

Accelerating Data Value Across a National Community Health Center Network
(ADVANCE) Dissemination Guidelines

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1 ABBREVIATIONS

ADVANCE	Accelerating Data Value Across a National Community Health Center Network
CRN	Clinical Research Network
CVS	Community Vital Signs
DTA	Data Transfer Agreement
ICMJE	International Committee of Medical Journal Editors
IRB	Institutional Review Board
PCORI	Patient-Centered Outcomes Research Institute
PCORnet®	National Patient-Centered Clinical Research Network
DW	Data Warehouse
RDW	Research Data Warehouse
PI	Principal Investigator
RA	Research Associate

2 PURPOSE

The purpose of these guidelines is to document a shared understanding and approach for disseminating research findings from ADVANCE projects. The following principles guide ADVANCE in our research dissemination efforts:

- Research is focused on improving the health of people accessing primary care services in community health center settings, including patients who have public insurance or no insurance.
- Engagement with patients, clinicians, community stakeholders, and investigators is a key part of the research conduct, interpretation, and dissemination processes.
- Dissemination of findings through efficient, timely, and collaborative processes that allow all partners to contribute as desired.
- Ownership of individual health system data resides with each health system; use of project data sets and findings is mediated through project-specific Data Transfer Agreements (DTA).

3 DEFINITIONS

These guidelines and review process apply to any dissemination arising from an **ADVANCE project** including research in progress, analyses, methods, findings, and public-facing content.

ADVANCE projects are defined as either:

- Projects originating through PCORnet® or another PCORnet® Clinical Research Network (Greater Plains Collaborative, INSIGHT, OneFlorida, PaTH Network, PEDSnet, REACHnet, STAR)

or

- Projects that include data use from two or more ADVANCE partners

OCHIN internal note: ADVANCE projects are identified in the [Active and Completed Research Projects](#) SmartSheet under the “ADVANCE” column.

Projects that **use ADVANCE infrastructure but do not meet the ADVANCE project definition** above **only need to follow the acknowledgement guidelines** in [Section 5](#) below. Examples of these include:

- Projects using Community Vital Signs data for one ADVANCE partner (e.g., OCHIN-only study using CVS data)
- Projects using the OCHIN Research Data Warehouse

4 ADVANCE REQUIREMENT CHECKLIST

ADVANCE PROJECTS

ADVANCE Project manuscripts, posters, and presentations must include:

1. Descriptions of ADVANCE CRN and ADVANCE data use, typically in the Methods section (examples in [Section 9](#))
2. Statement of IRB review and approval, typically in the Methods section
3. The ADVANCE Project acknowledgement ([see Section 5](#))
 - If a poster or presentation, inclusion of [PCORnet and ADVANCE logos](#)

ADVANCE INFRASTRUCTURE (“ACKNOWLEDGEMENT ONLY”) STUDIES

ADVANCE infrastructure studies’ manuscripts, posters, and presentations must include:

1. The ADVANCE infrastructure acknowledgement ([see Section 5](#))
2. [PCORnet and ADVANCE logos](#) in posters and presentations

5 ACKNOWLEDGEMENT GUIDELINES

Manuscripts, presentations, and other written communications (e.g., posters, handouts) from **ADVANCE projects** and **projects using ADVANCE infrastructure** (but not designated as an ADVANCE project) should recognize the ADVANCE CRN and the PCORI grant using the appropriate acknowledgement listed below.

Please note: The ADVANCE contract with the Robert Graham Center/*HealthLandscape* ended 10/1/2020. Please be sure to include [and the Robert Graham Center *HealthLandscape*] as relevant in acknowledgements below.

ADVANCE project acknowledgement: Applies to projects that originated through PCORnet® or another PCORnet® network partner (e.g., ADVANCE CRN, REACHnet) *or* include data use from two or more ADVANCE partners.

This work was conducted with the Accelerating Data Value Across a National Community Health Center Network (ADVANCE) Clinical Research Network (CRN). ADVANCE is a CRN in PCORnet®, the National Patient-Centered Clinical Research Network. ADVANCE is led by OCHIN in partnership with Health Choice Network, Fenway Health, and Oregon Health & Science University. ADVANCE’s participation in PCORnet® is funded through the Patient-Centered Outcomes Research Institute (PCORI), contract number RI-OCHIN-01-MC.

Acknowledgement for projects using ADVANCE infrastructure but not designated ADVANCE projects:

This work was conducted with the Accelerating Data Value Across a National Community Health Center Network (ADVANCE) Clinical Research Network (CRN). ADVANCE is led by OCHIN in partnership with Health Choice Network, Fenway Health, and Oregon Health & Science University. ADVANCE is funded through the Patient-Centered Outcomes Research Institute (PCORI), contract number RI-OCHIN-01-MC.

