATERNAL HEALTH

# REDCap Refresher: Importing, Customizing, and Exporting AIM REDCap Projects

**Thursday**  
**August 07, 2025**  
**1:00PM- 2:00PM (ET)**



ALLIANCE FOR INNOVATION  
ON MATERNAL HEALTH

**The Alliance for Innovation on Maternal Health is a national, cross-sector commitment designed to support best practices that **make birth safer**, **improve maternal health outcomes**, and **save lives**.**

**You can find more information at  
[saferbirth.org](https://saferbirth.org).**

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# Before We Get Started

- ▶ You are **muted** upon entry to the call.
- ▶ **You will have the ability to unmute** yourself during Q&A times.
- ▶ We encourage participants to **remain muted** to reduce background noise.
- ▶ If you are experiencing technical difficulties, please chat an AIM staff member or email **[aimdatasupport@acog.org](mailto:aimdatasupport@acog.org)**

**This presentation will be recorded.**

**Both the slides and recording will be available on the AIM Data Resources Webpage and shared in the follow-up newsletter.**



## Agenda

1

Welcome

2

Upcoming Technical Assistance

3

AIM REDCap Projects Refresher

4

Q/A

5

Closing



# Welcome

Izzy Taylor



# Meet the AIM Data Team



**Izzy Taylor**  
Senior Manager,  
AIM Data Program



**Inderveer Saini**  
Program Data  
Analyst II



**Rekha Karki**  
Program Data  
Analyst



**David  
Laflamme**  
Epidemiology  
Contractor

# Upcoming Technical Assistance



# Additional Technical Assistance

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***Session 2: AIM Data Center Refresher: How to Download Bulk Exports from the AIM Data Center and Helpful Resources to Remember***  
August 14, 2025, at 1PM (ET)

***Session 3: AIM Tableau Dashboard Template: Visualizing Your AIM Patient Safety Bundle Data***  
August 28, 2025, at 1PM (ET)

***AIM Office Hours – General & Data***  
August 13, 2025, at 12PM (ET)

***AIM Office Hours – General & Data***  
August 21, 2025, at 1PM (ET)

***Last Call: AIM Office Hours – General & Data***  
August 29, 2025, at 1PM (ET)

# **REDCap Refresher: Importing, Customizing, and Exporting AIM REDCap Projects**

**David Laflamme, Rekha Karki,  
and Inderveer Saini**



# Disclaimer

AIM/ACOG/HRSA are not affiliated with [REDCap \(Research Electronic Data Capture\)](#) and development of these tools does not imply endorsement.



# Learning Objectives

- Understand the key steps for importing the AIM REDCap project
- Apply forms and fields customization that includes hospital unique identifier, reporting period, measure name, race/ethnicity, and payor, etc.
- Export customized project for analysis



# Intro to REDCap

**In the context of AIM  
Patient Safety Bundles**

- What is REDCap?
- Why AIM-developed REDCap Projects?
- What do I need in place to get started?
- How to Navigate AIM REDCap Projects?
- How to Import AIM REDCap Projects?
- Bundle example: Project Grid from ReadMe, Types of Projects
- An Intro to the Forms and fields customization available within REDCap
- Live Demonstration
- Additional Resources



# What is REDCap?

Per the [REDCap® website](#):

“REDCap® is a secure web application for building and managing online surveys and databases. While REDCap can be used to collect virtually any type of data in any environment (including compliance with 21 CFR Part 11, FISMA, HIPAA, and GDPR), it is specifically geared to support online and offline data capture for research studies and operations.”



