REDCap Recharge Model:
Frequently Asked Questions

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What does this FAQ document cover?

This initial FAQ document is designed to help users begin classifying their REDCap projects under the new recharge model, with a focus on understanding the project modes and which modes are subject to billing.

Will training or a walkthrough be offered (for example, a webinar)?

We recognize that users have additional questions and concerns, many of which were shared through our REDCap Recharge Model Feedback Survey included with our original announcement. This FAQ will be expanded to address these broader topics in the coming weeks. We will also be hosting a webinar to provide additional guidance, answer questions, and help users navigate the transition to the new recharge model.

How do I know whether my project will be billed?

Whether a project is billed depends on two things: the entity the project is assigned to, and the project's mode.

1. Project assignment. The new recharge model applies only to REDCap projects assigned to the Biological Sciences Division (BSD) or the Pritzker School of Medicine (PSOM). Projects assigned to UChicago Medicine (UCM) or to non-BSD entities, such as the Division of the Social Sciences or Chapin Hall, are not affected by this change. Those projects have already been paying for REDCap services under an established recharge model for the past five years and will continue under their current arrangement. BSD and PSOM are simply joining a financial structure that is already well established elsewhere at the University.

2. Project mode. Among BSD- and PSOM-assigned projects, only those in Production or Analysis/Cleanup mode are billed. Projects in Development or Completed mode are not billed. See "What are the different project modes and which modes will incur charges?" below for details.

In short, a project is billed if it is assigned to BSD or PSOM **and** is in Production or Analysis/Cleanup mode on or after January 1, 2027.

What is the timeline for the new recharge model?

Date	What happens
Now through December 31, 2026	Log in and close out completed projects. CRI shares guidance and walks through the updated production request workflow.
January 1, 2027	Recharge model takes effect (FY27 Q3).
April 1, 2027	First quarterly invoices issued, covering projects which were in Production mode from January 1, 2027 to March 31, 2027.
Ongoing	Prorated invoices issued quarterly for ongoing active projects.

What do I need to do next regarding the new recharge model?

Between now and December 31, 2026, we ask that you log in to REDCap to review your projects, identify those that are no longer active or needed, and update their status accordingly by following the instructions provided within this document.

Individual department-specific project lists will no longer be provided upon request. Instead, we are developing a centralized list of REDCap projects that will be made available in Box for users to reference. Additional information will be shared once the list is ready for publication.

What counts as a project? I use multiple projects for one study, or many surveys under one grant?

A single project is identified by a Project ID number in REDCap, known as the PID. This PID is shown either on your My Projects page (PID column next to project title column) or within the project, next to the project title in red font.

- A PID may contain many instruments (forms and/or surveys), and those instruments within a single PID are not charged separately; that one grant funding one PID means one fee regardless of how many surveys it contains.
- If a single study or operational use case uses several PIDs (for example, a consent/case-management PID plus a data PID, or multiple surveys split across PIDs), each PID will be billed.
- Where technically possible, we suggest consolidating multiple PIDs into a single PID. Also, billing applies per PID, and not per user. Each user in a multiple-user PID is not billed.

What are the different project modes and which modes will incur charges?

There are four project modes:

- **Development *(not billed)*** - projects in Development are being built, configured, or tested before they are ready for active use. This mode is typically used to design instruments, set up surveys, configure project settings, and test functionality before moving to Production mode.

- **Production *(billed)***- Projects in Production are actively being used to collect, manage, or maintain study or operational data. This mode is intended for projects that are live and being used for their intended purpose, including ongoing data collection and data management.

- **Analysis/Cleanup *(billed)*** - Projects in Analysis/Cleanup are no longer actively collecting data but remain accessible for activities such as data review, cleaning, validation, analysis, and preparation for final reporting or publication. This mode provides time to complete outstanding work before a project is marked Completed.

- **Completed *(not billed)*** - Projects in Completed mode have concluded their active work, and no further routine data collection, cleaning, or analysis is expected. This classification indicates that the project has reached the end of its active lifecycle. Projects should be reviewed to ensure they meet the institution's criteria for completion before being classified in this mode.

**Although not a "mode", a project can also be deleted. More on this option later.*

Who can move a project to the different modes, and how is data impacted?

If a Project is in…	Users can…	Administrator action…	Deletes the project?	Deletes data?	Restorable?
Development	Delete the project	no action needed	Yes	Yes	No
Development	Request a move to Production	Move to Production	N/A	N/A	N/A
Production	Move the project to Analysis/Cleanup	no action needed	N/A	N/A	N/A
Production	Mark the project as Completed	no action needed	No	No	Yes
Production	Request deletion of the project	Delete the project	Yes	Yes	No
Analysis/Cleanup	Mark the project as Completed	no action needed	No	No	Yes
Analysis/Cleanup	Request deletion of the project	Delete the project	Yes	Yes	No
Completed	Request the project be restored	Restore the project	No	No	Yes
Completed	Request deletion of the project	Delete the project	Yes	Yes	No

Are projects in Development mode charged?