6 AUTHORSHIP GUIDELINES

Authorship on ADVANCE manuscripts is determined according to recommendations set forth by the [International Committee of Medical Journal Editors](#). The lead author is responsible for collaborating with their study team to identify and determine co-authors.

If ADVANCE partners are contributing data or serving as scientific collaborators (i.e. co-investigator, site-PI) they should be invited to participate as authors on manuscripts using ADVANCE data. Invitations for authorship should be sent in the development, design, or analysis phase before interpretation occurs to allow potential co-authors to meet the necessary criteria. Partner investigators or collaborators may elect a representative (e.g., site analyst or project manager) join the manuscript team in their place.

In addition to any specific journal requirements, authors on ADVANCE manuscripts need to meet four criteria:

1. Substantial contribution to ***at least one*** of the following:
 - a. Project concept and design
 - b. Data acquisition and analysis
 - c. Interpretation of data
 - d. [Creation of new software or tool used in the work](#)
2. Drafting or critical revision of the manuscript
3. Final approval of the manuscript and any subsequent substantial revisions
4. Agreement to be accountable for the work and appropriately resolve any questions related to the accuracy or integrity of the works

Offer any team member meeting the first criterion the opportunity to draft, review, and approve the final manuscript. Include all study team members meeting the four criteria as authors. Every included author should be able to clearly identify the sections or contributions for which each co-author is responsible.

If a team member leaves before a manuscript is developed or published, they will need to work with the lead author and Site-PI/PI to plan their continued level of involvement and authorship. If a person leaves and fulfills authorship criteria to stay on the manuscript, their institutional affiliation for the paper should be listed where the first criterion would have been met (e.g. OCHIN if they were an OCHIN employee) unless journal requirements specify otherwise. If the person leaving will need access to any data to complete the manuscript, they need to remain on the IRB protocol and retain a formal relationship (contract) with their ADVANCE partner organization even if they are no longer being paid.

Include any team members or contributors who meet some but not all authorship criteria in the manuscript's acknowledgement section. The study RA or corresponding author is responsible for obtaining written permission from each person in the acknowledgement section.

Once a paper is accepted, the lead or corresponding author will be included in ADVANCE communication about the development and conduct of related dissemination activities.

7 PCORI AND PCORNET® DISSEMINATION GUIDELINES

Any ADVANCE projects that are **designated as a PCORnet® study** by PCORnet® need to follow PCORI's [Guidelines for Use of the PCORnet® Name and Logos including acknowledgement and branding requirements](#).

ADVANCE projects should be aware of these guidelines and recommended use of PCORnet®'s name, logo, and descriptions, including how networks (i.e., ADVANCE) describe their relationship with PCORnet®. ADVANCE projects should acknowledge PCORnet® as in [Section 5](#) and include use of the PCORnet® logo as follows:

- **Presentations:** PCORnet® and ADVANCE logos on a slide with ADVANCE project acknowledgement
- **Print materials (posters, handouts, other collateral):** PCORnet® and ADVANCE logos with ADVANCE project acknowledgement

ADVANCE and PCORnet® logo JPEGs can be found in the [Dissemination Best Practice Files folder on SharePoint](#):



PCORnet® logo guidelines quick reference:

FONT NAME: MetaOT

COLORS:



Lime green

Cyan/blue

Dark blue

Hex: #7abf35

Hex: #3396bb

Hex: #0f1866

RGB: 122, 191, 53

RGB: 8, 176, 255

RGB: 15, 24, 102

LOGO

The PCORnet logo includes logo/wordmark combinations and the PCORnet symbol.

MINIMUM CLEAR SPACE

The clear space around the logo is 18px or 1/4 inch. The solid blue lines below indicate the required 18px clear space to be maintained.

PCORnet logo



PCORnet logo-alternate



WEB PAGE LOGO USAGE

The minimum allowed logo sizes are:

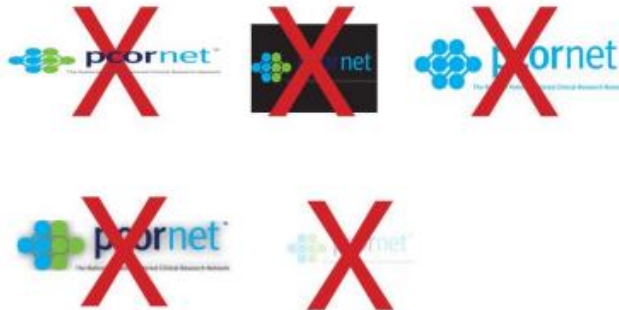
PCORnet logo: 201 (width) x 48 pixels (height) with a clear space of 18px

PCORnet logo-alternate: 209 x 28 pixels with a clear space of 18px

There are no maximum size limits; however, all design elements of logo must appear intact and unaltered per usage terms.

