REDCap AC Peer Reference Documentation for Faculty Coordinators

An Interim Solution

Prepared by PMACS

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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)
  - 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 http://redcap.med.upenn.edu/, log in with your PennKey and REDCap password, and select the "AC Peer Review" project.

NOTE If you don't see any projects, click the My Projects link in the top bar
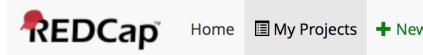
2. Select the Add/Edit Records link in the left sidebar.
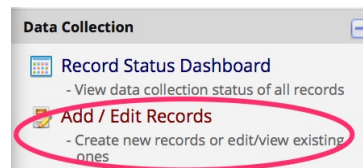
3. Click the Add New Record button in the right panel. This will create a blank record and take you to the Record Home Page showing the new, blank faculty record.

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.

    b. In the "Link to CV" field, enter a complete URL to the candidate's Curriculum Vitae in Penn Box (https://upenn.app.box.com). 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.
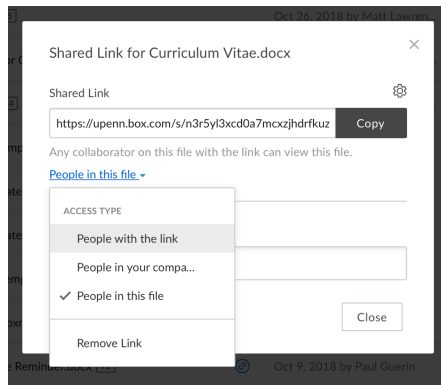
iv. Then click the "Copy' button to add the correct URL to your computer's clipboard.

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).
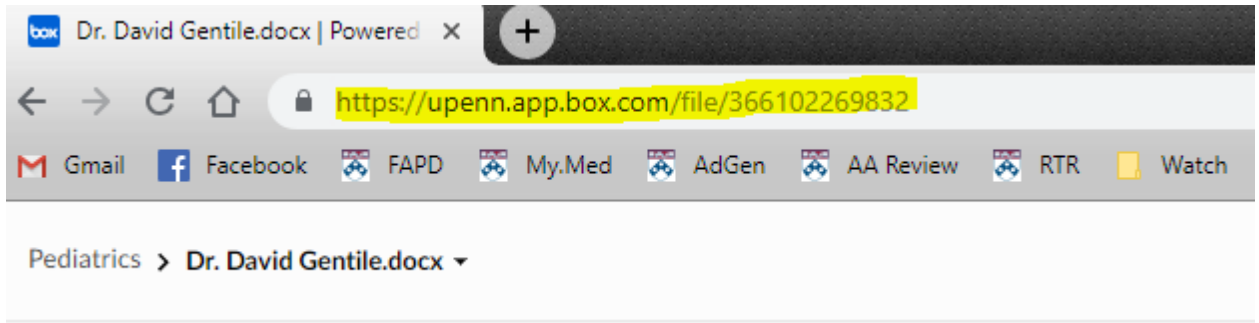
6. Return to the browser tab or window showing the REDCap Faculty Info form already in progress, and paste the URL into the "Link to CV" field.

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.
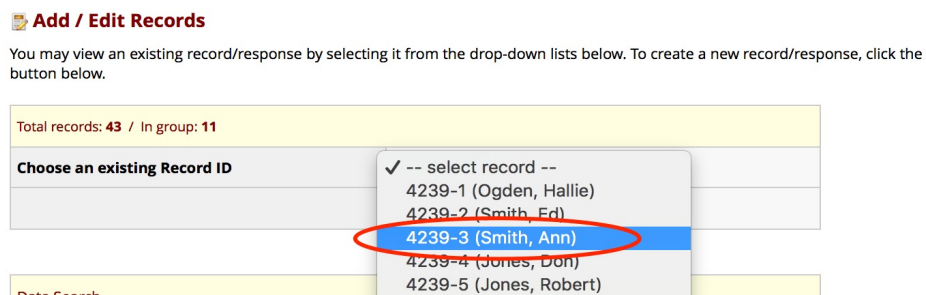
Adding References to the Faculty Record

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.

