STUDY LEADERSHIP

Leading an adaptation project in Equivalence

A procedural guide for principal investigators, project leaders, supervisors, and graduate researchers responsible for the method, team, final decisions, and reporting.

You are responsible for	Equivalence helps you
Method selection and justified deviations	Start from an established framework and configure the stage sequence.
Instrument permissions and source accuracy	Register measures and keep items, instructions, response options, and references together.
Qualified personnel and role independence	Assign scoped roles and prevent incompatible combinations.
Decision quality and final sign-off	Retain rationales, review evidence, participant feedback, dates, and the signed-off version.
Publication and project records	Generate methods text, tables, figures, profiles, and an audit certificate.

Human-led workflow
Equivalence does not translate instruments and does not provide translators. Your team supplies the source material, qualified people, methodological decisions, and final approval; the platform structures and records their work.

Start here

1	**Review the method** Read Frameworks and standards and identify the best starting workflow.
2	**Review the expected outputs** Use Example outputs to decide what evidence the completed project must contain.
3	**Create your account** Register at Sign up and complete the research profile.
4	**Create the project** Open New Project and work through the guided setup.

BEFORE SETUP

Prepare the study and source package

A careful setup prevents missing respondent-facing text, unclear role boundaries, and late changes to the adaptation design.

Define the adaptation

- State the construct, intended population, country or region of use, target language, mode of administration, and planned validation study.
- Confirm whether one project will contain one measure or several related measures sharing the same language route, team, and workflow.
- Choose a framework based on the instrument and intended use. Back-translation is optional in some frameworks and should not be added automatically without a rationale.
- Set a realistic project duration. Individual assignees receive a default seven-day deadline after accepting a role and may adjust it later.

Prepare each measure

Source element	What to prepare
Measure record	Name, APA reference or DOI, rights or permission note, and expected item count.
Instructions	All wording respondents read before or between items, including recall period and branching instructions.
Scored items	The exact source wording and order used in the intended source version.
Response options	Every anchor, category label, numeric mapping, and measure-specific variation.
Supporting units	Non-scored questions, examples, prompts, headers, safety text, or administration notes requiring adaptation.

Rights check
Record the version you are adapting and obtain any required permission before uploading or distributing protected instrument content. Equivalence does not grant adaptation rights.

PROJECT SETUP

Create the project and measures

The project wizard creates the language route, target context, framework, stage configuration, initial measures, and invitations.

1	**Basic information** Enter a concise project name, source language, target language, country or region of intended use, field, and overall project duration.
2	**Framework** Select the closest established framework. Review the summary rather than choosing only by familiarity.
3	**Stage configuration** Keep, remove, reorder, or configure stages before work begins. Record a rationale for method-specific changes in the project record.
4	**Measures** Enter the number of measures, then add each name, optional APA reference or DOI, expected item count, instructions, and response options.
5	**Initial team** Invite known team members. Additional members and roles can be added later from Project Settings.
6	**Source entry** Continue directly into the source-item workspace and complete each measure against its expected count.

Multiple-measure projects

Use one project when measures share the same source language, target language, target context, leadership, and broad adaptation design. Each measure retains its own reference, expected item count, instructions, response options, and item register.

Create separate projects when language routes, target contexts, permissions, teams, timelines, or methodological requirements differ materially.

Source entry gate
Do not advance with zero measures or incomplete source content. Check item counts and every respondent-facing unit before assigning translation work.

TEAM DESIGN

Assign roles without compromising independence

A person may hold more than one role when the selected framework permits it, but incompatible roles remain blocked.

Role	Main responsibility	Leader check
Project leader	Leads and facilitates the project; approves configuration and final sign-off.	Named first in the team record.
Forward translator	Produces an independent target-language version of all assigned units.	Must not see another translator's version before submission.
Reconciler	Compares translations and records one selected wording plus rationale.	Should have the linguistic and construct knowledge required to arbitrate differences.
Back-translator	Translates reconciled wording back to the source language when the framework uses this stage.	Should be independent and blind to the original source wording where required.
Expert reviewer	Rates relevance and contributes qualitative comments.	Ratings remain blinded until all required reviewers submit.
Interviewer	Conducts cognitive debriefing and records participant interpretation and issues.	Must follow the approved participant protocol.
Viewer or administrator	Supports logistics or read-only oversight without taking an incompatible scientific role.	Grant only the access required.

Invitation and handover rules

- Invite by the email address the person will use for Equivalence.

- A role starts after acceptance. The assignee receives a handover notification and a default seven-day deadline.

- Assignees may adjust their own deadlines; reminders are sent at 9:00 a.m. Hong Kong time on the due date.

- Duplicate roles are allowed when more than one person should perform the same function.

- Review pending invitations and resend when necessary. Remove access promptly when a person leaves the team.

ADAPTATION WORK

Run the framework-selected stages

The project dashboard shows the active stage, completion requirements, assigned tasks, and the handover to the next stage.