# AIM-developed REDCap Projects

- Significantly decreased development burden
  - Save time
  - Jump start development
  - Greatly decreased “mental gymnastics” when figuring out how to operationalize AIM Data Collection Plans
- Sustainable option for ongoing data collection
- Highly customizable
  - Teams can start with AIM-developed REDCap Projects and edit them to meet their specific needs
  - Ability to customize extracts for import into other tools (e.g. Excel).
- Improved standardization across teams
  - Increase comparability of data when it is collected in the same way



# What do I need in place to get started?

- ▶ REDCap server instance
  - Many teams already have access to a REDCap server within their organization or through a partner organization
- ▶ At least some basic REDCap skills/experience
  - While it helps to have some experience with REDCap, the documentation and support community are strong and users familiar with survey tools can often pick-up REDCap skills quickly.
- ▶ Download the AIM-developed REDCap Project(s) associated with the patient safety bundle(s) you are working on
  - Available at [AIM REDCap Projects](#) webpage
  - Import the Project into your instance of REDCap Server



# How to Navigate AIM REDCap Projects?

**AIM**

About Us ▾ Patient Safety Bundles ▾ Resource Kits ▾ Resources ▾ Events ▾ **AIM Data ▾** Contact

Overview  
Data Process  
Data Center Login  
Data Center Upload Guide  
Data Resources  
Impact Statements  
**AIM REDCap Projects**

## AIM REDCAP PROJECTS

The Alliance for Innovation on Maternal Health developed template REDCap projects to facilitate quality improvement data collection based on AIM data collection plans and AIM core patient safety bundles. Each template REDCap project was specially designed with reports that align with formatting requirements for successful upload to the AIM Data Center. Those interested in using the template REDCap projects must have their own instance of REDCap to use these resources.

**Guide to AIM-Developed REDCap® Projects**  
Last updated: March 13, 2021

[↓ REDCap User Guide](#)  
[↓ FAQs](#)

## DOWNLOAD BY CORE PATIENT SAFETY BUNDLE

Obstetric Hemorrhage



Severe Hypertension in Pregnancy



Safe Reduction of Primary Cesarean Birth



Cardiac Conditions in Obstetric Care



Care for Pregnant and Postpartum People with Substance Use Disorder



Perinatal Mental Health Conditions



Postpartum Discharge Transition



Sepsis in Obstetric Care





# The Guide to AIM REDCap Projects

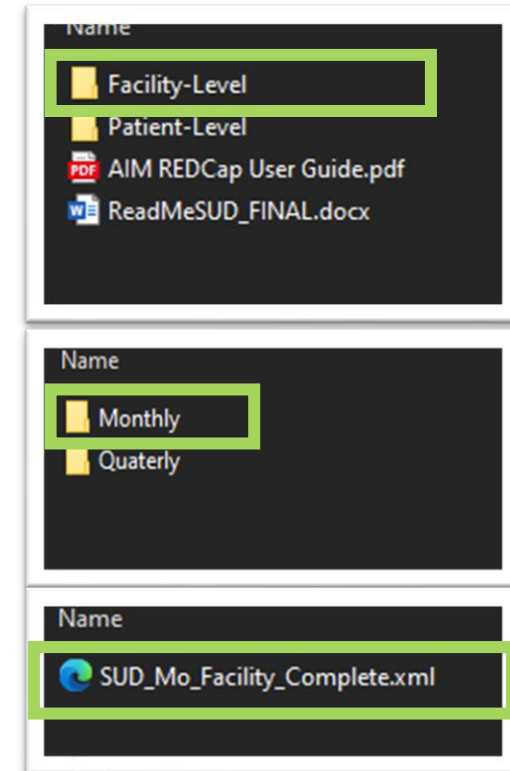
- This guide walks users through key steps in using the AIM-Developed REDCap Projects.
- It is your main resource when learning about and customizing a Project.





