



Deliverable D2.4

MULTI-ACT Toolbox 2.0

MULTI-ACT Toolbox release 2.0.



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AUTHORS (name and organization):	George Tsakirakis (Intrasoft International S.A.) Sofia Tsekeridou (Intrasoft International S.A.)

This document details the functionalities that were implemented in the final version of the MULTI-ACT Toolbox (MULTI-ACT Toolbox 2.0) and intends to provide all necessary know how to serve as a user manual of the web application.

REVISION HISTORY

REVISION	DATE	COMMENTS	AUTHOR (NAME AND ORGANISATION)
V0.1	28/09/2020	Table of Contents and structure of Deliverable	George Tsakirakis (INTRASOFT International S.A) Sofia Tsekeridou (INTRASOFT International S.A)
V0.2	20/11/2020	First Deliverable draft with initial contributions	George Tsakirakis (INTRASOFT International S.A) Sofia Tsekeridou (INTRASOFT International S.A)
V0.3	02/03/2021	Updated Deliverable version documented all implemented functionalities	George Tsakirakis (INTRASOFT International S.A) Sofia Tsekeridou (INTRASOFT International S.A)
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V1.0	30/03/2021	Addressing internal review comments	George Tsakirakis (INTRASOFT International S.A) Sofia Tsekeridou (INTRASOFT International S.A)
V1.1	08/04/2021	Final version edited and submitted	Valentina Tageo (FISM)

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Acronyms and Abbreviations

CRIF	Collective Research Impact Framework
DiA	DANE ANALIZY
MA	Materiality Analysis
PE	Patient Engagement
RFPO	Research Funding and Performing Organizations
RRI	Responsible Research and Innovation

Glossary

Collective Research Impact Framework, CRIF is a conceptual framework developed by MULTI-ACT enabling a new collective accountability approach to managing and assessment multi-stakeholder R&I initiatives.

Governance Criteria are a set of recommendations on how to organize your initiative's governance bodies, define its mission and agenda, and implement a monitoring and measurement system. Thanks to the Governance Criteria, your initiative can define its mission and shared agenda in accordance with the MULTI-ACT principles of stakeholder engagement and co-accountability. You will also find instructions how establish a shared and effective assessment system, including a set of indicators of the Master Scorecard that promotes improvement and communication, and set a mechanism to receive feedback.

Patient Engagement Guidelines are an operative guide for meeting the criteria of “participatory governance” and “effective stakeholder engagement” for the key and often under-represented stakeholder category “patient, their families and caregivers”. The Patient Engagement Guidelines provide advice on how to engage patients and to what extent to include them in your decision-making processes depending on your situation. They will help you select the research priority and stages of research where patient engagement is instrumental to meet the initiative's mission and agenda.

Master Scorecard is a component of the CRIF which helps you implement co-accountability. It is a set of 125 indicators, from which your initiative will choose the most relevant ones for, creating a customised scorecard.

Materiality Analysis is a process through which your initiative's stakeholders will determine which indicators the initiative will use for assessing its impact.

Baseline Analysis is a questionnaire that measures the level of compliance of your initiative's governance and patient engagement with the CRIF.

EXECUTIVE SUMMARY

The final version of the MULTI-ACT Toolbox delivers the full set of features and functionalities that were defined in Deliverable D2.5 (Report describing the methodology & design principles of the MULTI-ACT Toolbox).

The numerous changes and additions that were implemented are derived from the evolution of the MULTI-ACT Toolbox to extend its usage and applicability to accommodate a multi-stakeholder stakeholder perspective, while continuing to support a single user perspective that was delivered in its first version. In addition, following the evolution of the MULTI-ACT model in the meantime and crystallization of the definitions of all its features and relevant procedures, numerous new functionalities were implemented to complement the initial version of the MULTI-ACT Toolbox v1.0. For this purpose, during the recent amendment process, in order to fully capture, implement and subsequently document envisioned features and functionalities in the final version of the Toolbox, including the produced guidelines in the context of WP6, the current Deliverable has been granted an extended deadline of M35.

The MULTI-ACT Toolbox v2.0 can be accessed at <https://toolbox.multiact.eu>.

1 MULTI-ACT Toolbox 2.0 Functionality

In the first version of the MULTI-ACT Toolbox, the registered user acted like the sole representative and promoter of an initiative. The second version of the MULTI-ACT Toolbox evolved into a truly multi-stakeholder tool to meet co-accountability innovative strategy of the MULTI-ACT Collective Research Impact Framework (CRIF) via co-creation approach. It is visible in the Patient Engagement Plan, but above all in the Materiality Analysis (MA). Engagement Coordination Team, which comprises of representatives of various stakeholders, co-creates the Patient Engagement Plan. A comment section functionality was added to facilitate exchanges. The Materiality Analysis (MA) fully enables external stakeholders of the initiative, both registered and unregistered Toolbox users, to participate in collective decision-making. It is worth noting that, to promote informed choice, the Toolbox provides to all MA participants educational materials about materiality analysis process and the CRIF. All participants of the MA can see the results in the form of the Master Scorecard.

Therefore, Toolbox 2.0 realises the idea of continuous collective assessment and co-accountability. Subsequently, the presentation of the Toolbox 2.0 features and functions from an end user perspective and in the form of a user manual with screenshots is provided.

1.1 Home Page

The MULTI-ACT Toolbox Home page informs the visitor about the nature and goal of the MULTI-ACT project and produced web application. The users can further familiarize themselves with extended information related to project related terms and concepts by following the web links leading them to the related sections of the MULTI-ACT manual (Figure 2 Home Screen Info). Furthermore, users' one-time consent to the use of web cookies¹ is requested.

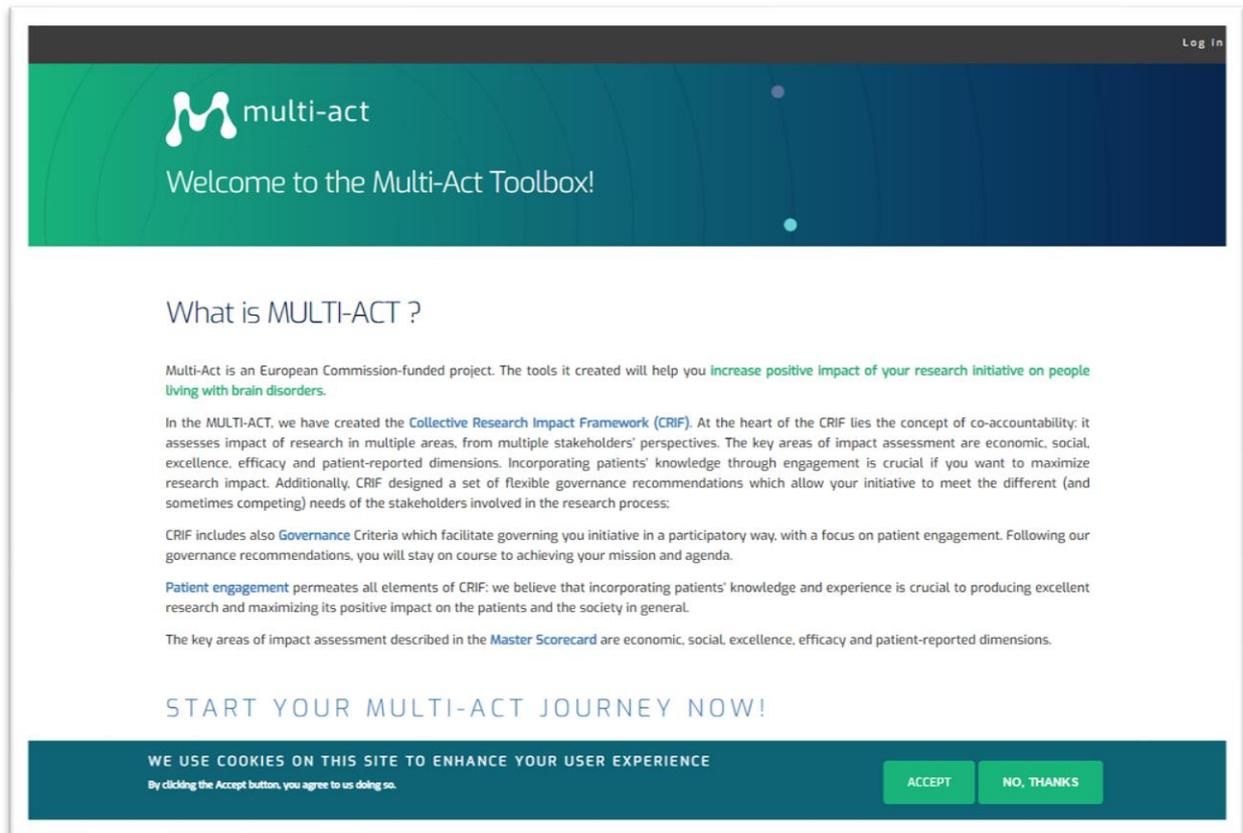


Figure 1 Home Screen & cookie disclaimer

¹ Cookies are text files with small pieces of data stored on the user's computer by the web browser while browsing a website that are used to identify specific users and improve their web browsing experience.

