# REDCap AC Peer Reference Documentation for Faculty Coordinators

An Interim Solution



Prepared by PMACS October 2019

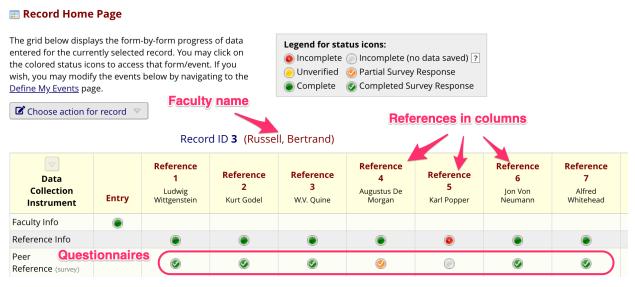
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## Before you start, make sure you have:

- A PennBox account for yourself (you will need this to create a link to the faculty's CV)
  - o https://upenn.app.box.com
  - If you are unable to create a PennBox account, please alert FAPD and follow the alternative CV upload steps on page 5.
- A copy of the faculty member's CV downloaded from FEDS & saved to your desktop
- An email address, practice site, and academic/professional title for all References

# How to create Peer References

Peer References include a faculty candidate's information and all associated reviewers. It is represented as a Faculty Record. Each record has 15 evaluation columns, each of which contains a single reviewer and their corresponding Reference.



Record Home Page

Each record has:

- One Entry column with a single bubble in the Faculty Info row for the candidate's information.
- Fifteen Reference columns (eight of which are shown in the screenshot)
- A bubble for Reference information (Reference Info Row)
- A bubble for their evaluation questionnaire (Clinical Evaluation Row)

Each bubble represents a data collection form. Clicking a bubble links to the corresponding form.

### Create the Faculty Record

1. Go to <a href="http://redcap.med.upenn.edu/">http://redcap.med.upenn.edu/</a>, log in with your PennKey and REDCap password, and select the "AC Peer Review" project.



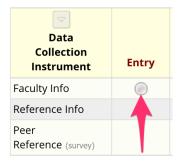
2. Select the Add/Edit Records link in the left sidebar.

Data	Collection	
	Record Status Dashboard - View data collection status of all records	
Č	Add / Edit Records - Create new records or edit/view existing ones	)

3. Click the Add New Record button in the right panel. This will create a blank record and take you to the Record Home Page showing the new, blank faculty record.

Add / Edit Records You may view an existing record/r create a new record/response, clie		e drop-down lists below. To
Total records: 2		
Choose an existing Record ID	select record	\$
	Add new record	

4. On the Record Home Page, click the gray bubble in the Entry column next to Faculty Info to open the Faculty Info form for this record.



- 5. In the Faculty Info form:
  - a. Fill in all the fields; REDCap does not pull data from FADS.

Adding new Record ID 4376-1	
Event Name: <b>Entry</b>	
Record ID	4376-1
aculty Candidate Information	
irst name	Madaaa
must provide value	Venkner
ast name	
must provide value	leilstadt
ype of action	o Promotion
must provide value	<ul> <li>Appointment</li> </ul>
Proposed rank	
must provide value	Associate Professor 🗘
At Penn?	o Yes
must provide value	⊖ No
Department	
must provide value	Anesthesiology & Critical Care
Area of concentration	
must provide value	Quality and Safety
Primary practice site	
must provide value	Pulmonary ambulation at HUP
ink to CV	https://upenn.box.com/s/erxei8otbafslg0yrb7
must provide value	Complete URL to download the CV (https://upenn.box.com/s/abcdefghijklmnop)
orm Status	
Complete?	Complete 🗘
	Save & Exit Form Save &

- b. In the "Link to CV" field, enter a complete URL to the candidate's Curriculum Vitae in Penn Box (<u>https://upenn.app.box.com</u>). To get this URL, you will need to have a new browser window or tab open to Penn Box (do not close the current window or navigate away from the form you are currently filling in), and follow these steps:
  - i. Upload the current CV into a folder within your Box account, or navigate to that folder if you previously uploaded the candidate's CV.
  - ii. Click the "Share" button to the right of the file name.

iii. In the dialog that appears, click on the "People in this file **▼**" link, and **choose "People with the link"** from the submenu.