# Contents of Downloads

- Zip file
  - Facility-level
  - Patient-level
  - AIM REDCap User Guide
  - ReadMe file
    - Grid showing contents of Zip file
    - Project Type definitions



# AIM REDCap Project Types

| AIM REDCap Project Type | Associated Project File Name                                                                                                 | Intended Purpose                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Facility                | SUD_Mo_Facility_Complete.xml<br>SUD_Qtr_Facility_Complete.xml<br>SUD_Mo_Facility_Partial.xml<br>SUD_Qtr_Facility_Partial.xml | Facility projects assist users in capturing data that are mostly NOT at the patient level. These measures often include assessment of provider education/training, policies, and resources. <u>Project files that include Partial in the name omit measures that may be collected through sampling and/or not pre-aggregated measures.</u>                                                                                                                                                                             |
| Patient                 | SUD_Mo_Patient.xml<br>SUD_Qtr_Patient.xml                                                                                    | <u>Patient</u> projects assist users in capturing data for typically smaller groups of patients with specific characteristics (e.g. patients with Perinatal Mental Health Conditions, Substance Use Disorder, Cardiac Conditions, Sepsis, etc.). The AIM Data Collection Plan does not usually allow sampling for these measures and all patients with certain characteristics of interest must be included. Some Optional measures fall into this category and are not available in AIM REDCap Projects at this time. |
| Patient Sample          | SUD_Mo_Patient_Sample.xml<br>SUD_Qtr_Patient_Sample.xml                                                                      | <u>Patient Sample</u> projects assist users in capturing data either from a sample or, in the case of lower volume and/or high resourced facilities, all persons delivering a live infant. These projects often require simple modification to deactivate (hide) fields if you do not sample every race/ethnicity category and payor category. See the <a href="#">AIM Sampling Excel Workbook</a> for details on how to establish your categories.                                                                    |



# Facility-level

**Purpose:** Assist users in capturing **process & structure** measures data from the facility teams.

- Measures include, but are not limited to:
  - Provider & Nursing education
  - Unit Policies and Procedures
  - Resource Mapping
- Project Files associated with facility-level include:
  - SUD\_Mo\_Facility\_Complete.xml
  - SUD\_Qtr\_Facility\_Complete.xml
  - SUD\_Mo\_Facility\_Partial.xml
  - SUD\_Qtr\_Facility\_Partial.xml

*Project files that include **Partial** in the name omit measures that may be collected through sampling or are patient-level measures that are not pre-aggregated to the facility-level.*



# Patient -level

- **Purpose:** These projects allow the option for users to enter patient-level data individually into a REDCap® form for relevant measures.
- Examples include:
  - Patients with Perinatal Mental Health Conditions, Substance Use Disorder, Cardiac Conditions, Sepsis, etc.
  - AIM Data Collection Plans do not usually allow sampling for these measures and all patients with certain characteristics of interest must be included. Optional measures fall into this category but are not available in AIM REDCap Projects at this time.
- Example Project Files associated with patient-level include:
  - SUD\_Mo\_Patient.xml
  - SUD\_Qtr\_Patient.xml



# Patient Sample

- **Purpose:** Assist users in capturing data either from a sample or, in the case of lower volume and/or high resourced facilities, all persons delivering a live infant.
- These projects often require simple modification to deactivate (hide) fields if you do not sample every race/ethnicity category and/or payor category.
- See the [AIM Sampling Excel Workbook](#) for details on how to establish your categories.
- Project Files associated with patient sample include:
  - SUD\_Mo\_Patient\_Sample.xml
  - SUD\_Qtr\_Patient\_Sample.xml