INCORRECT LOGO USAGE

- Outlining / Inlining
- Distorting or applying special effects
- Changing the relative size or positioning of the elements
- Scanning the logo from printed documents
- Filling the logo with a pattern or photo element
- Using the logo as a watermark
- Using the logo as part of a sentence or phrase
- Reproducing the logo in colors other than the official approved colors
- Using the PCORnet symbol alone
- Placing the logo on a background that distracts or overpowers the logo



8 DISSEMINATION NOTIFICATION AND REVIEW PROCESS

As part of our reporting requirements under PCORI, ADVANCE project teams need to follow the dissemination notification and review process below. This process **applies to ADVANCE project dissemination** materials (e.g., presentations and manuscripts, slide decks, posters, results summaries) and events.

The ADVANCE dissemination and review process is usually coordinated by the OCHIN Research Associate in conjunction with any necessary OCHIN review. If there is no OCHIN RA, the Site-PI should assume this role or delegate to another team member (ideally an OCHIN co-author).

Please conduct all dissemination notification and review communications through Jira. Use Project **Research Cores (RCL)**, Issue Type **Engagement – Dissemination**, label **ADVANCEReview** and assign to

the Research Dissemination Specialist Sarah Gioia. If you do not have Jira access, please contact Sarah by email.

The Research Dissemination Specialist is the primary contact for dissemination and review: Sarah Gioia, gioias@ochin.org.

ADVANCE DISSEMINATION REVIEW PROCESS

The Research Dissemination Specialist will review manuscripts, posters, presentations, and other dissemination collateral to confirm accuracy in descriptions of the ADVANCE CRN and resources used as well as acknowledgements and attributions to ADVANCE, PCORnet®, and PCORI as our funder. On rare occasions (e.g., an analysis beyond study aims) additional review may be needed by ADVANCE team members or partners. If this occurs, the Research Dissemination Specialist will liaise with your team to plan accordingly.

Please allow 10 business days for review to be completed.

STEP 1 – Review request

The review process is initiated by the OCHIN Research Associate over Jira. If there is no OCHIN Research Associate, this should be managed by the Site-PI or co-author on the project. If you need to initiate a review and do not have Jira access, you may send by email to Sarah Gioia, gioias@ochin.org with the information below.

Manuscript review request:

1. **Create Jira ticket:** Create a ticket under **Research Cores (RCL) -> Engagement – Dissemination**, label **ADVANCEReview**, and assign to the Research Dissemination Specialist. Please include:
 - a. **Study aims:** List study aims relevant to the manuscript. If the manuscript does not fall under a specific aim, or the aims have changed since the study started, please describe these differences and any related input from ADVANCE.
 - b. **Target journal:** Journal name
 - c. **Submission date:** Please indicate if target date or hard deadline
 - d. **Lead and corresponding author(s):** Names, emails
 - e. **Data review process description:** Note where data review process is described in the manuscript
 - f. **Review period:** Please allow up to 10 business days for manuscript review. If your manuscript is not clearly related to the study aims or the aims have changed, please allow up to 15 days for review to allow ADVANCE partner input as needed.
2. **Attach manuscript:** Attach a clean copy of the manuscript in as near to final draft version as possible. Many teams find it works well to submit manuscripts for ADVANCE review at the same time they send for final co-author review.

Presentation or poster review request:

1. **Create Jira ticket:** Create a ticket under **Research Cores (RCL) -> Engagement – Dissemination**, label **ADVANCEReview**, and assign to the Research Dissemination Specialist. In the ticket, please include:

- a. **Study aims:** List study aims relevant to the poster or presentation. If the material does not fall under a specific aim, or the aims have changed since the study started, please describe these differences and any related input from ADVANCE.
 - b. **Conference or meeting information:** Name, dates, location
 - c. **Submission date:** Please indicate if target date or hard deadline
 - d. **Lead and presenting author(s):** Names, emails
 - e. **Review period:** Please allow up to 10 business days for poster or presentation review. If your material is not clearly related to the study aims or the aims have changed, please allow up to 15 days for review to allow ADVANCE partner input as needed.
2. **Attach poster, presentation, or other collateral:** Attach a clean copy of the material in as near to final draft version as possible. Many teams find it works well to submit material for ADVANCE for review at the same time they send for final co-author review.

