# UPLIFT

# Manual of Procedures

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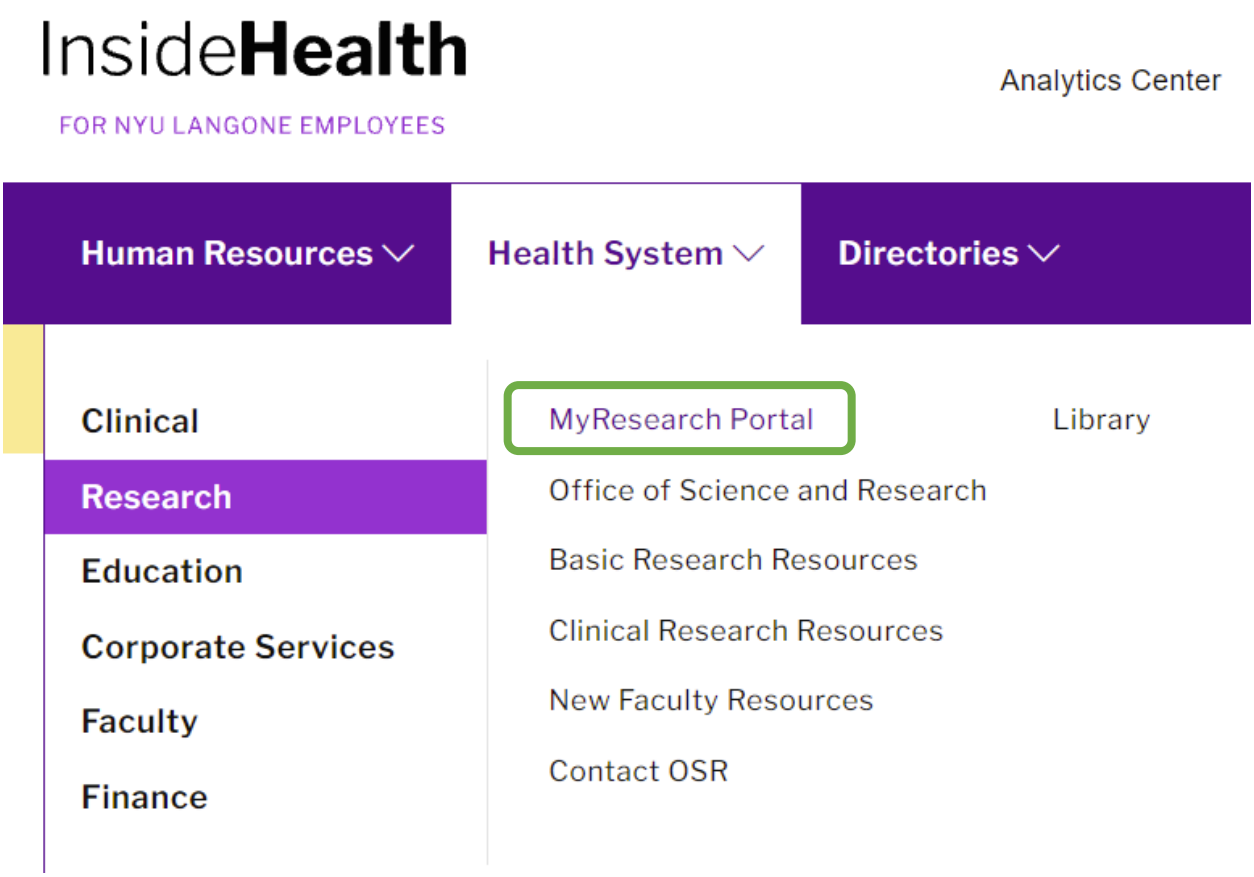

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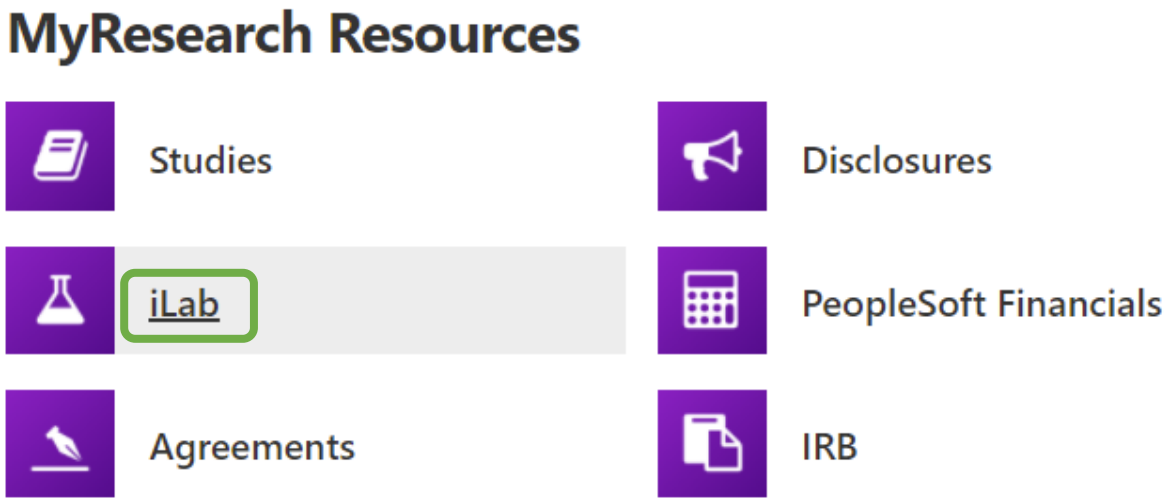
# 2 Recruitment

## 2.1 How to Submit a DataCore request

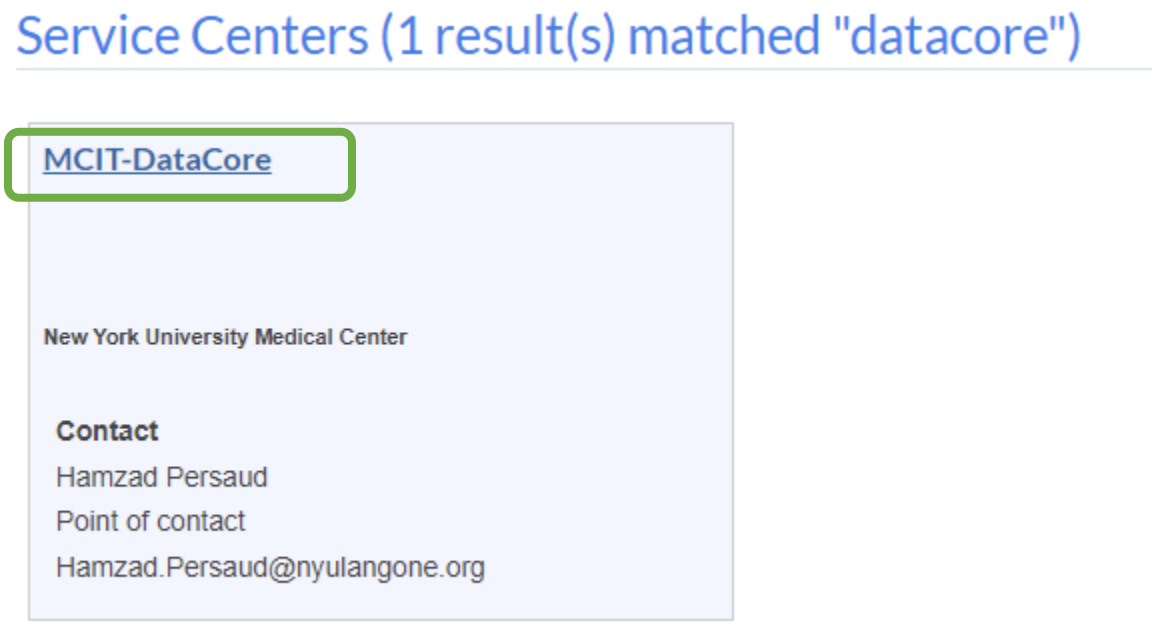
1. From the InsideHealth homepage, go to Health System > Research > MyResearch Portal



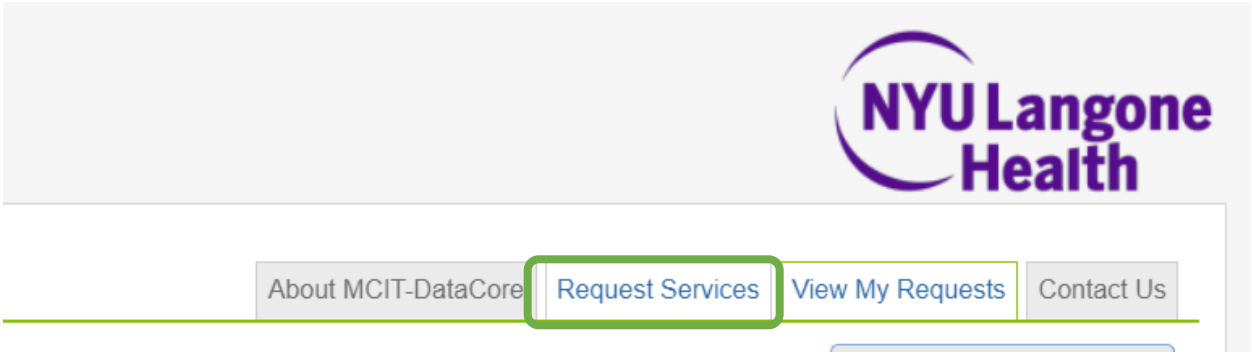

2. Go to iLab



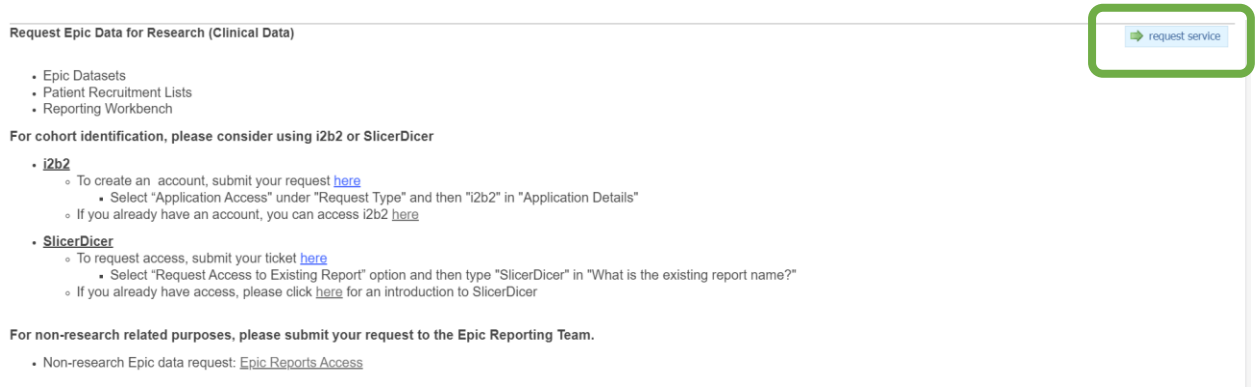
3. Search for “DataCore” in the search bar at the top and click on MCIT-DataCore when it pops up




