SOP 2: Procedure for Requesting Access to the Platform

1. Introduction

This document describes the steps to follow to request the use of the ESPEN Collect platform. It is intended for national programmes, NGOs and other partners involved in the elimination of neglected tropical diseases (NTDs) in the WHO African Region.
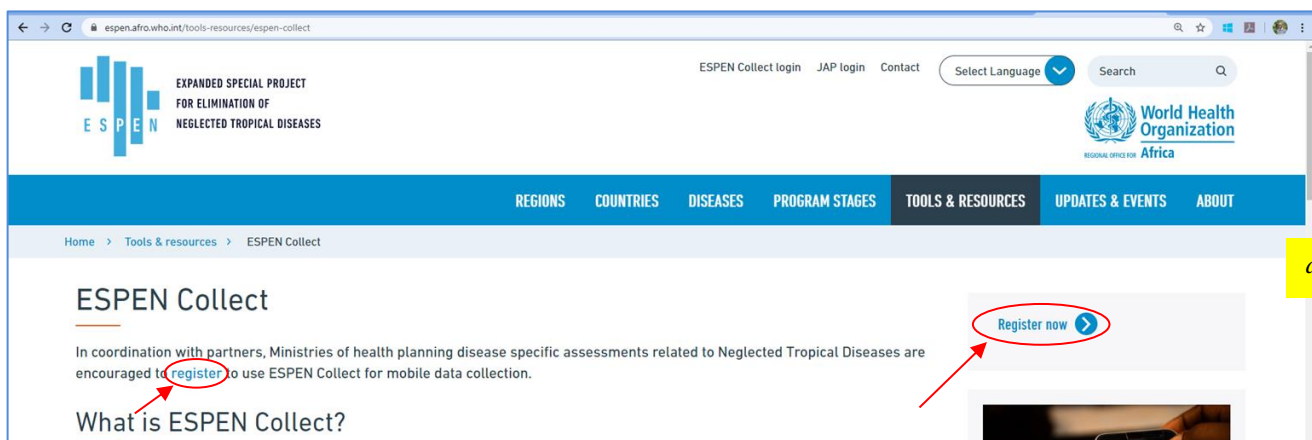
2. Procedure

2.1. Complete Registration form

In coordination with partners, countries' MoH fill a request to use ESPEN Collect survey support services by completing the registration form on ESPEN Portal. The registration form is filled for each survey type being requested at least 6 weeks before the intended start date.

a. Sign up for ESPEN Collect services

- On ESPEN Portal (https://espen.afro.who.int) go under 'Tools & Resources', then 'Data Collection Tools' and select ESPEN Collect.
- On ESPEN Collect registration page, click on 'Register' or on 'Register now' [a].

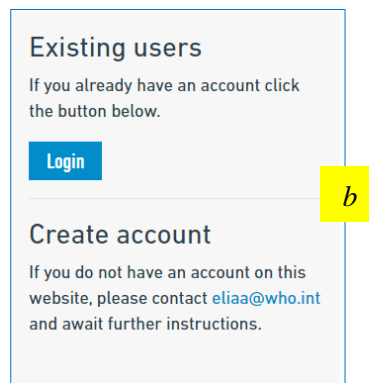## b. Login

i. Existing users

ESPEN Portal uses **Microsoft Identity Provider (**Azure Active Directory (Azure AD)) for authentication. Internal users with WHO accounts are automatically registered in a wide database that uses this authentication method to connect to both online and offline protected resources (applications).

