

# Quick Start Checklist – First Access to REDCap

This quick checklist is designed for experienced users as a brief reminder of the essential steps to complete first-time access to REDCap.

## STEP 1 – Install Authenticator

- Install Microsoft Authenticator
- Allow camera and notifications
- Open the app and keep it ready
- Do not add an account yet



## STEP 2 – Open REDCap Portal

- Open Browser: Chrome / Edge / Firefox/ Safari
- Open New Private / InPrivate Window
- Paste the REDCap link provided by email



## STEP 3 – Login

- Enter UBEP email address
- Enter temporary password
- Click Sign In



## STEP 4 – Change Password

- Enter temporary password
- Enter new password
- Confirm password
- Click Sign In



## STEP 5 – Scan QR Code

- Click Next until the QR code appears
- In Authenticator: tap + → Work or school account
- Scan the QR code on your computer



## STEP 6 – Approve Request

- Check the sign-in notification on your phone
- Enter the number shown on your computer
- Tap Approve / Yes

## STEP 7– Add Security Info (SMS+Email )

### Phone Verification

- Enter your phone number
- Receive the SMS verification code and enter the SMS code to confirm



### Email Verification

- Enter your name, surname and personal email address
- Open mail from REDCap and click on the link to verify email.



## STEP 8 – Access Project

- Click Access REDCap button and wait for the REDCap home page
- Click My Projects and choose your assigned project from the list
- You are now ready to begin working in your assigned REDCap project