4. Click on the “Request Services” tab



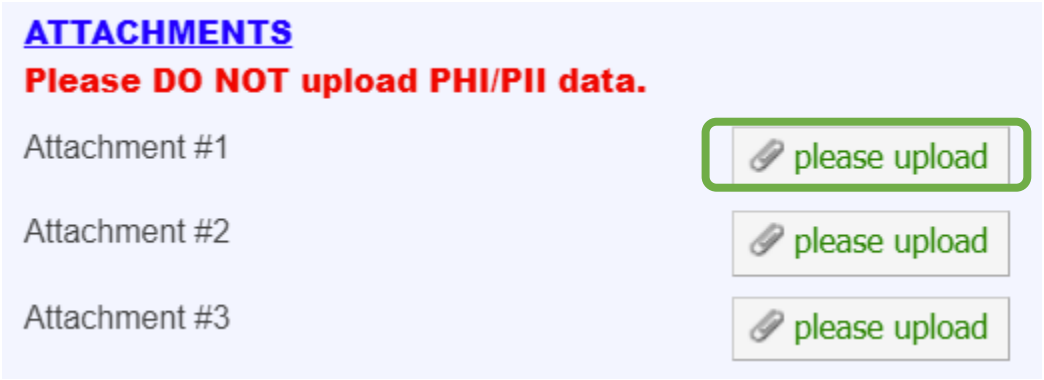

5. Click “request service” at the far right of the “Request Epic Data for Research” section



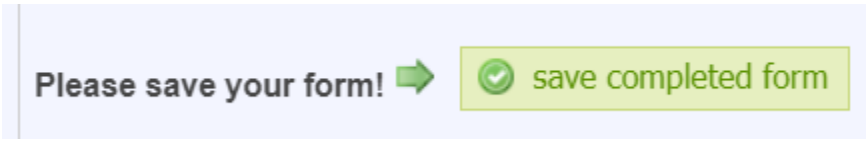
6. Add lab members as collaborators



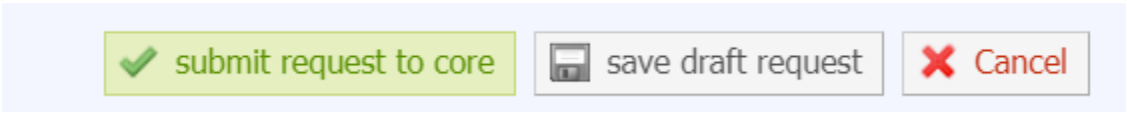

7. Complete the request form. Note that you should attach the IRB-approved MyChart recruitment message in the attachment section




8. Click **save completed form**



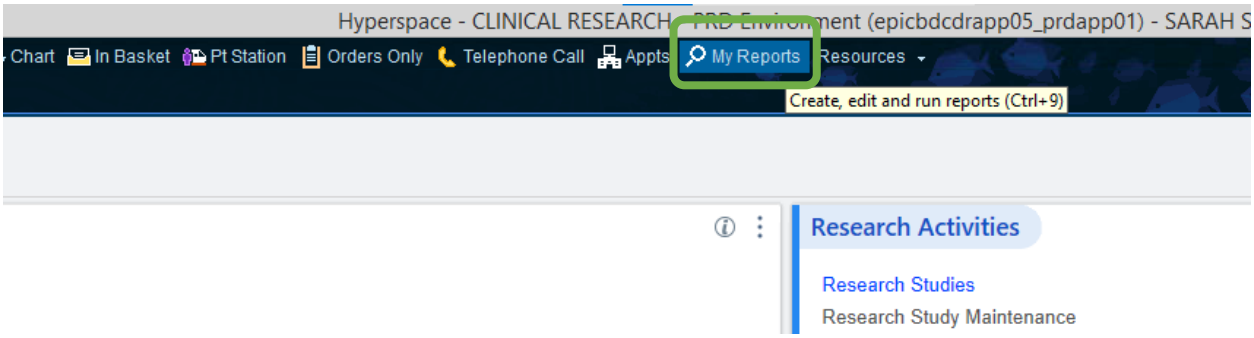

9. Click **submit request to core**




10. MCIT will assign an analyst to your project who will reach out to you to confirm details and process the request. At the time of this writing (Oct 2021), the MCIT contact for DataCore is Hamzad Persaud, Hamzad.Persaud@nyulangone.org

