PROJECT COORDINATION

Administering adaptation work in Equivalence

A detailed guide for research assistants, project coordinators, programme staff, and administrators who may handle invitations, source entry, multiple roles, deadlines, records, and outputs.

Administrative responsibility	What good practice looks like
Project setup	Accurate language route, target context, measures, item counts, and selected workflow.
Team coordination	Correct email addresses, accepted invitations, valid role combinations, and clear handovers.
Content operations	Every item, instruction, response option, and supporting unit is entered and assigned.
Schedule	Project duration is current; task deadlines and reminders are monitored without replacing substantive review.
Records and outputs	Names, dates, contributions, decisions, and exportable records are complete before sign-off.

Role boundary
Administrative access does not transfer scientific authority. Escalate framework choices, construct questions, disputed wording, threshold interpretation, participant-safety issues, and final sign-off to the project leader or named method lead.

What Equivalence does not automate

- Equivalence does not supply translators or generate the official target-language wording.
- It does not decide whether a translation is conceptually equivalent.
- It does not replace participant consent, research ethics, data-management, or validation procedures.
- It does not make the final report correct when the underlying project record is incomplete.

ACCESS AND RECORDS

Set up accounts and understand permissions

Each person uses their own account. Project access comes from an invitation and assigned role, not from shared credentials.

1	**Create an account** Register through Sign up using the email address that will receive project invitations.
2	**Complete the research profile** Enter the required name, degree or professional background, organisation, role, research area, country or region, and planned use.
3	**Accept the invitation** Open the invitation email and accept the assigned project role. If the email is missing, check spam and ask the leader to verify the address.
4	**Review My Projects** Use My Projects to see active projects, assigned tasks, archives, and the completed example project.
5	**Open the correct project** Confirm project name, language route, target country or region, framework, measures, and current stage before editing.

Access principles

- Never share accounts or copy another person's submission into your own role.

- Blinded content is intentionally hidden. Do not request screenshots or files that bypass the independent-work design.

- Use Viewer access for oversight when no operational role is needed.

- Remove access promptly when a member leaves; record a replacement and handover when needed.

- Keep personal participant information out of project fields unless the approved protocol explicitly permits it.

Completed example project
New users can open the read-only Filipino MHC-SF example from My Projects to see an end-to-end completed workflow and downloadable report. It does not count toward the project allowance.

PROJECT CONFIGURATION

Enter setup information accurately

If the project leader delegates setup, confirm each entry before advancing. Corrections become harder after work is assigned.

Field	Administrative check	Escalate when
Project title	Use a recognisable, non-confidential study title.	The title could disclose protected information.
Source language	English is the default; choose Other and enter the language when needed.	The source version uses more than one language.
Target language	Enter the language used for the adapted instrument.	Multiple variants or scripts may require separate projects.
Country or region	Select the intended-use context from the controlled list.	The adaptation targets several materially different contexts.
Framework	Choose only the framework approved by the leader.	The team wants to add, remove, or reorder stages.
Duration	Enter the planned overall project duration, not individual deadlines.	The plan changes materially.

Adding multiple measures

1	**Enter the measure count** Use the number of scales or measures expected in the project.
2	**Name each measure** Use the full name and abbreviation consistently.
3	**Add the source** Record the APA reference or DOI when available, plus a permission or rights note in the project record.
4	**Set the expected item count** Count scored items for that measure; track instructions and response options as supporting units.
5	**Check measure-specific text** Do not reuse one response set when measures use different anchors, recall periods, or administration instructions.

SOURCE CONTENT

Build a complete respondent-facing register

The translation workflow must cover what respondents actually see, not only the scored item stems.

Content type	Enter	Quality check
Items	Exact source wording, identifier, order, and measure.	Count matches the registered measure.
Instructions	Recall periods, branching, examples, section headings, and administration prompts.	Placed with the correct measure and translated as assigned.
Response options	Labels, numeric values, order, and any visual or verbal anchors.	Mapping is preserved and variants are not collapsed.
Supporting units	Non-scored follow-up questions, safety text, or explanatory wording.	Included when respondents or administrators rely on it.
Reference and rights	Source citation, version, DOI or URL, and permission note.	Matches the exact source package entered.

Efficient source entry

- Work measure by measure and compare the entered count with the expected count.
- Use bulk entry only after cleaning line breaks and confirming that one source item appears per row.
- Keep identifiers stable so translation and review exports remain easy to reconcile.
- Proofread punctuation, symbols, reverse-scored wording, response values, and item order against the authorised source.
- Ask the leader to approve the source register before advancing to translation.

Common failure
Instructions and response options often lag behind item translation. Check their status separately for every measure at each handover.

PEOPLE AND ROLES

Invite, assign, and hand over work

The same person may hold several compatible roles, and several people may share a role, but independence rules still apply.

Administrative task	Procedure
Invite a member	Open Project Settings, enter the exact email address, select permitted roles, and send the invitation.
Duplicate a role	Assign the same role to more than one member when independent or parallel work is required.
Combine roles	Select multiple roles only when the interface permits the combination and the leader approves it.
Track acceptance	Monitor pending invitations. Resend when needed and confirm the member can open the project.
Replace a member	Remove access, document the handover, invite the replacement, and confirm whether prior work should remain attributed.
Change a deadline	The assignee may adjust the default deadline after accepting. Record broader schedule changes with the leader.