[Choose action for record ▽]

Legend for status icons:
- 🔴 Incomplete
- ⚪ Incomplete (no data saved) [?]
- 🟡 Unverified
- 🟠 Partial Survey Response
- 🟢 Complete
- ✅ Completed Survey Response

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

Data Collection Instrument	Entry	Reference 1 Herbert Henckley-Morris	Reference 2 Heckler Janis	Reference 3	Reference 4	Reference 5
Faculty Info	🟢					
Reference Info		🟢	🔴	⚪	⚪	⚪
Peer Reference (survey)		⚪	⚪	⚪	⚪	⚪
Delete all data on event:	✖	✖	✖			

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

Row	Bubble	Meaning
Reference Info	⚪	No Reference information has been entered. Click on this to enter a new Reference.
	🔴	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

Data Collection Instrument	Entry	Reference 1
Faculty Info	●	
Reference Info		○
Peer Reference (survey)		○

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.

6. 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

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 address
* must provide value   **Always copy correct**   For record-keeping purposes
Address here

Requested due date
* must provide value   Today   M-D-Y
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	Reference 2 Ryan Sinclair
Faculty Info	●		
Reference Info		●	●
Peer Reference (survey)		●	○
Delete all data on event:	✕	✕	✕

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

Reminder e-mail body:

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: PSOM Faculty Track Descriptions

You may open the evaluation in your web browser by clicking the link below:
AC Peer Reference

If 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
University of Pennsylvania

Compose Reminder

2. Click the "Compose Reminder" button. Your mail application will open with a new message. The body of the message will not be complete.
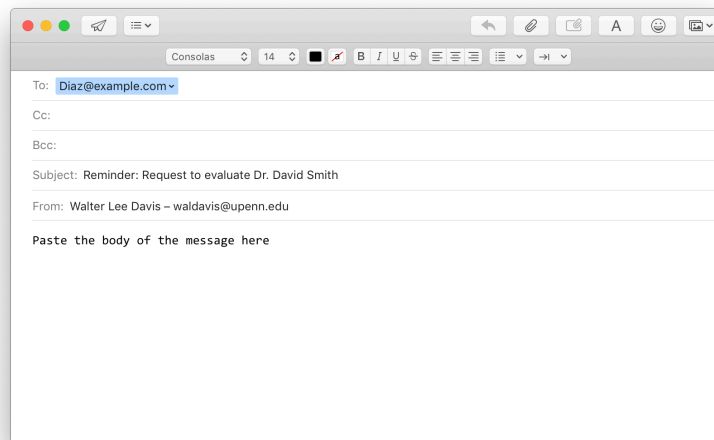
3. Select the placeholder body, and paste to replace with the composed body text that you copied in step 1 (paste to "keep source formatting" to preserve hyperlinks in message):
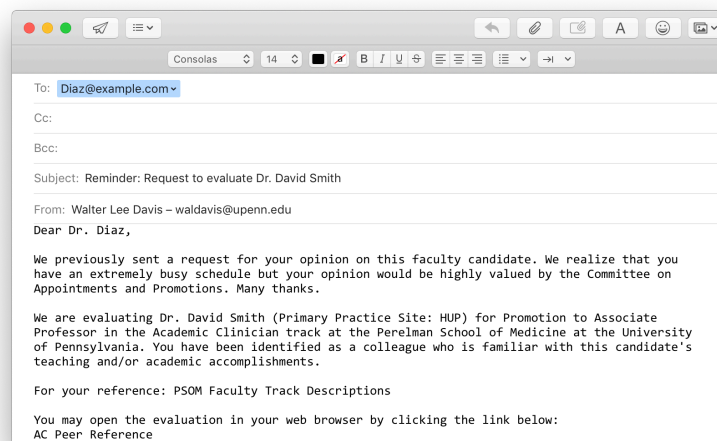
4. Adjust the message, if desired, to add a due date or additional urgency. Send the message as you would a normal e-mail message, and return to REDCap in your browser to continue.

5. When you have finished creating your reminder e-mail, press the "—Cancel—" button in the top-right of the page in REDCap.
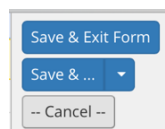
It is important that you **not save this form** when you close it.