## 2.2 Sending EPIC Recruitment Requests

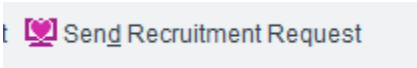
1. In EPIC, go to My Reports



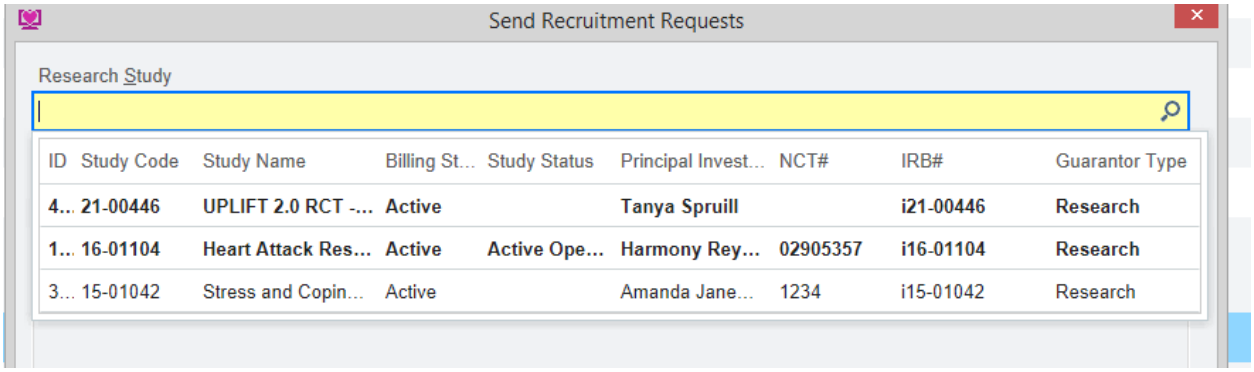

1. Click to run the appropriate report



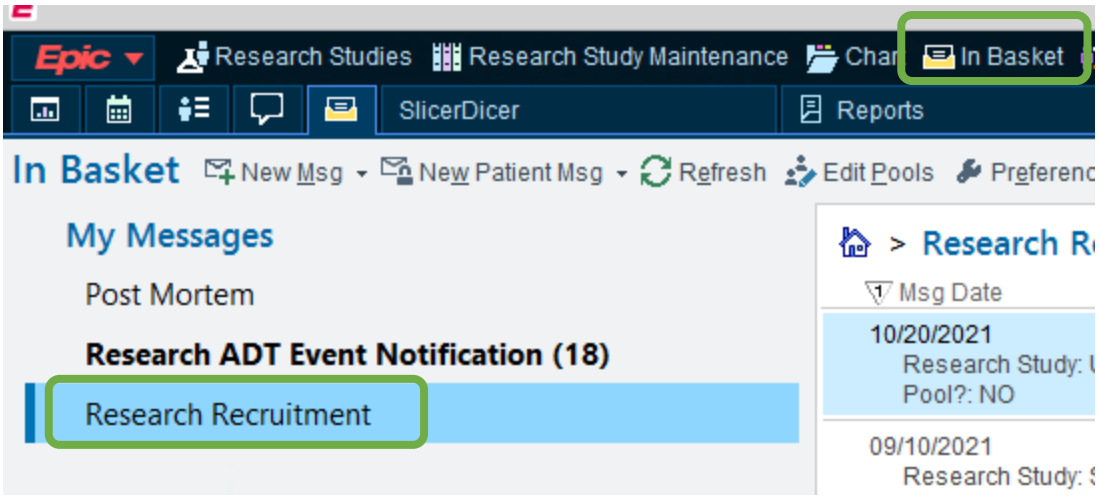

2. Select the participant(s) you want to send the request to and click Send Recruitment Request




3. Select the appropriate study

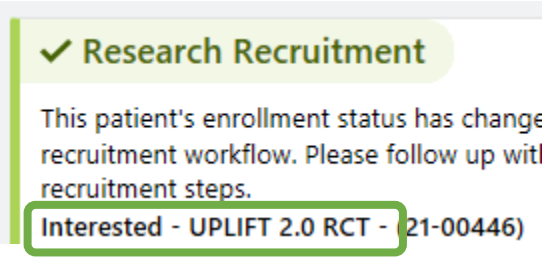



4. Responses will show up in your In Basket under Research Recruitment



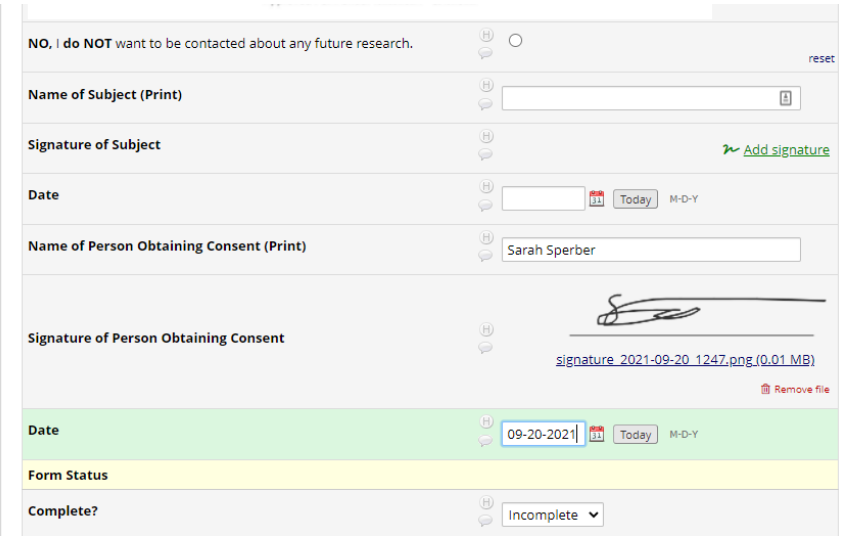

# 3 Recruitment Flow

1. Identify participants in EPIC.




2. Add participants to the screening REDCap
    a. If a patient is not interested, still add them to the screening REDCap. Make sure their MRN is added so that we know not to contact them in the future. Set their status to "Declined."

3. If “interested,” contact participant by email to set up a time to talk. If they don’t respond by email, you can also try phoning and texting.
4. 1st phone call
    a. Use telephone recruitment script
    b. If patient is still interested, tell them you will send them the consent form and ask them to read over it. Set up another time for a call to highlight the main points of the form, answer any questions they may have, and have them sign the form with you on the line.
5. Send consent form (see “Consent” section below)
6. Update screening REDcap with date that consent was sent & contact log
7. 2nd phone call
    a. 10 minutes before the call: open e-Consent and sign and date where appropriate. Save the form.




    b. On the call: ask if they have read through the consent form
    c. Either way, highlight the main points of the form (go into more detail if they haven’t read the form already)
    d. Allow time for questions, ask them if they are still interested. If so, they can sign while you are on the line.
    e. Check that their signature has come through on your end
    f. Continue immediately to complete the phone screening

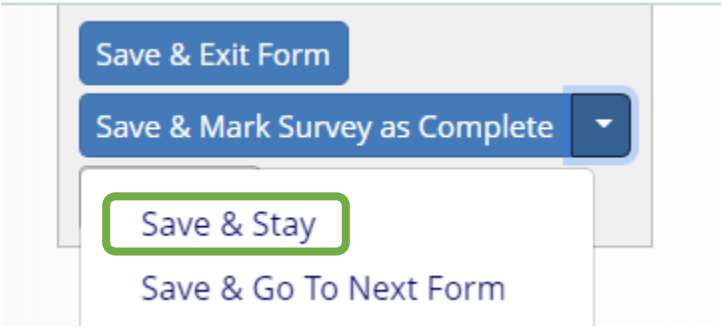
****Remember to log all contact with participants in the screening REDCap under “Contact Log”****

## 3.1 If no longer interested

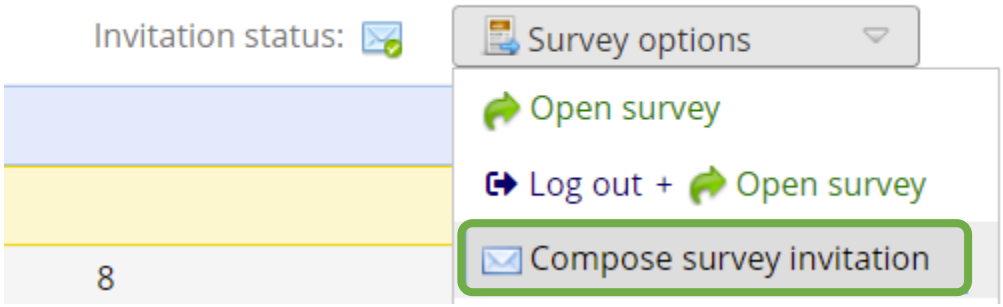
- Make a note in the Screening instrument in the screening REDCap under “Contact Log.” Mark the form as complete.
- In the Status instrument, select “declined” and mark the form as complete.

# 4 Consent

1. If eligible and interested in participating, create a record in OpenREDCap
2. Fill in the first 3 fields of the Identifying Information instrument (name, phone, email)
3. Go into the e-consent instrument and "save & stay."




4. You should now have the option to "Compose Survey Invitation"




5. Use the following text:

Subject: Managing Epilepsy Well (MEW) Consent Form

Hi [Name],
It was a pleasure speaking with you! Please click on the link below to review the consent form. Please do not sign the form until our phone call [whenever you have planned this call].
You may open the survey in your web browser by clicking the link below:
[survey-link]
If the link above does not work, try copying the link below into your web browser:
[survey-url]
This link is unique to you and should not be forwarded to others.
Best,
[Your name]
MEW Study Team

# 5 Screening

## 5.1 Eligibility Decision

- Email Tanya with a PDF of the patient's screener and inform her of their eligibility
- Email the patient using one of the following templates.

If eligible:

> Dear [Name],
>
> Thank you for agreeing to participate in the NYU Managing Epilepsy Well (MEW) Study! We are happy to share that you are eligible to take part in one of the 8-week telephone programs we are testing. You will soon receive a link to your first set of surveys which should take around an hour to complete, and for which you will receive a $25 Amazon gift card. After you have completed the surveys, we will add you to the list of people who will be randomly assigned to one of the two telephone programs. This will happen once we have enough people to fill both programs, which we expect to be within 1-2 months. We will reach out again at that point to inform you of which program you have been assigned to, and to schedule a time for the weekly phone sessions.
>
> We look forward to having you in the study, and please feel free to reach out with any questions!
>
> Kind regards,
>
> [Your name]
>
> NYU MEW Study Team

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If ineligible:

> Dear [Name],
>
> Thank you for agreeing to participate in the NYU Managing Epilepsy Well (MEW) Study. Unfortunately, after completing the screening process, we have determined that you are not eligible to continue in the study. We are only able to include people who meet a specific set of criteria that you do not fit at this time. We are grateful for your time and interest and wish you the best of luck in your ongoing epilepsy management. Please do not hesitate to reach out to us if you have any questions.
>
> Kind regards,
>
> [Your name]
>
> NYU MEW Study Team

## 5.2 Updating REDCap

- Update both screening and OpenREDCap
    - Open REDCap

        - Assign Study ID (see Consent Tracking report to identify the next number in the series)
        - Rename record to Study ID
    - Screening REDCap
        - If the patient has consented, set their status as “active” in the Status instrument
        - Update contact log once you have informed them of eligibility

# 6 Suicide Protocol

If participant endorses anything above a 0 for PHQ question 9:

- Email Dr. Daniel Friedman and CC Tanya with the patient’s screening form, MRN & phone number.
    - Friedman, Daniel (Neurology) Daniel.Friedman@nyulangone.org
- Let Tanya know who the participant’s neurologist is so she can notify them.

# 7 Baseline

Subject: MEW Study Baseline Questionnaires

Dear [NAME],

Please click the link below to complete your baseline questionnaires. You will receive a $25 Amazon gift card for completing these questionnaires. Once we have recruited enough people for your cohort, we will randomly assign you to receive either the UPLIFT or the BOOST intervention.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:
[survey-url]

This link is unique to you and should not be forwarded to others.

Best,

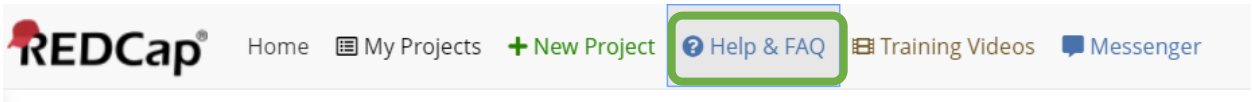
[YOUR NAME]

MEW Study Team

# 8 REDCap

## Resources

- **Basic Information**: REDCap Help & FAQ in the application




- **Advanced Branching Logic**: UFL How-To Guide https://www.ctsi.ufl.edu/wordpress/files/2017/06/Branching-Logic-in-REDCap-%E2%80%93-How.pdf

## Making Changes to the REDCap Project

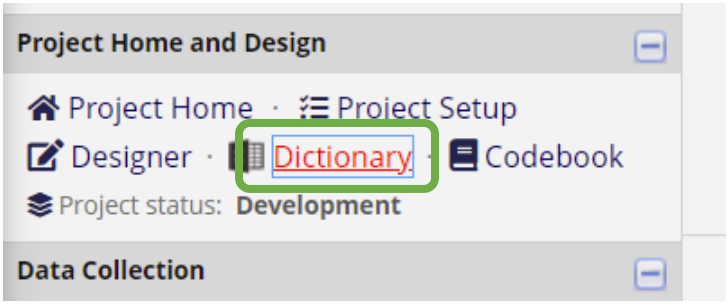
- You can make changes to a REDCap project in one of two ways, via the Designer or the Dictionary