Who can benefit from implementing the CRIF ?

CRIF can be used by performing and funding health research initiatives that are currently taking a multi-stakeholder approach to increase the co-accountability of health research. Initiatives that are not yet following that path but that are interested in doing so can also benefit from the MULTI-ACT Toolbox through the guidance it offers to develop and improve multi-stakeholder research initiatives.

If you are a pharmaceutical company, multi-stakeholder research initiative, research institute, health products or services company, a patient organisation, a brain health-focused NGO, a university, a neurology hospital department... then you probably want to learn more about what we offer. .

What is the MULTI-ACT Toolbox ?

The MULTI-ACT Toolbox provides you with a set of tools that will help your multi-stakeholder health research initiative put patient engagement at the heart of its operations. They will help you assess and improve your governance system, create a patient engagement plan that will fit your needs and capabilities. MULTI-ACT offers a wide range of indicators for all key dimensions of impact.

Baseline Analysis

...is a simple and fast way of assessing to what extent your initiative is already compliant with the Governance Criteria. This questionnaire will also tell you which gaps in your management structure and operations you need to address. It will provide you with a customised set of simple recommendations which will help your research initiative to fully adopt participatory practices, deep patient engagement, excellence in doing science. And not forget about the financial sustainability!

Patient Engagement Plan

... is a way for you to never again struggle with patient engagement. Thanks to Multi-Act Patient Engagement Guidelines, it will be easy for you to decide which stakeholders to engage and how much decision-making power to give them. We understand that these factors change depending on the research stage, and we have created a Research and Innovation 7-steps Path to deal with that.

Thanks to the Patient Engagement Plan, you will fast build a strategic stakeholder engagement plan. It also provides a set of quantitative and qualitative indicators which make it easy to monitor and report your progress. It will become clear how much your research gains on engaging the patients.

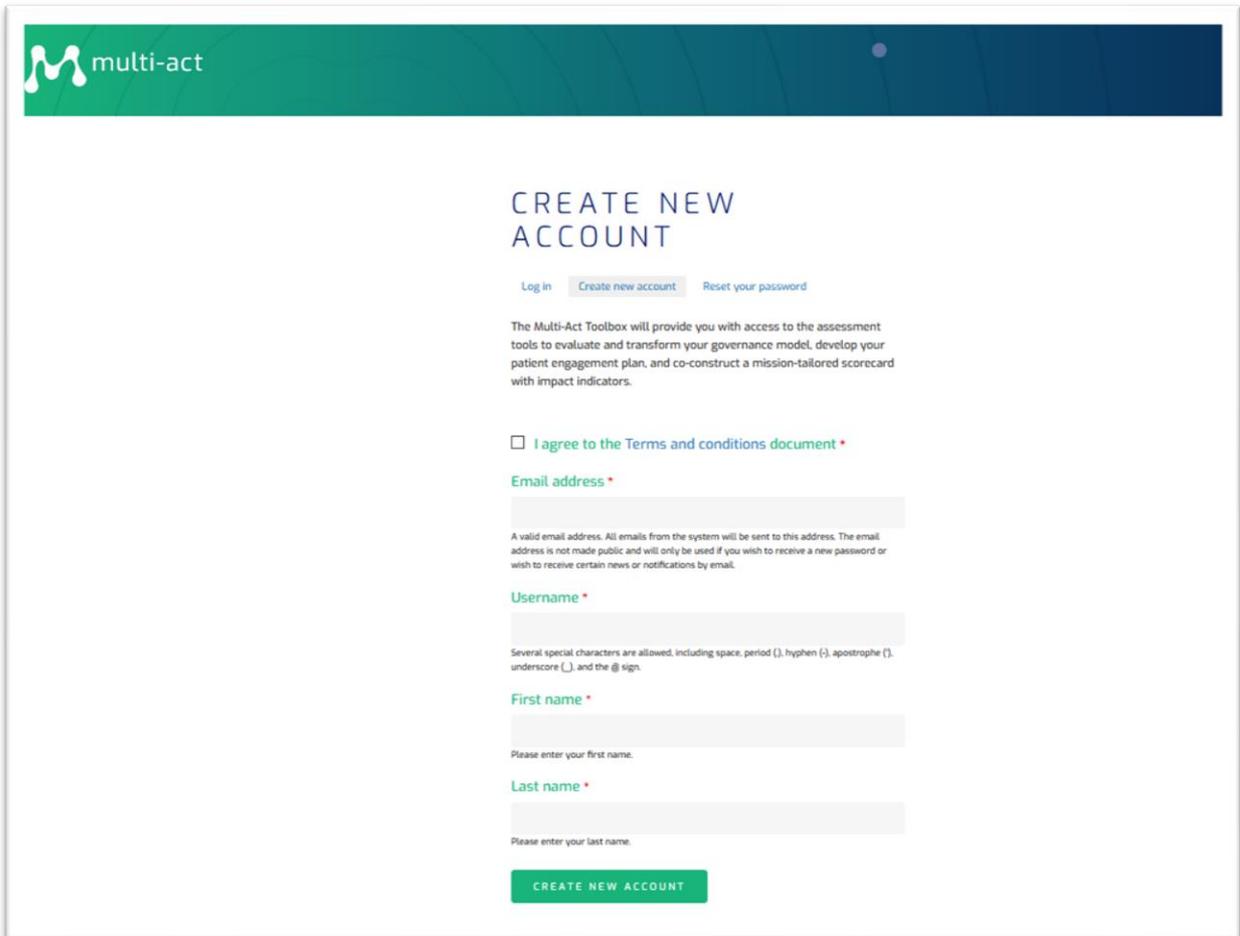
Figure 2 Home Screen Info

1.2 User Registration

New users that wish to register are provided with all legal information of the MULTI-ACT Toolbox *Terms and Conditions* and are required to give their consent. These disclaimers cover all the legal aspects pertaining to the users' data that is populated and stored in the Toolbox, its intended use, and data retention time. They then provide a minimum set of information consisting of:

- A valid email address
- A desired username
- Their First and Last name

Afterwards, by clicking on the *Create Account* link (Figure 3 User Registration) the MULTI-ACT Toolbox sends a confirmation email to their email.



 multi-act

CREATE NEW ACCOUNT

[Log in](#) [Create new account](#) [Reset your password](#)

The Multi-Act Toolbox will provide you with access to the assessment tools to evaluate and transform your governance model, develop your patient engagement plan, and co-construct a mission-tailored scorecard with impact indicators.

I agree to the [Terms and conditions document](#) *

Email address *

A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by email.

Username *

Several special characters are allowed, including space, period (.), hyphen (-), apostrophe ('), underscore (_), and the @ sign.

First name *

Please enter your first name.

Last name *

Please enter your last name.

CREATE NEW ACCOUNT

Figure 3 User Registration

1.2.1 User Registration Confirmation

New registered users receive an email containing a unique link that can only be used once, which leads them to a Welcome Screen (Figure 4 User First Time Login) for them to setup their password.

