

Section 14. Computer Assisted Self-Interview (CASI)

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14.1 Background

Computer Assisted Self-Interview (CASI) is a method for collecting information where a person reads questions on a computer screen and enters his or her answers directly into the computer. Many different types of electronic equipment (such as laptops, desktops, touch-screen computers or handheld devices) can be used to administer the CASI and various types of software can be used to design the data collection tool. For HPTN 084, the software used to design the survey is called REDCap Cloud (RCC). The HPTN084 Questionnaire is attached in **Appendix 14A**.

14.2 Technical Requirements

Device

The HPTN 084 CASI questionnaires are web-based (using RCC software) and can be taken from almost any device with a strong internet connection and a web browser. **Please review RCC’s hardware and software requirements web page for more information:**

<https://portal.redcapcloud.com/Documentation/article/KA-01028/en-us>

In the room where the computer is located, there should be an electrical outlet and a jack for broadband connection unless a reliable wireless connection is used. If possible, the computer should be plugged into an AC power source. If a laptop is used, it is recommended that an external mouse be connected to the laptop. To minimize problems with computers, sites should avoid having food or drink nearby and keep the area where the computer is used clutter-free. An antivirus program should also be installed on the computer.

Each site is responsible for addressing issues of computer security and privacy as well as general issues such as lighting, ergonomics, and overall participant comfort. For questions about how to use a computer, sites should refer to the operations manual of the desktop or laptop. Issues such as where the computer(s) will be located and who is in charge of addressing computer-related issues should be addressed in each site’s study specific Data Management Standard Operating Procedure (SOP).

Web Browser

The following list of web browsers can be used to administer the CASI in RCC.

- Safari for macOS
- Microsoft Edge
- Google Chrome for Windows, macOS, and Linux desktops
- Mozilla Firefox for Windows, macOS, and Linux desktops

Make sure to always use the most current version of each browser to optimize the full capacity of the product's features and functionality.

14.3 CASI Administration

The CASI will be administered to participants at many different visits. Participants are expected to complete each of the surveys. However, if the participant does not complete the survey (e.g., decides not to take it), this must be noted on the Behavioral Assessment CRF.

The questionnaire should **always be administered before any HIV/STD risk reduction counseling occurs** and the participant should complete the questionnaire in one sitting whenever possible.

14.3.1 Survey URL

All surveys are accessed via a single URL provided by SCHARP. The link can be bookmarked in a web browser; however, ***desktop shortcuts to the survey should not be created***: using a desktop link to connect to the survey will result in the site always connecting to the version of the survey that was running when they originally created the link rather than the most current version of the survey. It is likely that the survey will need to be updated over time; using a desktop link or shortcut will result in the old version of the survey being administered.

14.3.2 CASI Practice for Site Staff

Staff members should be familiar with the content of the questionnaire in order to respond to participant questions. Staff members who will administer the survey should practice taking, and demonstrating how to use, the survey using test CASI Identification numbers (CASI IDs) provided by SCHARP. The staff member responsible for administering the CASI should be able to explain to the participant how to complete the survey, including how to use a computer and how to click through the questions using a mouse or touchpad.

14.3.3 Logging in to the CASI

When the participant is ready to begin the CASI, the staff member responsible for administering the survey will click on the appropriate URL. To find the surveys easily it is helpful to bookmark the URL you will be using in this study in your preferred web browser.

SCHARP will provide each site a list of CASI IDs in a link log to document the HPTN 084 PTIDs linked to each CASI ID.

Once the survey is opened, the staff member will enter a “CASI ID” from the list provided by SCHARP and the appropriate language (if applicable) and visit is selected. You will then be prompted to enter the PTID that is linked to the CASI ID.

Site staff will then answer one or more questions based on the visit; the answers to these questions will determine whether certain survey items will be included or excluded from the questionnaire.