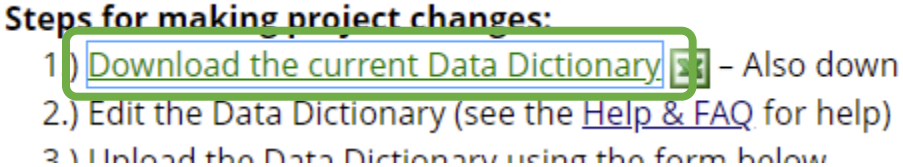

- The advantages of the Designer are:
  - More user-friendly
  - More intuitive
  - You can make small edits faster
  - The interface looks most similar to how the instrument will eventually be presented
- HOWEVER, the Dictionary has certain advantages as well:
  - You can make mass edits/edits affecting multiple fields faster
  - You can make more nuanced edits involving Rich Text in matrix fields
- It'll save you a lot of time to use the Data Dictionary in certain circumstances, e.g.:
  - Copying multiple fields either within an instrument or across instruments
  - Copying branching for multiple fields
  - Checking scoring
  - Getting an overview of variable names

## Data Dictionary

- To make changes using the data dictionary, click Dictionary on the left-hand menu




- Download the current data dictionary



- **<u>IMPORTANT: Save a copy that you will edit (this is so that you have the clean, unedited copy in case you need to revert)</u>**.
- If you have never used the data dictionary before, take some time to familiarize yourself with the different rows and columns. Each row represents a project field, with columns representing different features of that field:

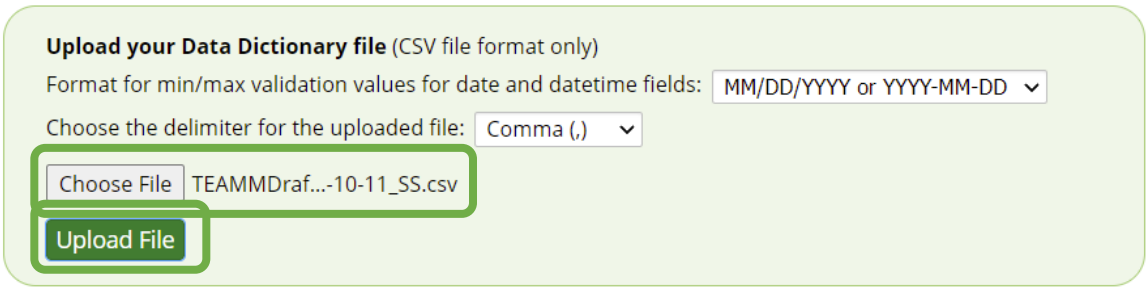
| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| | Variable / Field Name | Form Name | Section He | Field Type | Field Label | Choices, C | Field Note | Text Va |
| | record_id | ehr_pull_contact_information | | text | Record ID | | | |
| | firstname | ehr_pull_contact_information | | text | First name | | | |
| | lastname | ehr_pull_contact_information | | text | Last name | | | |
| | emailaddress | ehr_pull_contact_information | | text | Email address | | | email |
| | phone | ehr_pull_contact_information | | text | Phone number | | | phone |
| | sendprescreen | racompletestudy_management | | radio | Send pre-s | 1, Yes | | |
| | sendeconsent | racompletestudy_management | | radio | Send e-Co | 1, Yes | | |
| | cohortnumber | racompletestudy_management | | dropdown | Cohort nu | 1, 1 \| 2, 2 \| 3, 3 \| 4, 4 \| 5, 5 \| 6 | | |
| 0 | sendm0 | racompletestudy_management | | radio | Send out n | 1, Yes | | |
| 1 | week1send | racompletestudy_management | | radio | Send out V | 1, Yes | | |
| 2 | notes | racompletestudy_management | | notes | Participant Notes (Date and Note) | | | |
| 3 | sendinformedconsent | racompletestudy_management | | yesno | Send out informed consent | | | |
| 4 | prescreenintro | prescreening | Pre-screen | descriptive | <p><sp | | | |
| 5 | gendem1 | prescreening | | text | What is your age? | | | number |
| 6 | gendem2 | prescreening | | yesno | Do you read English? | | | |
| 7 | gendem3 | prescreening | | yesno | Do you suffer from significant hearing los | | | |
| 8 | timeavailable | prescreening | Interest | checkbox | The interv | 1, 4:00 pm \| 2, 4:30 pm \| 3, 5: | | |
| 9 | intcomm1 | prescreening | | text | Please describe briefly why you are inter | | | |
| 0 | intcomm2 | prescreening | | radio | How inter | 1, 1 - Not interested \| 2, 2 \| 3, | | |
| 1 | intcomm3 | prescreening | | radio | How much | 1, 1 - No confidence \| 2, 2 \| 3, | | |
| 2 | intcomm4 | prescreening | | radio | Please cho | 0, I will definitely attend at lea | | |
| 3 | physiciandx | prescreening | Headache | yesno | Has a physician diagnosed you with a mig | | | |
| 4 | migdem1 | prescreening | | yesno | Has a headache limited your activities fo | | | |
| | | | | | On how | | | |

- You can edit anything in the dictionary. The beauty of the dictionary is that you can copy and paste e.g. branching logic for multiple fields

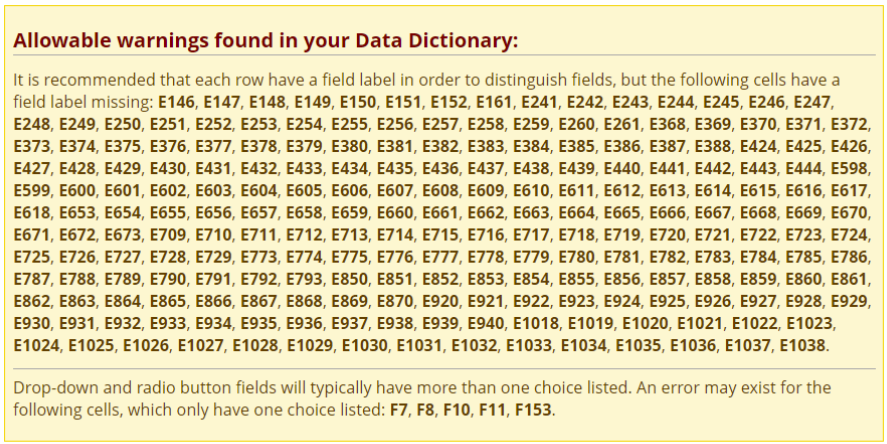
| | | |
|---|---|---|
| | | y |
| | [dast10q1] = '1' | y |
| | [dast10q1] = '1' | y |
| | [dast10q1] = '1' | y |
| | [dast10q1] = '1' | y |
| h dr | [dast10q1] = '1' | y |
| | [dast10q1] = '1' | y |
| | [dast10q1] = '1' | y |
| ppe | [dast10q1] = '1' | y |
| los | [dast10q1] = '1' | y |
| last | [dast10q1] = '1' | |
| | | y |

*Example of branching logic copied to different fields*

- Once you have made your desired changes, upload the edited data dictionary




- Allowable warnings are fine. Click Commit Changes





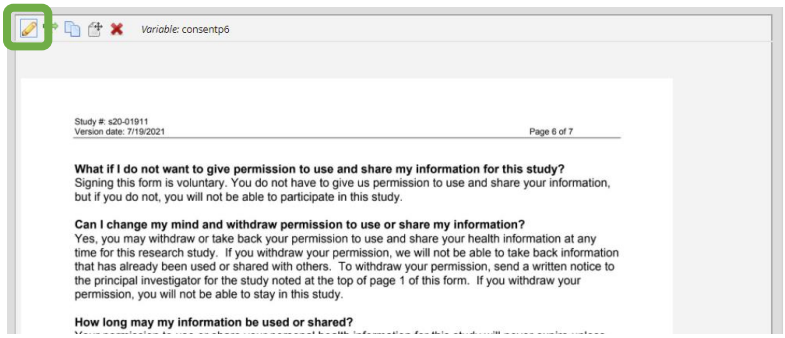


- Remember: if you make any mistakes during this process you can revert to the older version of the project by uploading the unedited data dictionary you saved (by following the steps above 😊)

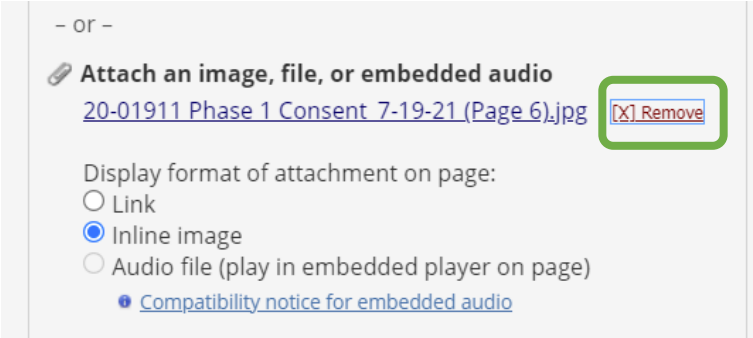
## E-Consent

- If the consent is ever modified, it must be updated within the e-Consent framework:

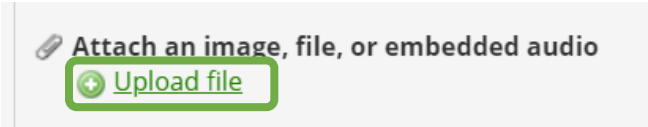
1. Download the latest PDF of the consent form (with the IRB approval footer) from RNav. See the next section “Downloading Documents” if you don’t know how to do this.
2. Convert the PDF into JPEG. You can do this in Adobe or online (Google PDF to JPEG conversion)
3. Go to the Online Designer in REDCap and open the E-Consent instrument.
4. **For each page** (you have to do this for each page of the document), click on the pencil symbol to edit



