



National Alzheimer's  
Coordinating Center

**UDSv4**

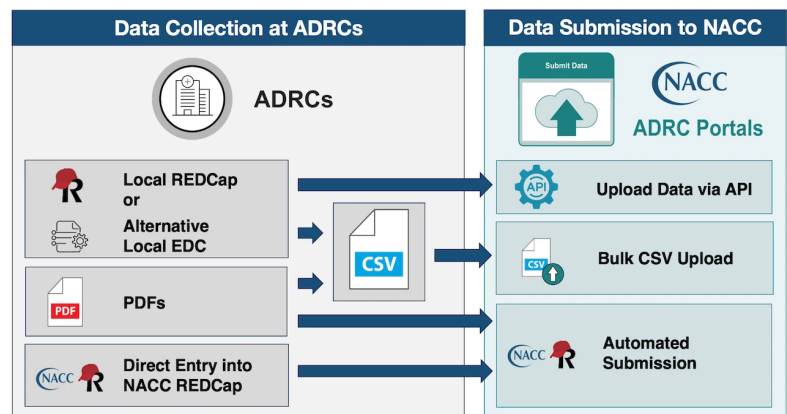
**ONBOARDING CHECKLIST**



# OVERVIEW

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

This checklist assumes you've reviewed the options and decided which data collection and submission options your site will use for UDSv4. Review the [data collection](#) and [submission options](#).



**ALL PARTICIPANTS WILL GET AN INITIAL UDSv4 UDS VISIT**  
*regardless of whether they are newly enrolled or previously enrolled participants.*  
*The UDSv4 follow-up visit packet will be released before December 2025.*

## NACC UDSV4 RESOURCES AND TOOLS

### *UDSv4 Implementation Resources and Support*

Review the most current general, clinical, and technical UDSv4 resources and training materials on the [UDSv4 webpage](#) to help ensure a successful transition at your site. They include detailed documentation and guidance on data collection and submission options and protocols, information on how to access your data, and FAQs. Additionally, we have highlighted changes from previous UDS versions to improve data consistency and quality across the ADRC Program.

### *ADRC Program Community Forum*

The [ADRC Program Community Forum](#), hosted on Discourse, provides a 24/7 space for ADRC Program members to collaborate, share knowledge, seek help, build community, and provide feedback on ADRC programs and initiatives. There is a section (category) focused on [UDSv4](#) where you can connect with NACC, our partners, and fellow ADRC members to address all of your UDSv4 roll-out questions.

If you did not receive an email inviting you to the ADRC Program Community Forum, your ADRC Administrator can send you an invitation from the NACC Directory. Have your administrator follow these [instructions](#) to update the directory.

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

### *ADRC Portal*

The ADRC Portal will serve as a centralized location for UDS data submission, reviewing QC checks and alerts, as well as viewing, auditing, and downloading UDS data for your ADRC participants.

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



# PREPARE STAFF FOR UDSv4

## Step 1: Identify staff roles

ROLE	TASKS
ADRC Administrator	<ul style="list-style-type: none"> <li>• Provide staff access to the NACC Data Platform via the NACC Directory</li> <li>• Oversee deployment of UDSv4</li> </ul>
Clinical Core staff	<ul style="list-style-type: none"> <li>• UDSv4 Data collection</li> <li>• Direct entry into REDCap or another EDC system <i>(optional)</i>. <i>Some sites designate specific individuals to administer each form.</i></li> </ul>
Data Core staff	<ul style="list-style-type: none"> <li>• REDCap or other local EDC Project Build</li> <li>• UDSv4 Data entry <i>(only for sites that are not using the NACC instance of REDCap)</i></li> <li>• UDSv4 Data submission to the ADRC Portal</li> </ul>
Technical staff	<ul style="list-style-type: none"> <li>• Configure API settings <i>(optional)</i></li> <li>• Database maintenance</li> <li>• Front line technical support</li> </ul>

## Step 2: Grant ADRC Portal access via the NACC Directory

Ensure that relevant staff have the correct permissions to access your ADRC Portal within the NACC Data Platform. Follow these [instructions](#) to grant permissions.

