M&E Database for Community & Stakeholder Engagement in Clinical Trials (CSEMES)

Database Refresher Training – 3rd March 2015
Purpose of Training

• Refresher training on using the database
• Train you to how to
  1. Log in and reset your password
  2. Set up research sites
  3. Navigate the tools
  4. Entering data and uploading documents
• Overview of reports/outputs
Terms & Acronyms

• **M&E**  Monitoring and evaluation
• **CSE**  Community and stakeholder engagement
• **CSEMES**  Community and Stakeholder Engagement for Clinical Trials M&E Software
• **CAB**  Community advisory board
• **CSH**  Community stakeholder
• **BSH**  Broader stakeholder
• **NSH**  National stakeholder
• **ISH**  International stakeholder
• **SHs**  Stakeholders
Background - The ENGAGEMENT&ENT Toolkit

• M&E database is a web based data entry, data analysis and reporting tool.
  – Data entry component for 11 tools.
  – Simple descriptive statistics & narrative output component
  – Capability to export all data to a statistics package for sophisticated analysis & evaluation purposes;

• Potential for a mapping hub programmed already.
The Toolkit

- Work planning
- Reporting
- M&E Planning
- M&E Implementing
- Results, Analysis & Interpretation

The CSE M&E ToolKit
Tools
1a – Log in

Link: [http://67.207.154.82/App/](http://67.207.154.82/App/)
1b – Reset Password

- Click on the ‘Forgot your password’ Link
- Enter username and click the ‘Recover’ button. You will receive an email with instructions
1c – Change your password

You will be required to enter both your current password and the one.
1d. Updating your user profile

- Keep your email address up-to-date in the database.
1e. Logging out

• You should always log off when done.

Log out of the database using any of the two links above.
2 – Setting up Research Sites

• First step before entering data using tools
• Lists need to be kept up-to-date
• What do you need to enter?
  1. Trial Details: list of trials – used on all tools
  2. Region Details: used on tool A2
  3. Health Facility: used on tool A2
  4. Site Personnel: person compiling or interviewing
2a. Getting started

Link to the research site setup page
2b. Trial Details

Add the list of trials at your site that you will be collecting M&E data on. This list should be updated as new trials commence at your site.
2b. Trial Details – How are they used?

List of research trials on each tool is derived from the site setup screen.

List of research trial protocols is derived from the site setup screen.
### 2c. Region Details – Tool A2

#### Site Setup

Research Site selected: Wits Reproductive Health Institute - Johannesburg, South Africa

#### Site Details (Trial/Trial Protocols, Regions, Health Facilities and Site Personnel)

- **Trial Details**
- **Region Details**
- **Health Facility Details**
- **Site Personnel Details**

#### Region Details

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Botswana</td>
<td></td>
</tr>
<tr>
<td>Eastern Cape SA</td>
<td></td>
</tr>
<tr>
<td>Free State SA</td>
<td></td>
</tr>
<tr>
<td>Gauteng SA</td>
<td></td>
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<tr>
<td>KwaZulu-Natal SA</td>
<td></td>
</tr>
<tr>
<td>Limpopo SA</td>
<td></td>
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<tr>
<td>Mpumalanga SA</td>
<td></td>
</tr>
<tr>
<td>North West SA</td>
<td></td>
</tr>
<tr>
<td>Northern Cape SA</td>
<td></td>
</tr>
<tr>
<td>Swaziland</td>
<td></td>
</tr>
</tbody>
</table>

Showing 1 to 10 of 12 entries
2c. Region Details – How are they used?

In this example, no regions or health facilities have been added using the site setup screen.

In this example, 12 regions and 2 health facilities have been added using the site setup screen.
2c. Region Details – How are they used?

Adding regions will enable you to have a more detailed breakdown of your enrolment data by region.

In this example, 12 regions were added to your site setup. You can now specify enrolment data for each region.
## 2d. Health Facility Details – Tool A2

### Site Setup

Research Site selected: Wits Reproductive Health Institute - Johannesburg, South Africa

### Sites

Site details (Trial, Trial Protocols and Site staff involved in Engagements)

### Site Details (Trial/Trial Protocols, Regions, Health Facilities and Site Personnel)

#### Health Facility Details

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RNT centre: Hillbrow Johannesburg</td>
<td>The clinic space will be inside the Wits RHI Research and Training Centre, next door to the Esselen Clinic where the SW project is located. As part of the Hillbrow Health Precinct (HHP) in partnership with COJ, DOH and WRHI</td>
</tr>
<tr>
<td>Sediba Hope Medical Centre: Pretoria</td>
<td>Sediba Hope Medical Centre provides affordable healthcare in the Tshwane inner city. The centre is an affiliate of Participate Empower and Navigate (PEN), a non-profit FBO that works closely with other NGOs and State departments in and around Tshwane</td>
</tr>
</tbody>
</table>

Showing 1 to 2 of 2 entries

Add a row
2d. Health Facility Details – How are they used?

In this example, no regions or health facilities have been added using the site setup screen.

In this example, 12 regions and 2 health facilities have been added using the site setup screen.
2d. Region Details – How are they used?

Adding health facilities will enable you to have a more detailed breakdown of your enrolment data by region.

In this example, 2 health facilities were added to your site setup. You can now specify enrolment data for each facility.
2e. Site Personnel

Add the list of site personnel that will be either conducting the interviews or compiling the daily, monthly, quarterly or annual data. This list should be updated when there are any changes to the site personnel at your site. This will automatically update the Interviewer or Compiler list when filling in the tools.
2e. Site Personnel Details – How are they used?

List of research trials on each tool is derived from the site setup screen.

List of research trial protocols is derived from the site setup screen.
3 – Navigate the Tools

Navigate to a tool by clicking on the tool link on the left menu or on the toolkit map.
4 – Entering Data and Uploading Documents

• To get started, click on the tool using the left menu, or click on the tool on the toolkit map (if on the welcome page).
4 - Add a new tool record – Step 1

1. Select tool type. 
   AA, A1, A2, A3 
   B1, B2, B3 
   C1, C2 
   D1, D2

2. Click the “Add Row” button to add a new entry

3. Modify Draft – allows you to update the record. You should mark completed records as “Final” using Mark as Complete button.
4 – Searching for a record

Change the page size to view more entries.

1. Select tool type. AA, A1, A2, A3 B1, B2, B3 C1, C2 D1, D2

2. Search for the entry using the tracking number or date of consultation.
4b – Uploading documents – Step 1

On the “Related Documents” page, click the “Select file” to upload on or more documents. Use the shift key or ctrl key to select more than one file at once.
4b – Uploading documents – Step 2

1. After selecting the files, wait for the files to be uploaded.
2. Each successfully uploaded file will be added to the list of uploaded documents (highlighted text)
3. **Now click the “SAVE CHANGES” button to confirm the upload.** You will be redirected to the list page. Select the record you have just updated and click on the “Modify Draft” link. The uploaded file will appear in the list of uploaded documents.
4b – Uploading documents – Step 3

• List of uploaded documents

• Click on the file (displayed as a blue link) to download the uploaded document.

• Uploaded documents should be given meaningful titles (names), a category selected and a description.
5 – Mapping Hub (WIP)
5 – Mapping Hub (WIP)
• Your Questions!

• Post Training Tasks
  – Log into the database
  – Set up research site information (if not done)
  – Actively use the database to enter data
  – Provide suggestions and feed-back