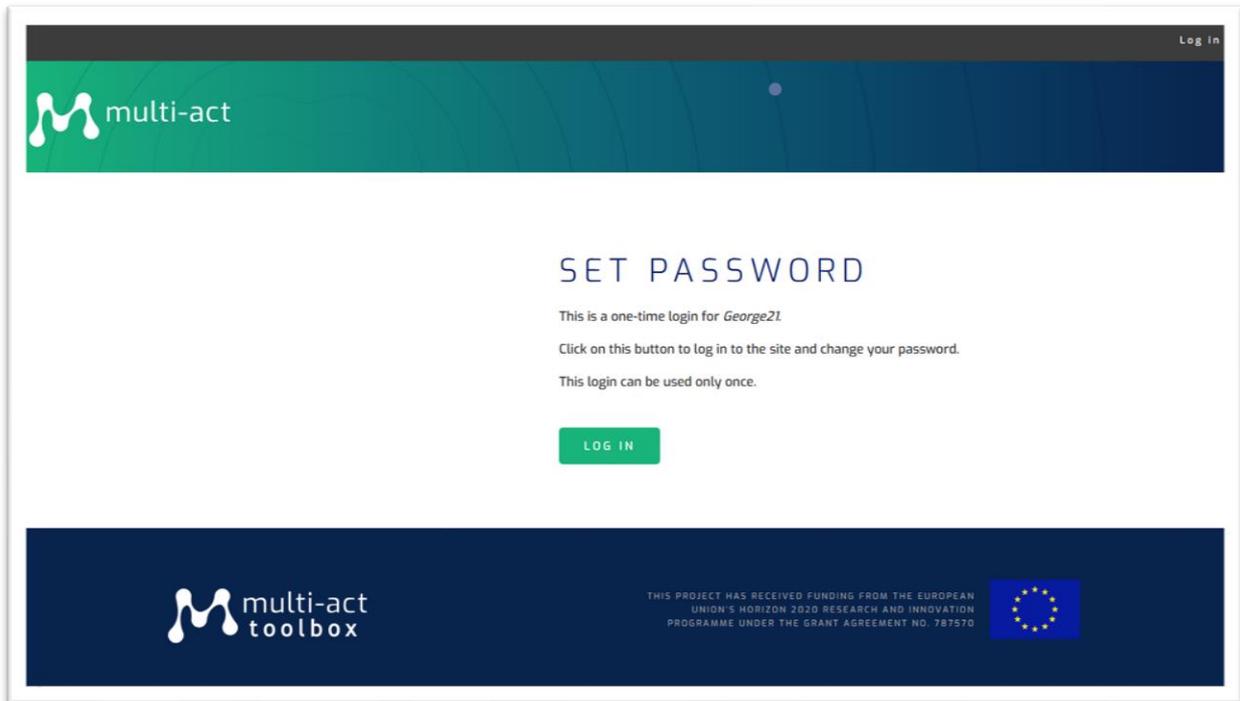
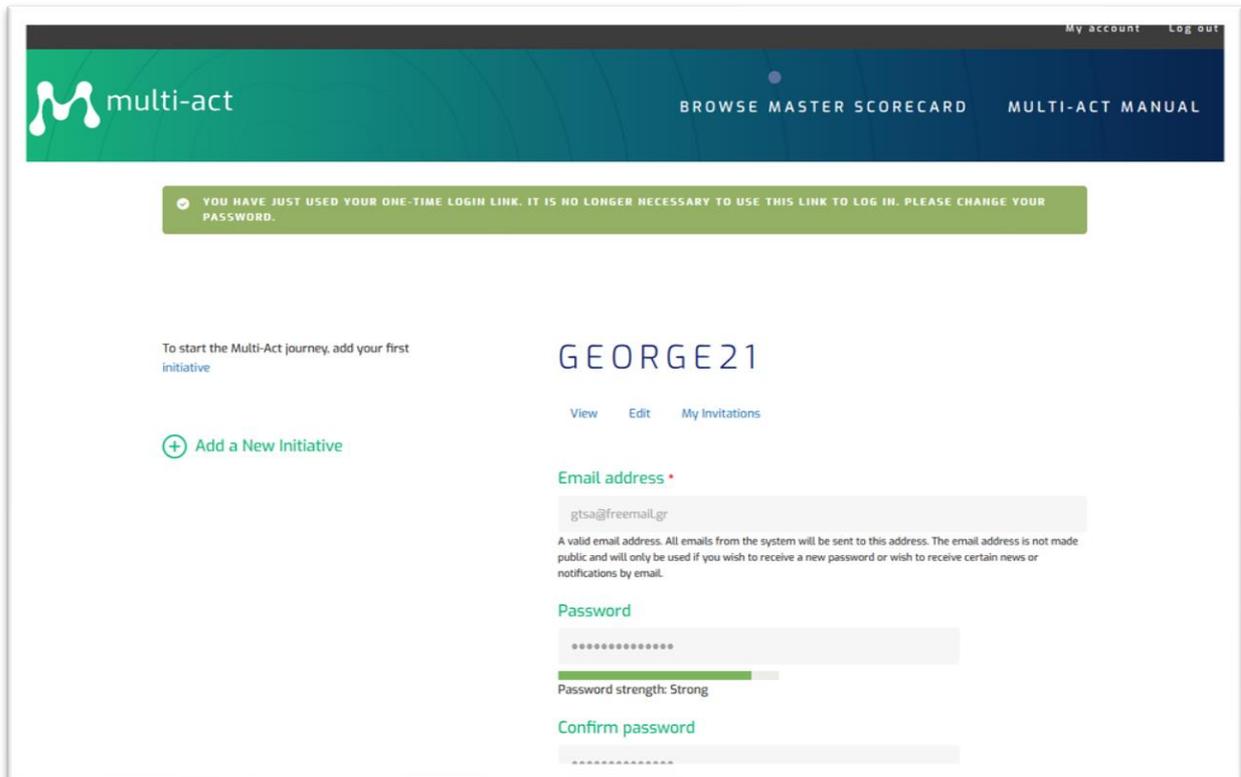


Figure 4 User First Time Login

1.2.2 User Password Set

In this screen, the user will have to add and confirm their password in the required fields (Figure 5 User Password Set). Afterwards, they will need to save their progress by clicking the “SAVE” link (Figure 6 User Registration Info).



My account Log out

multi-act BROWSE MASTER SCORECARD MULTI-ACT MANUAL

YOU HAVE JUST USED YOUR ONE-TIME LOGIN LINK. IT IS NO LONGER NECESSARY TO USE THIS LINK TO LOG IN. PLEASE CHANGE YOUR PASSWORD.

To start the Multi-Act journey, add your first initiative

+ Add a New Initiative

GEORGE21

View Edit My Invitations

Email address *

gtsa@freemail.gr

A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by email.

Password

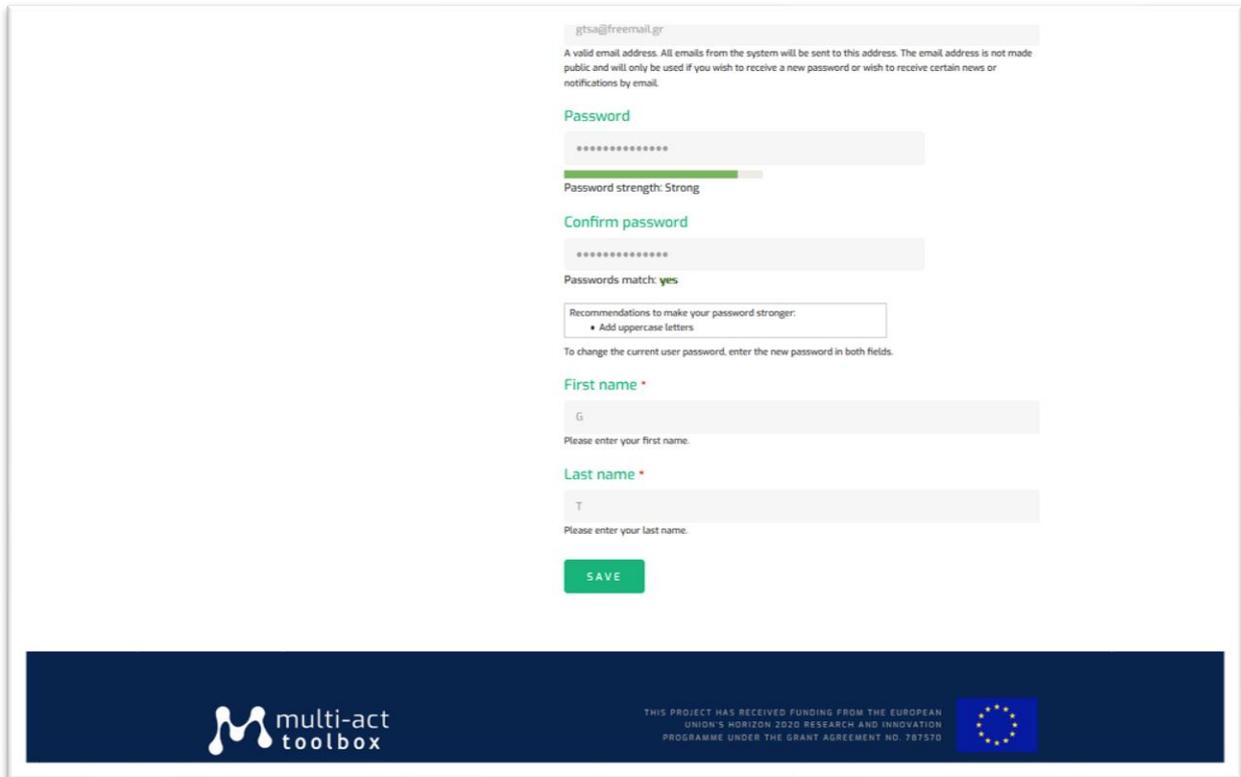
.....

Password strength: Strong

Confirm password

.....

Figure 5 User Password Set



gtsa@freemail.gr

A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by email.

