

## Human Subject Participation Payment REDCap Messenger Checklist

### Step 1 – Create a conversation

- Click on **“REDCap Messenger”** within your REDCap project or at the top of your REDCap homepage.
- Create a REDCap Messenger conversation
  - Click **“Create new conversation”**
  - Add **relevant users** from the Users List or by searching users
  - Title** your conversation accordingly so no mix-ups occur
    - Note:** You can **“Link Conversation to Project”** to further link the communication and prevent users from seeing sensitive data when they are no longer attached to the project
  - Click **“Create”**
    - Note:** All **communication** related to payments for the study should be sent in the same conversation

### Step 2 – Send communication

- Send messages, PDFs, and Excel spreadsheets via your **“Conversation”**
  - Note:** REDCap Messenger is secure and HIPAA-compliant
  - Note:** You can mark messages as important to send a special notification to users
- To send a **message**
  - Type a message in the box at the bottom of the conversation
  - Click **“Enter”** to send
- To send a **file**
  - Click **“Add File”** under the message text box
  - Choose file and click **“Upload”**