Projects in Development mode are not billable. Development projects can be used for exploration of new features, testing data-collection approaches, training and demonstration efforts. Note, there is a 20-record maximum for Development projects. Users can bulk-delete these records anytime *(Project Home and Design, Setup, Other Functionality, Erase all data)* to continue using the project in Development mode for the purposes outlined above. Occasional audits will be performed to monitor for appropriate use of Development mode.

How will new projects moving to Production mode be billed?

Development projects only become billable when they are moved to Production mode. When the request is made to move to Production mode, REDCap will automatically send a follow-up survey to collect the funding source information. The project will be moved to Production once the billing information is reviewed and approved. Fees will be prorated and billed on a quarterly basis.

What about projects that are already in Production?

All existing and new projects in Production or Analysis/Cleanup mode as of January 1, 2027, will be included in the first quarterly billing cycle, with invoices issued in April 2027. Over the next few months, funding information will be collected for existing Production and Analysis/Cleanup projects.

Will a project and its data be deleted if no billing information is provided?

No. The project and its data will not be deleted. However, the project may be marked as Completed until the required billing information is provided. If further work is needed on the project, an administrator can restore it once the necessary information has been submitted.

What about projects that are finished but that I still want to keep, such as those in Analysis/Cleanup mode, or those awaiting IRB retention requirements?

Projects in Analysis/Cleanup mode remain subject to billing because the project continues to be actively used for research data review, cleaning, reporting, exporting, and analysis, even though new data entry is disabled. Once all work requiring active use of REDCap has been completed, project owners should change the project mode to Completed. Completed projects will no longer incur ongoing recharge charges under the standard billing policy, while the project and its data will remain on our REDCap servers for appropriate retention,

subject to institutional policies. Researchers should keep projects in Analysis/Cleanup mode for as long as they need to actively work with their data in REDCap. Projects should not be marked Completed until that work is finished or once IRB retention requirements are known.

Will CRI close projects on my behalf, or must I do it?

On November 1st, the CRI moved active projects with no activity in the past two years to Completed status. No projects were deleted - Completed mode simply archives the project and preserves all its data on our server.

If you need a Completed project reopened, go to the bottom of your My Projects page, click on Show Completed Projects, click on the project title, and submit the request to the REDCap team. The request will be processed within 24 hours.

For all other remaining active projects on your My Projects list, we encourage you to review and close out any other projects (instructions below), as you are most familiar with whether they are still needed.

If I delete or mark my project Completed, how do I export and archive data, and where should it be stored? What is the guidance for PHI and for long-term retention?

Our institution's data storage and security requirements are guided by the CISO's Office and the Secure Research Data Strategy. PHI handling involves the University's Privacy Office, and retention requirements are governed by institutional records management policies and applicable regulatory requirements. REDCap administration supports the technical implementation but does not independently establish these requirements.

If you wish to export your data, please follow the export procedures in REDCap, following all institutional policies for secure data storage. CRI provides research storage services. BSD faculty are provided 4TB of storage free year. Each additional TB is $71/TB/year, billed in quarterly increments. BSD faculty who wish to archive their data should contact the BSD IS service desk.

To close out old Development or Production projects, should I mark them Completed or delete them?

Below is a discussion of the two options, their pros and cons, and important considerations.

Option 1: Mark a Project as Completed

Marking a project as **Completed** retires the project without deleting it.

Who can do this?

A user with Project Design user rights has this ability.

Important: Once marked Completed, the project is no longer considered an active billable project, but **the project and its data remain available for restoration from our REDCap server.**