Password

Password strength: Strong

Confirm password

Passwords match: yes

Recommendations to make your password stronger:

- Add uppercase letters

To change the current user password, enter the new password in both fields.

First name *

G

Please enter your first name.

Last name *

T

Please enter your last name.

SAVE

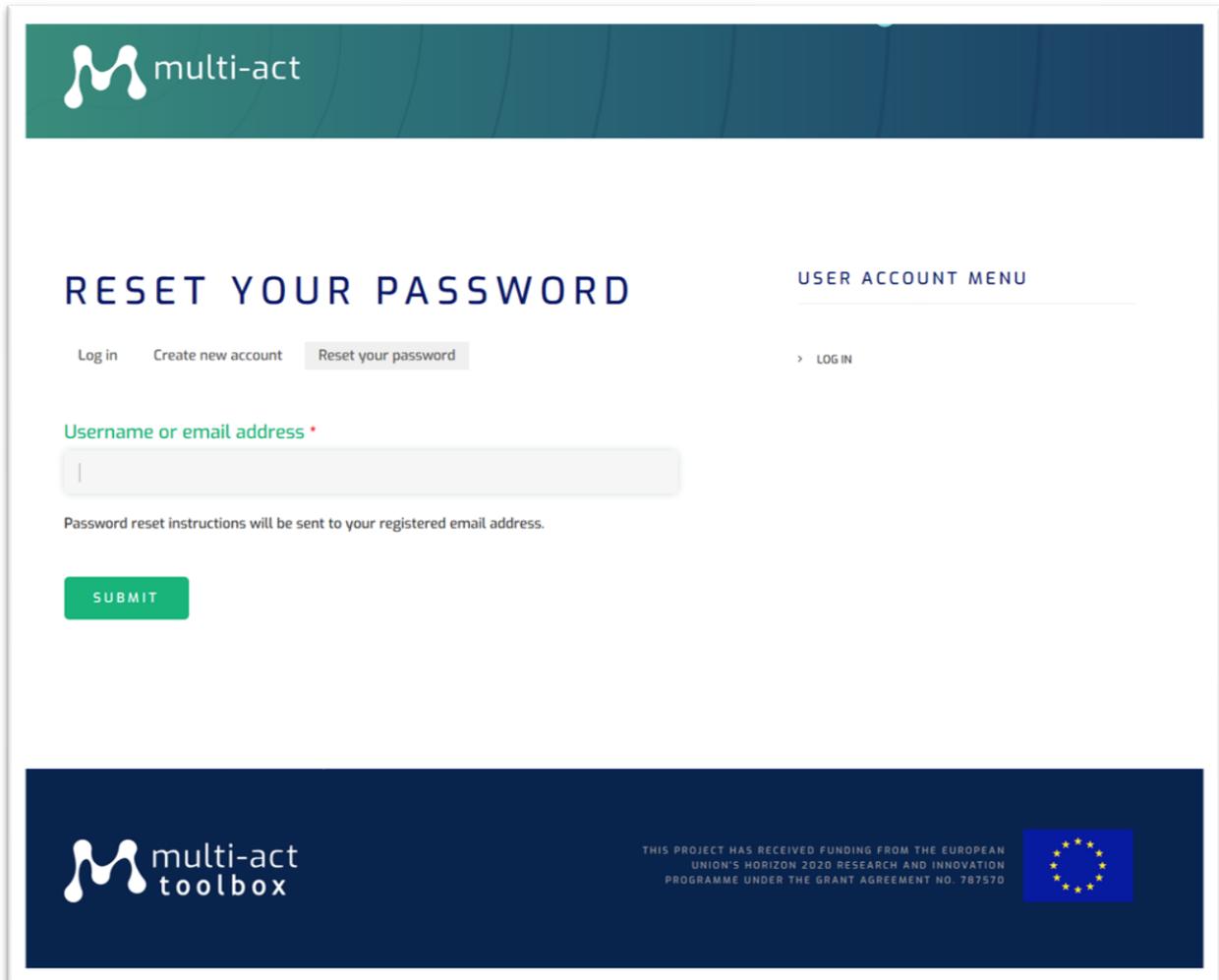
 multi-act toolbox

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Figure 6 User Registration Info

1.2.3 Password Reset

Users that have forgotten their password can use the password reset functionality (Figure 7 Password Reset.), by entering their registered email address in the password reset form. The MULTI-ACT Toolbox would then send an email with instructions containing a unique link to use, in order to define a new password.



multi-act

RESET YOUR PASSWORD

Log in Create new account **Reset your password**

Username or email address *

Password reset instructions will be sent to your registered email address.

SUBMIT

USER ACCOUNT MENU

> LOGIN

multi-act toolbox

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Figure 7 Password Reset.

1.2.4 User Login

The user can log in to their account through entering their credentials to the fields mentioned (Figure 8 User Login) and click on the “LOG IN” button, placed at the bottom of the screen.

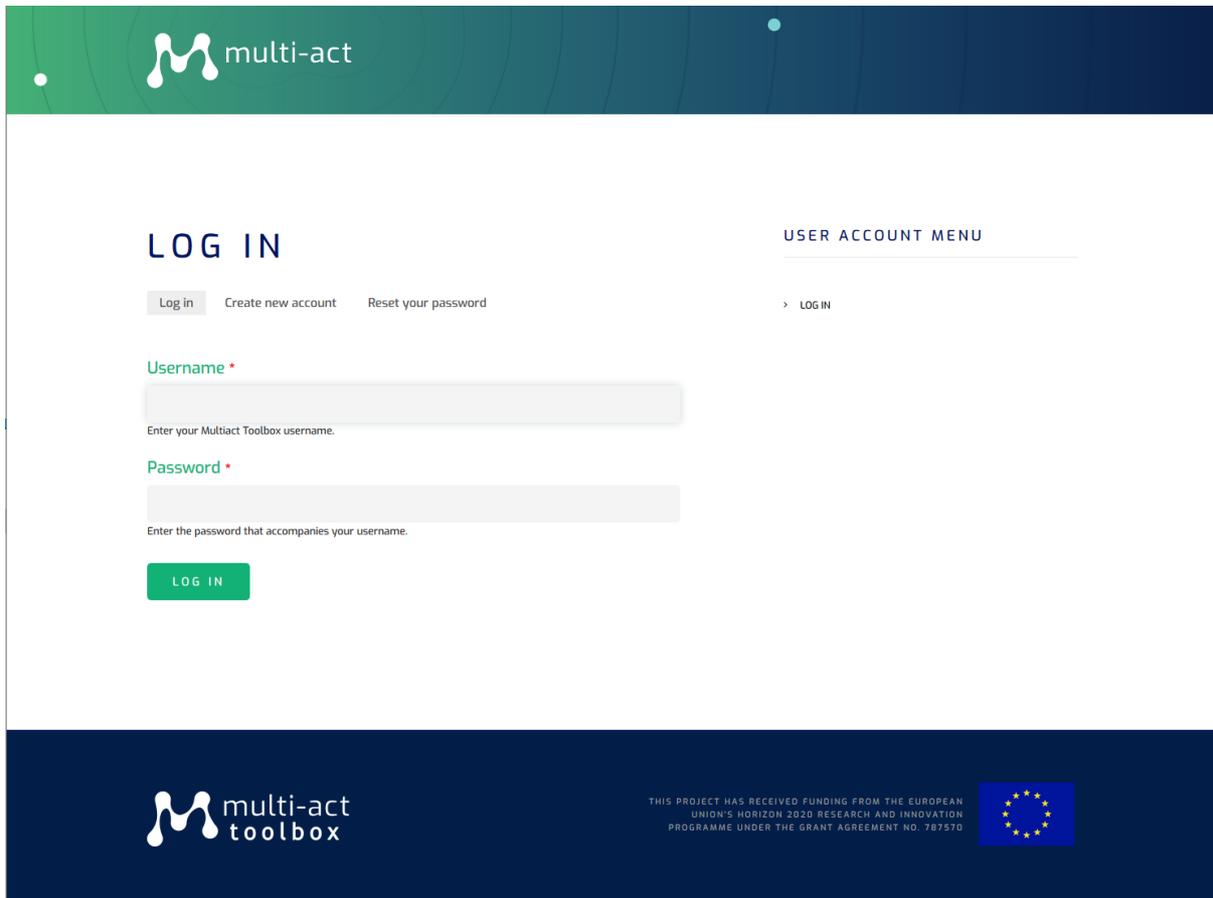


Figure 8 User Login

1.3 User Profile / Account

The User Profile page (Figure 9 User Profile) provides a condensed view of the user information (Name & Surname) as well as a depiction of the user’s created Initiatives. Users are able at any time to return to their profile page by using the permanent *My Account* link at the top right of the page.