STEP 2 – Initial review and escalation

The Research Dissemination Specialist will review your materials and determine the need for any further review based on the scale and types of data used and alignment with established study aims.

ADVANCE designated project manuscript, presentation, and poster review checklist:

1. Descriptions of ADVANCE CRN and ADVANCE data use, typically in the methods section
2. Statement of IRB review and approval, typically in the methods section
3. Inclusion of appropriate ADVANCE acknowledgement ([see Section 5](#))
 - a. If presentation or poster, include [PCORnet and ADVANCE logos](#)

ADVANCE infrastructure project manuscript, presentation, and poster review checklist:

1. ADVANCE infrastructure acknowledgement ([see Section 5](#))
 - a. If presentation or poster, include [PCORnet and ADVANCE logos](#)

STEP 3 – Approval or further review

The Research Dissemination Specialist will communicate the outcome of your review via JIRA. Likely review pathways and outcomes include:

Approval or minor changes needed:

These will be the most common outcomes:

- **Research Dissemination Specialist approval:** No changes needed
- **Research Dissemination Specialist approval with changes:** Specific, minor changes that can be approved without further review.

Changes needed before approval:

If questions arise that need more substantial clarification or revisions, they may be escalated to the ADVANCE Project Manager for follow-up and approval

- **Project Manager approval with changes:** Changes will be reviewed and confirmed in collaboration with the ADVANCE Project Manager

Substantial changes or content beyond agreed study aims:

In the case an analysis or other dissemination content falls outside agreed study aims, the ADVANCE Project Manager may escalate to ADVANCE Project Director, partners or Executive Committee as needed. This may require more time for review. If you anticipate materials falling into this category, please note in Jira request and allow up to 15 business days for review.

- **Project Manager and Research Dissemination Specialist approval:** Confirm no changes or minor changes needed with ADVANCE partners/Executive Committee
- **Project Manager and Research Dissemination Specialist approval with changes:** Changes requested by ADVANCE partners/Executive Committee will be reviewed and confirmed in collaboration with the ADVANCE Project Manager and Director.

STEP 4 – Final publication or presentation

Please attach final materials to the original Jira ticket with a comment tagging the **Research Dissemination Specialist**, Sarah Gioia for archiving and tracking.

Manuscripts: Once accepted and published, include the full citation and link to your article in the Jira comments. If your article will not be open access, attach a PDF of the submitted version.

Presentations and posters: Once delivered, attach a final copy of your slides or poster (PDF or PowerPoint) to the Jira.

9 ADDITIONAL RESOURCES

ADVANCE NETWORK OVERVIEW

DeVoe JE, Gold R, Cottrell E, et al. The ADVANCE network: accelerating data value across a national community health center network. J Am Med Inform Assoc. 2014;21(4):591-5. DOI: [10.1136/amiajn-2014-002744](https://doi.org/10.1136/amiajn-2014-002744)

ADVANCE NETWORK DESCRIPTION

Please note: The ADVANCE contract with the Robert Graham Center/*HealthLandscape* ended 10/1/2020. Please be sure to include or remove Robert Graham Center/*HealthLandscape* as relevant in descriptions below.

These descriptions can be adapted as needed. Detailed descriptions are available in the [Short Guide to the ADVANCE Clinical Research Network](#). Citation of this document or the short guide should reference their ADVANCE website location, last update, and accessed date.

1. This study used electronic health record (EHR) data from the Accelerating Data Value Across a National Community Health Center Network (ADVANCE) Clinical Research Network (CRN), a member of PCORnet®. ADVANCE is a multicenter collaborative led by OCHIN (not an acronym) in partnership with Fenway Health, Health Choice Network, and Oregon Health & Science University.
2. ADVANCE partners serve Federally Qualified Health Centers, public health departments, and community-based health centers delivering care to people who are publicly insured, uninsured, or otherwise medically underserved. ADVANCE integrates outpatient EHR data and geocoded

community-level data into a common data model, which is the nation's most comprehensive set of health care and outcomes data for patients using health center services.

3. ADVANCE is a multicenter research network led by OCHIN in partnership with Fenway Health, Health Choice Network, and Oregon Health & Science University. As the nation's most comprehensive set of health data from community-based health centers, ADVANCE integrates outpatient health record data and community-level data that represents over [9] million people seen in [221] community-based health systems across [36] states. ADVANCE is funded through the Patient-Centered Outcomes Research Institute and is a member of PCORnet®. ***If using this, up-to-date network demographics are available on the ADVANCE website via the [ADVANCE Short Guide](#).***