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

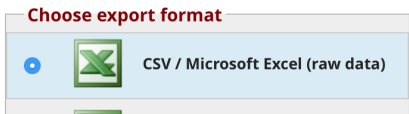## Download the "Raw Data Export" Data

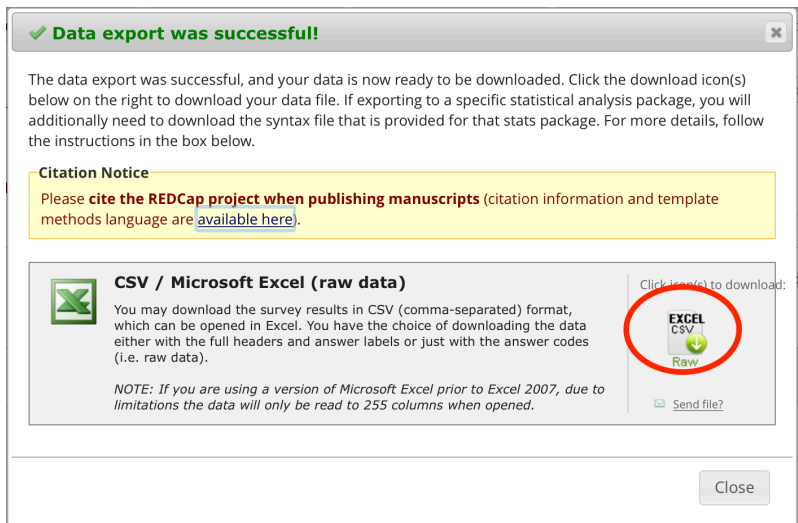1. Click on the "Raw Data Export" link in the 'Reports' sidebar

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

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:

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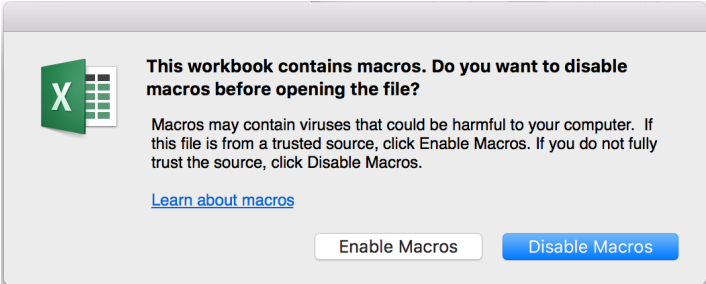
The Excel file will process the data generated by REDCap. The Word document will then "Mail-Merge" it to produce a formatted report for inclusion in the candidate's dossier.
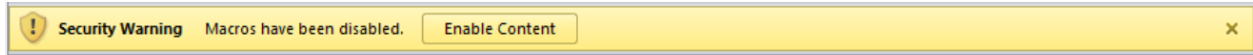
Generate reporting data

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".

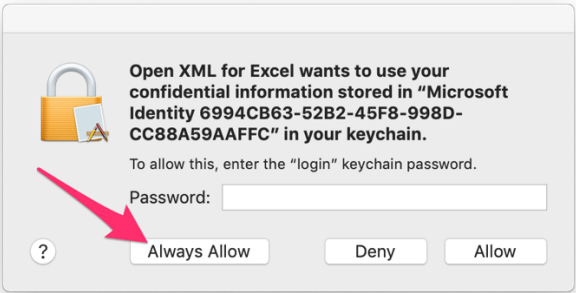3. If you are prompted to enable macros or it says that macros are disabled, select "Enable Macros".

This workbook contains macros. Do you want to disable macros before opening the file?

Macros may contain viruses that could be harmful to your computer. If this file is from a trusted source, click Enable Macros. If you do not fully trust the source, click Disable Macros.

Learn about macros

Enable Macros   Disable Macros

Macro warning (Mac)

Security Warning   Macros have been disabled.   Enable Content   ×

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".

Open XML for Excel wants to use your confidential information stored in "Microsoft Identity 6994CB63-52B2-45F8-998D-CC88A59AAFFC" in your keychain.

To allow this, enter the "login" keychain password.