To login on ESPEN Portal, all they need is to click on the 'Login' [b] button, provide the WHO email address [c] and then click 'Next'.
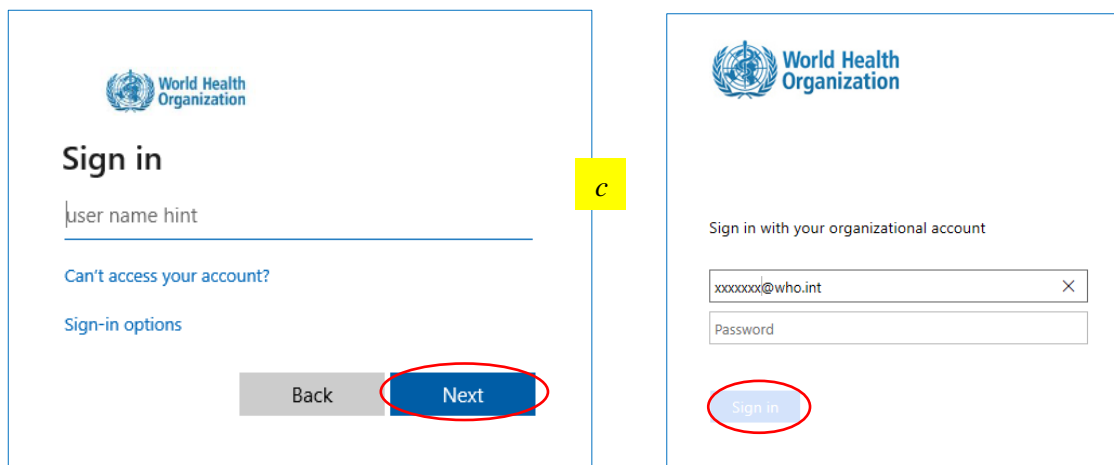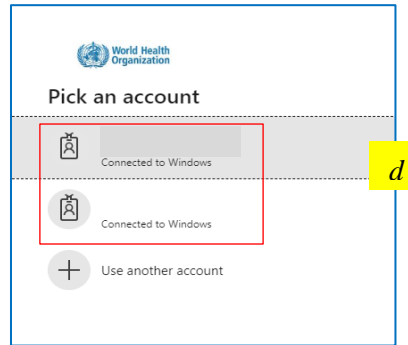
Enter your password and hint 'Sign in'.

Note: For Windows users, it is possible to save the password in Windows credentials[1] and select your WHO account to get into the system. [d]

---

[1] What is the Credential Manager, Accessed 26 June 2020, https://www.digitalcitizen.life/credential-manager-where-windows-stores-passwords-other-login-details,

ii. Request new account

To have an account, new users have to send an email requesting an account to ESPEN Collect management team (espensupport@who.int) by specifying: the name, email address, country and position.

Note: Make sure that the **email address** he provided is accessible.
The invitation process let everyone use own credentials to access ESPEN Portal secured pages without having to share them.