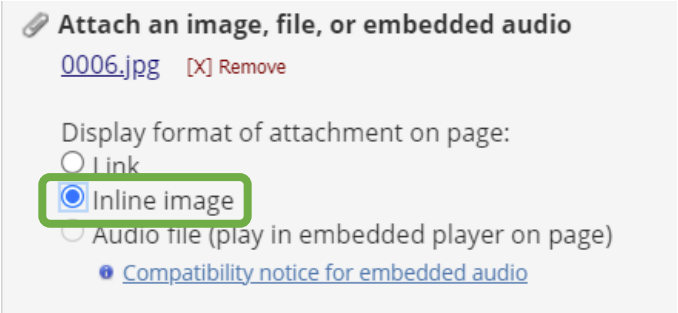

5. Remove the JPEG of the old consent




6. Click Upload file to add the JPG of the new consent

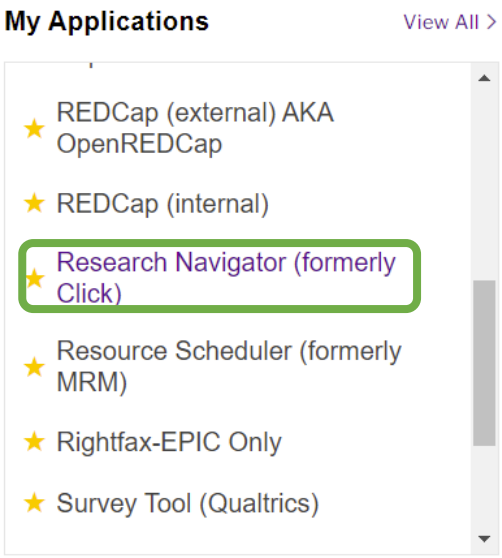



7. The JPEG must be displayed as an inline image

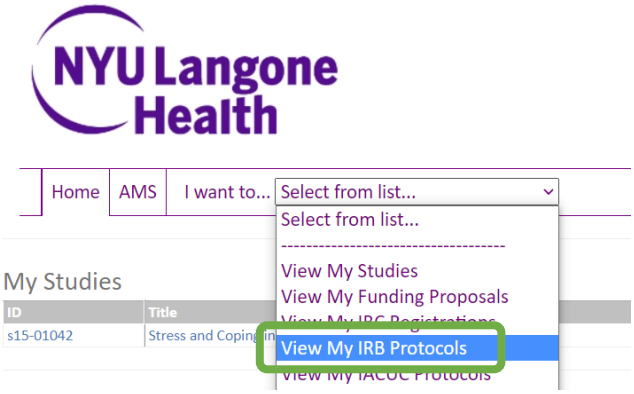



## Downloading Documents

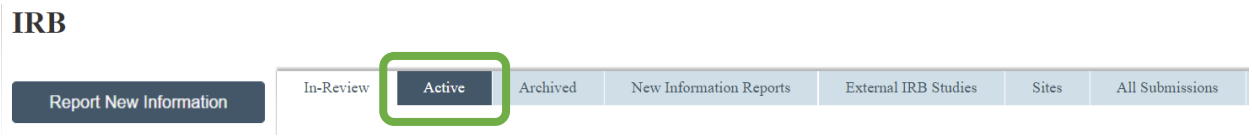
- You can download the latest-approved version of any document from RNav by following the below steps
- Access RNav through the InsideHealth applications (you can star/favorite it for easy access)



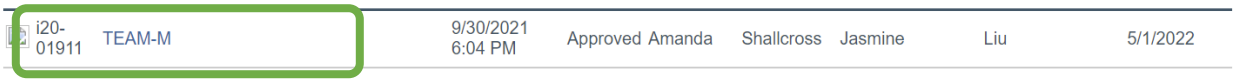

- Once you are in RNav, select “View My IRB Protocols” from the dropdown menu




- Click **Active**

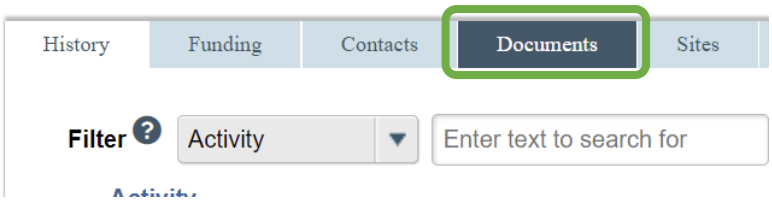



- Click the appropriate Study (HARP)




- Go to **Documents**




- Download any documents you want to edit from the **Final** column

**Study Related Documents**

| Draft | Category | Final | Last Finalized | Document History |
|---|---|---|---|---|
| OCI-R | IRB Protocol | OCI-R | 8/31/2021 9:23 AM | History |
| Final Eligibility Psychiatric Symptoms Checklist | IRB Protocol | Final Eligibility Psychiatric Symptoms Checklist | 8/31/2021 9:23 AM | History |
| PROTOCOL | IRB Protocol | PROTOCOL | 8/31/2021 9:23 AM | History |
| QUIDS-16sr_with instructions.pdf | IRB Protocol | QUIDS-16sr_with instructions.pdf | 7/23/2021 8:04 AM | History |
| PROMIS SF v1.0 - ED-Depression-SF8a.pdf | IRB Protocol | PROMIS SF v1.0 - ED-Depression-SF8a.pdf | 7/23/2021 8:04 AM | History |
| Off-Protocol Co-occurring Treatment Tracking v2.pdf | IRB Protocol | Off-Protocol Co-occurring Treatment Tracking v2.pdf | 7/23/2021 8:04 AM | History |
| MSQ_AU2.1.pdf | IRB Protocol | MSQ_AU2.1.pdf | 7/23/2021 8:04 AM | History |
| HDI.pdf | IRB Protocol | HDI.pdf | 7/23/2021 8:04 AM | History |
| Acceptability Questions | IRB Protocol | Acceptability Questions | 7/23/2021 8:04 AM | History |
| CSQ | IRB Protocol | CSQ | 7/23/2021 8:04 AM | History |
| Safety Tracking Questions | IRB Protocol | Safety Tracking Questions | 7/23/2021 8:04 AM | History |
| PRE-SCREENER | IRB Protocol | PRE-SCREENER | 5/2/2021 5:18 PM | History |
| FFMQ-15.pdf | IRB Protocol | FFMQ-15.pdf | 5/2/2021 5:18 PM | History |
| NYC area Mental health resources_1.29.21.docx | IRB Protocol | NYC area Mental health resources_1.29.21.docx | 5/2/2021 5:18 PM | History |
| | IRB | | 5/2/2021 5:18 | |

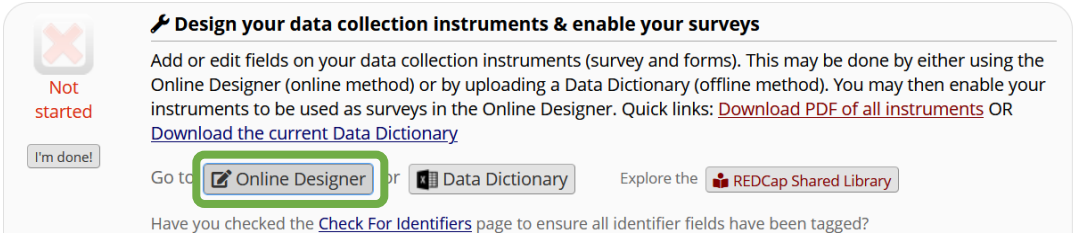
## Automatic Survey Invitations

REDCap can automatically send survey invitations according to a pre-determined schedule.

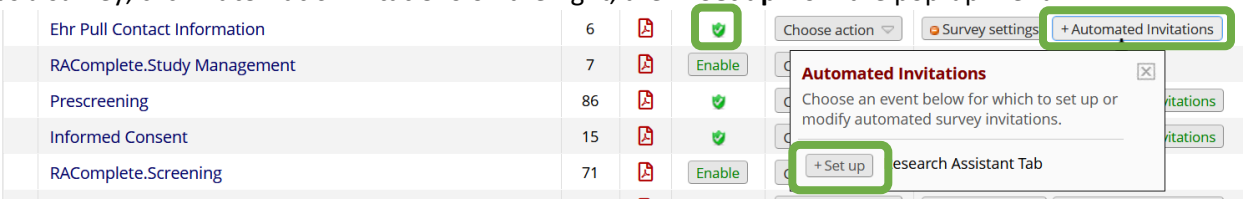
1. Log into REDCap and the HARP Stress Renewal Project
2. Click on **Project Setup**