Pros

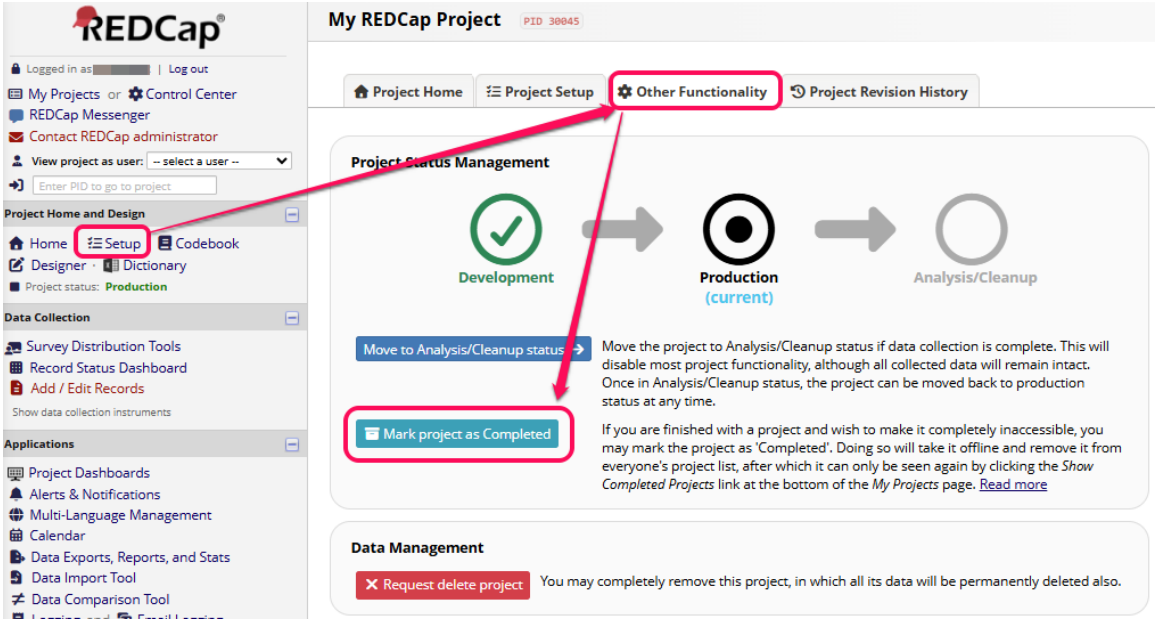
- **Does not delete the project or its data.**
- Preserves the project's instruments, records, reports, and configuration for future reference.
- Provides a safer option when a project is finished but may need to be accessed later.
- Can be reversed/reopened by an administrator if the project needs to become active again.

Cons

- The project and its data **remain in REDCap** and continue to consume storage/resources.
- It does not serve as a substitute for institutional data-retention or archival policy.
- Users should not assume that marking a project as completed satisfies IRB, regulatory, or institutional record-retention requirements.
- If the project contains sensitive data, those data remain subject to your institution's applicable data-retention and security requirements.
- If the project needs to be restored, new billing charges will apply.

Steps:

1. Open the REDCap project.
2. Go to **Project Home and Design** (left-hand menu).
3. Click on **Setup**.
4. Click on the **Other Functionality** tab.
5. Click on **Mark project as Completed.**
6. Confirm that you want to mark the project as completed.



Option 2: Delete a Project

Deleting a Production project permanently removes the project and its data from REDCap. Please be absolutely sure of this choice as it is **permanent and irreversible**.

Who can do this?

Please note, you can delete Development projects without administrator action, but Production projects can only be deleted by the administrator.

Important: Do not request deletion simply because a project is no longer actively being used. If the project may need to be referenced in the future, consider **marking it as Completed** instead.

Pros

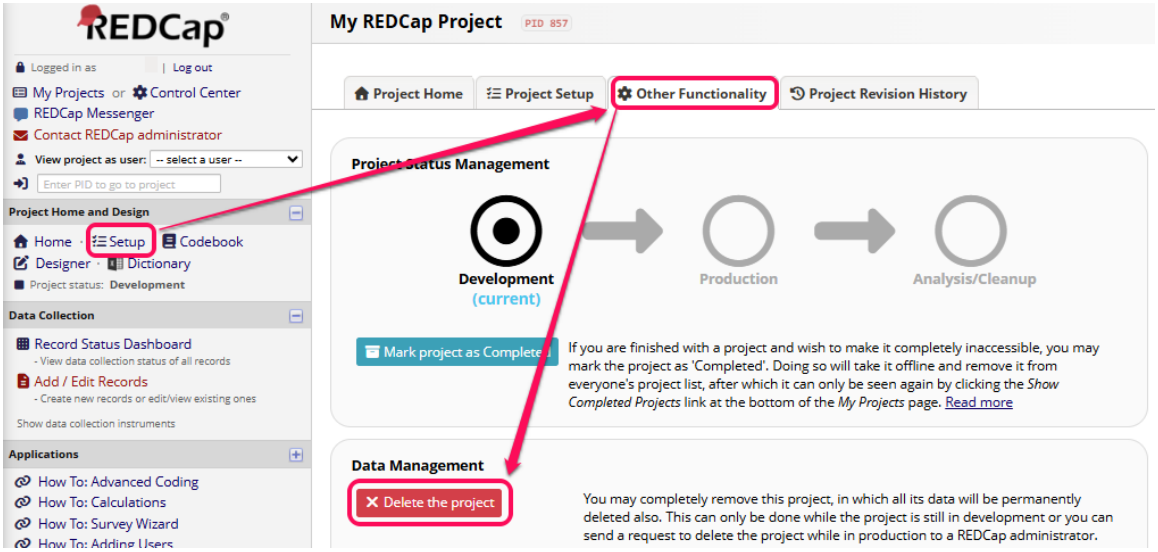
- Permanently removes the project and its data from REDCap.
- Removes the project from users' project lists.
- Eliminates an obsolete project from the active REDCap environment.
- Useful when a project was created in error, is no longer needed, or has been appropriately archived elsewhere.

