HCHS/SOL Web Guidebook

The Study Member / Investigator

Version 1.1
1/27/2011

This guidebook is to assist the Study Member of the Hispanic Community Health Study / Study of Latinos (HCHS/SOL). Topics covered include submitting proposals for manuscripts, presentations, publications, and abstracts; revising these proposals and viewing reports of the status and content of these submissions; as well as accessing and subscribing to the study calendar. Nothing stated in this guidebook should be interpreted as overriding current study policy – this guidebook is not a manual of operations.

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The Guidebook Overview

This guidebook to the study website highlights some of the features available to you as an Investigator/ Study Member: from accessing and subscribing to the study calendar to submitting a proposal for a new manuscript. Website security is very important to the study; therefore, please remember to not share or distribute username and passwords, unless you have permission to do so. If you have any comments/criticisms or requests for additional information, please contact the study administrator at HCHSAdministration@mail.cscc.unc.edu.

The HCHS/SOL website

The study website can be accessed at the following web address:

http://www.cscc.unc.edu/hchs/

The website contains useful information for both the public/scientific community as well as the staff that work on the study. There are four basic sections on the site:

1. A public section that provides basic overview information about the study and staff contact information
2. The Affiliated Investigator section, a password-protected area with limited functions
3. The OSMB Area, a password-protected area with information and links designated strictly for members of the HCHS/SOL Observational Study Monitoring Board
4. The Study Members Area, a password-protected area for Investigators/study staff that contains information related to the study and access to the publications system

Figure 1. Navigation bar

Above, you can view the site's navigation bar. The public sections are designated by the bronze text color, while the secure, password-protected areas are listed in red. Each secure section requires different login credentials.

Public information

The information that is freely available on the study website falls under the first three navigation menu items on the website. The "About the Study", "Directory", and "Links" menu items contain public information resources that do not require passwords to access. The second menu contains links to the directory, which displays contact information for all of the staff that work on the study. The Directory menu contains options to sort the information by a variety of filters as well as allowing a search for a specific name. The Links page lists a variety of related websites and additional non-specific to HCHS/SOL resources.

The About the Study menu contains information for the general public. The first section is the acknowledgements, which is a list of the people that have contributed to the study. The study overview describes the origins, requirements, and goals of HCHS/SOL. The Ancillary Studies section contains forms and materials for those researchers that would like to propose a new ancillary study. The video section displays the public videos that have been commissioned. Information regarding the requirements for publications related to the study can be found in the Publications section. The Published Manuscripts section lists a table of all of the published manuscripts from the study, along with a link to access them. Viewing the materials may not be immediately viewable after publication, as subscriptions to the scientific journals are often required. Generally, the embargo on free access is a year before links for public viewing will work. Finally, the Public Manuals and Documents section contains the manuals and study documents that have been released to the general public, including the questionnaire instruments.

Protected information

The information that is accessible from the final three menus requires username and passwords to access. As a *Study Member*, you will not have access to the Affiliated Investigators and OSMB areas. The Study Members Area (the last menu in the navigation bar) will contain all of the information and links permitted.

Hovering over the Study Members Area menu will display a list of available options. Some the options will direct you to the Document Filter application (described in the next section) and others will contain a special page for the content. Descriptions of each option appear below.

- In the *Steering Committee Agendas and Minutes*, you may find the Steering Committee meeting agendas and minutes for in-person meetings and teleconferences. The *Study Calendar* is discussed in Chapter 5: *Study Calendar*. The *Subcommittees* option displays collections of recent and archival materials from the various subcommittees, such as the Ancillary Study proposals or action items from subcommittee meetings. Jump to the table of documents for a particular subcommittee by clicking on the committee name.
- The *Administrative Documents* contains files relating to the approval of the study by the National Institutes of Health (NIH) and the National Heart, Lung, and Blood Institute (NHLBI). The *Ancillary Studies Hub* contains information regarding the tracking of the various proposals in development, approved studies, and links to active/funded ancillary studies.
- The *Forms* section contains the forms that are in their final archival paper version "ready to use in the field" format. The study field centers collect data using a computer based proprietary data-management system. Many of these forms can also be found in the Public Documents section in the About the Study public menu.

