

*DRAFT FOR COMMUNITY FEEDBACK:*

*NACC UDSv4 Resources & Tools*

# NACC UDSv4 Resources and Tools

## UDSv4 Implementation Resources and Support

Explore the most current clinical, technical, and general UDSv4 resources, including 24/7 online ADRC Program Community Forum access on [NACC's website](#).

## ADRC Program Community Forum

The NACC Community Forum, hosted on Discourse, is an online space for ADRC Program members to collaborate, share knowledge, seek help, build community, and provide feedback on NACC tools (Data Platform, ADRC Portal, etc.).

Watch a [quick demo](#) of how to get the most out of the ADRC Program Community Forum.

## ADRC Portals

The ADRC portal will serve as a centralized location for data submission, reviewing QC checks and alerts, as well as viewing and downloading UDSv4 data.

Watch a [quick demo](#) of the ADRC portal.

# NACC UDSv4 Onboarding Checklist

## Overview

This checklist is to serve as a roadmap for onboarding your site to start using UDSv4.

This form assumes you've decided which data submission methods to use for the different types of data. An overview of the 3 data submission methods can be found [here](#).

**ALL PARTICIPANTS WILL GET AN INITIAL UDSv4 UDS VISIT.  
Follow ups will then use the UDSv4 follow-up visit packets.**

## Preparing Staff for UDSv4

### Step 1: Identify staff roles

ROLE	Tasks	Who
ADRC Administrator	Provide staff access to the NACC Data Platform Overall strategy guidance for deploying UDSv4	
Clinical Core staff	UDSv4 Data collection  Direct entry into REDCap or another EDC system (optional). Have you identified someone at your site that is responsible for administering each of the forms?	
Data Core staff	REDCap Project Build UDSv4 Data uploads UDSv4 Data entry	
Technical staff	Configure API settings ( <i>optional</i> ) Database maintenance Front line technical support	
Other		

### Step 2: Create/update users in the NACC Directory

- Ensure that staff have the correct permissions to the NACC DP.

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- Instructions on how to grant permissions can be found [here](#) (ONLY ADRC Administrators may grant permissions)

**Step 3: Prepare staff for their roles (Is your staff trained and ready to start collecting UDSv4 data on all future UDS visits?)**

For all staff	Sign up for NACC Community forum in <a href="#">NACC Directory</a> Office hours – Sign up ( <i>Coming soon</i> )
Clinical staff onboarding (are all staff familiar with all the parts that they will be a part of? E.g. a person will interact with certain (not all) forms	<ol style="list-style-type: none"> <li>1. <a href="#">UDSv4 forms</a> have been reviewed</li> <li>2. <a href="#">UDSv4 coding guidebooks</a> has been reviewed</li> <li>3. Site has determined which staff member will administer each form</li> <li>4. All <a href="#">UDSv4 clinical resources</a> have been reviewed</li> <li>5. Site has developed a training plan</li> <li>6. Training plan has been implemented</li> </ol>
Data staff onboarding	<ol style="list-style-type: none"> <li>1. <a href="#">Watch Data Submission Training</a></li> <li>2. Log in to the <a href="#">NACC Data Platform</a></li> <li>3. <b>OPTIONAL:</b> Begin configuring an API for data submission and return – documentation <a href="#">here</a></li> </ol>
Technical staff onboarding	Review technical documentation <a href="#">here</a> Office hours – Sign up

**Stage 1: Preparing your Site**

**Step 1: Review relevant SOPs for setup**

- Download and review UDSv3 to UDSv4 Crosswalks, UDSv4 REDCap XML, UDSv4 PDF forms, and other files – [EDC Website](#)
- Set up your local REDCap – [Instructions](#)
  - Configuring Medication fields in form A4 - [SOP](#)
- [API Instructions](#) or [CLI Instructions](#)
- Review [ADRC Program Community forum](#) for tips or to post question
- Make sure to fill out an enrollment form at the time of consent for all newly enrolled participants prior to submitting UDSv4 data. Manage your participants on the [ADRC Portal](#).

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Step 2: Review training and plan procedures

- [Data Submission Training](#)
- [CTF Training webinars](#)
- [Clinical form instruction videos](#)

Stage 2: Collect data with your preferred collection method

- [UDSv4 PDF Form Downloads](#)
- [REDCap Direct Entry](#)
- Local REDCap instance
- ADRC's local Electronic Data Capture (EDC) software
  - Update local EDC using [data crosswalks and Data Element Dictionary](#)

### Stage 3: Submitting UDSv4 Data (choose one or more methods)

#### Paper Forms (PDF) Data collection

- For paper forms
  - Print UDSv4 [PDF Form Downloads](#)
  - Transcribe into data storage program for submission
  - Ensure that you [export to CSV](#)
- [QC and clean the data](#)
- Navigate to the [ADRC Portal](#) > Submit Data > Upload data via Batch File

#### Batch Upload – CSV

- Creating a CSV for [submission](#)
- [CSV submission](#)
- [QC and clean the data](#)
- Navigate to the [ADRC Portal](#) > Submit Data > Upload data via Batch File

#### API Data Transfer

When you submit your UDSv4 data via API, the transfer happens through a direct data transfer from your local database to the Flywheel platform. The transfer is initiated from your site to push data to NACC's Flywheel instance. You can initiate the transfer with a time-based or manual trigger.

- API Setup [Instructions](#)

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## Direct Entry – NACC-hosted REDCap

When you submit your UDSv4 data via direct entry to NACC's hosted REDCap project, you will use the REDCap forms to collect and submit data.

- Navigate to the [ADRC Portal](#) > Submit Data > UDSv4
- See your ADRC's REDCap Project
- Follow the steps for REDCap Direct Entry to NACC's hosted REDCap – [Instructions](#)

## Error Checks/Quality Assurance

When you submit data to NACC, it will be processed for errors and alerts prior to being incorporated into the NACC Data set.

- Review [errors and alerts](#) from the ADRC Portal
- Correct and resubmit corrected data