| Folder\Filename                   | Version | Abbreviated Measure ID (see second table below) |    |    |    |    |    |    |    |    |    |        |        |    |    |    |
|-----------------------------------|---------|-------------------------------------------------|----|----|----|----|----|----|----|----|----|--------|--------|----|----|----|
|                                   |         | All P1                                          | P1 | P2 | P3 | P4 | P5 | O1 | O2 | O3 | O4 | All S1 | All S7 | S1 | S2 | S3 |
| <i>Root</i>                       |         |                                                 |    |    |    |    |    |    |    |    |    |        |        |    |    |    |
| ReadMe.docx                       | 1.0     |                                                 |    |    |    |    |    |    |    |    |    |        |        |    |    |    |
| AIM_REDCap_Project_User_Guide.pdf |         |                                                 |    |    |    |    |    |    |    |    |    |        |        |    |    |    |
| <i>Facility\</i>                  |         |                                                 |    |    |    |    |    |    |    |    |    |        |        |    |    |    |
| SUD_Mo_Facility_Complete.xml      | 2/13/24 | X                                               | X  | X  | X  | X  | X  | X  | X  | X  | X  | X      | X      | X  | X  | X  |
| SUD_Qtr_Facility_Complete.xml     | 2/13/24 | X                                               | X  | X  | X  | X  | X  | X  | X  | X  | X  | X      | X      | X  | X  | X  |
| SUD_Mo_Facility_Partial.xml       | 2/13/24 | X                                               | X  | X  |    |    |    |    |    |    |    | X      | X      | X  | X  | X  |
| SUD_Qtr_Facility_Partial.xml      | 2/13/24 | X                                               | X  | X  |    |    |    |    |    |    |    | X      | X      | X  | X  | X  |
| <i>Patient\</i>                   |         |                                                 |    |    |    |    |    |    |    |    |    |        |        |    |    |    |
| SUD_Mo_Patient.xml                | 2/13/24 |                                                 |    |    | X  | X  | X  | X  | X  | X  | X  |        |        |    |    |    |
| SUD_Qtr_Patient.xml               | 2/13/24 |                                                 |    |    | X  | X  | X  | X  | X  | X  | X  |        |        |    |    |    |
| SUD_Mo_Patient_Sample.xml         | 2/13/24 |                                                 |    | X  |    |    |    |    |    |    |    |        |        |    |    |    |
| SUD_Qtr_Patient_Sample.xml        | 2/13/24 |                                                 |    | X  |    |    |    |    |    |    |    |        |        |    |    |    |

**Key:** Mo = Monthly reporting | Qtr = Quarterly reporting

**Notes:**

1. State Surveillance Measures and Optional Measures are not included in AIM-developed REDCap Projects at this time.
2. Multi-bundle measures ("All") uploaded to the AIM Data Center will populate any active projects. In other words, if you have more than one bundle active, multi-bundle measures only need to be collected for one PSB. This is designed to reduce the data collection burden.



# Become Familiar with Core Data Collection Plan and ReadMe

- ▶ Download the Core Data Collection Plan for your bundle of interest from [saferbirth.org](https://saferbirth.org)
  - ▶ Take a close look at it!
- ▶ Know your reporting cadence
  - ▶ Monthly or Quarterly
    - ▶ Birth facility volume may influence your team's choice
- ▶ Review the ReadMe document found in the zip file associated with your bundle REDCap Project
  - ▶ Pay special attention to the grid showing which measures are included in each Project. Your goal is to use one or more projects to collect each measure once (i.e. a single checkmark per measure column).

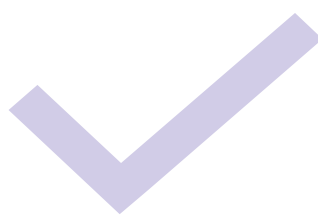


# How to Import AIM REDCap Projects?



## Download

- Contains zip file
- Extract all



## Select

- Choose Facility-level or Patient-level
- Choose monthly or quarterly



## Import

- Login to REDCap
- Select XML file to upload



# How to Import AIM REDCap Projects? Cont.

[Home](#)[My Projects](#)[+ New Project](#)[Help & FAQ](#)[Training Videos](#)[Send-It](#)[Messenger](#)

## + Create a new REDCap Project

You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.

**Project title:**

**Project's purpose:**

*How will it be used?*

---- Select One ----

**Assign project to a Project Folder?** ☐

**Project notes (optional):**

*Description of the project's use or purpose  
(displayed on the My Projects page)*

**Project creation option:**

☐ Empty project (blank slate)

☒ Upload a REDCap project XML file (CDISC ODM format) ?



Select XML file:

Choose File

No file chosen

☐ Use a template (choose one below)



# **An Introduction to the Functionality Available within REDCap**

User Groups/Permissions

Data Collection Options

Survey logic

Calculations

Reports and Exports

Project Sharing



# Data Validation

See the User Guide!