- *Study Manuals* define the procedures and requirements of the study, the field centers, and the subcommittees. Like the forms, many of these manuals are included in the Public Documents section.
- The *Publications Hub* section contains three functions: submission of a proposal, maintenance of a proposal, and the reports of the submissions. These functions are detailed in depth in Chapter 2: *Proposal Submissions*, Chapter 3: *Proposal Maintenance*, and Chapter 4: *Proposal Reports*, respectively. The *Reports* are generated by the Coordinating Center and illustrate the overall study's progress and current state or that of specific subcommittees.
- The *Steering Committee to Review* section contains questionnaires that have been approved by the Questionnaires Committee and waiting review by the Steering Committee. The *Study Archive* shows some of the events that have happened at the study, such as PowerPoint photo presentations.
- The *Study Data & Analytic Methods* section contains reference materials for Investigators and is used for the distribution of datasets to Investigators.
- *Public Relations Resources* are the official files (such as logos) of the study and its sponsors that are to be used when officially representing the study.
- The *Training Materials* section includes documents for training purposes. It is important to stay up-to-date with the materials.
- The *DVD Project* refers to both the Recruitment video that was commissioned for the potential study participants and the educational videos regarding informed consent. This section contains the English and Spanish versions of the video as well as the release forms required for the study to use pictures of staff / participants.
- *Clinic Audio* contains recordings from clinic interviews used for quality control and training purposes.

The Document Filter application

The site employs the CSCC Document Filter application. This feature displays documents in a table format with available options to filter which documents will be shown.

The top-right corner of the content (below the header and navigation) has an option labeled "Show Filter and Sort Tool." Clicking on this option will provide options to filter and sort the documents that are displayed. The fields include selecting only certain committee documents, filtering by the date, draft status of the document, and including the archived documents in the results. Archived status has been designated to the documents from the study's developmental process. If the document that you are looking for is not visible, check the archived documents to see if it is present. Also, some of the pages contain extra options for filtering, such as by the type of document.

In the top-right corner of the content area is an option labeled “Show About This Page”. Clicking on this option will display a description of the information present on the page. You may click on the option again in order to hide the description.

Chapter 1: *Access the Study Members Area*

Introduction

The Study Members Area of the HCHS/SOL website is reserved for only those people that have been expressly granted access. That also means that information present in the zone should not be discussed or shared with entities that do not have access to view and edit the information. An *authorized* username and password are required to access the area.

Obtain Access

Step 1: Proceed to the HCHS/SOL website

The current website for the Hispanic Community Health Study can be found by accessing http://www.cscc.unc.edu/hchs/ on an internet browser.

Step 2: Obtain access to the Study Members Area

On the homepage of the study website, there is a horizontal navigation bar displaying various zones. Move the cursor to hover over the one labeled "Study Members Area". This will trigger a menu to drop down. Choose one of the options. If you are not currently logged in, a window will pop up requesting a username and password.

Step 3: User information

Enter _____________ for the username.

Enter _____________ for the password (Principal Investigators have this information for distribution to appropriate staff).

Upon successful entry of the two fields, choose OK and you will directed to the option that was chosen.

Troubleshooting

If you are having trouble with your account information, follow the steps below:

1. Confirm that you are using the correct username
   a. Usernames are not case-sensitive
2. Confirm that you are typing the password correctly
   a. Passwords are case-sensitive. (Make sure Caps Lock is disabled on the computer.)

If you are still having trouble, contact the system administrator for the study at HCHSAdministration@unc.edu with the subject line "Account issue: Study Member".

Chapter 2: *Proposal Submissions*

Introduction

HCHS/SOL Investigators are permitted to submit a proposal for an abstract, presentation, manuscript, or publication. This process requires knowledge of an authorized username and password for the study's website.

Submission Process

Step 1: Access Publications Hub application

Under the Study Members Area of the main navigation bar, there is "Publications Hub". (Refer to Chapter 1: *Access the Study Members Area* if unsure about logging in.)

Then select the "Proposal Submissions Form" button to begin the process.