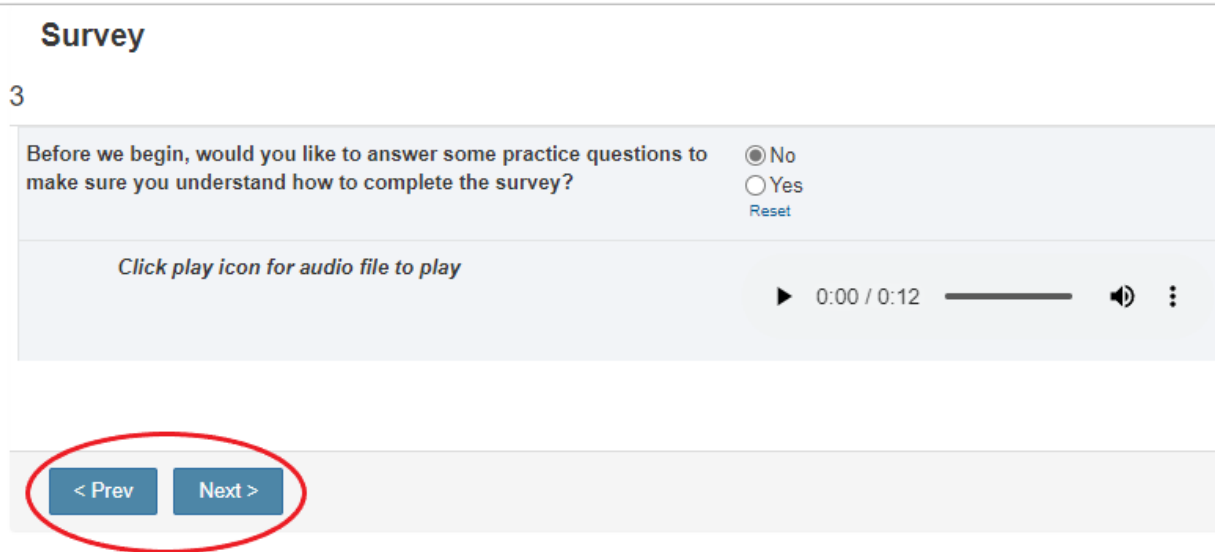
Once these questions are answered, the participant is ready to take the survey on his or her own.

14.3.4 Navigating the Survey

Participants should navigate through the survey using the “< Prev” and “Next >” buttons that are part of the RCC software (**Figure 1**); they **should not** use the browser navigation buttons, which are the forward and back arrows usually located in the top left-hand corner of the browser (**Figure 2**). If the browser navigation buttons are mistakenly used, proper functioning of the survey can be disrupted, and data may be lost.