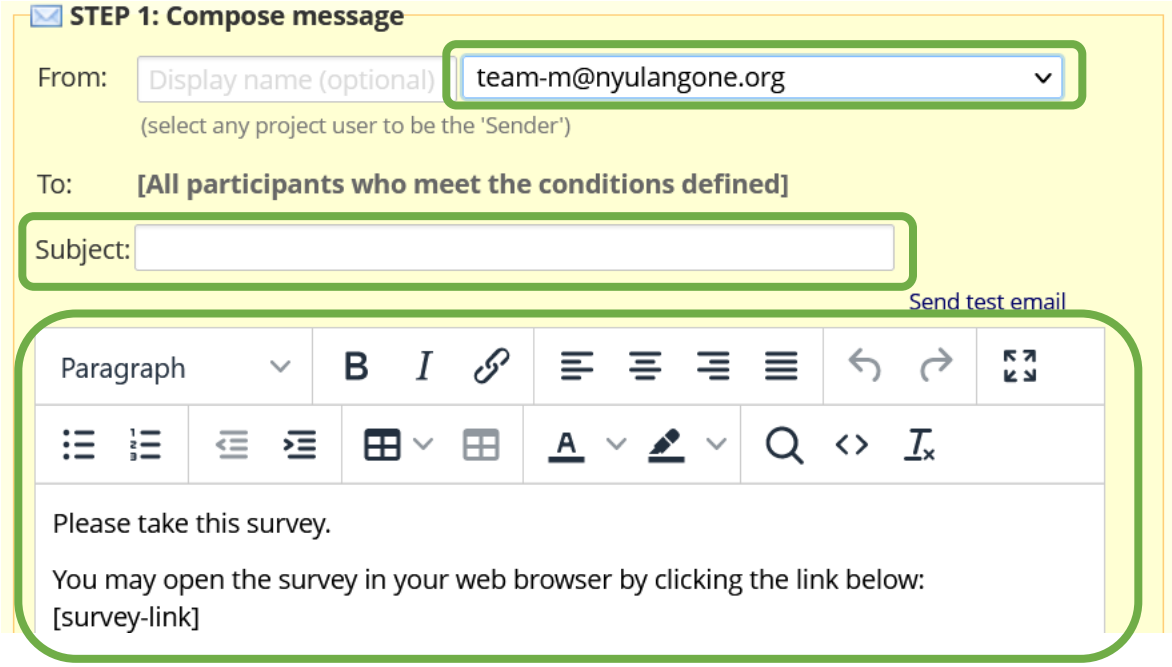
3. Click on **Online Designer**



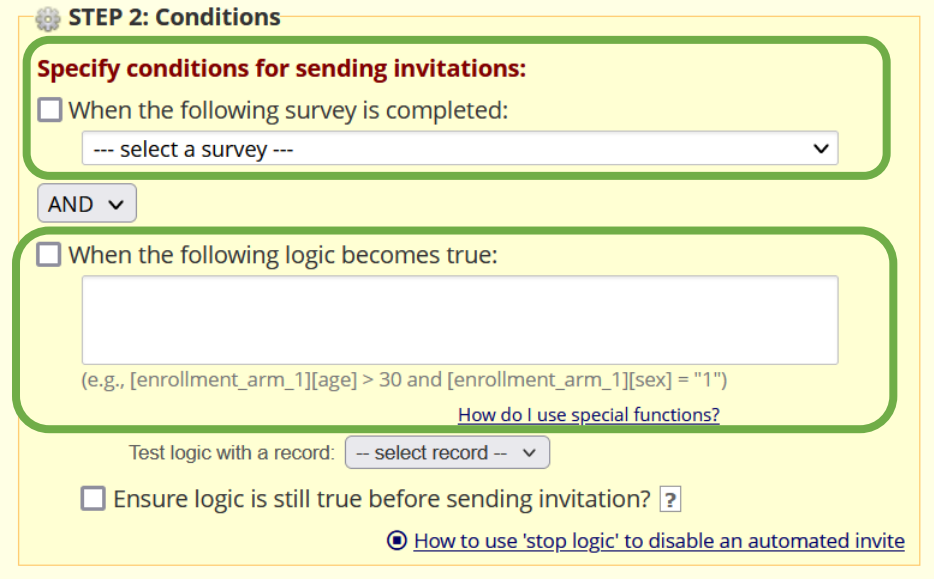

4. Select the instrument you want to set up automatic invitations for and make sure it is enabled as a survey, click **Automatic Invitations** on the right, then **+Set up** from the pop-up menu



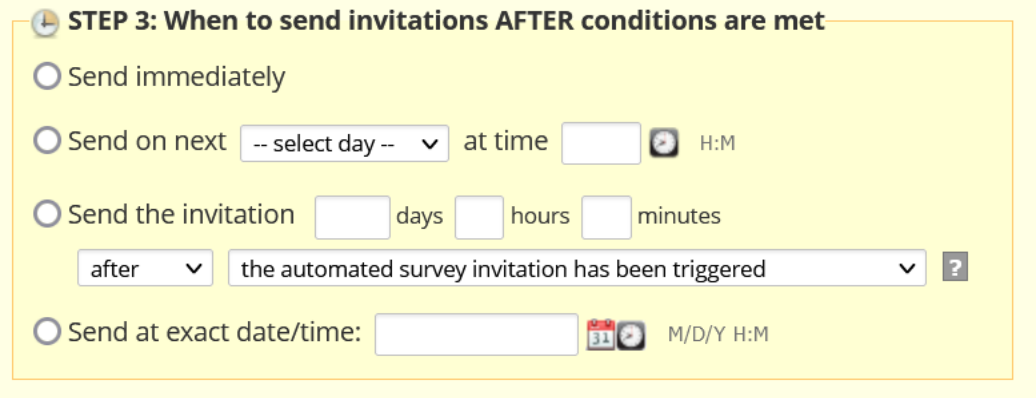

5. Follow the step-by-step process in the following window. Step 1 is selecting the email address which will send the survey invitation, as well as creating the email subject and main message. For HARP, use the harpstress@nyulangone.org email address in the "From:" box.




6. Step 2 sets the conditions for when the survey invitation is automatically sent, such as after another survey, and/or you can enter branching logic to instruct when the survey is sent.




7. Step 3 determines when to send the survey invitation after the conditions in Step 2 are met, such as immediately, on a specific day, or at an exact time.




8. The final steps include an option to repeat sending the survey every few hours or days, up to 5 times total, if a participant does not complete a survey. Finally, select **Active** to enable the automatic survey invitation.

**OPTIONAL: Enable reminders**

☑ Re-send invitation as a reminder if participant has not responded by a specified time? (Times below refer to AFTER original invitation time.)

- ○ Send every -- select day -- at time H:M
- ○ Send every days hours minutes
- ○ Send at exact date/time: M/D/Y H:M

– AND –

Recurrence: Send only once

**STEP 4: Activated?**

Activate these automated invitations? In order for automated survey invitations to be sent using these specified conditions, it must be set to Active. You may make them Not Active (and vice versa) at any point in the future. **NOTICE: Setting it to 'Not Active' will not prevent any invitations from sending that have already been scheduled, in which case they must instead be deleted manually.**

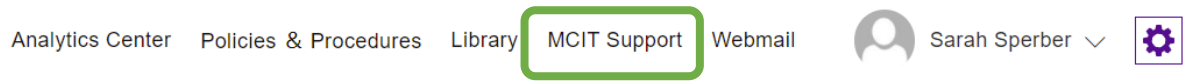
○ Active ○ Not Active

# 9 Emailing Participants

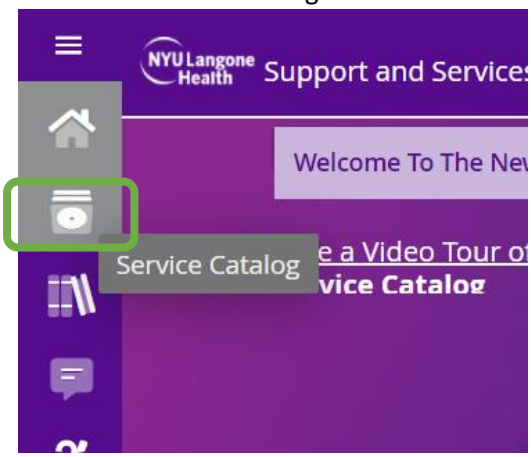
- When emailing participants, use the MEW@nyulangone.org email address.
- **Important**: CC or BCC the MEW@nyulangone.org email address on every message you send out. This is so that we have an archive of all messages sent and received in the same place. (Since this is a shared mailbox, messages you send will show up in your personal sent box, but not the shared sent box.)

## Getting Access to the Shared Mailbox

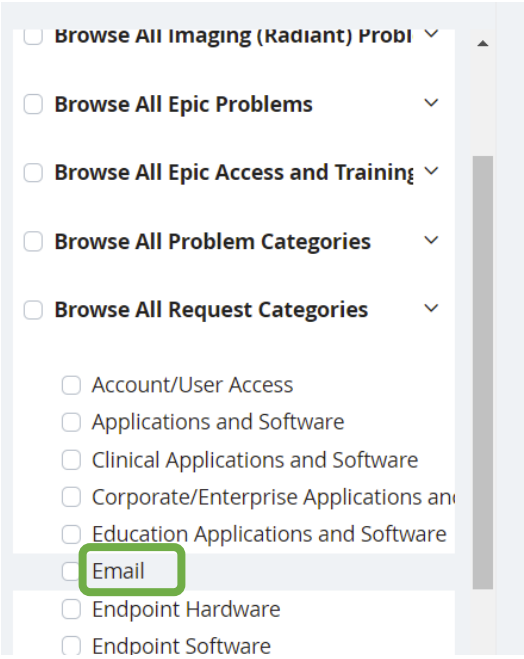
- This can be done through MCIT. On the InsideHealth homepage, click **MCIT Support** along the top.