As soon as ESPEN receives the account request email, an invitation process is initiated.
The user will receive an invitation from Microsoft invitations on behalf of the World Health Organization specifying that you were invited to access an application within WHO, in this case ESPEN Portal and more precisely the ESPEN Collect services registration form. [e] (*see screen capture on next page*)
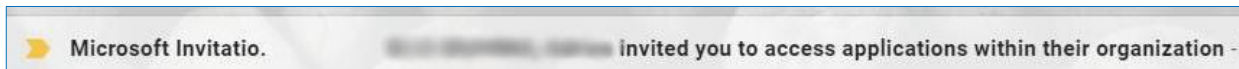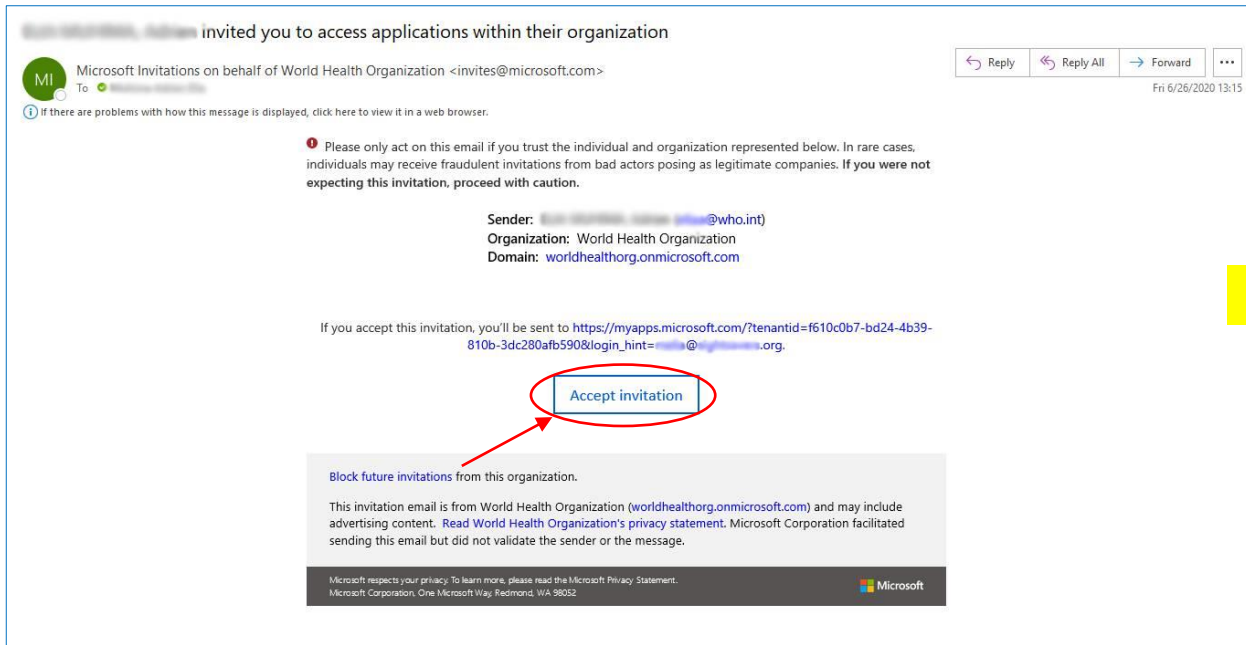
Click on 'Accept invitation' to move forward with private accounts (E.g.: a Gmail, Yahoo, Hotmail…) [*f*], in case your account is already connected using your browser, you will have to select the account, sign in and provide password and click 'Next'.