	Oct 26, 2018 by Matt Law
Shared Link for Curriculum	Vitae.docx
Shared Link	\$
https://upenn.box.com/s/n3r5yl	3xcd0a7mcxzjhdrfkuz Copy
People in this file - ACCESS TYPE	
People in this file -	
People with the link	
People in your compa	
✓ People in this file	
	Close
Remove Link	

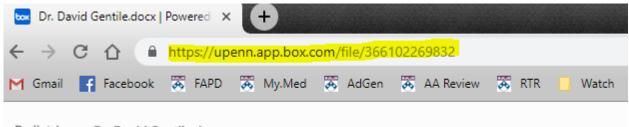
- iv. Then click the "Copy' button to add the correct URL to your computer's clipboard.
- v. Return to the browser tab or window showing the REDCap Faculty Info form already in progress, and paste the URL into the "Link to CV" field.
- c. In the "Complete?" field, select "Complete". This must be done whenever entering data as a coordinator and should never be anything other than blank or "Complete".

#### Alternative Method to Upload a CV

- 1. Have an electronic copy of the faculty member's CV available on your computer. We recommend naming the file after the faculty member so it is easy to locate in later steps.
- 2. Email the CV (as an attachment) to the Penn Box email address provided to you by FAPD. This email address is unique to your department and does not expire.
  - a. You may receive a confirmation email from Penn Box that your file was received this can be ignored.
- 3. Navigate to the Penn Box folder for your department (provided to you by FAPD). The link to this folder is unique to your department and does not expire.
- 4. Click the CV for the faculty member.



5. Copy the link in the address bar (Note: Your link may be longer or shorter than the example below).



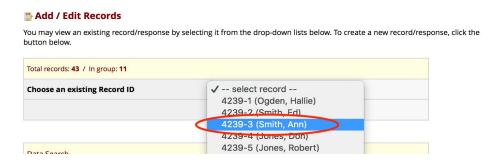
Pediatrics > Dr. David Gentile.docx	Ŧ
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- 6. Return to the browser tab or window showing the REDCap Faculty Info form already in progress, and paste the URL into the "Link to CV" field.
- 7. In the "Complete?" field, select "Complete". This must be done whenever entering data as a coordinator and should never be anything other than blank or "Complete".
- 6. Click "Save and Exit Form". (Never click "Save & Go To Next Record".)

You will be forwarded to the Record Home Page, which is the primary screen for interacting with a Faculty Record. The Faculty Record is now created, which has a numerical ID, which you can ignore. The bubble in the Entry column, Faculty Info row should now be green.

### Return to a specific Faculty Record

- 1. Click Add/Edit Record in the sidebar.
- 2. Select the Faculty Record from the Choose an existing Record ID drop-down. This opens the Record Home Page.



### Adding References to the Faculty Record

Overview of the "Reference Info" row on the Record Home Page:

#### 📰 Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.



#### Legend for status icons:

💿 Incomplete 🔘 Incomplete (no data saved) 💽

🦲 Unverified 🛛 📀 Partial Survey Response

Complete Survey Response

#### Record ID **4376-1** (Jeilstadt, Venkner) Anesthesiology and Critical Care

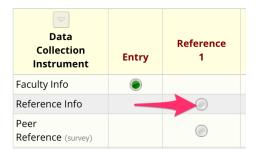
Data Collection Instrument	Entry	<b>Reference 1</b> Herbert Henckley-Morris	<b>Reference</b> <b>2</b> Heckler Janis	Reference 3	Reference 4	Reference 5
Faculty Info	۲					
Reference Info		۲	۲			
Peer Reference (survey)			$\bigcirc$	$\bigcirc$	$\bigcirc$	
Delete all data on event:	×	×	×			

The bubbles in the "Reference Info" row show the status of each Reference:

Row	Bubble	Meaning
	$\bigcirc$	No Reference information has been entered. Click on this to enter a new Reference.
Reference Info	٩	You forgot to mark "Complete"; no email will be sent to the Reference.
		Reference has been entered; initial email sent from REDCap.