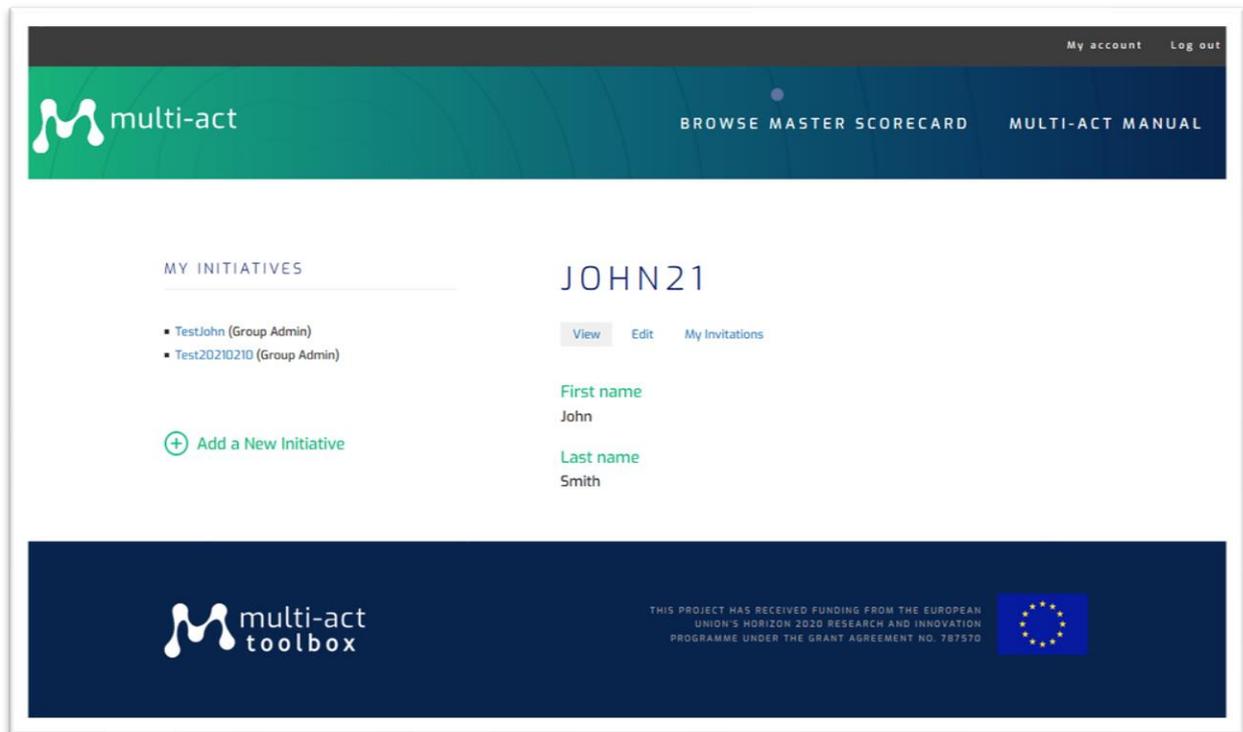


Figure 9 User Profile

1.4 The MULTI-ACT CRIF user journey

As described in the D4.3 deliverable following the evolution of the CRIF pillars, a logic flow for the initiative seeking to implement a multi-stakeholder approach has been defined. The so-called MULTI-ACT CRIF user journey described in Figure 10 shows the steps to be undertaken by the initiative in this stage. The workflow is composed by 5 main phases (corresponding to the MULTI-ACT co-accountability pillars) divided in 9 steps (displayed in Figure 10).

The Digital Toolbox guides in particular the user in the adoption and implementation of the following steps of the MULTI-ACT CRIF:

- **Phase 1:** initiatives submit a **baseline analysis** in order to measure their initial level of coherence with the **MULTI-ACT Governance criteria and patient engagement guidelines**.
- **Phase 2** MULTI-ACT proposes a specific methodology for defining the material topics which establish the agenda of the initiative: **the collective materiality analysis**. The Digital Toolbox allows a co-selection process of the aspects and indicators that best reflect the relevant issues for the stakeholders. By operating in this way, each initiative will have a score card of 12-15 aspects chosen from a list of 53 aspects available, and relevant 12-15 indicators chosen from the 125 that the model makes available in its impact assessment scorecard.

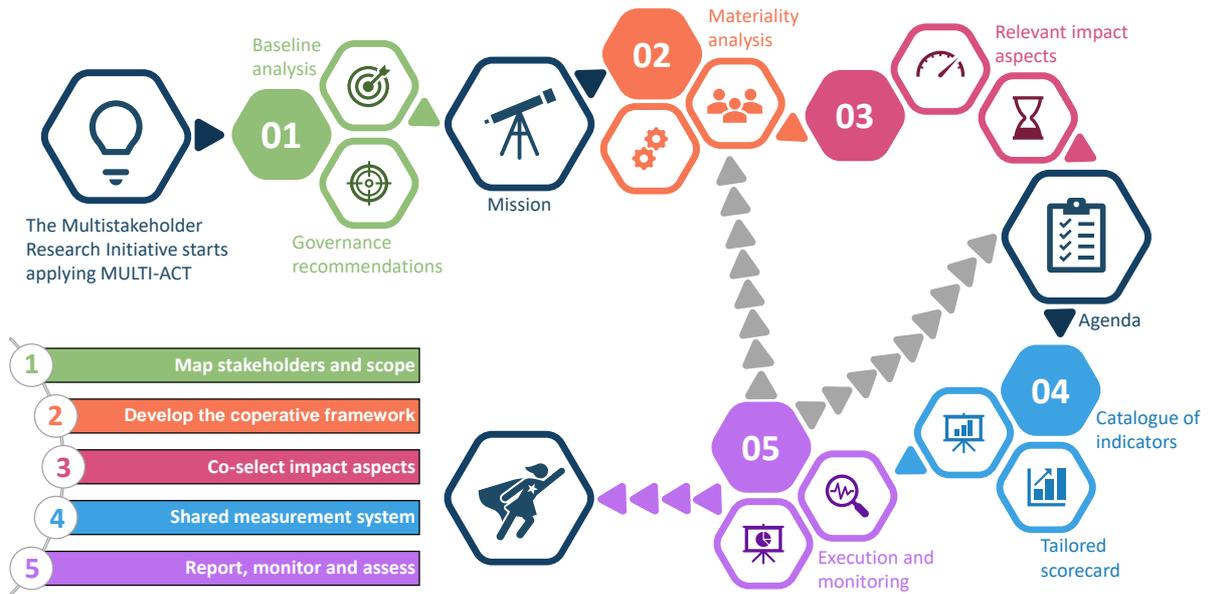


Figure 10: The MULTI-ACT CRIF user journey and the relation with Digital Toolbox.

The MULTI-ACT Toolbox enables the constant digital engagement of the stakeholders, in particular the patients, according to the principles and indications provided by the patient engagement and related guidelines.

1.5 Manual

In addition to the text content throughout the Toolbox, that is interlinked to the relevant sections of the MULTI-ACT manual, users can at any time access the Manual by using the relative menu link (Figure 11 Manual Page A).