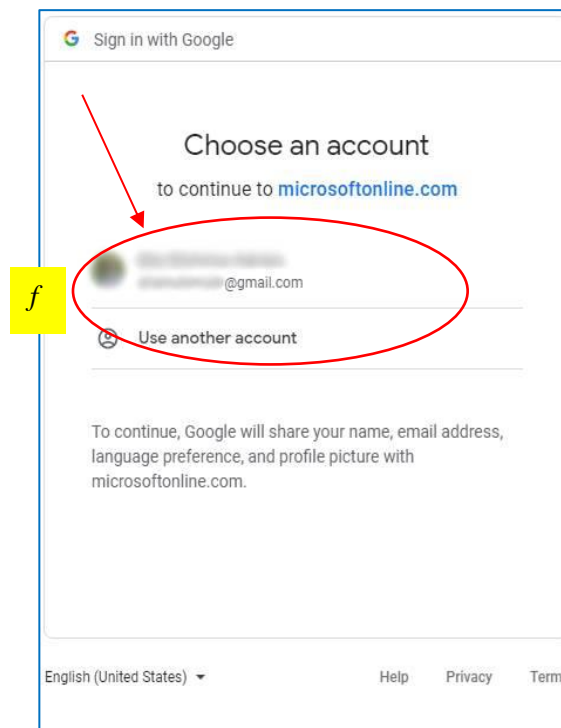
For professional account [*h*], from Outlook or any other email management application, you will have to click on 'Accept' to allow World Health Organization to read your name, email address and photo. Remember that the authentication is safe and highly secured.
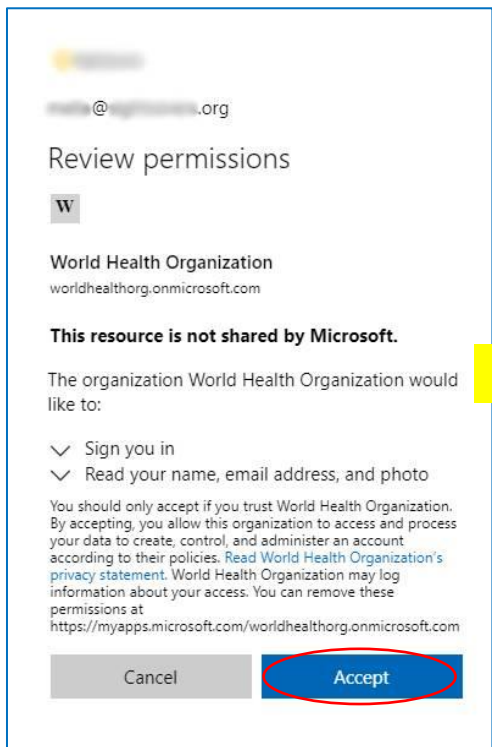
Be aware that after someone successfully signs in, they end up on the WHO system page [g]. At this point in the process, you need to open your browser and go to https://espen.afro.who.int/ and click **ESPEN Collect login** at the top of the page.
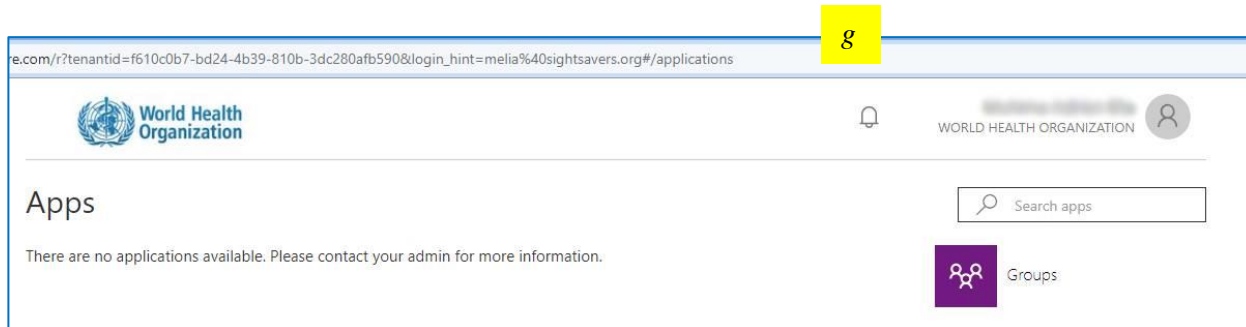
Congratulations, you have an active account.