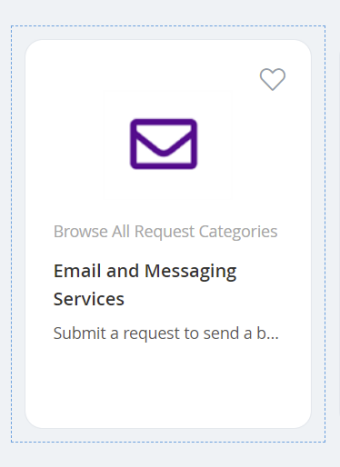

- Go to the Service Catalog



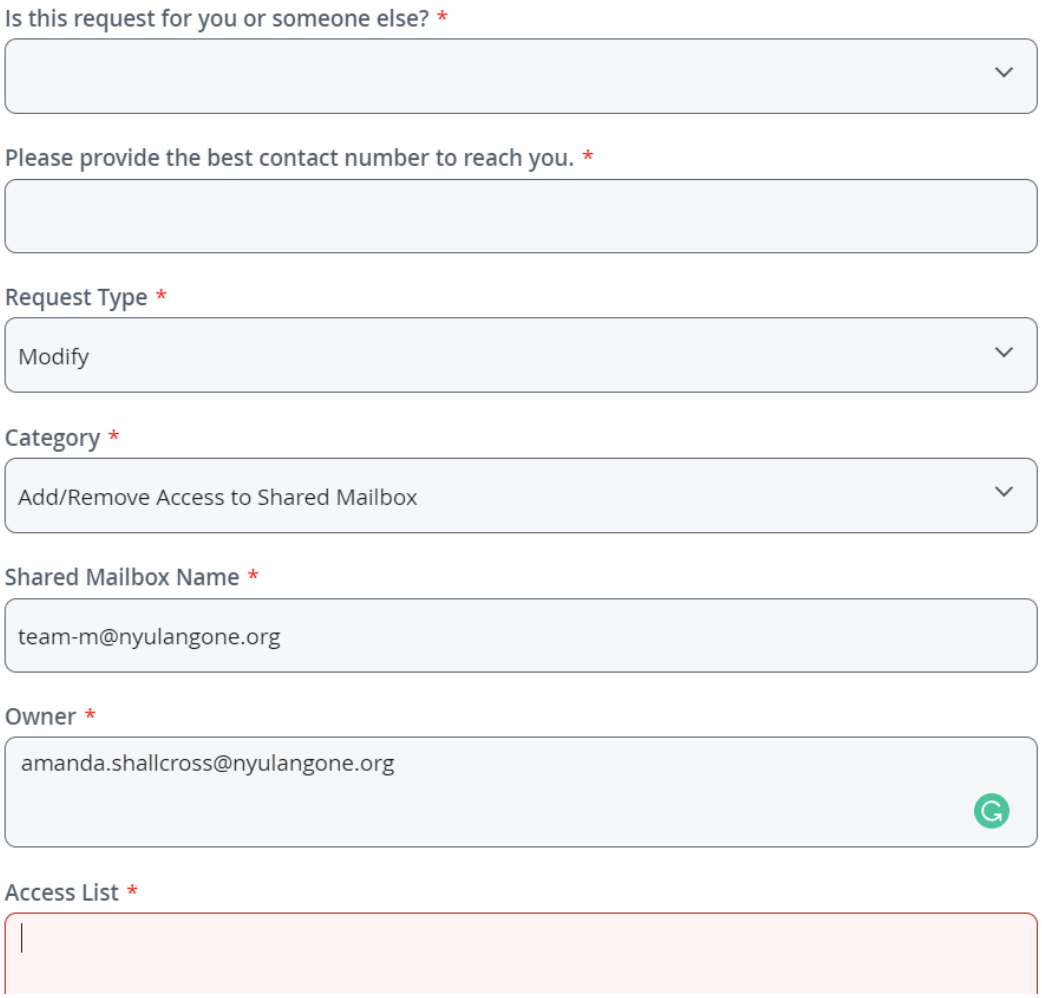

- Find the Email request category



- Select Email and Messaging Services




- Complete the form as shown below, filling in your information and the complete list of people who should have access to the mailbox. For HARP, this will be the harpstress@nyulangone.org email address and the owner is Tanya.spruill@nyulangone.org.




MCIT may reach out to you to coordinate the request or ask for confirmation of details.

# 10 Study Schedule

## 10.1 Screening

1. Clinic-based recruitment: The research staff will review clinic schedules to identify potential participants and will approach these patients in person or by phone. Those who are interested will provide informed consent, either in person or via RedCap, and then will complete screening to confirm eligibility.
2. EPIC-based recruitment: NYU who are contacted via MyChart or SendSafe email (see 5.4.1) and who indicate interest will be contacted by phone. If interested, they will provide informed consent via RedCap and then will complete screening to confirm eligibility.
3. Community-based recruitment: Self-referral patients facilitated by our community partners may contact the study team to express interest in the study. If interested, they will provide informed consent via RedCap and then will complete screening to confirm eligibility. They will complete a medical record release form so that the diagnosis of epilepsy can be confirmed.

For each of these three recruitment approaches, screening will involve EHR review and a brief interview to determine inclusion and exclusion criteria (see 5.1 and 5.2).

**Screening Visit (Day -42 to -1)**

- Obtain informed consent of potential participant; signature on hard copy or in RedCap.
- Review medical history to determine eligibility based on inclusion/exclusion criteria.
- Review medications history to determine eligibility based on inclusion/exclusion criteria.
- Complete PHQ-9 questionnaire to determine eligibility.
- Provide eligible participants with options for completing baseline self-report questionnaires by phone with research staff or independently via REDCap link.

## 10.2 Enrollment/Baseline (Visit 1, Day 0)

Participants will complete baseline self-report questionnaires by phone with research staff or independently via REDCap link. Research staff will review the EHR to collect relevant medical and treatment data.

## 10.3 Intermediate Visits

### 10.3.1 Randomization Call

Once 12 participants with the same language preference have been enrolled and completed baseline assessments, research staff will use the randomization sequence provided by the study statistician to determine participants' group assignments. Research staff will contact participants by phone to inform them of their assignment, collect availability in order to schedule the weekly sessions, and provide an approximate start date of the intervention. Following the call, research staff will mail the UPLIFT or BOOST materials to the participant.

### 10.3.2 Intervention Sessions

Research staff will coordinate a day/time for the weekly phone sessions with the participants and facilitators for each intervention cohort. All participants will complete 8 weekly 1-hour phone sessions. Reminders will be provided prior to each sessions. Attendance will be recorded and research staff will contact participants who miss a session and help to address any barriers. Brief make-up sessions will be offered to UPLIFT participants who miss a session so that they can easily re-join the group.

### 10.3.3 3-month Follow-up Visit

Research staff will schedule follow-up visits with all participants following completion of the intervention at which time self-report measures will be repeated by phone with research staff or via RedCap link to the surveys. The first follow-up visit has a target of 3 months post-baseline to permit completion of the 8-week intervention, with an allowable time window of -4/+6 weeks.

### 10.3.4 6-month Follow-up Visit

Research staff will schedule 6-month follow-up visits with all participants at which time self-report measures will be repeated by phone with research staff or via RedCap link to the surveys. The 6-month follow-up visit has an allowable time window of -6/+6 weeks.

## 10.4 Final Study Visit

Research staff will schedule 12-month follow-up visits with all participants at which time self-report measures will be repeated by phone with research staff or via RedCap link to the surveys. The 12-month follow-up visit has an allowable time window of -6/+6 weeks.

# 11 Participant Reimbursement or Payments

## 11.1 Amazon Gift Card

For UPLIFT participants will be compensated $25 (Amazon gift cards) for completion of each study visit, for a total possible compensation of $100.

## 11.2 REQUESTING GIFT CARDS IN PEOPLESOFT FINANCIALS

From the InsideHealth homepage log into the PeopleSoft Financials app

Select the Gift Card tile

Select the Add a New option and then select Gift Card

On the Request page:

Default Department Information will display. If you are missing any of the following required fields, complete them by clicking Edit Information:

ENTER THE FOLLOWING INFORMATION:

- Kerberos ID:
- Requestor Name:
- Department: CHBC
- Telephone:
- Email ID:
- Ship-To Location: PPNGRRVG
- Address: 180 Madison Avenue
- City: NY
- Zip Code: 10016
- Location Code: E500103762
- Address: 180 Madison Avenue
- Floor: 007

- Room#: 734A (your office/cubicle number)
- City: New York
- State: NY
- Zip Code: 10016

CHARTSTRING INFORMATION (for UPLIFT)

  - Use Default Information  Edit Information
- Business Unit: SOM01
- Fund Code: 26
- Operating Unit: B
- Dept. ID: 89011
- Program Code: NYUPG
- Project: 115780

WHAT TYPE OF GIFT CARD ARE YOU LOOKING TO PURCHASE?

  - Amazon
  - Bank of America (fee: $20 to mail gift card and $1.50 for each gift card)
  - Other

For Amazon Only: There are no fees related to Amazon cards

- Number of gift cards: 20
- Total dollar amount: 25.00
- Please list the reason why the gift cards are needed: (From the drop down select Other)
- If Other, Please specify: *Compensation for study participation - surveys*
- Are these gift cards for employees?: No

I confirm that the individual(s) listed above are authorized to receive a NYU Langone Health Gift Card and above Chartstring Information is the correct.

- Click on **I Agree**
- Click Save then **Submit**

A Request ID will populate and the form will be routed to Departmental Chartstring approvers and AP Compliance for final approval.

- Request ID: (example: 0000000168)
- Supplier: Gift Card
- Status: New
- Created by: Name of Requestor

TO CHECK THE STATUS OF REQUEST click on: View Approval Flow

- It will show the approvals to the request
  - Departmental Approval
  - AP Compliance
  - Comments:

- *You will receive a notification from someone in the Financial department* saying I've ordered your Amazon e-gift cards of 20 x $25. You'll be receiving a direct email with your e-gift cards from Amazon.

- Electronic-gift cards come as an individual email for each card (if you requested 20 gift cards you will received 20 separate emails containing the CLAIM CODE for participants to redeem their gift card)

## 11.3 CHANGES AS OF August 30, 2021

**From:** Murrell, Lazette <Lazette.Murrell@nyulangone.org>
**Sent:** Monday, August 30, 2021 4:08 PM
**To:** Yepez, Myriam <Myriam.Yepez@nyulangone.org>
**Cc:** Elmsiyah, Lizeta <Lizeta.Elmsiyah@nyulangone.org>
**Subject:** Amazon Incentives Process...Gift Card Request ID: 460
**Importance:** High

Hello Myriam,

Please see the attached spreadsheet. Fill this spreadsheet out for your e-gift card request id: 0000000460. Once completed email back to me for processing.

file:///P:\BengaGroup\PROJECTS\Spruill%20PROJECTS\UPLIFT%202.0%20RCT\Payments\Copy%20of%20Upload_Email_Template_amazon.com_en_US%20Incentives%20Req.%20460.xls

FYI…Going forward when you have multiple e-gift card orders, please fill the spreadsheet out and attach it in your gift card request before submitting it to me.