- ▶ Many fields have validation associated with them in REDCap. For example, numeric fields and date fields often have built-in REDCap validation that has been setup.
- ▶ Teams can choose to remove or enhance these validations in the REDCap Designer.



# Race and Ethnicity for Facility-level

See the User Guide!

- ▶ If you are not reporting on every category, you may “hide” unused categories.
- ▶ Hiding rather than completely removing them allows for easier editing should your needs change in the future.
- ▶ Hide the fields and remove the corresponding row(s) from the table.



# Classifying Race and Ethnicity for Patient-level

See the User Guide Appendix I

- ▶ Appendix I of the *Guide to AIM-Developed REDCap Projects* contains an example of how to “map” to the racial and ethnic group categories of your choice.
- ▶ Each AIM REDCap Patient-level REDCap Project is designed to accept the race and ethnicity category responses as they appear on the [U.S. Standard Birth Worksheet](#)



# Carry Forward Denominators

See the User Guide!

- ▶ Denominators which are the same across measures are “carried forward” to reduce data entry burden and ensure consistency.



# Live demonstration

- ▶ Customize facility names and confidential IDs
- ▶ Customizing the reporting period
- ▶ Race/ethnicity and Hiding fields
- ▶ Data exports



# Additional Resources



REDCap® Home My Projects + New Project **Help & FAQ** Training Videos Send-It Messenger Logged in as d\_laflamme Profile Log out

## REDCap Help & FAQ

Click the tabs below to navigate to a specific topic. When performing a keyword search, each tab will list the number of keyword matches in that section.

**Search for a Question**

No filter applied.

General Project Setup/Design Data Collection Instrument Design Data Entry/Collection Communicating from REDCap App Making Production Changes Optional Modules and Services

Jump to a sub-section: General | Licensing | Mobile Devices | Language Modules

### General

- How much experience with programming, networking and/or database construction is required to use REDCap?
- Where can I suggest a new REDCap feature?
- Can I still maintain a paper trail for my study, even if I use REDCap?
- Can I transition data collected in other applications (ex: MS Access or Excel) into REDCap?



REDCap® Home My Projects + New Project Help & FAQ **Training Videos** Send-It Messenger Logged in as d\_laflamme Profile Log out

## REDCap Training Videos

**Just Getting Started?**  
Explore these overviews of fundamental concepts and features.

| Title                      | Description                                                                                                                                                                                                                                    | Watch Video                                                                                         |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| <b>Brief Overview</b>      | A quick summary of what REDCap is and what it can do.                                                                                                                                                                                          | <br>4 minutes    |
| <b>Detailed Overview</b>   | This video provides an overview of basic functions and features within a REDCap project. It will serve as a starting point for learning about the basic concepts of REDCap, what REDCap projects are, how to create them, and how to use them. | <br>14 minutes   |
| <b>Data Entry Overview</b> | A focused exploration of basic data entry workflow. Suitable for training data entry staff.                                                                                                                                                    | <br>19 minutes |



# Additional Resources, Cont.

- ▶ An Introduction to AIM-developed REDCap Projects
  - <https://vimeo.com/manage/videos/941974910>
- ▶ Using Facility-level REDCap Projects for AIM Data Collection
  - <https://vimeo.com/manage/videos/944274569>
- ▶ Using Patient-level REDCap Projects for AIM Data Collection
  - <https://vimeo.com/manage/videos/946702849>

# Questions?

**AIM Data Support**  
**[aimdatasupport@acog.org](mailto:aimdatasupport@acog.org)**

**David Laflamme**  
**[david@mchepi.com](mailto:david@mchepi.com)**



# Thank You!

The slides and recording will be shared to all the attendees

Any questions about this session can be sent to  
aimdatasupport  
@acog.org

Be sure to complete the evaluation survey!  
It will pop up in your browser as you exit the session

Remember to register for upcoming Sessions