From the ESPEN Portal home page, click on 'ESPEN Collect login' at the top of the page [i], and click on '**Login**' to submit new requests or consult previously submitted applications.

Now that you have an account, refer to the section of '**Login**' as an **existing account**. On [c], type in your email address, then click '**Next**' and type your password if required.
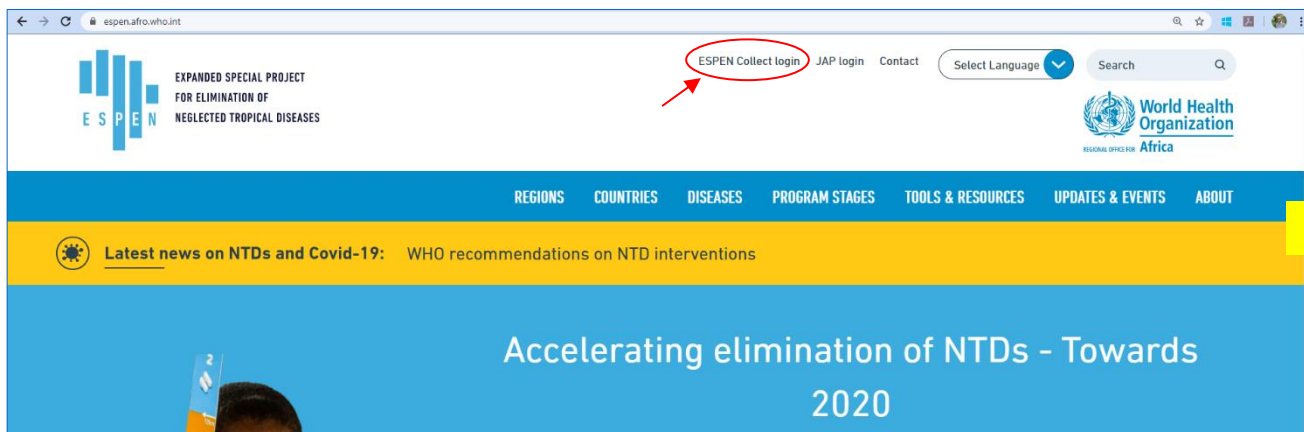
You can now start to fill your ESPEN Collect services request. It takes up to 15 minutes to fill the form. Before starting, please make sure you have:
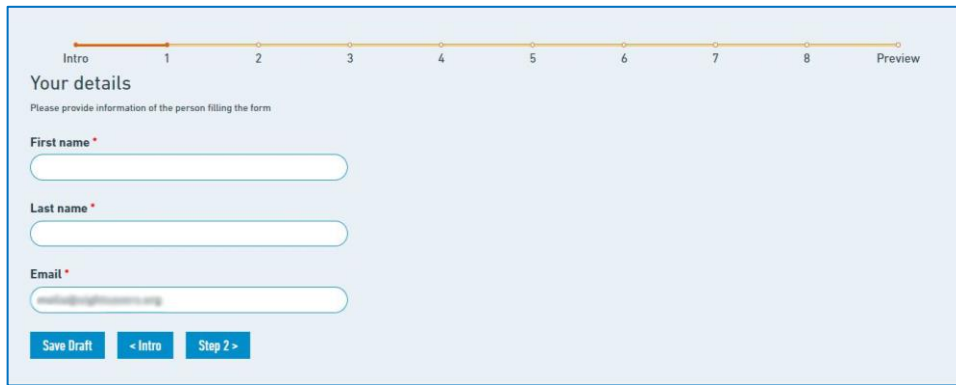
- All the information about the survey
- The survey protocol to submit for review (as part of this form)
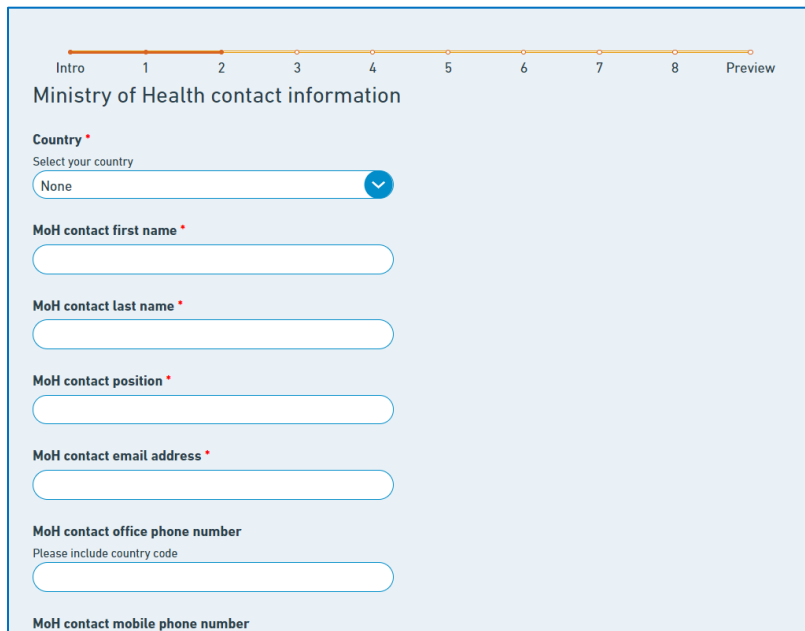
c. Navigating into questions
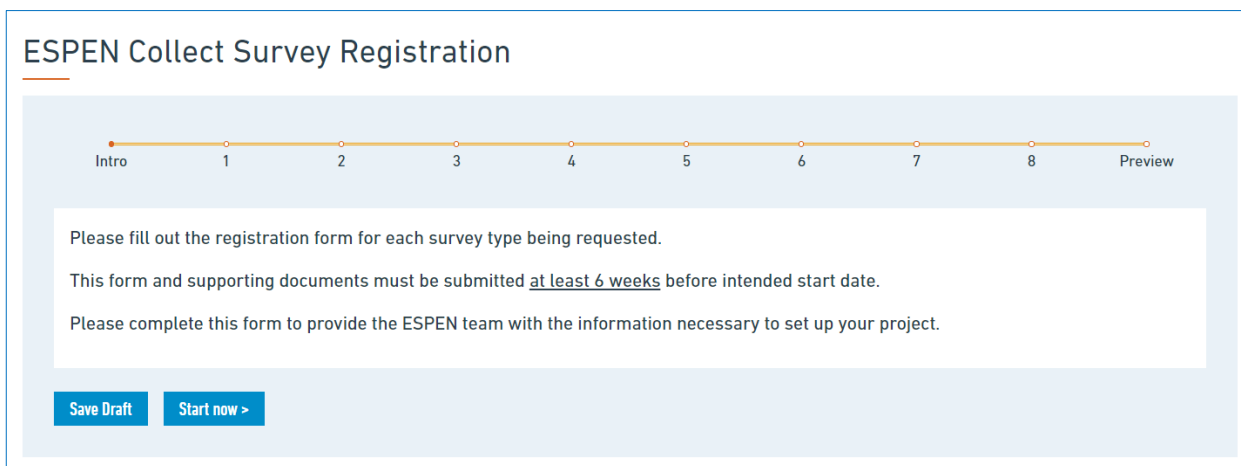
The form is subdivided into 8 small sections:

1. The introduction part, information of the person submitting the form.

2. Ministry of Health info and WHO country office info (NTD focal point contact)

3. Organization partner survey lead.

World Health Organization — African Region

ESPEN — EXPANDED SPECIAL PROJECT FOR ELIMINATION OF NEGLECTED TROPICAL DISEASES

| Intro | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | Preview |

Organization Partner Survey Lead

Name of the organization *

[   ]

┌─ Organization partner contact person ────────────────────┐

Please provide contact information of the NTD focal person

First name *

[   ]

Last name *

[   ]

Position *

[   ]

Email address *

[   ]

Phone number
Please include country code

[   ]

Is this person the primary contact on the survey? *
○ Yes
○ No

└──┘

[Save Draft]   [< Step 2]   [Step 4 >]

4. Important dates.

| Intro | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | Preview |

Important dates

Estimated Training Start date *

[Day ▼] [Month ▼] [Year ▼] 📅

Testing date *

[Day ▼] [Month ▼] [Year ▼] 📅

Estimated Data Collection Start Date *

[Day ▼] [Month ▼] [Year ▼] 📅

Approximate End Date *

[Day ▼] [Month ▼] [Year ▼] 📅

[Save Draft]   [< Step 3]   [Step 5 >]

World Health
Organization
African Region

ESPEN — EXPANDED SPECIAL PROJECT FOR ELIMINATION OF NEGLECTED TROPICAL DISEASES

5. Support needed.

Intro   1   2   3   4   5   6   7   8   Preview

About the survey and support

Estimated number of Evaluation Unit (EUs) *

Estimated number of sites to be surveyed *

Nature of survey sites *
○ Community
○ School
○ Mixed Community/School

Please include the full name and email of all users you would like added to this project *
These people will have access to view data during the collection process

