User Guide to Using the Cross-Network Community Engagement Reporting System

Overview

1. The Community Engagement Reporting System is in REDCap. REDCap is a secure web platform for building and managing online databases and surveys. The content is virtually the same from the Microsoft Word versions of annual plans and reports that you may have used in the past.
2. This reporting system replaces the annual work plan and mid-year and end-of-year reporting process for the Networks involved. With this system, you will only need to complete one (1) report, regardless of how many Networks your site is affiliated with.
3. Please note that the system is broken up into different pages. Each page will require some input or action on your part. For every page in the system where an action is required from you, this guide will specifically state what the action required is under each section heading. Please complete all the appropriate pages for your site.
4. As you go through the pages of the system, please be sure to complete each of the sections as appropriate, and when all information has been entered, click the "Save and Exit Form" button toward the bottom of the screen, which makes certain that the information you input is saved. You have the ability to start entering data, and save and return later to finish. To do so, mark any page as **incomplete**, then click **Save and Exit Form**.
5. You can check the status of each of the pages in the system by using viewing the circles adjacent to each of the pages. The colors will indicate where the page is complete, needs additional information, or has not been started.
6. Please pay close attention that you are typing the correct information in the correct field.
7. After you complete your work plan or reports, an email will be sent to the HVTN, MTN, and HPTN Community Staff to alert them to review.

User Guide to Using the Cross-Network Community Engagement Reporting System

Table of Contents

User Guide to Using the Cross-Network Community Engagement Reporting System

New Account Setup/Resetting User Access

If you require access to the Cross-Network Community Engagement Reporting System, please contact your site's Community Program/Project Manager who will initiate the request. Do NOT contact the REDCap Administration team directly, as they will not be able to assist you with this task.

If you are unable to log-in and/or reset your password, please contact your site's Community Program/Project Manager who will initiate the request. Do NOT contact the REDCap Administration team directly, as they will not be able to assist you with this task.

Logging In/Accessing Reporting System

Logging In:

Step 1: Open your browser and go to URL http://redcap.fredhutch.org/

Step 2: Enter User ID and Password

Accessing Reporting System:

Step 1: Click on the **Cross Network Community Engagement Reporting System** link. This will take you to the project home page.

On the **Project Home** page you should be aware of the following:

Project Statistics (center of screen)

Data Collection (left hand menu)

- Record Status Dashboard
- View/Edit Records

User Guide to Using the Cross-Network Community Engagement Reporting System

Applications (left hand menu)

- Export data
- Fred Hutch Redcap Training
- Calendar

Entering Data into Reporting System

Step 1: To enter/view data, click on **View/Edit Records**

- Go to “Choose an existing Subject ID”, and select your site from the drop-down menu
- Once your site is selected, you will be taken to the “Record Home Page” automatically
- Make sure the site indicated is your site
- Scroll down to the “Data Collection Instrument” Section and you will notice a list of pages and columns that represent the reporting periods.
- The legend in top right corner corresponds to status of each page. You will see at the bottom of each page (once opened) how this works
- You can go to a page by clicking on the circle to the right of it. Make sure you are clicking the circle under the appropriate reporting year you want to enter information for.

Cover Page *(complete this page last!!)*

The *Cover Page* displays the logos of the Networks collaborating on this system, and includes other relevant information, and is the first page of the reporting system. The important information that sites will input on this page is the Network(s) selection, country and site selection, names of contributors to the work plan, and signature of the CRS PI or their designee.

> ***Action Step***: To be completed after you have completed all other pages in the work plan. Please click the boxes next to the Network(s) that your site is affiliated with. Next, indicate the country and site that you are affiliated with. Next, **input the names and email addresses** of the persons involved in contributing to the work plan (the work plan should be developed by the site community staff, CAB, clinic/site coordinator, and PI). Finally, the **CRS PI (or**

designee) should input their signature indicating agreement and support of the plan. Finally, under **Form Status** select **complete**, then click **Save and Exit Form**.

Evaluation

The *Evaluation* page describes the key areas of how your annual work plan will be evaluated by the Network Community Staff that you indicated your site was associated with in the *Cover Page*. Additionally, this page also describes the metrics that are used by the HVTN Network Evaluation Committee (NEC) to evaluate community engagement at clinical research sites. Only HVTN sites are required to comply with the HVTN NEC requirements.

Action Step: Read this page to ensure you understand the information relevant to your site. Under **Form Status** select **complete**, then click **Save and Exit Form**.

Community Assessment

The *Community Assessment* page is where you will describe important information regarding the community where your site is located. This information helps "paint a picture" of some of key elements of the community, and potential influencers of education, recruitment, and retention activities. New sites should complete all sections on this tab. Existing sites should review the information on this page and note any changes.

Action Step: Please review the questions/prompts on this page thoroughly. New sites should input information in all of the fields on this tab. Existing sites should only input information to update their assessment from the previous year. **If an existing site has no updates, then this page can be skipped.** Finally, under **Form Status** select **complete**, then click **Save and Exit Form**.

User Guide to Using the Cross-Network Community Engagement Reporting System

Site Community Engagement (CE) Capacity

The *Site Community Engagement Capacity* page is for you to describe your community education, recruitment, and retention team members, and what assets are in place to assist these team members in the execution of their work. On this page, please note the first and last name of all community staff persons at your site, along with their specific role (e.g., recruiter, retention, educator, CER manager/lead, etc.), along with putting an "X" in whether the person is part-time or full-time. After inputting all the staff information, please respond to the questions on the page.