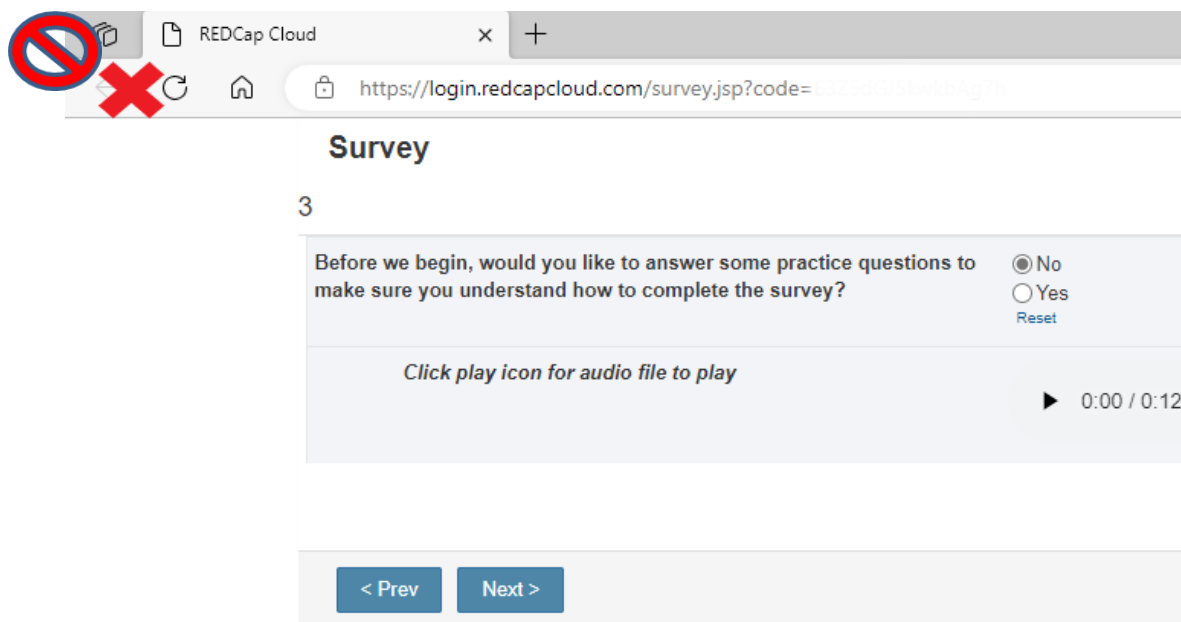
If a participant asks for help while taking the survey it is OK for a staff member to assist the participant. For example, if the Internet crashes, the survey freezes or the participant does not understand a question, it is OK for the site staff to help. For technical problems with RCC see Section 9.6.12.

Figure 1: Use the “< Prev” and “Next >” Buttons to Navigate Through the Survey



The screenshot shows a survey titled "Survey" with a question number "3". The question is: "Before we begin, would you like to answer some practice questions to make sure you understand how to complete the survey?". There are two radio buttons: "No" (selected) and "Yes". Below the "Yes" button is a "Reset" link. Below the question is an audio player with the text "Click play icon for audio file to play" and a play button. At the bottom of the survey area are two buttons: "< Prev" and "Next >". These two buttons are circled in red.

Figure 2: Do Not Use the Browser Navigation Buttons During The Survey



The screenshot shows a web browser window with the address bar displaying "https://login.redcapcloud.com/survey.jsp?code=...". The survey content is the same as in Figure 1. However, the browser's back, forward, and refresh buttons are highlighted with a red 'X' and a red circle with a diagonal line through it, indicating that these browser navigation buttons should not be used during the survey.

14.3.5 Graphical Interface of the CASI

Most of the questions in the survey are answered by clicking on radio buttons (**Figure 3**), which consist of a group of circular white dots. When the participant selects one of the circles, a grey dot appears in the middle of the circle. Some of the questions in the survey are answered by clicking on check boxes (**Figure 4**). When the participant clicks on the check box, a blue check appears in the box. For some questions, instructions will indicate whether more than one check box may be selected.

Some questions require participants to type in a number (**Figure 5**). Sometimes an “other, specify” box is included as one of the response categories to capture participant responses that do not fit into one of the categories listed. When a participant’s response does not match or fit into one of the listed response categories, the participant may select “other” and type in their answer in the space provided (**Figure 6**).

When training the participant how to complete the survey on the computer, it can be helpful to point out the different ways they will be required to answer questions. There is also a brief (1-page) non-required section at the beginning of the survey for participants to practice entering responses, if desired.

14.3.6 Figure 3: Graphical Interface – Radio Buttons

Survey

3

Before we begin, would you like to answer some practice questions to make sure you understand how to complete the survey?

☐ No
☒ Yes
[Reset](#)

Click play icon for audio file to play

▶ 0:00 / 0:12

Figure 4: Graphical Interface – Check Boxes

Do you have any favorite colors? *Mark all that apply.*

☐ No
☒ Red
☐ Yellow
☒ Blue
☐ Green
☒ Orange
☐ Purple
☐ Black
☐ White
☐ Other
[Reset](#)

Figure 5: Graphical Interface – Entering Numbers

If you have any questions about how to complete these items, please ask a member of the study staff

Click play icon for audio file to play

▶ 0:00 / 0:07

How old are you?
(0 / 199)

34

Click play icon for audio file to play

▶ 0:00 / 0:03

Figure 6: Graphical Interface – Entering Text

Do you have any favorite colors? Mark all that apply.