Is the survey being outsourced to a third-party organization? *
○ Yes
○ No

6. About the survey (Targeted disease, survey type, diagnostic to be used,...)

Intro   1   2   3   4   5   6   7   8   Preview

Survey & tests

Disease assessment *
☐ Lymphatic filariasis
☐ Onchocerciasis
☐ Soil-transmitted helminthiasis
☐ Schistosomiasis
☐ Loiasis
☑ **Coverage surveys**

Coverage survey *
Which Coverage surveys will you be conducting? Select all that apply.
☐ MDA Drug Coverage Survey
☐ Supervisory Coverage Survey
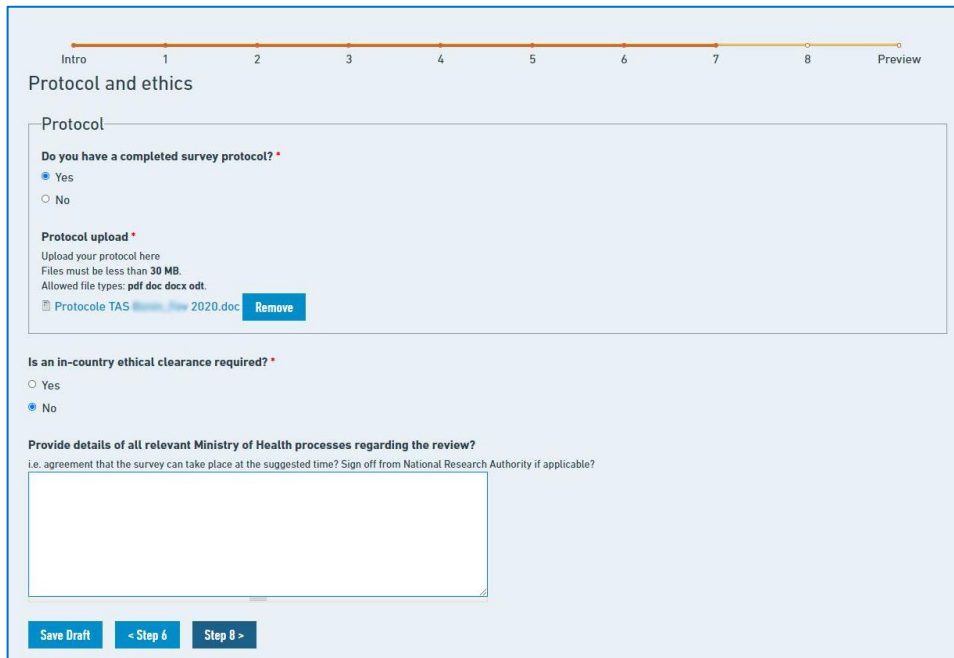☐ CDD Survey to be included with MDA Drug Coverage survey
☑ **Other**