*Lazette M. Murrell*

***Department of Finance***

***NYU Langone Health***

***1 Park Avenue, 11th Floor, New York, NY 10016***

***lazette.murrell@nyulangone.org***

***Fax- 212-404-4150***

***SalesForce- https://nyulangonecorpsvc.force.com/FinancePortal/s/***

*Please note per email on 9/1/2021: If You're requesting 50 gift cards at $25 each. You have to put your name, email address and the amount ($25) 50 times on the spreadsheet. A line has to be filled out on the spreadsheet for each gift card you're requesting.*

## 11.4 Paying Participants by check

PEOPLESOFT FINANCIALS

Go to the PeopleSoft Financials application

Click on the Payment Request icon (hands with the money bag)

For all clinical trial compensation, please use

There are two tabs: Vendor Information and Payment Request Fluid

Fill out the information on both tabs

On the VENDOR INFORMATION tab enter the Participant Information:

Vendor# 16019 SOM01 Clinical Trial
Supplier ID: 0000016019 SOM SINGL-01 SOM Single Pay

Supplier ID
0000016019 0000016019
**Location** 1
Address
1 1

SOM Single Pay

Country: USA
County:
City
State
Postal Code

On the PAYMENT REQUEST FLUID tab enter the following Information:

*Business Unit

SOM01 SOM01

**Voucher ID** will be generated by the system 03791028

**Voucher Style** Regular

**Form Type** Payment Request

**Status** Postable

**Approval Status** Initial

Invoice ID

*Invoice Date

11/23/2021 11/23/2021

Print Invoice Validate Combination

Gift ☐ ☑ Yes **No**

Pay as Check ☑ ☐ **Yes** No

Hold for Pick Up (if you want the participant to pick up the check at the office)

☑ ☑ **No**

Currency USD USD

**Payment Method** CHK

**Total Amount** 100.00

Chartfields: Enter the Chartstring for UPLIFT

UPLIFT: **26-B-89011-NYUPG-115780**

Amount: 25.00

Currency: USD

GL Unit (business unit): SOM01

Description: Compensation for study participation

Account: 63676 HUMAN SUBJECT-STUDY PAYMENTS

Account Description: Compensation for participation in study

Fund (two numbers): 26

Operating Unit (one character): B

Department Unit (five numbers): 89011

Program (five characters): NYUPG

Project (six numbers): 115780

Explanation/Justification (Required): Elderly patient doesn't have a computer and is unable to retrieve electronic gift card

Explanation/Justification (Required)

Attachments (0) Attach proof of explanation/justification (required): Attach email from participant (if applicable) and from Tanya authorizing the payment

Save Draft **Preview Approval** Save & Validate

**Submit for Approval:** Once you verify that all information entered is correct click **Submit**

**View Approval tab:**

**Business Unit** SOM01

**Voucher ID** 03791028

**Invoice ID**

| | | |
|---|---|---|
| **Invoice Date** | 11/23/2021 | |
| **Supplier ID** | 0000016019 | SOM Single Pay |
| **Amount** | 25.000 | |
| **Currency** | USD | |

## Line Info

**1 row**

| Line | Amount | Description | GL BU | Account | Fund |
|---|---|---|---|---|---|
| 1 | 25.000 | Compensation for study partici | SOM01 | 54047 | 15 |

Comment


Elderly patient is unable to retrieve electronic gift card

Departmental Approval

You can check if the request was approved on the PeopleSoft Financials application

Click on the Approvals icon (sheet with a check mark), it will show if the request is pending

You will receive an email from do-not-reply-peoplesoft@nyu-mcit.org

Subject: A Payment Request Has Been Approved.

Message: The following payment request has been approved.

Business unit: SOM01
Voucher ID: 03798540
Vendor ID: 0000016019
Vendor Name: SOM01 Clinical Trial
Amount: 25

For auditing purposes, keep the Gift Card Disbursement tracker up to date.

file:///P:\BengaGroup\PROJECTS\Spruill%20PROJECTS\UPLIFT%202.0%20RCT\Payments\UPLIFT%20%20Gift%20Card%20Disbursement%20Tracker%209.1.2021.xlsx

# 12 Printing Workbooks

[How to submit a Printing Request]

- Contact Dan Dingraudo Printing Services via email: Daniel.Dingraudo@nyulangone.org
- Inquire about options and prices
- Provide details of the workbooks we need printed:
  - PROJECT UPLIFT Workbook 88 pages Double sided, clear plastic front cover, color black plastic back cover, spiral bound.
  - BOOST Workbook 6 pages Double sided, clear plastic front cover, color black plastic back cover, spiral bound
  - Quantity: 10-12 of each
- Attach copies of workbooks
- We will get a response from Dan that will include the cost of printing
- Notify Tanya and get her approval
- Prepare an IOI (Interdepartmental Order & Invoice) form (see below)
- Send completed IOI form to Tanya for approval signature
- Submit completed and signed IOI form to Printing Services via email
- Follow-up on request and delivery

NYU Langone MEDICAL CENTER

| IOI # FOR REFERENCE | |
|---|---|
| DEPT ID (5 #s) | DATE (MMDDYY) (6) |
| | 07/27/22 |

**INTERDEPARTMENTAL ORDER & INVOICE (IOI) FORM**

| CREDIT TO ACCOUNT: | Business Unit (HOS01 or SOM01) | Account (5 numbers) | Fund (2 #s) | Op. Unit (1 char.) | Dept. ID (5 numbers) | Program (5 numbers) | Project (6 numbers) |
|---|---|---|---|---|---|---|---|
| | | | | | | | |

CHECK THE APPROPRIATE BOX BELOW:

| | | | | | |
|---|---|---|---|---|---|
| | Audio Visual | | Food & Nutrition – IRM | | Med. Gases/Oxygen |
| | Building Services – IRM | | Food & Nutrition – Student Cafeteria | | Medical Library |
| | Building Services – MSB | | Food & Nutrition – TCH | | Pharmacy |
| | Building Services – TCH | | General Stores - Chemicals | | Physical Therapy |
| | Bookstore | | General Stores – Stationery, Forms | | Postage |
| | Catering | | General Stores – Other (from WHSE1) | X | Printing |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Approved by (Signature): | Tanya Spruill Digitally signed by Tanya Spruill Date: 2022.07.27 10:58:39 -04'00' | Dept. | Population Health | | | Date: | 07/27/22 |
| Deliver to (Printed name): | Tanya Spruill | Ext. | | Bldg | 180 Madison Ave. | Fl./Rm.# | 7th Floor |
| Received by (Signature): | | | | | | Date: | |

| QTY | UOI | GS# | DESCRIPTION | UNITS ISSUED | UNIT PRICE | AMOUNT |
|---|---|---|---|---|---|---|
| 12 | | | UPLIFT Participant Workbook | | | $439.00 |
| | | | Double sided, clear plastic front cover | | | $ |
| | | | color black plastic back cover, spiral bound | | | $ |
| 3 | | | UPLIFT Facilitator Workbook | | | $ |
| | | | Double sided, clear plastic front cover | | | $ |
| | | | color black plastic back cover, spiral bound | | | $ |
| 8 | | | BOOST Workbook | | | $ |
| | | | Double sided, clear plastic front cover | | | $ |
| | | | lor black plastic back cover, spiral bound | | | $ |
| | | | | | TOTAL CHARGES | $439.00 |

| CHARGE TO ACCOUNT: | Business Unit (HOS01 or SOM01) | Account (5 numbers) | Fund (2 #s) | Op. Unit (1 char.) | Dept. ID (5 numbers) | Program (5 numbers) | Project (6 numbers) |
|---|---|---|---|---|---|---|---|
| | SOM01 | 63676 | 26 | B | 89011 | NYUPG | 115780 |

## 13 Audio Files

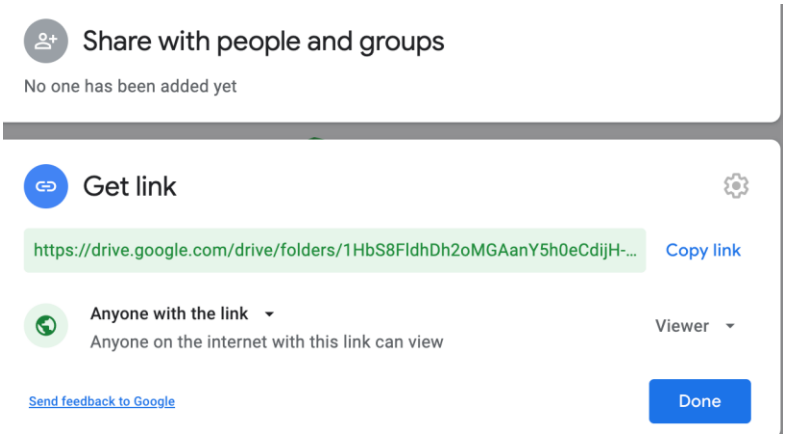
Audio guides are stored in the following location: P:\BengaGroup\PROJECTS\Spruill PROJECTS\UPLIFT 2.0 RCT\Recruitment Materials\UPLIFT Audio Exercises English\2020 Recordings

To upload files onto google drive for patients' easy access using the gmail account:

**Username:** uplift.nyu@gmail.com

**Password**: 4SN;'w}[*2L3CuNU

Create a folder, upload the audio files, and share the folder with "anyone with the link" as a "viewer".




Copy the link to share.

UPLIFT Audio (English): https://drive.google.com/drive/folders/1HbS8FldhDh2oMGAanY5h0eCdijH-ukX5?usp=sharing

UPLIFT Audio (Spanish): https://drive.google.com/drive/folders/13glzsMN1zwAYNJWD50TpEy3WkCn6tpsP?usp=sharing