

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”**