### Adding References from the Record Home Page

3. Click an empty (gray) "Reference Info" bubble



- 4. Enter the data for the Reference:
  - a. Fill in all the fields, including the Due Date.
  - b. For every Reference, re-type the email into the "Re-enter email address" field. Failure to do this will result in emails failing to send.
  - c. In the "Complete?" field, change to "Complete". This must be done whenever entering data as a coordinator and should never be anything other than blank or "Complete".
  - d. Click the "Save & Exit Form" button.
  - e. The bubble you clicked on should now be green. This indicates that an email has been automatically sent to this Reference.
- 5. Repeat these instructions, moving from left to right, until at least 10 references are entered.
- For each new Reference, notice that the screen will pre-populate with the previous Reference's email. You must remove that and enter the correct email of the new Reference. Remember that you must re-enter the correct email:

Reference Information	
First name	
* must provide value	É
Last name	
* must provide value	
Primary practice site	
* must provide value	
Academic or professional position	
* must provide value	
Academic rank	
* must provide value	\$
Email address * must provide value Overwrite if populated	
Re-enter email add a ways copy correct	For record-keeping purposes
Requested due da Address here	Today M-D-Y
* must provide value	When is the response due?

The email is sent to the Reference immediately upon completing and saving the Reference Info form.

**NOTE** When revisiting a Reference form, the first "Email" field will often have the most recently entered Reference email address. Do not worry if you see this; as long as you entered the correct email when you created the Reference, the questionnaire email went out properly.

# Sending Reminder Emails

You must send reminder e-mails manually to respondents who have not completed their surveys. To make this process simpler, we include a tool to compose these messages in your desktop e-mail application (Mail, Thunderbird, or Outlook). The respondent will not see this, but you may access it through the "Add/Edit Records" interface. Select the respondent you wish to remind, then click the gray bubble (which indicates no response) in the Peer Reference row of the interface:

Data Collection Instrument	Entry	Reference 1 Grace O'Brien	<b>Reference</b> <b>2</b> Ryan Sinclair
Faculty Info	۲		
Reference Info		۲	۲
Peer Reference (survey)		۲	
Delete all data on event:	×	×	×

1. Copy the "Reminder e-mail body" value from the top of the form

	Dear Dr. Diaz,
	We previously sent a request for your opinion on this faculty candidate. We realize that you have an extremely busy schedule but your opinion would be highly valued by the Committee on Appointments and Promotions. Many thanks.
	We are evaluating Dr. David Smith (Primary Practice Site: HUP) for Promotion to Associate Professor in the Academic Clinician track at the Perelman School of Medicine at the University of Pennsylvania. You have been identified as a colleague who is familiar with this candidate's teaching and/or academic accomplishments.
	For your reference: <u>PSOM Faculty Track Descriptions</u>
	You may open the evaluation in your web browser by clicking the link below: AC Peer Reference
	f the link above does not work, try copying the link below into your web browser: https://redcap.med.upenn.edu/surveys/?s=iaHNrJ3J8K
	This link is unique to you and should not be forwarded to others.
	We would appreciate your completing this peer reference form. It is the policy of the University of Pennsylvania that evaluations be held in confidence. In the event of litigation or a governmental investigation, however, the candidate or others may gain access to the information contained in these evaluations.
	Thank you for your assistance with this process.
	Sincerely,
,	Lisa Bellini, M.D. Vice Dean for Faculty Affairs Perelman School of Medicine
	Jniversity of Pennsylvania

2. Click the "Compose Reminder" button. Your mail application will open with a new message. The body of the message will not be complete.