Step 2: Choose the proposal type

The Study Members Area contains two options to proceed. The choice you make will depend on what type of proposal you are submitting.

If you are submitting a proposal for an abstract or presentation, then choose the first option and proceed to Step 3: Submit Abstract or Presentation of the guide.

If you are submitting a proposal for a manuscript or publication, then choose the latter option and proceed directly to Step 4: Submit Manuscript or Publication of this guide.

Step 3: Submit Abstract or Presentation

You will be redirected to a web form, which is labeled "HCHS/SOL Abstract or Presentation Submission." If not, then return to the previous page and try again.

The top of this form holds a shaded region labeled as the "contact information." Fill out this information first. Provide a valid email address where you or the primary contact for the submission can be reached. It is the study's policy to only accept institutional and organizational email addresses (.edu and .org). Commercial email addresses are discouraged. You must also provide a password that will be used to access and edit the proposal in the future. Confirm the password in the box below.

Now you can begin filling in the necessary information for the proposal. Item 1a is the manuscript number followed by the full title. If a proposal does not have an already approved manuscript number, then only include the full title of the proposal. Item 1b is the abbreviated title. This field is limited to 40 characters. It should be descriptive enough to allow the proposal to be identified, but should omit the study name and any extra descriptive elements. Item 1c is the keywords field. Include as many keywords that are related to the proposal, separated by commas. Item 1d is the meeting field, which is the time and place you would expect to present the proposed submission.

For Item 2, please follow the format to input the proposer's name. If the proposal has an affiliation with one of the centers in the study, please include that information in Item 3. Proposals require a sponsoring PI, and that person's name must be included as Item 4. The next item is for inclusion of any suggested co-authors. Follow the instructions included in the form as to the syntax to follow. Note that this list of co-authors is not always the final list. If a proposal is approved by the Publications Committee, it may be opened up to further co-author nomination as detailed in Co-author nomination, of Chapter 4.

Item 6, include the abstract or outline of the proposal. Also, if there is a presentation file, upload that using the provided "Browse…" function.

In order to finalize the submission, you must find the "Save/Submit" button at the top-right of the form and click it. This will bring you to a screen that confirms that the proposal was submitted successfully.

Step 4: Submit Manuscript or Publication

You will have been redirected to a web form, which is labeled as HCHS/SOL Manuscript or Publication Submission. If not, then return to the previous page and try again.

The top of this form holds a shaded region labeled as the "contact information." Fill out this information first. Provide a valid email address where you or the primary contact for the submission can be reached. It is the study's policy to only accept institutional and organizational email addresses (.edu and .org). Commercial email addresses are discouraged. You must also provide a password that will be used to access and edit the proposal in the future. Confirm the password in the box below.

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Item 6 refers to the Primary Author of the proposal. This person will be listed first and is responsible for the progress of the manuscript or publication. Choose an author from the drop down list. If the proposed author is not currently on the list, select “None” from the menu and type the name in the provided box.

Item 7 requests to know whether DNA or biomarker data will be needed for the research. Item 8 is a confirmation that no overlaps of scope and purpose exist between any current or published manuscript proposals. Item 9 is the location where data analysis would be performed. This information is used to project work load of analysis and permit study management decisions. Item 10 is for ancillary information. If the proposal is related to an ancillary study, then check “yes” in 10a and fill out the information for part 10b. Otherwise, check “no” for 10a and move on to Item 11.

Items 11, 12, and 13 are very important to the proposal. Strong arguments and hypotheses are needed. Item 14 should include all relevant references formatted according to journal requirements/standards.

In order to finalize the submission, you must find the “Save/Submit” button at the top of the form and click it. This will bring you to a screen that confirms that the proposal was submitted successfully.

Subsequent Events

Following a submission, the proposal will be reviewed by the Publications Committee.

The email address provided during the submission will be contacted with the results of the review. A study member can also view in-progress submissions. This feature is detailed in Chapter 4: *Proposal Reports*.

Chapter 3: *Proposal Maintenance*

Introduction

HCHS/SOL investigators can access and revise a proposal for an abstract, presentation, manuscript, or publication prior to study approval of the proposal. A revision to the initial proposal is often requested by the Publications Committee as part of the review process. This application allows a investigator/member to improve their proposal and it works closely with the submission application detailed in Chapter 2.