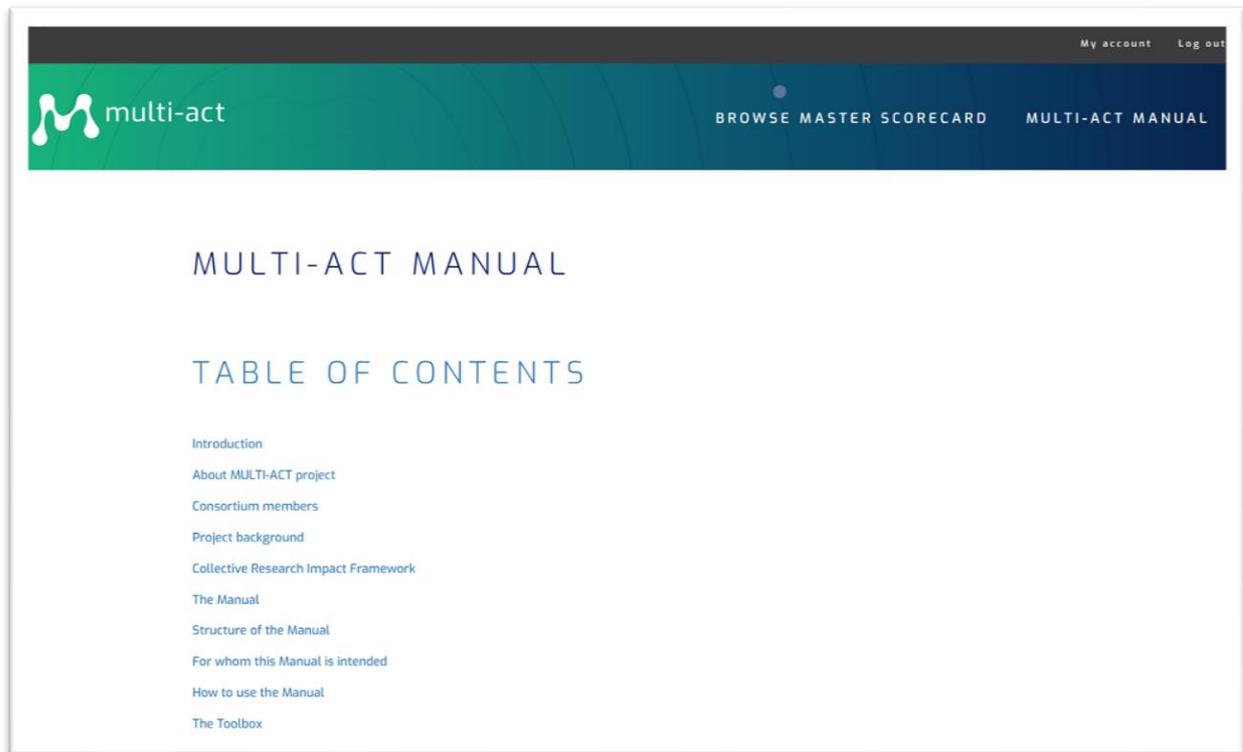


Figure 11 Manual Page A

The current content is transcribed from the preliminary draft of Deliverable *D6.1*² and has undergone all needed adaptations to be properly depicted in a web format (Figure 12 Manual Page B). This transformation includes producing a document map for easier transition to specific parts of the document, proper annotation and captions of all contained images to facilitate use by people with disabilities etc. It will be further updated once the final version of the D6.1 is ready to be submitted (around mid of M36).

²D6.1 MULTI-ACT CRIF Integrated Manual for R&I Actors (DiA) [to be submitted at the end of M36]

You can read more about the dimensions in the [Co-Accountability: Materiality Analysis and Master Scorecard](#).

The Master Scorecard:

- Translates the MULTI-ACT philosophy and agenda into action, providing potential indicators to evaluate the impact of health research and innovation, with special focus on the benefits for patients, healthcare, and society.
- Provides a catalogue of 125 indicators grouped into the CRIF dimensions with descriptions, example, data sources and qualitative and quantitative measurement information and methods.

The Master Scorecard indicators are grouped into the 5 CRIF dimensions: mission, excellence, social and economic. Indicators are assembled into 53 aspects, which are key topic areas for a dimension.



Figure 4 CRIF: Master Scorecard dimensions, aspects and indicators

WHY USE THE MASTER SCORECARD AND FOR WHAT PURPOSES?

You can use it as a strategic management tool to monitor the progress of your initiative and to demonstrate whether and how your initiative produces an actual impact.

Adapt the Master Scorecard to your individual needs:

- It allows flexibility and can be tailored to diverse multi-stakeholder projects, so the scorecard should not be used as a fixed set of indicators.
- It is dynamic as the user can select indicators for different purposes and specific needs of many stakeholders.
- The Master Scorecard is constructed so that it can be used, customised, and applied by a broad range of users. Therefore, indicators among different topics can be selected according to needs.

HOW TO USE THE MASTER SCORECARD?

Your initiative can adopt MS to build co-accountability by linking the research outputs with the mission and priorities of the initiative. It can be done regardless of the stage of R&I project, although early adoption renders best results.

Figure 12 Manual Page B

1.6 Master Scorecard

Through the *Browse Master Scorecard* link (Figure 13 - Master Scorecard - Search Filters), users can access the Master Scorecard content. By using any of the available filters, users can search for indicators belonging to a specific CRIF dimension, aspect and/or group of indicators.

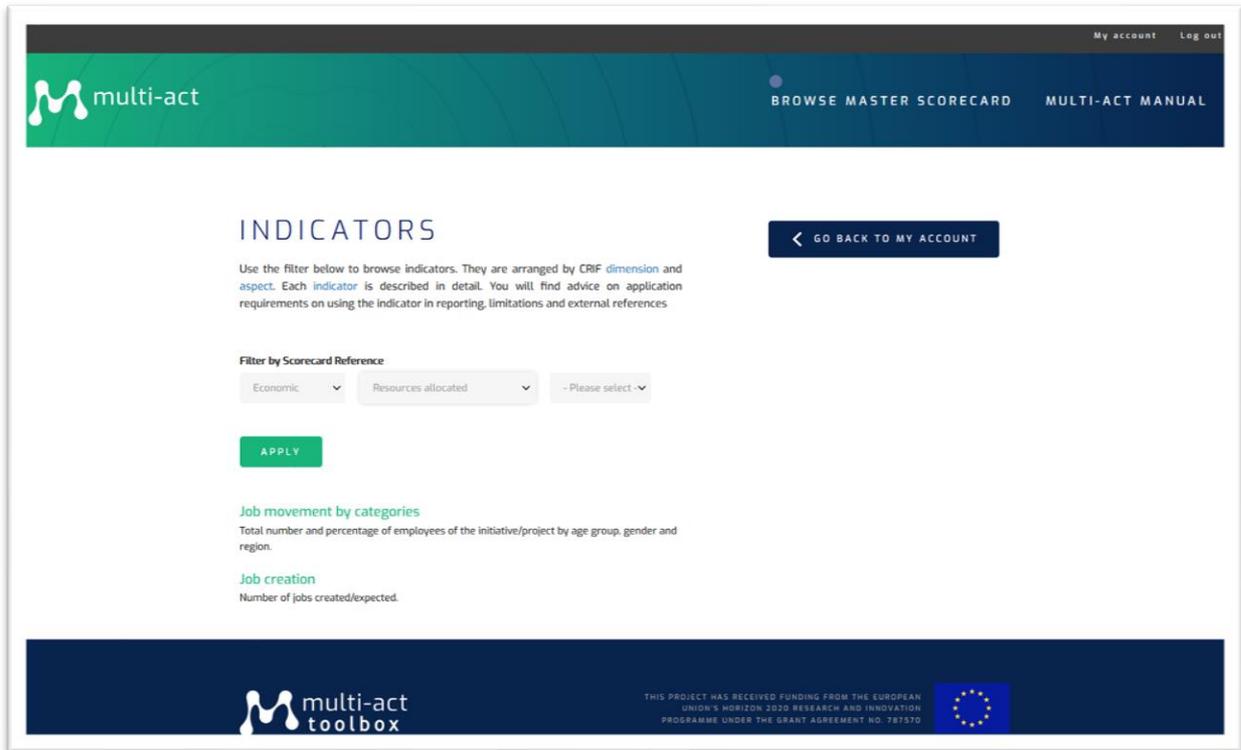


Figure 13 - Master Scorecard - Search Filters

The final selection of an indicator returns all relative indicator information that is contained in the Master Scorecard (Figure 14 - Indicator View).



Figure 14 - Indicator View

1.7 Initiative Creation

Users can create new initiatives from their account page by clicking on the *Add a New Initiative* link, by providing the initiative's Name and clicking *Create Initiative* (Figure 15 Initiative Creation 01) and (Figure 16 Initiative Creation 02).



ADD INITIATIVE

Name *

Attica2020

CREATE INITIATIVE



Figure 15 Initiative Creation 01

Core Activities

Evaluation of treatments and therapeutic interventions
Health and social care services research
 Management of diseases and conditions
Prevention of diseases and conditions / promotion of health and wellbeing
 Underpinning research and aetiology

STAKEHOLDER MEMBER TYPES *

Care providers
 Industry
 Patients
 Patients Organizations
 Payers and Purchasers
 Policy makers
 Public
 Research and Education Organizations

Funding Research

Geographical Coverage *

Andorra
Angola
 Antigua and Barbuda
Argentina
 Armenia

Parent Initiative

MS Initiative 01 (529)

Inherits Parent's Assessment

SAVE PREVIEW

Figure 16 Initiative Creation 02

1.8 Initiative Page

Upon selecting an Initiative, the user is presented with all existing information; then, a newly created initiative's page is displayed (Figure 17 Initiative Page 1), implementing the MULTI-ACT CRIF user journey as briefly presented in Section 1.4.

