REDCap Payment Form Instructions

Prepare REDCap forms prior to your session. Participants should be added to REDCap during recruitment.

1. Log into REDCap:
   1.1. Click REDCap Version [15 or higher] Production Server and login to your account.
   1.2. Click on My Projects tab and click on Project Title: CML – Mechanisms of Cognition.
2. Under the Data Collection tab, click "Add / Edit Records." Under Data Search > Choose a field to search, select "participant_name (Participant Name)" and search for your participant by name to see if they have an existing REDCap ID.
   2.1. Tip: Be sure to try multiple searches in case the participant goes by a nickname or their maiden/married name.
   2.2. It may also be helpful to search the "participant_email" or "phone_number" fields.
3. If a REDCap ID already exists for the participant, click on it to open their record.
   3.1. Open the Participant Information form and update the information as needed.
4. If there is no REDCap ID for the participant, you will need to create one.
   4.1. Under the Data Collection tab, click Add / Edit Records and click the +Add new record (green) button.
   4.2. Open the Participant Information form and complete the form with the information that is available to you. It is strongly recommended to collect the following information:
      4.2.1. Recruited by [**your name]**
      4.2.2. Participant Name
      4.2.3. Date of Birth [Helpful, but not necessary for most younger adults. **Strongly recommended for older adults**.]
      4.2.4. Participant email address
      4.2.5. Participant phone number

Load the Payment Form onto the testing computer during experiment setup. Each Payment Form is specific to one participant, so assign seats and keep track of who is sitting at each station!

5. Log in to REDCap and navigate to the correct participant using the process outlined in steps 1-3 above.
6. Open Data Collection Instruments: Payment Form. If a Payment Form already exists for the participant, click the grey plus sign to add a new instance.
   6.1. Experiment name: Enter the experiment name.
      6.1.1. Use the **exact same characters** each time you enter the experiment name on **<u>all</u>** of your REDCap forms to ensure that all participants appear in the study's REDCap reports.
   6.2. Click "Save and Stay" then click "Okay" in the pop-up message.
   6.3. Click "Survey Options" then click "Log out + Open survey" to load the participant-facing view. Instruct participants to complete the form before or after completing your study procedures.

After the study has concluded, be sure to return to the Payment Form and input the final payment amount.

7. Follow the process outlined in steps 1-3 to navigate to the correct participant. In the sidebar, click on the participant's Record ID to view all of their REDCap forms.
   7.1. Click the icon next to the Payment Form corresponding to your study.
   7.2. Click "Edit response" and input the final payment amount.
   7.3. Click "Save and exit form."

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