Edit/review submissions

Step 1: Access Publications Hub application

Under the Study Members Area of the main navigation bar, there is “Publications Hub”. (Refer to Chapter 1: *Access the Study Members Area* if unsure about logging in.)

Select the “Proposal Review / Maintenance” button to begin the process.

Step 2: Search/find submission

A screen with a drop-down menu and buttons will now be visible. There are two ways of accessing a submission to edit. The first option is to simply leave the drop-down menu on the “All” selection and click “Search”. All of the proposals that are open to editing will appear. The table can be sorted by a specific column by selecting its header. Click on the abbreviated title field of a proposal. This is a hyperlink to the submission edit form. The other option to accessing the edit form is to click on the drop-down menu and select the proposal that you would like to edit. Then choose the “Search” button and you will be redirected to the web-form.

Step 3: Update submission

The update form is very similar to the submission form used when the proposal was originally submitted. For more information regarding certain fields, please see Chapter 2: *Proposal Submissions* for more information (specifically Steps 3 and 4).

The email and password fields at the top of the form must be filled in with the same values as when the proposal was originally submitted. These fields protect the document.

After the fields have been updated, choose the “Save/Submit” button in the top right corner of the form. The form will not be saved until the “Save/Submit” button is pressed. *The “Save/Submit” function generates an alert email to the website administrator that a change has been made, no automatic confirmation message/email is sent to the submitter.*

Chapter 4: *Proposal Reports*

Introduction
Study Members have many options and features at their disposal.

First thing is to access the "Proposal Reports" section. Under the "Study Members Area" menu, select "Publications Hub." There will be a button to view the "Proposal Reports."

View in-progress and published submissions
Once you have entered the reports section, there will be a set of options. You will be able to view in-progress and published submissions.

Choose the button that corresponds to what you would like to see. The matching submissions will be displayed in a table. The default sorting criteria is the first column. Tables are able to be sorted based on a different field by selecting a column header. An in-depth look of each specific view follows.

View 1: Proposals in review
Proposals in review are sorted by default based on the submission time. This means that the newest submissions will be at the top. The view also contains the fields of title, first author, affiliation, status, last updated, and Publication Committee meeting where its status was last changed.

In order to view the content of a proposal, click on the submission time of a specific submission. This hyperlink will direct you to a printer-friendly version of it.

View 2: Abstracts in progress
Abstracts in progress are sorted by default based on their assigned abstract number. The view also contains the fields of title, lead author, status, last updated, and Publication Committee meeting where its status will be reviewed.

In order to view the content of an abstract, click on the view button in the title field. This will direct you to a pdf of the document.

View 3: Presentations and published abstracts
Presentations and published abstracts are sorted by their assigned number given by the Publications Committee upon approval of the proposal. Default fields displayed are the meeting date when presented/published, lead author, title, manuscript number (if applicable), proposed slides, and final slides.

In the title field, there is a white "View" button that can be selected to view the proposed or final presentation.

View 4: Manuscripts in progress

Manuscripts in progress are sorted by the "manuscript number" that is assigned by the Publications Committee as part of the approval process. The number has three parts: prefix, manuscript number, and suffix. The prefix and suffix are used when the Coordinating Center administration assign related manuscripts their id number. These values can be used to indicate a relation between manuscripts and for other reasons. In order to display all three in only one column, each part is separated by an underscore. Other fields included are the title, lead author, status, and dates regarding when the Publications Committee needs to receive the manuscript.

Original manuscript proposals can be viewed using the white "View" button included in the title field. Only approved manuscript proposals will have this button. The button redirects the user to the manuscript proposal as a PDF file (this function therefore requires Adobe Reader).

Certain manuscripts will also contain an orange "Nominate" button in the title field. For more information regarding when and how to utilize this function, see the section Co-author nomination.

View 5: Published manuscripts

Published manuscripts will be sorted by manuscript number, same as in View 4: Manuscripts in progress. The other fields are title, lead author, year of publication, journal, and links to the publication (often a journal database).