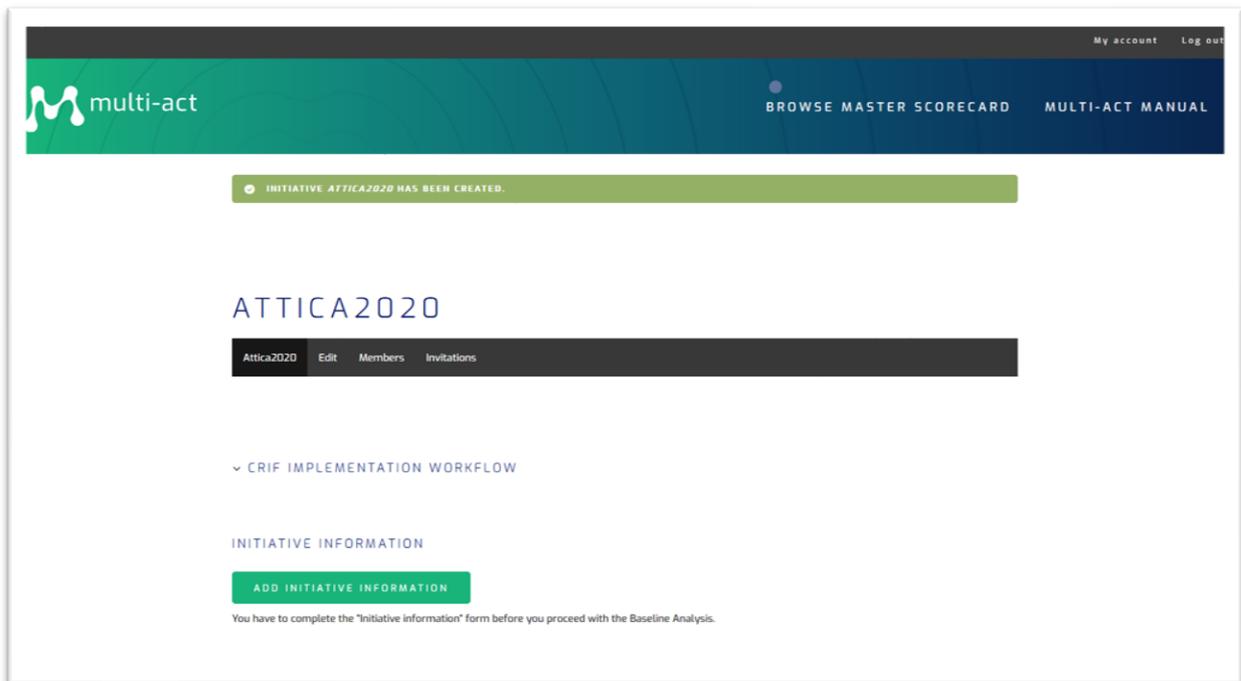


Figure 17 Initiative Page 1

The user is then guided to proceed to a series of predesignated steps in order to go through the MULTI-ACT CRIF user journey while being provided with detailed information about each step (Figure 18 Initiative CRIF Implementation Info).

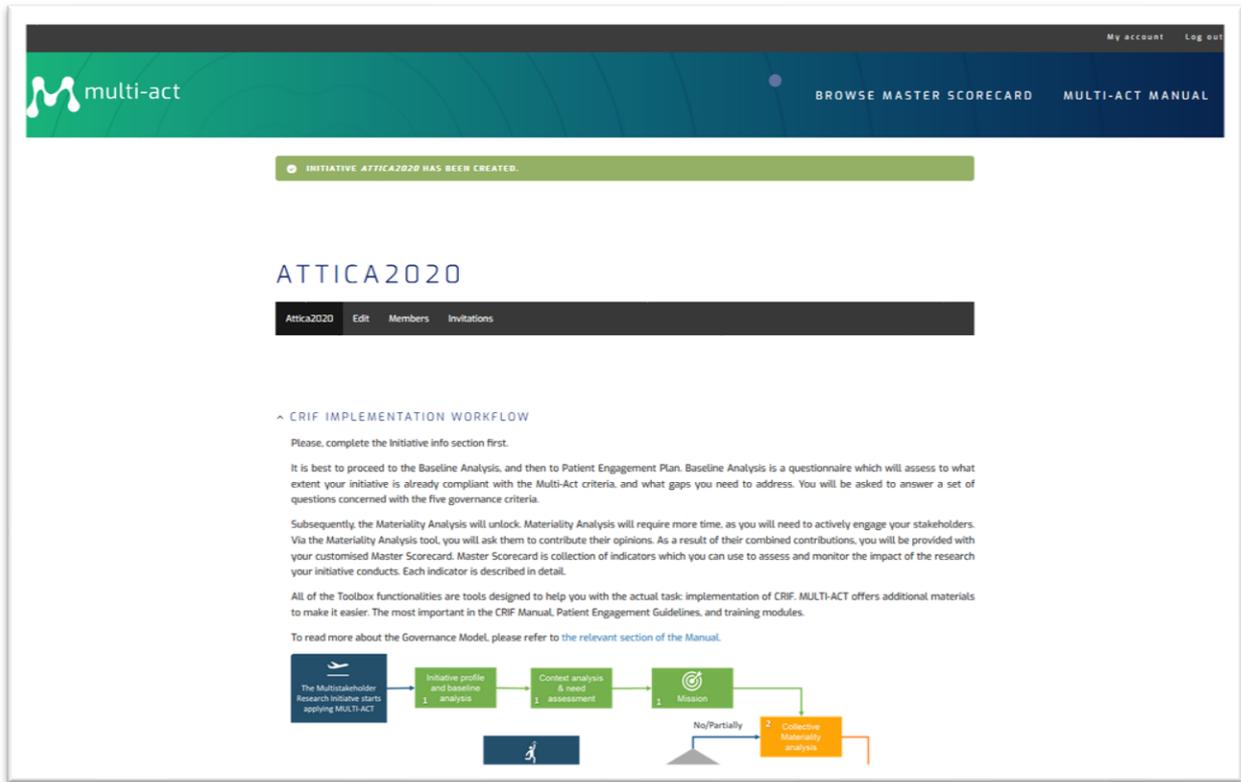


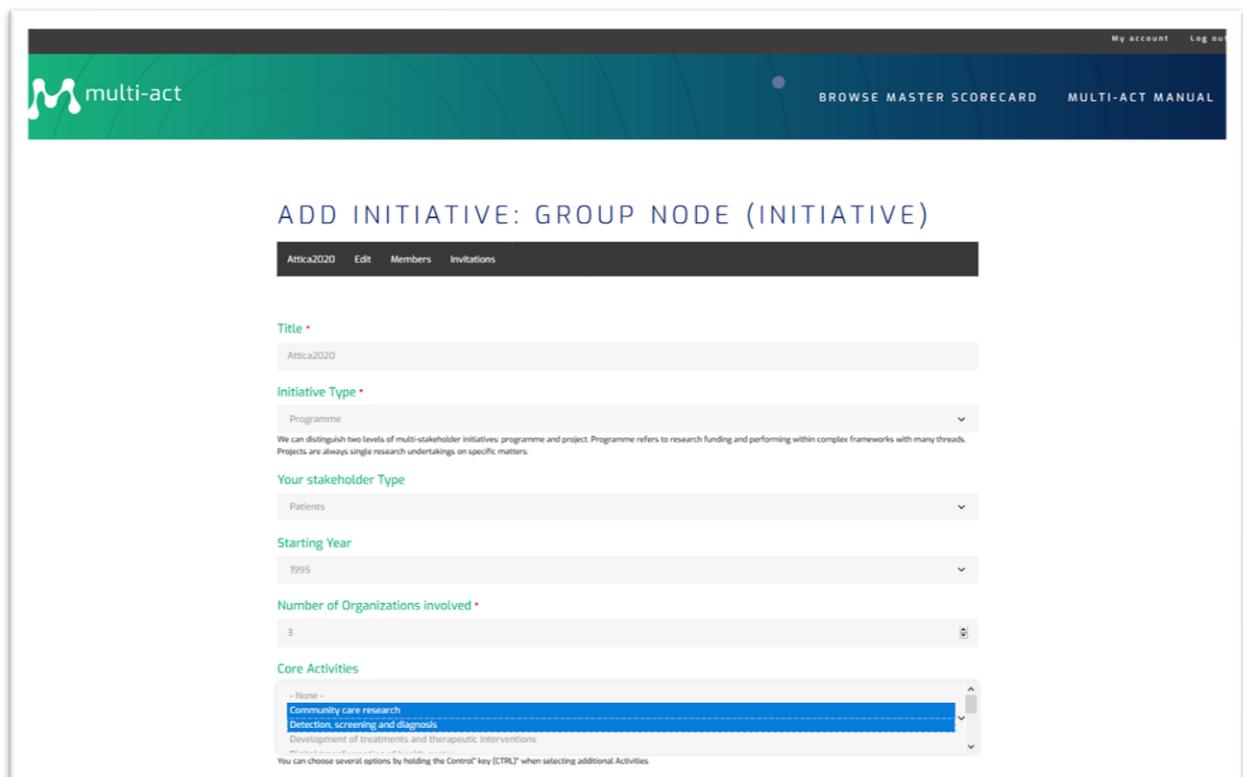
Figure 18 Initiative CRIF Implementation Info

After the completion of every step of the procedure, a new section is revealed with relevant guiding information over the specific new set of requested actions.