Independence safeguards

- Forward translators submit independently before seeing one another's work.
- Back-translators remain independent and blind to the original where the selected method requires it.
- Expert reviewers submit ratings independently before aggregate results are revealed.
- An administrator should not manually disclose hidden submissions to accelerate a stage.
- When a role combination is blocked, ask the leader to assign another qualified person rather than seeking a workaround.

Notifications
Members are notified when work is handed over to them. Accepted assignments receive a default seven-day deadline, and the due-date reminder is sent at 9:00 a.m. Hong Kong time.

WORKFLOW OPERATIONS

Coordinate stages without making the scientific decision

Administrators can keep records complete, identify blockers, and prepare handovers while escalating substantive questions.

Stage	Administrative completion check	Escalate
Translation	All assigned units submitted by every required translator.	Omitted wording, translator dispute, or source ambiguity.
Reconciliation	One selected version and rationale recorded for every unit.	Construct shift, unresolved difference, or changed response mapping.
Back-translation	Submission complete where the framework retains the stage.	Meaningful discrepancy or question about whether the stage is required.
Expert review	Required reviewers submitted; comments and flagged items are visible to the appropriate team.	Low indices, conflicting comments, or proposed revision.
Debriefing	Required participant logs entered, de-identified, and linked to issues and resolutions.	Safety concern, repeated misunderstanding, or need for another round.
Sign-off	Final wording, team, dates, duration, and outputs reviewed.	Any incomplete evidence or disputed final version.

Daily handover routine

1	**Check the stage gate** Read the stated completion requirements and identify the exact missing record.
2	**Contact the responsible role** Send a concise reminder with the project, stage, measure, task, and deadline.
3	**Confirm the submission** Verify that the platform shows the work as submitted; do not rely only on an email reply.
4	**Request leader review** Ask for substantive approval when wording, ratings, or participant findings require a decision.
5	**Advance and confirm handover** After approval, advance the stage and confirm the next assignee received access and notification.

MONITORING AND TROUBLESHOOTING

Resolve routine blockers safely

Most problems come from an unaccepted invitation, a missing unit, an incomplete submission, or a role boundary working as intended.

Problem	Administrative response
Invitation not received	Verify spelling, ask the member to check spam, then resend from Project Settings.
Member sees no task	Confirm acceptance, role assignment, active stage, and that the task has been handed over.
Content is hidden	Check whether blinding is active and whether all required independent submissions are complete.
Stage cannot advance	Read the gate message and check missing source units, submissions, rationales, ratings, logs, or sign-off fields.
Item count is wrong	Filter by measure and compare scored items separately from instructions, response options, and supporting units.
Deadline is wrong	Ask the assignee to adjust the task deadline; update overall duration only when the project plan changes.
Report has incorrect details	Correct the underlying project record, then regenerate. Do not edit only the PDF.
Project will not allow edits	Check whether it is archived, signed off, or read-only because the project leader's plan is inactive.

Escalate immediately

- A participant-safety concern or unintended disclosure of identifiable information.
- A request to bypass blinding or role independence.
- A disputed change to item meaning, construct, response options, or scoring.
- A suspected unauthorised instrument copy or adaptation.
- A final sign-off request when records or approvals are incomplete.

RECORDS, EXPORTS, AND CLOSURE

Prepare a clean version of record

The quality of the export depends on the quality of the project record. Complete administrative fields before the leader signs off.

Pre-export audit

- Project name, language route, target context, framework, measures, and project duration are correct.
- Project leader is listed first and every member's role and contribution are accurate.
- All source and adapted units are present in the final measure order.
- Required workflow dates, reviewer counts, participant counts, indices, and issue resolutions are recorded.
- The final adapted wording is approved and the content hash was generated at sign-off.
- The report has been regenerated after the last correction and opened for a visual check.

Closure action	Use
Download PDF	Fixed completed report for circulation, review, or archiving.
Download Word	Editable Pro report for manuscript and supplementary materials.
Archive	Preserve a paused or completed project outside the active list.
Restore	Return an archived project to the active list.
Delete	Permanently remove an erroneous or non-retainable project after confirmation.
Manage billing	Open Stripe to update payment details, download invoices, or cancel a subscription.

Keep the final package together
Archive the completed report, editable manuscript materials where applicable, audit certificate, permission documentation, validation plan, and any institution-required records under the project's approved retention procedure.

REFERENCE

Operating checklist and quick links

Use this page as a recurring coordination checklist. Sign-in is required for account and project pages.

At the start of each week

- Review active projects, My Tasks, current stages, pending invitations, and approaching deadlines.
- Check item and supporting-unit completion by measure.
- Identify handovers awaiting leader review or assignee acceptance.
- Confirm project duration and staffing still match the work plan.

Before each stage handover

- Every required submission is complete in the platform.
- The leader or named method lead has reviewed substantive evidence.
- The next role is assigned, accepted where possible, and independent where required.
- The handover notification and deadline are appropriate.

Equivalence page	Use it for
My Projects	Review projects, tasks, archives, and the completed example.
New Project	Create a project when delegated by the project leader.
Methods Guide	Check stage rules, thresholds, and platform outputs.
Account Settings	Update the research profile and account information.
Billing	Manage the project leader's plan and Stripe portal.
Product Updates	Review recent changes that may affect procedures.
Developer and user guides	Download current guidance and find contact details.

When in doubt
Do not alter the method to solve an interface or scheduling problem. Check the Methods Guide, then escalate to the project leader. Platform contact details and the latest downloadable guides are on the Developer page.