Password:

?   Always Allow   Deny   Allow

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

15
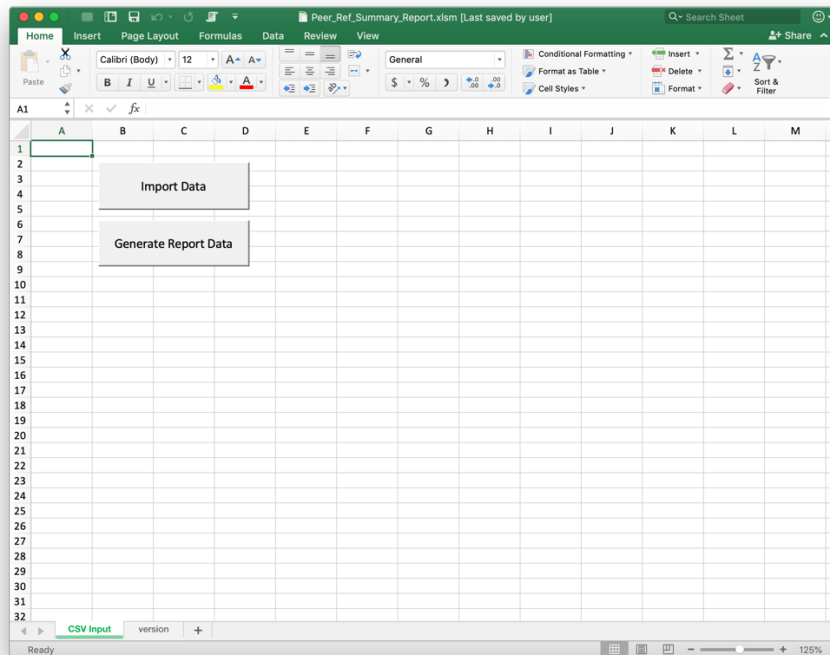
6. Click on "Import Data". In the File selector window, browse to the "Raw Data Export" downloaded from REDCap. Its name will be of the format "ACTrackPeerReference-RawDataExport_DATA_<date>.csv"

7. The data will be imported into the "CSV Input" sheet.
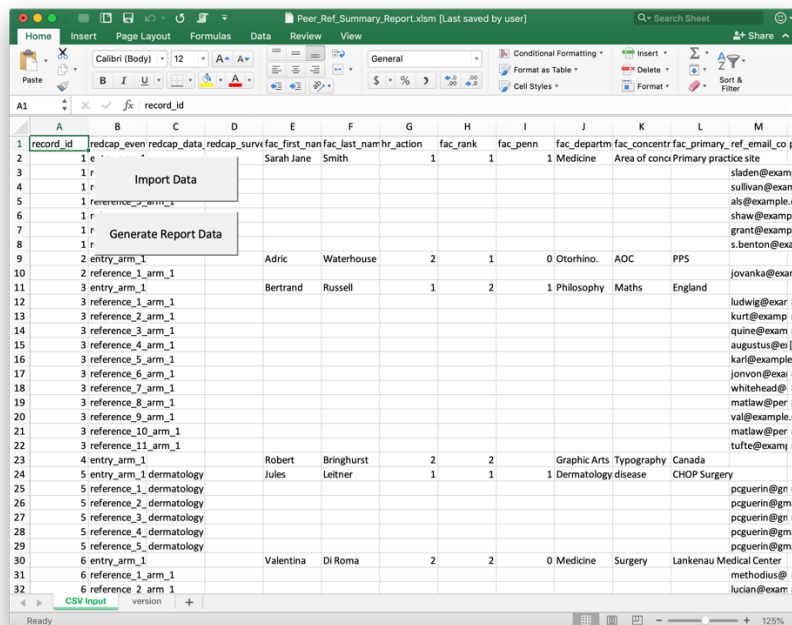
8. Click on "Generate Report Data".

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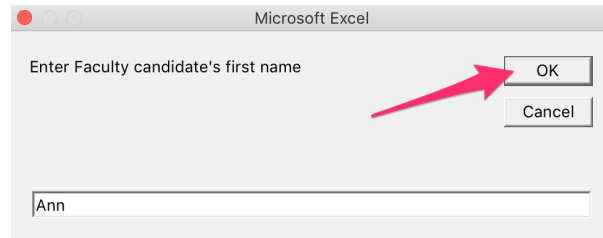
10. When both prompts are answered, the Macro will generate a new Excel Workbook containing the filtered data. **Save this new Workbook** with whatever name you wish, but remember to choose a location you are familiar with. By default, it will be called "BookN", where N is an incrementing number.