Stage	What the team records	Leader decision
Forward translation	Independent versions for items, instructions, response options, and supporting units.	Confirm required translators submitted before comparison.
Reconciliation	One reconciled wording and a rationale for every unit.	Resolve omissions, construct shifts, register, and response mapping.
Back-translation	Independent source-language rendering when retained by the framework.	Decide whether differences indicate a target-language problem or an acceptable adaptation.
Expert review	Blinded relevance ratings and comments; I-CVI, modified kappa, and S-CVI/Ave.	Review flagged items and document revisions rather than relying on a threshold alone.
Cognitive debriefing	Participant interpretation, response use, difficulties, and issue resolution.	Determine whether further revision or another round is needed.
Final sign-off	Final wording, approval record, date, and SHA-256 content hash.	Confirm the complete package before locking the version of record.

Do not advance merely to clear a gate
A completed field is not evidence of an adequate decision. Review wording, rationales, comments, ratings, and participant feedback before handing the project to the next role.

When a stage is optional

Follow the selected framework and the documented study design. For example, back-translation is useful in some approaches but is not universally required. If a stage is omitted or added, retain a defensible reason for that choice in the project record and manuscript.

OVERSIGHT

Monitor progress, quality, and the project record

Use the dashboard for substantive oversight as well as scheduling. The project leader remains accountable even when administration is delegated.

Routine leader checks

- Review My Tasks and the project stage summary at least weekly.
- Check accepted and pending roles, overdue assignments, and handovers awaiting action.
- Inspect counts by measure so instructions and response options do not lag behind item translation.
- Read reconciliation rationales and comments on flagged expert-review items.
- Confirm participant feedback is de-identified and linked to a recorded issue or resolution.
- Check that the project duration and actual workflow dates are accurate before sign-off.

Project controls

Action	Use it when	Effect
Duplicate	A new adaptation will reuse the structure but not the completed evidence.	Creates a separate editable project.
Archive	Work is paused or complete but should remain accessible.	Removes it from the active list while preserving records.
Restore	Archived work needs to resume.	Returns it to active projects.
Delete	A project was created in error or must be permanently removed.	Deletes the project and associated data after confirmation.

Use deletion cautiously
Archive when there is any possibility that the audit trail or project record will be needed. Permanent deletion is intended for records that should not be retained.

COMPLETION AND REPORTING

Sign off and export the project

Outputs are generated from the work recorded across the project. Review them as drafts derived from your data, not as substitutes for author judgement.

Output	Use	Leader review
Completed report PDF	A fixed project package available with Equivalence One and Pro.	Check names, dates, item tables, method statements, and notes.
Editable Word report	A Pro export for manuscript and supplementary-material preparation.	Edit into the authors' voice and journal format.
Methods paragraph	A project-derived adaptation methods draft.	Verify every claim and retain relevant citations.
CVI table	Item- and scale-level content-validity summary.	Report rater count, scale, thresholds, revisions, and interpretation.
Workflow figure	A visual summary of completed stages and counts.	Use the project-specific route and update the caption for the journal.
Profiles table	Qualifications and contributions of the adaptation team.	Confirm consent, accuracy, and appropriate disclosure.
Audit certificate	A hash-linked record of the signed-off package.	Do not present it as validation or institutional approval.

Final sign-off checklist

- All measures, items, instructions, response options, and supporting units are complete.
- The final target wording matches the version approved by the team.
- Role assignments, actual dates, rationales, reviewer counts, and participant records are accurate.
- Any framework deviations and omitted optional stages are explained.
- Instrument rights, safety procedures, and validation limitations are stated where relevant.
- The exported methods text and tables have been reviewed against the manuscript and TARES.

REFERENCE

Quick links and troubleshooting

These links lead to the main pages used by project leaders. Sign-in is required for project and account pages.

Equivalence page	Use it for
Create an account	Register, then complete the required research profile.
My Projects	Open active projects, archived projects, tasks, and the completed example.
New Project	Create the project, language route, target context, measures, team, and workflow.
Methods Guide	Review stages, thresholds, role controls, and outputs.
Frameworks and standards	Review methodological sources and TARES-aligned documentation.
Example outputs	See what a completed export can contain.
Billing	Manage a subscription or open the Stripe billing portal.

If progress is blocked

Symptom	Check first
A stage will not advance	Open the stage requirements and identify missing submissions, rationales, ratings, participant logs, or sign-off fields.
A member cannot see a task	Confirm the invitation was accepted, the correct email was used, and the required role is assigned.
Translations are hidden	Blinding remains active until all required independent submissions are complete.
Counts do not match	Review each measure separately, including instructions, response options, and supporting units.
A second project is read-only or cannot be created	Review the project leader's plan at Billing. Invited collaboration does not use a member's allowance.
The report contains an unexpected statement	Correct the underlying project record first, then regenerate the output.

Method support
Use the in-platform Methods Guide for stage definitions and thresholds. For platform questions or corrections not available in the interface, use the contact information on the Developer page.