Cons

- **Permanent and irreversible.**
- Project data, instruments, project settings, reports, and other project configuration are removed.
- You cannot simply restore or reopen the project later.

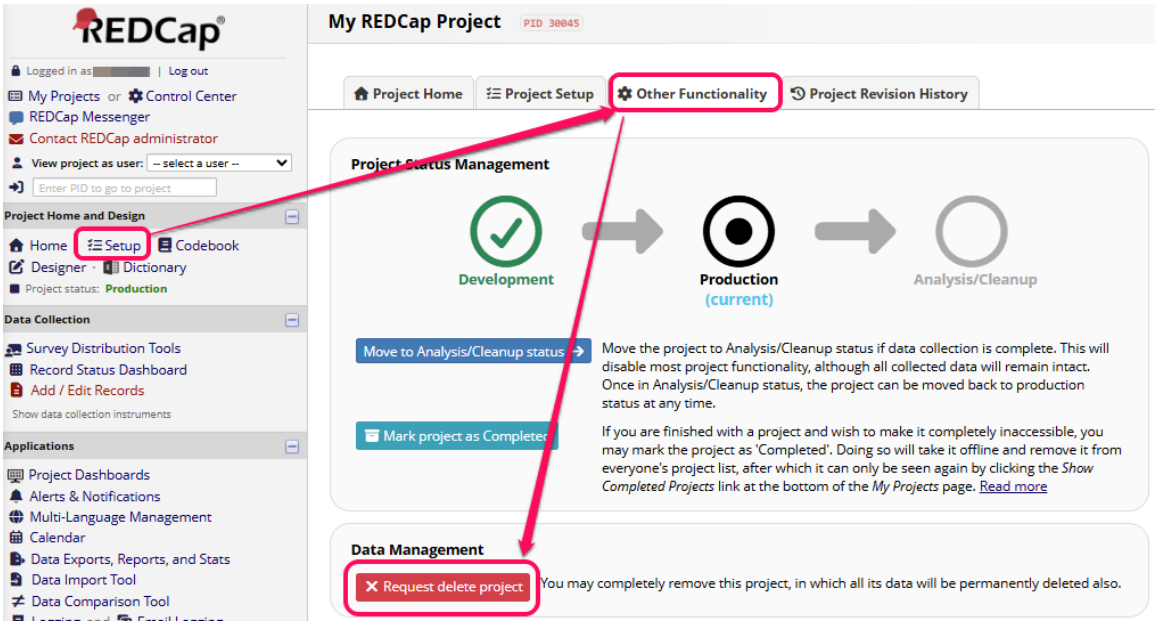
Steps to delete a Development project:

1. Open the REDCap project.
2. Go to **Project Home and Design** (left-hand menu).
3. Click on **Setup**.
4. Click on the **Other Functionality** tab.
5. Click on **Delete the project**.
6. Confirm that you want the project deleted.



Steps to delete a Production (or Analysis/Cleanup) project:

1. Open the REDCap project.
2. Go to **Project Home and Design** (left-hand menu).
3. Click on **Setup**.
4. Click on the **Other Functionality** tab.
5. Click on **Request delete project**.
6. Confirm that you want the project deleted.
7. The REDCap Administrator will review the request and delete the project.



Our recommendation

When in doubt, mark the project as Completed rather than requesting deletion. Marking a project as Completed allows you to retire it while preserving the project and its data. **Deletion should be reserved for projects that are truly no longer needed and whose data can be permanently removed in accordance with applicable institutional, IRB, regulatory, and data-retention requirements.**

Where can I request help, ask more questions, or find additional updates?

Our team is ready to help you sort out any questions you may still have.

- For technical guidance specifically related to closing out projects, please contact redcap@uchicago.edu.
- For additional questions and concerns related to the overall recharge model, please reach out to us via the REDCap Recharge Model Feedback Survey or cri@bsd.uchicago.edu.
- For the latest updates, also visit our REDCap news page.