> ***Action Step:*** All sites should input their community staff information in the required boxes, including name, role, and marking an "X" in whether the staff person is part-time or full-time. Additionally, all sites should respond to the questions on the page as completely as possible. Finally, under **Form Status** select **complete**, then click **Save and Exit Form**.

CAB

The *CAB* page is for you to describe the composition of your sites' CAB (and/or Community Working Group), including chair and co-chair information, CAB objectives, CAB training, and CAB demographics. As you input training and other information on this page, please make special note of the CAB Goal.

> ***Action Step:*** All sites should input the names, emails, and contact numbers of CAB (and/or Community Working Group) chairs, co-chairs, and GCAB representatives. Input the number of CAB meetings that are scheduled for the reporting period, and the number of meetings an Investigator of Record (IoR), Principal Investigator (PI), or co-investigators (Co-PIs) are scheduled to attend. Input the training activities that the CAB will be involved in during the reporting period, and then respond to the questions as completely as possible. Finally, under **Form Status** select **complete**, then click **Save and Exit Form**.

User Guide to Using the Cross-Network Community Engagement Reporting System

Annual Plan

The *Annual Plan* page is for you to describe the specific community education, recruitment, and retention goals and objectives your site and CAB have agreed to conduct. As you input the optional goals and objectives, please make special note of the working definition of goals and objectives at the top of the tab, and the examples in each section on this tab. Both the community education and recruitment sections of this tab have an additional space to input an additional goal, if your site and CAB have agreed to a site-specific goal that is not already listed. It is advised that you try to keep your objectives brief yet specific (as shown in the examples). Note that all of the objectives you input on this tab will automatically carry over and populate the Mid-Year and End-of-Year report pages (so you do not need to repeat the information).

> ***Action Step:*** All sites should input objectives for community education, recruitment, and retention that are measurable, as well as how many times the activity will occur in the reporting period, and which goal(s) the activity accomplish (from the list of goals at the beginning of each section).
>
> Input all the HVTN studies that your site is currently working on, or will work on, during the reporting year. Finally, under **Form Status** select **complete**, then click **Save and Exit Form**.

Annual Plan Narrative

The *Annual Plan Narrative* page is for you to describe the specific components of your recruitment and retention process. This page is important because it describes how your efforts to conduct community education, transition into recruitment and retention for studies. This also allows us the opportunity to understand how your recruitment or retention process may be supporting or hindering your sites' efforts, so that we can provide support or share ideas that have been successful at other sites.

User Guide to Using the Cross-Network Community Engagement Reporting System

Action Step: Please respond to the questions/prompts on this page thoroughly. New sites should input information in all of the fields on this tab, as appropriate. Existing sites should only input information to update that has changed from last year. If an existing site has no updates, then this page can be skipped. Finally, under **Form Status** select **complete**, then click **Save and Exit Form**.

PAUSE: You have completed the primary components of the annual work plan. After the Cover Page has been completed an email notification will be sent to your Network Community Program/Project Manager(s) for them to review.

The next section of this guide describes the Mid-Year and End-of-Year reports. Only complete these reports when instructed to do so.

Mid-Year and End-of-Year Reports

Mid-Year and *End-of-Year* reports are designed to assist the Networks in assessing sites' progress to completing their stated annual goals and to get a glimpse into any successes and challenges the site may be having. The annual work plan objectives will automatically carry over, so you do not need to enter that information again (and the form will not allow you to). Please pay attention to the reporting period for each report, and only report on activities conducted during the indicated reporting period.

Action Step: All sites will complete the *Mid-Year* and *End-of-Year* reports. Input the target audience and number of times occurred for each activity indicated. If the activity did not occur in the reporting period, please leave the target audience and number of times columns blank. Briefly summarize the major highlights, including successes and challenges of efforts in community education, recruitment, retention, and CAB in the fields just below those sections. Input how many CAB meetings occurred and the number of meetings where a site IoR, PI, or co-PI attended a CAB meeting in the fields indicated. Finally, under **Form Status** select **complete**, then click **Save and Exit Form**.

Additional note: If you are an HVTN site, you will see additional study-specific Mid-Year and End-of-Year reports. ***Please complete these reports in addition to the primary Mid-Year and End-of-Year reports.*** For each of the recruitment strategies listed, you will enter the ***number of people who came into the clinic to initiate the informed consent process***, and the ***number of people ultimately enrolled*** for the reporting period listed only. If you have any questions about providing this information, please contact your site's Community Engagement Project Manager.

User Guide to Using the Cross-Network Community Engagement Reporting System

User Support

If you are having any challenges or issues navigating the system, gaining access, or for questions regarding any of the forms, please email your sites Network Community Program/Project Manager directly, or you may email the Cross-Network CE Reporting System Team at: cross-network-ce-reporting-system@googlegroups.com

User Resources

Please use the resources below to assist you in learning about the reporting system and REDCap. Additional support can be provided by contact your sites' Network Community Staff Representative.

Data Entry Overview:
https://vimeo.com/332083903

REDCap Resources:

REDCap Basic Overview:
https://redcap.vanderbilt.edu/consortium/videoplayer.php?video=redcap_overview_brief02.mp4&title=REDCap%20Video&referer=cdsweb07.fhcrc.org

REDCAP Detailed Overview:
https://redcap.vanderbilt.edu/consortium/videoplayer.php?video=redcap_overview03.mp4&title=REDCap%20Video&referer=cdsweb07.fhcrc.org

REDCap Data Entry Overview:
https://redcap.vanderbilt.edu/consortium/videoplayer.php?video=data_entry_overview_02.mp4&title=REDCap%20Video&referer=cdsweb07.fhcrc.org