> **Note** If your cursor disappears while using this on a Mac, click the Icon 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".

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…"
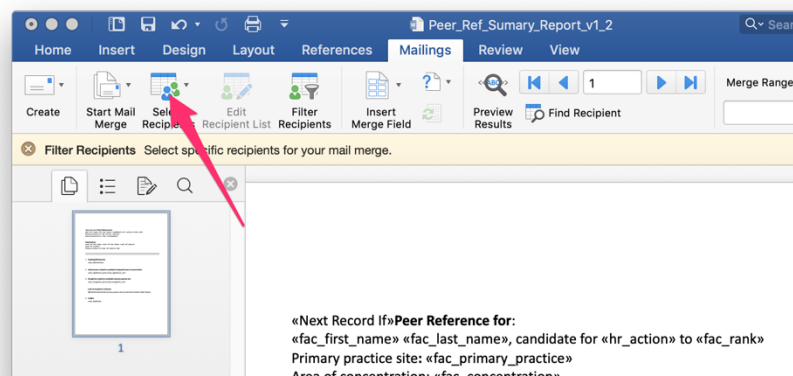
Followed by
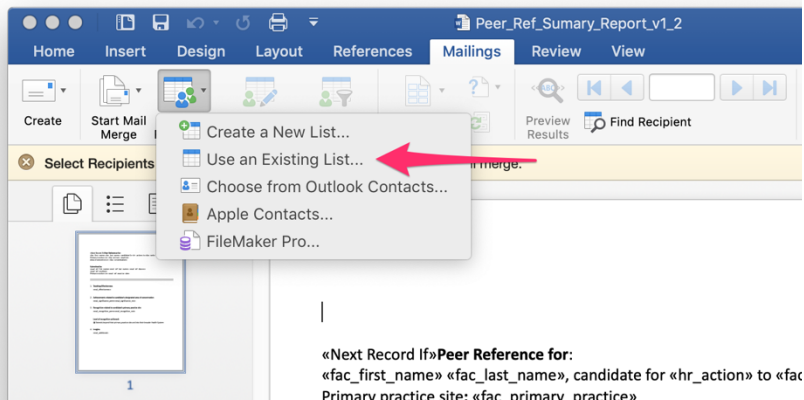
5. Navigate to the "BookN" Excel file you generated and saved in the last step.

6. If prompted, grant Word permission to access this file.
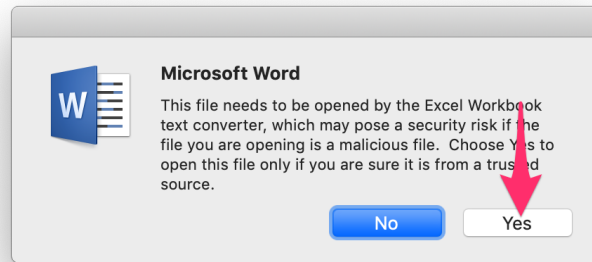
7. You **may** also have to enter your password to allow Word to convert this file.

8. After granting permissions, click "OK" when presented with the "Open Workbook" screen. Choose "Sheet1" or "Sheet1$" if prompted.
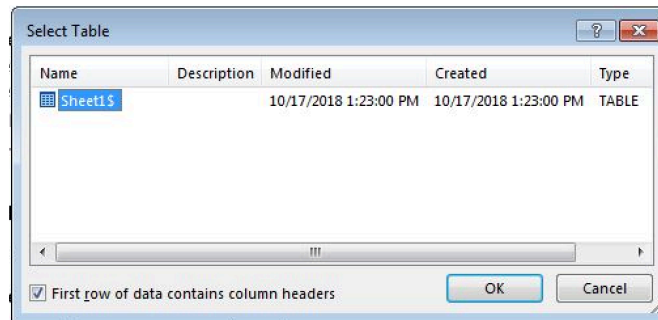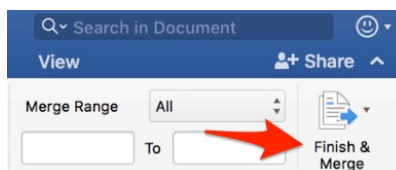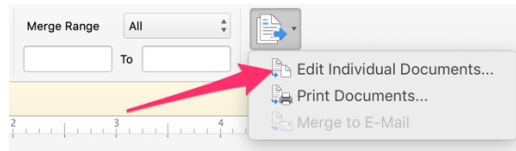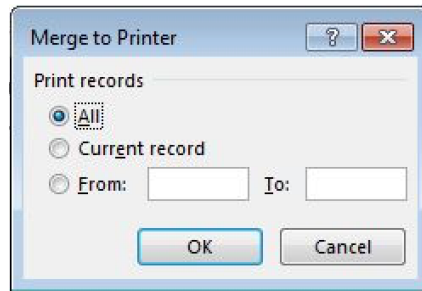