Co-author nomination

After a proposal is submitted to the CSCC, it undergoes review by the Publications Committee. If it is approved by the committee, the proposal can be opened for co-author nominations for a brief period of time. Study investigators/members are allowed to nominate co-authors for proposals. After the nomination period closes, the Publications Committee will add approved nominees to the proposal writing group. Only eligible nominees may be submitted for consideration. An eligible nominee is one that has been authorized to join writing groups by his or her affiliated center. The process for authorization may vary between centers.

Step 1: Accessing the Nomination form

From the Reports screen, there are options to select different views. An explanation of each view can be accessed in the section View in-progress and published submissions.

Choose "Manuscripts in progress." A list of all of the submissions will appear. Submissions that are open to co-author nominations will have an orange "Nominate" button in the title field. Nomination of co-authors is only open for manuscript proposals that have been approved and have had the process for nomination started by the Publications Committee. Click the "Nominate" button.

Step 2: Submit nomination

Fill in the relevant fields of the nomination form. You will be able to see the current nominees and the current authors in bold typeface at the top of the form.

Please ensure that the nominee is eligible for consideration before submitting his or her name.

When the form is filled out, submit the revision by using the "Save" button in the upper-right hand corner. The nomination will not be submitted unless the "Save" button is pressed.

Step 3: Subsequent events

After the nomination period closes, the committee will make a decision regarding the inclusion/exclusion of the nominations. Accepted co-authors will be added to the manuscript and contacted by lead author.

Chapter 5: *Study Calendar*

Introduction

The study calendar displays all of the regularly-scheduled HCHS/SOL events. This allows study members to stay up-to-date with the current schedules of calls and meetings. The calendar allows the user to view all events or filter the results by specific categories. Users can sign up for email reminders to specific events or to all events in a specific category. Investigators can have the reminder sent to others on their team as well. For those who use calendar software, the calendar can export the events in iCalendar format, which can be imported by most popular clients (Google Calendar, Microsoft Outlook, iCal, etc.).

Notifications are set to be sent 2 days before an event is scheduled to begin.

Accessing the calendar

Choose the "Calendar" option from the "Study Members Area" menu on the study website.

Username is case-sensitive. Unlike the rest of the website, this function requires the username to be inputted in the correct case.

Password is case-sensitive.

Upon successful completion of the login form, you will see the calendar after a brief interim redirection screen. (For more information regarding login, see Chapter 1: *Access the Study Members Area*.)

Navigating the calendar

The calendar defaults to the month-view of events, where the current month will display.

The bottom of the screen holds the options menus: "Display", "Navigation bar", "This calendar", and "System options".

The display menu allows you to highly customize your view of the calendar. The first drop-down menu allows you to view events for a day, week, month, quarter, or year. The second menu allows choosing the layout of this information: block, list, condensed, or timeline.

At the top of the screen, there are links to view different days, weeks, months, and years (depending on the display setting). This feature can be changed at the bottom of the screen under the "Navigation bar" options. The absolute bar displays links to a certain set of views regardless of the current date, while the relative option allows you to navigate based on the date of the view you are looking at. The calendar also allows you to show both of these navigation bars or neither of them.

The “This Calendar” menu allows for printing of the calendar as well as accessing the “Options” menu. This latter option allows management of email notifications, filtering calendar events, as well as exporting the events.

Managing subscriptions

On the main calendar screen, choose “Options” (at bottom of the screen). A window will pop up detailing all of the options available to the user. Choose the one labeled “Email Subscriptions”.

The window will now read “Email Notification”. Fill out the form. Enter the email address at which you would like to receive notifications. (Please remember the email policy of the CSCC, where commercial email addresses are not permitted for study-related information exchange.) Select which events to subscribe to. You may choose to receive notifications for every event, only those from specific categories, only those you specifically request, or none at all. In order to select multiple categories for the second option, you must use the keyboard. On a Windows installation, hold down the Ctrl key when selecting categories. Click the "Save" button to save the form.

Subscribing to individual events

From any of the calendar views, choose an event that you would like to be reminded about. A window will pop up. If an event allows for email reminders, enter your email in the designated area and click “Remind me”.