*(NOTE: ONLY ADRC Administrators may grant permissions)*

## Step 3: Prepare staff for their roles

For all staff	<ul style="list-style-type: none"> <li>• The <a href="#">ADRC Program Community Forum</a> is available 24/7 and is where you can pose UDSv4 questions to NACC, NIA, the CTF, the EDC Workgroup, key UDSv4 partners, and your fellow ADRC members.</li> <li>• Drop-in office hours <i>(Coming soon)</i></li> </ul>
Clinical staff onboarding <i>(Staff should be familiar with all the forms that they will be administering)</i>	<ul style="list-style-type: none"> <li>• Review the <a href="#">UDSv4 forms</a></li> <li>• Review <a href="#">UDSv4 coding guidebook</a></li> <li>• Determine which staff member will administer each form</li> <li>• Review all <a href="#">UDSv4 clinical resources</a> including trainings developed in collaboration with the CTF</li> <li>• Develop and implement a site training plan</li> </ul>
Data staff onboarding	<ul style="list-style-type: none"> <li>• <a href="#">Watch Data Submission Training</a></li> <li>• Log in to the <a href="#">NACC Data Platform</a>. OPTIONAL: Begin <a href="#">configuring an API</a> for data submission and return</li> </ul>
Technical staff onboarding	<ul style="list-style-type: none"> <li>• Review <a href="#">technical documentation</a>: data capture development, data uploads and quality checks, creating a CSV for submission, API submission methods, and user authentication</li> <li>• Drop-in office hours <i>(Coming soon)</i></li> </ul>



# PREPARE TECHNICAL INFRASTRUCTURE FOR UDSv4

## **Step 1: Review relevant SOPs for setting up your technical infrastructure**

- [Review the available UDSv4 Resources](#) including the UDSv3 to UDSv4 Crosswalks, UDSv4 REDCap XML, UDSv4 PDF forms, and more
- [Set up your local REDCap](#)
- [Configure Medication](#) fields in form A4
- [Upload data programmatically](#)
- Review [ADRC Program Community Forum](#) for tips or to post questions
- NOTE: Starting January 1, 2025, newly consented participants must complete an enrollment form at the time of consent before submitting UDSv4 data. [Information](#) on assigning and managing NACCIDs for participants at your ADRC.

## **Step 2: Review data collection and submission processes and resources**

- Review data collection options below
- Review UDSv4 [data submission options](#)
- [Watch a demo video](#) on submitting data via the ADRC Portal



# COLLECT UDSv4 DATA USING YOUR PREFERRED COLLECTION METHOD

ADRCs have multiple options for collecting UDSv4 Data. [Review the data collection options.](#)

- Collect data via [UDSv4 PDF Form](#)
- Use direct entry via NACC-hosted REDCap instance ([Instructions](#))
- Use direct entry via local REDCap instance ([Instructions](#))
- Direct entry via ADRC's local Electronic Data Capture (EDC) software.

You can update your local EDC using the UDSv3 to UDSv4 [data crosswalks and data element dictionary](#). [Learn how to use](#) the crosswalk files at your ADRC.



# SUBMIT UDSv4 DATA USING YOUR PREFERRED SUBMISSION METHOD

## *Prepare your UDSv4 data for submission*

- This must occur before submission via any of the methods outlined below
- [Create a CSV for submission](#)
- Perform local QC and clean the data
  - Optional: Use [NACC's JSON code](#) to do your own error checks before submitting the data to NACC

## *Batch Upload – CSV*

- [Create a CSV for submission](#) and name them using the specified format
- Navigate to the [ADRC Portal](#) > Submit Data > Upload data via Batch File

## *API Data Transfer*

When you submit your UDSv4 data via API, the data is directly transferred 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. Follow the API [setup Instructions](#).

## *Direct Entry – via 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

## *Paper Forms (PDF) Data collection*

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

## *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 UDSv4 data quality process](#)
- [Review errors and alerts](#) on the ADRC Portal
- Correct and resubmit corrected data through the [ADRC Portal](#)