	<b>≡</b> •		
	Consolas 🗘 14	♦ I U 9	
To: Diaz@examp	le.com ~		
Cc:			
Bcc:			
Subject: Reminde	r: Request to evaluate Dr. D	David Smith	
From: Walter Lee	Davis – waldavis@upenn.ee	du	

3. Select the placeholder body, and paste to replace with the composed body text that you copied in step 1 (paste to "keep source formatting" to preserve hyperlinks in message):

	Consolas	s 🔹 0 14 0 🔳 🌶	K B I U ↔ ΞΞΞ ⅲ ▾ → ▾
To: Diaz@exan	nple.com ~		
Cc:			
Bcc:			
Subject: Remine	der: Request to ev	valuate Dr. David Smith	1
From: Walter Le	e Davis – waldavi	is@upenn.edu	
Dear Dr. Dia:		o e aponno a a	
Dear Dr. Dia; We previously have an extre Appointments We are evalua Professor in of Pennsylvar	, v sent a reque emely busy sch and Promotion ating Dr. Davi the Academic nia. You have	st for your opinic edule but your opi s. Many thanks. d Smith (Primary P Clinician track at	on on this faculty candidate. We realize that you nion would be highly valued by the Committee on Practice Site: HUP) for Promotion to Associate : the Perelman School of Medicine at the University a colleague who is familiar with this candidate's
Dear Dr. Dia: We previously have an extre Appointments We are evalua Professor in of Pennsylvar teaching and,	2, / sent a reque mely busy sch and Promotion ating Dr. Davi the Academic tia. You have for academic a	st for your opinic edule but your opi s. Many thanks. d Smith (Primary F Clinician track at been identified as	nion would be highly valued by the Committee on Practice Site: HUP) for Promotion to Associate : the Perelman School of Medicine at the University : a colleague who is familiar with this candidate's

- 4. Adjust the message, if desired, to add a due date or additional urgency. Send the message as you would a normal e-mail message, and return to REDCap in your browser to continue.
- 5. When you have finished creating your reminder e-mail, press the "—Cancel—" button in the top-right of the page in REDCap.



It is important that you not save this form when you close it.

# Creating the Peer Reference Summary Report

When a Faculty record has received at least seven reference responses, the Peer Reference Summary Report can be generated using the steps below. These instructions require that Excel and Word are already installed on your computer.

# NOTE: IF YOU ARE USING A MAC, YOU MUST HAVE EXCEL 2016 AND WORD 2016 INSTALLED

Refer to

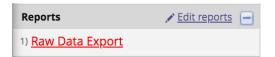
https://www.isc.upenn.edu/how-to/current-supported-computing-products

An overview of the steps follows:

- A. Download the data from REDCap
- B. Download the supporting files used for generation of the Report
- C. Open the Excel Macro Workbook and import the REDCap data
- D. Generate the report data and save the result
- E. Open the Word Mail-Merge template and import the report data you saved
- F. Print, or save to PDF, the resulting document

### Download the "Raw Data Export" Data

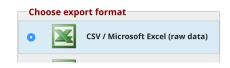
1. Click on the "Raw Data Export" link in the 'Reports' sidebar



2. In the header of the configured report, click the "Export Data" button.

Data Exports, Reports	, and Stats	EI <u>VIDEO: How t</u>	o use Data Exports, Reports, and Stats
+ Create New Report	H My Reports & Exports	C Other Export Options	Q View Report: Raw Data Export
Number of results returned Total number of records que ('records' = total available data acro	ried: 601	네 Stats & Charts Export I	Data Print Page Schüt Report

3. Choose the first format option ("CSV / Microsoft Excel (raw data)"), then press "Export Data".



4. In the pop-up that appears, click the download button and then close the pop-up:

below on tł additionally	port was successful, and your data is now ready to be downloaded. Click th he right to download your data file. If exporting to a specific statistical analys y need to download the syntax file that is provided for that stats package. Fo cions in the box below.	sis package, you will
	Notice te the REDCap project when publishing manuscripts (citation information language are <mark>available here</mark> ).	n and template
X	CSV / Microsoft Excel (raw data) You may download the survey results in CSV (comma-separated) format, which can be opened in Excel. You have the choice of downloading the data either with the full headers and answer labels or just with the answer codes (i.e. raw data). NOTE: If you are using a version of Microsoft Excel prior to Excel 2007, due to limitations the data will only be read to 255 columns when opened.	Click length to downloa
		Close

5. Do not open this file; always click "Save". If prompted, save to a location you will be able to navigate to in the future, such as your "Downloads" folder. Keep this location in mind.