☐ No
☐ Red
☐ Yellow
☐ Blue
☐ Green
☐ Orange
☐ Purple
☐ Black
☐ White
☒ Other

Click play icon for audio file to play

▶ 0:00 / 0:28

Other Color
(- / 100)

scarlet

14.3.7 Submitting the Survey

Once the participant has answered the last question and clicked the “Submit” button, there will be a “thank you” message on the screen, which indicates the survey is complete.

It is important that the staff member responsible for administering the CASI survey double check that the participant has completed the survey before closing the browser.

14.3.8 What Happens to the Data?

It is **important** to understand, and to tell the participant, that the data the participant enters into the computer will never be stored on that computer. Each time the “next” button is clicked and the participant moves to the next question, the answer to the previous question will automatically be transmitted to the SCHARP-specific server. Site staff cannot access these data.

14.3.9 How to Resume a Partially Completed RCC Survey

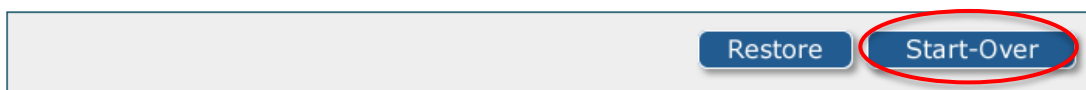
If there is an intentional or accidental closure of the browser, if internet connection is lost, if the computer crashes, or if the participant needs to pause survey completion mid-visit for any reason, site staff will need to log the participant back in to the survey – once available - to allow completion.

Re-open the survey in a web browser and re-enter the participant ID. A page will appear with the following message: “We have located a survey in-progress. Would you like to continue where you last left off or start over?” (**Figure 7**).

Figure 7: Resuming a Partially Completed Survey

We have located a survey in-progress.

Would you like to continue where you last left off or start over?



Select the “Start-Over ” button to open the survey to where the participant stopped.

14.3.10 Making Up a Missed CASI

If a participant misses taking the CASI at a required visit, or if there is a technical problem that cannot be resolved, the participant can take the CASI at a later time, but no later than the next required visit. If the survey was not done for Week 24 visit, it can be made up no later than Week 32 visit. *The original CASI ID/visit code combination for the missed survey is entered into the CASI.* For example, the Week 24 visit took place on 1 July 2023 but the survey was not done; the participant returned on 8 July and completed the survey. Week 24 would be entered into the survey.

14.3.11 Reminders

Before the participants take the survey, the site should remember to do the following:

- Explain the purpose of the survey and provide general instructions regarding how to use the computer, if necessary, such as how to use a mouse and how to “click” a button.
- Emphasize that the browser navigation buttons should never be used; only the buttons that say “Previous” and “Next” in the actual RCC survey should be used when navigating the survey.
- Remind the participants that their answers are completely confidential. The answers provided by the participants will never be permanently stored on the computer (they

- are sent to a server that is only accessed by the Statistical and Data Management Center); therefore, none of the site staff will ever see their answers.
- Tell the participants that at the end of the survey they will see a “thank you” message on the screen. This indicates that the participants have completed the survey and they do not have to do anything else.
 - Let the participants know that they can ask a site staff member for help, if needed.

14.4 Problems and Questions

If a problem with the CASI occurs, or for all other questions about the CASI including technical questions regarding RCC, contact the SCHARP Clinical Data Manager alias: sc.084cdm@scharp.org.

Stephanie Beigel-Orme
sbeigelo@scharp.org

Please remember that the SCHARP office is located in the Pacific Time Zone (GMT – 7:00). Therefore, “real time” responses to emails and phone calls may not always be possible. A response can be expected, however, within 24 hours.