(Windows)
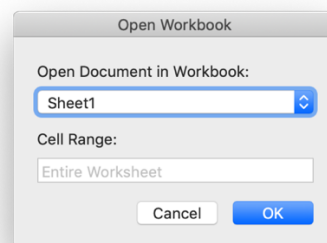
(Mac)

9. The data is now imported. In the Mailings Ribbon, select "Finish & Merge" followed by "Edit Individual Documents".

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

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.
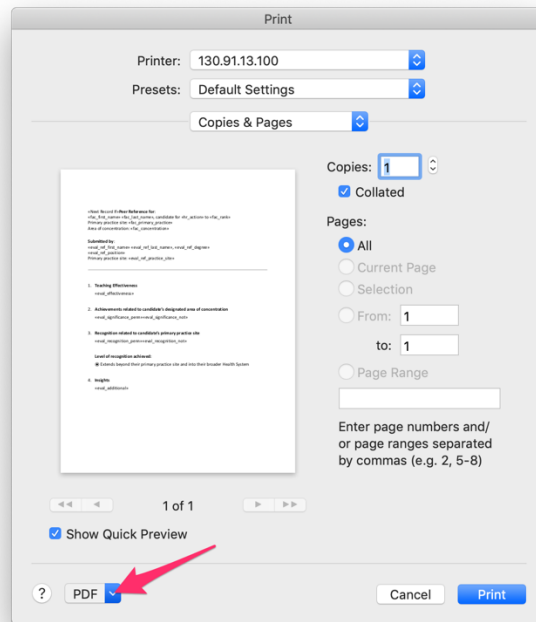
12. If you want to print the summary report to PDF:

    a. Ctrl+P
    b. For Windows: Select "Adobe PDF" as the printer
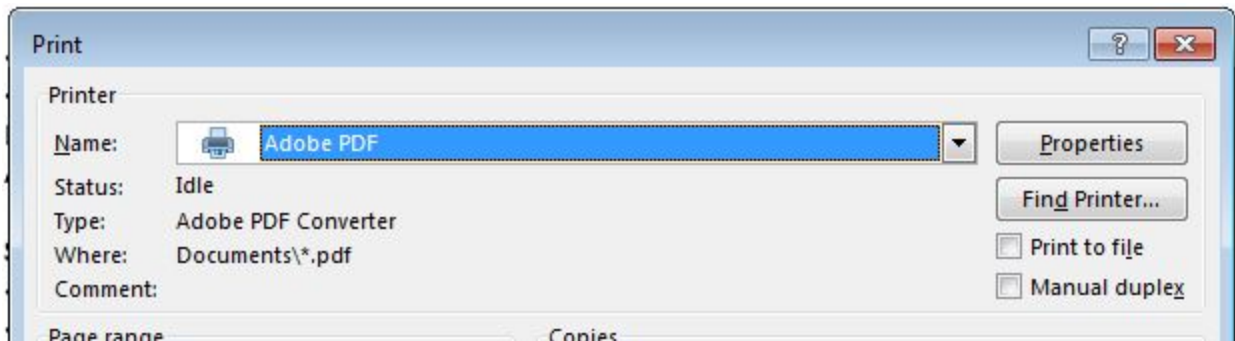
Windows: Save report as a PDF by selecting "printer" PDF

    c. For Mac: Use the PDF dialog at the bottom left

Mac: Save report as a PDF by clicking on the drop-down