Other surveys *
Provide details of other surveys that you plan to conduct.
None

Additional Questions for Coverage Evaluation Surveys

How many implementation units were targeted for MDA? *
3

7. Protocol and ethics
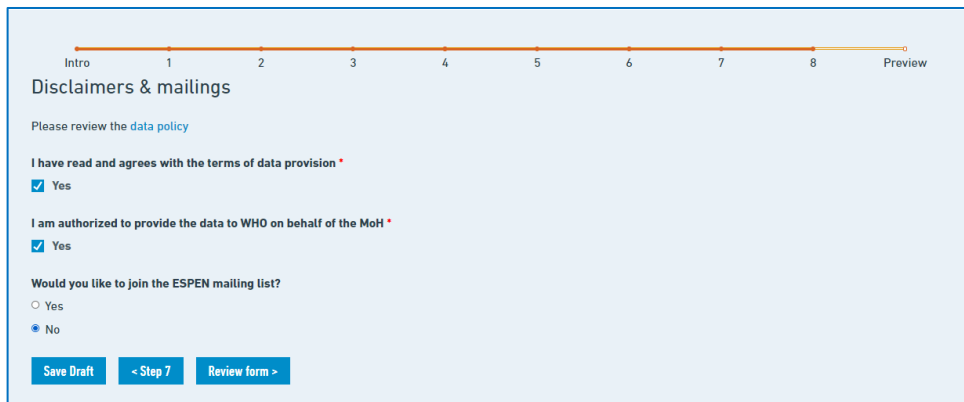
8. Disclaimer and mailings
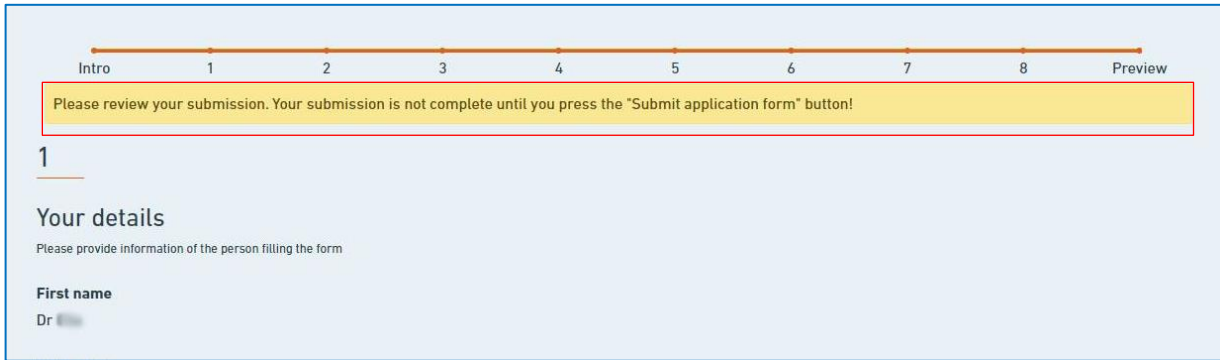

Note:
- It is essential to know that it is possible to save a draft of a request and resume at the stage you stopped at the appropriate time. By login into the ESPEN Collect account, you can therefore complete the form and choose to save again as a draft or submit the request.
- Before submitting, the form allows a general preview to avoid submission with errors.

To confirm the submission, an automatic ESPEN email with a link to the page that summarizes the request as well as the entire list of requests submitted by the account.

At the next connection, the country can view the requests previously submitted and see the request stage as updated by the ESPEN Collect service manager. [j]
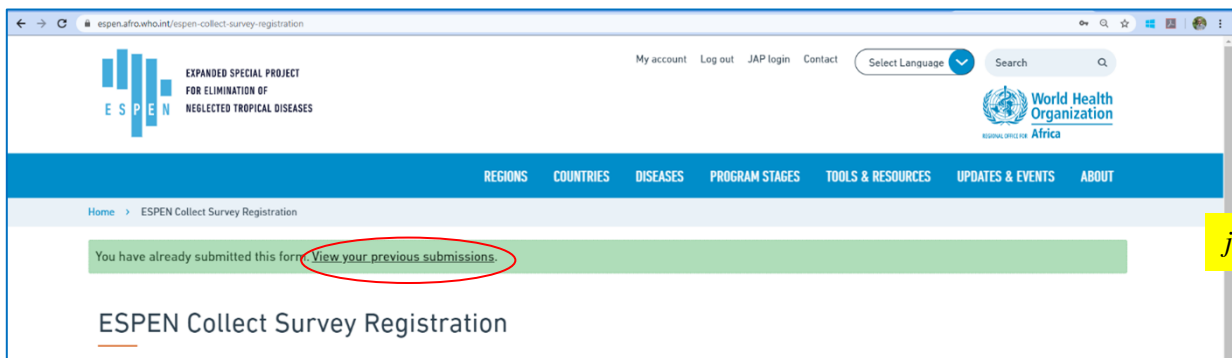
3. Conclusion

Following these procedures ensures that all users have the necessary to request the use of ESPEN Collect platform for PC-NTD surveys. For further guidance on configuring mobile devices, refer to SOP 3: ESPEN Collect Step-by-Step Guide.