This downloads the "Raw Data Export" to your computer. We're now ready to generate the report.

### Generate the report in Excel and Word

If you have not yet done so, download a copy of the "Summary Report" Excel workbook by clicking the "[Excel] Summary Report" link in the sidebar. Additionally, download the "[Word] Summary Report" Word document by clicking the associated link in the sidebar.

**As before**, if prompted, Save these documents; do not choose "Open" before saving. If asked to specify a location, please choose one that you know how to get to, such as "Downloads". The "Downloads" folder is the default for most computers.

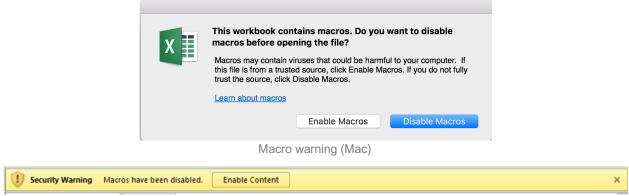
The Excel file will process the data generated by REDCap. The Word document will then "Mail-Merge" it to produce a formatted report for inclusion in the candidate's dossier.

#### Generate reporting data

- 1. Open the "Peer\_References\_Summary" workbook in Excel by navigating to where you saved it. Note: you must be using Excel 2016 if on a Mac.
- 2. If the document opens in protected view, click "Enable Editing".

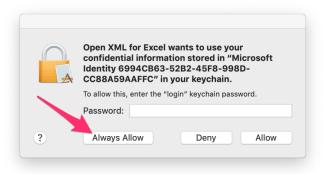
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U	PROTECTED VIEW Be careful—tiles from the internet can contain viruses. Unless you need to edit, it is safer to stay in Protected view.	Enable Editing

3. If you are prompted to enable macros or it says that macros are disabled, select "Enable Macros".



Macro warning (PC)

4. Mac users may also be presented with a screen asking for permission to open files with "Open XML". If you are asked for your password with a similar screen, please enter it and select "Always Allow".



5. If you have never used this template, it will be mostly blank. The main sheet ("CSV Input") has two buttons on it.

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- Click on "Import Data". In the File selector window, browse to the "Raw Data Export" downloaded from REDCap. Its name will be of the format "ACTrackPeerReference-RawDataExport\_DATA\_<date>.csv"
- 7. The data will be imported into the "CSV Input" sheet.

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3	1 r										sladen@exan
4	1 r Import Data										sullivan@exa
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7	<sup>1</sup> r Generate Report Data										grant@exam
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10	2 reference_1_arm_1										jovanka@exa
1	3 entry_arm_1	Bert	rand	Russell	1		2	1 Philosophy	Maths	England	,
12	3 reference 1 arm 1										ludwig@exar
13	3 reference_2_arm_1										kurt@examp
14	3 reference 3 arm 1										quine@exam
15	3 reference 4 arm 1										augustus@e
16	3 reference_5_arm_1										karl@exampl
17	3 reference 6 arm 1										jonvon@exa
18	3 reference 7 arm 1										whitehead@
9	3 reference 8 arm 1										matlaw@per
20	3 reference 9 arm 1										val@example
1	3 reference_10_arm_1										matlaw@per
22	3 reference_10_arm_1										tufte@exam
23	4 entry arm 1	Robe		Bringhurst	2		2	Graphic Arts	Turnersehu		turte@exam
23	5 entry_arm_1 dermatology	Jules		Leitner	1		1	1 Dermatology		CHOP Surger	
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29	5 reference_4_dermatology 5 reference 5 dermatology										pcguerin@gn
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31	6 reference_1_arm_1										methodius@
32 ▶	6 reference 2 arm 1 CSV Input version +										lucian@exam

8. Click on "Generate Report Data".

9. Enter the Candidate's first name followed by their last name when prompted. (Click the "OK" button with your mouse instead of pressing "Enter", to avoid an Excel bug that causes the cursor to disappear.)

00	Microsoft Excel	
Enter Faculty candi	date's first name	ОК
		Cancel
Ann		

10. When both prompts are answered, the Macro will generate a new Excel Workbook containing the filtered data. **Save this new Workbook** with whatever name you wish, but remember to choose a location you are familiar with. By default, it will be called "BookN", where N is an incrementing number.

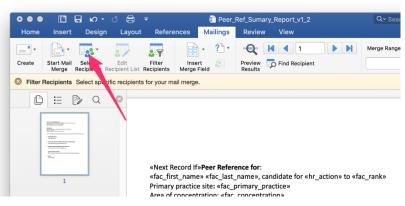
Note If your cursor disappears while using this on a Mac, click the <b>É</b> lcon in the top	
left of the screen to re-enable it	

### Create the Peer References report

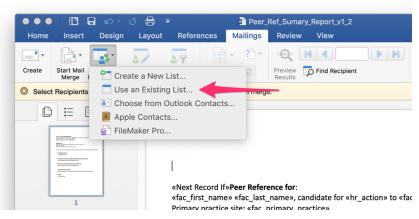
- 1. Open the Word document you downloaded from REDCap by navigating to where you saved it.
- 2. If the document opens in protected view, click "Enable".

TROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

- 3. You will populate this template with data from the Excel document you saved. To start this process, click the "Mailings" Ribbon at the top of the application.
- 4. Click "Select Recipients" followed by "Use an Existing List..."



#### Followed by



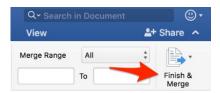
- 5. Navigate to the "BookN" Excel file you generated and saved in the last step.
- 6. If prompted, grant Word permission to access this file.



- 7. You may also have to enter your password to allow Word to convert this file.
- 8. After granting permissions, click "OK" when presented with the "Open Workbook" screen. Choose "Sheet1" or "Sheet1\$" if prompted.

Name	Description	Modified	Created	Туре
Sheet1\$	besenption		10/17/2018 1:23:00 PM	TABLE
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		Open Workbook		
	Open Do	ocument in Workbook:		
	Open Do Sheet1			
			•	
	Sheet1 Cell Ran			
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9. The data is now imported. In the Mailings Ribbon, select "Finish & Merge" followed by "Edit Individual Documents".



#### Followed by



10. If you see the 'Merge to Printer' dialog, click OK.

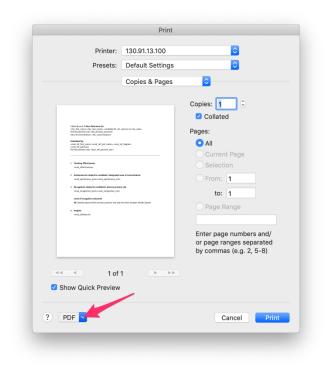
Merge to Print	er		? <b>X</b>
Print records <ul> <li><u>All</u></li> <li>Curr<u>e</u>nt r</li> </ul>	ecord		
© <u>F</u> rom:	1	<u>T</u> o:	
	OK		Cancel

- 11. Word will generate a new Word document containing the summary report with a name like "Letters1". You can save the document with the candidate's name, e.g., Peer\_References\_John\_Doe.docx, for your records. If more than seven references are included, you (or someone in your department) will need to remove all but seven before including the report in the dossier.
- 12. If you want to print the summary report to PDF:
  - a. Ctrl+P
  - b. For Windows: Select "Adobe PDF" as the printer

rint		8
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