1.8.1 Initiative Info

For a newly created initiative, the first step is for the user to fill all its information (Figure 19 Initiative Information A). This includes:

- The type of initiative (Programme/Project).
- The user's stakeholder category in the initiative.
- Starting Year of the Initiative.
- Number of Organizations involved.
- The stakeholder member types.
- The Core Activities.
- Geographical Coverage.



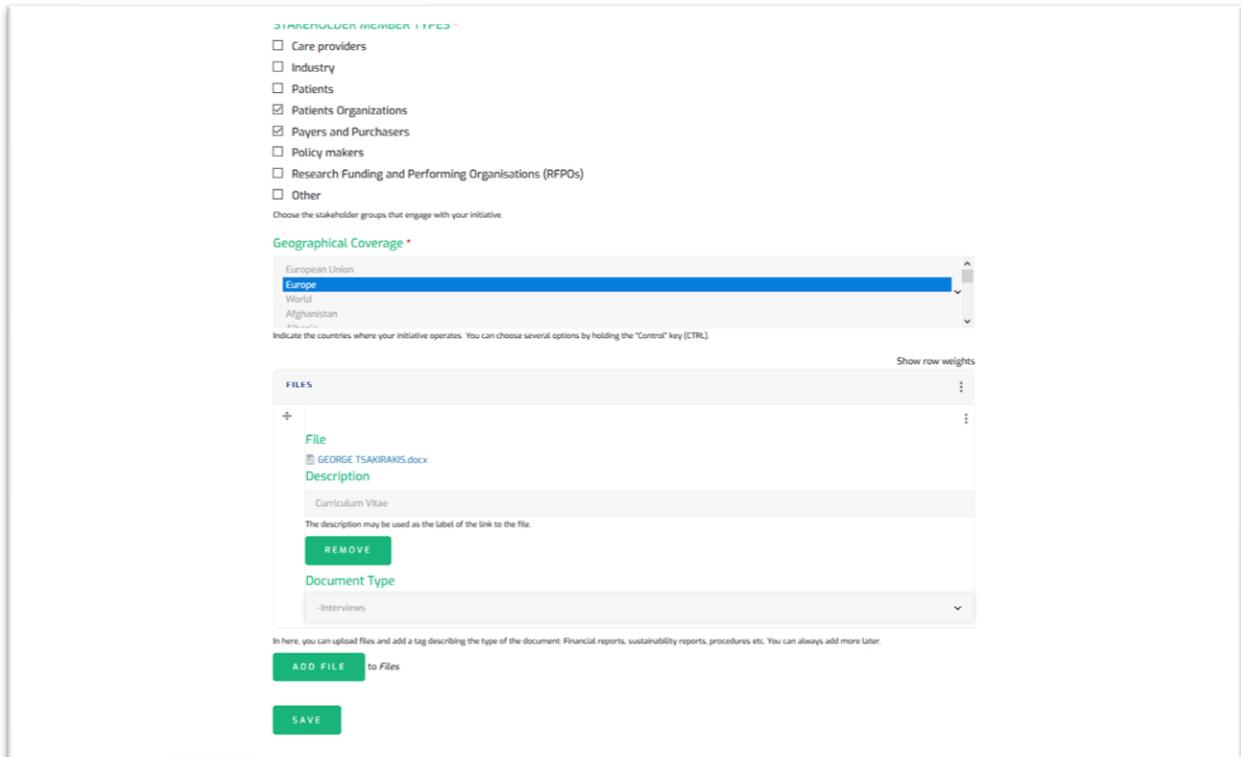
The screenshot shows the 'ADD INITIATIVE: GROUP NODE (INITIATIVE)' form. The form is titled 'Attica2020' and has a navigation bar with 'Edit', 'Members', and 'Invitations'. The form fields are:

- Title**: Attica2020
- Initiative Type**: Programme (dropdown menu)
- Your stakeholder Type**: Patients (dropdown menu)
- Starting Year**: 1995 (dropdown menu)
- Number of Organizations involved**: 3 (input field)
- Core Activities**: Community care research, Detection, screening and diagnosis, Development of treatments and therapeutic interventions (checkboxes)

Figure 19 Initiative Information A

Additionally, the users can upload documents to the initiative's portfolio and annotate them based on the Content Annotation Taxonomy (Figure 20 Initiative Information B) which was described in Deliverable D2.2³.

³ D2.2 MULTI-ACT content and data collection manual (INTRASOFT - 29/02/2020)



STAKEHOLDER MEMBER TYPES

- Care providers
- Industry
- Patients
- Patients Organizations
- Payers and Purchasers
- Policy makers
- Research Funding and Performing Organisations (RFPOs)
- Other

Choose the stakeholder groups that engage with your initiative.

Geographical Coverage *

European Union
Europe
 World
 Afghanistan

Indicate the countries where your initiative operates. You can choose several options by holding the "Control" key (CTRL).

Show row weights

FILES

+

File
 GEORGE TSAKIRAKIS.docx
Description
 Curriculum Vitae
 The description may be used as the label of the link to the file.
 REMOVE

Document Type
 -Interviews

In here, you can upload files and add a tag describing the type of the document: Financial reports, sustainability reports, procedures etc. You can always add more Later.

ADD FILE to Files

SAVE

Figure 20 Initiative Information B

After submitting the initial form, the users can access and edit the initiative's information and files by clicking the View/Edit Initiative Information (Figure 21 - Initiative Information (View/Edit)).

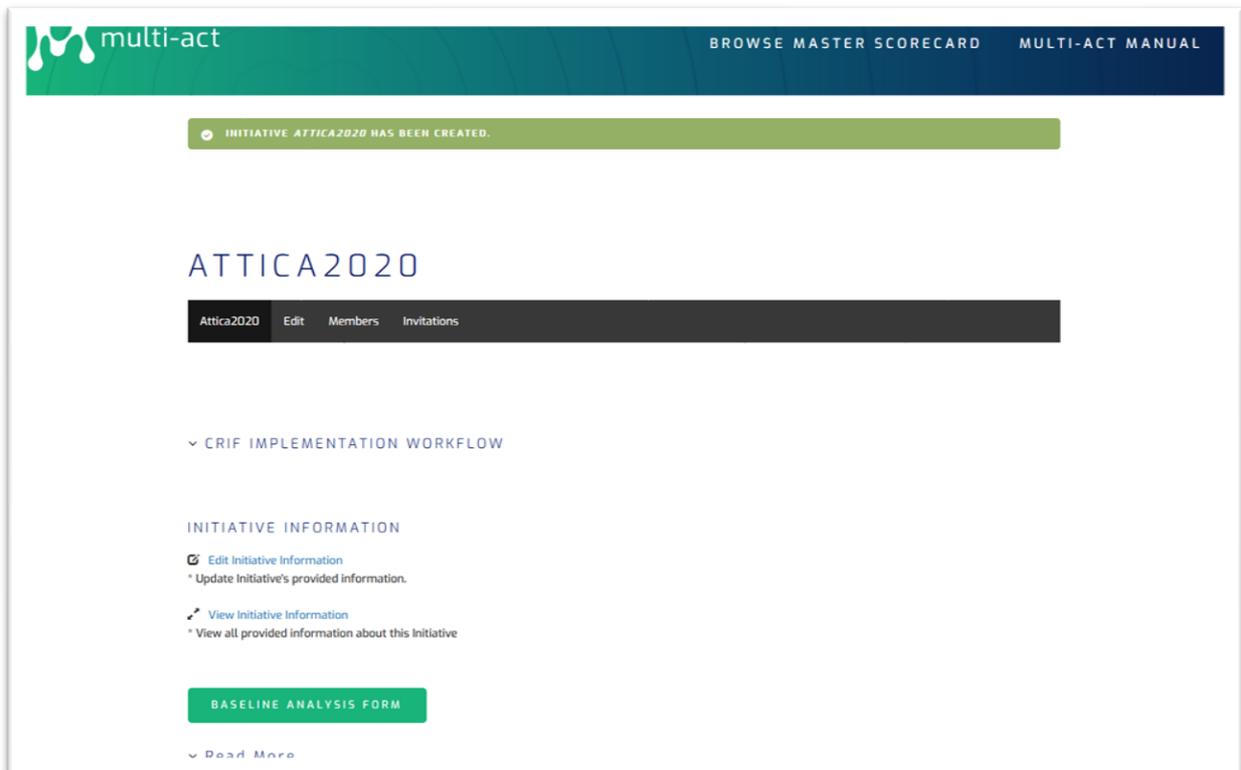
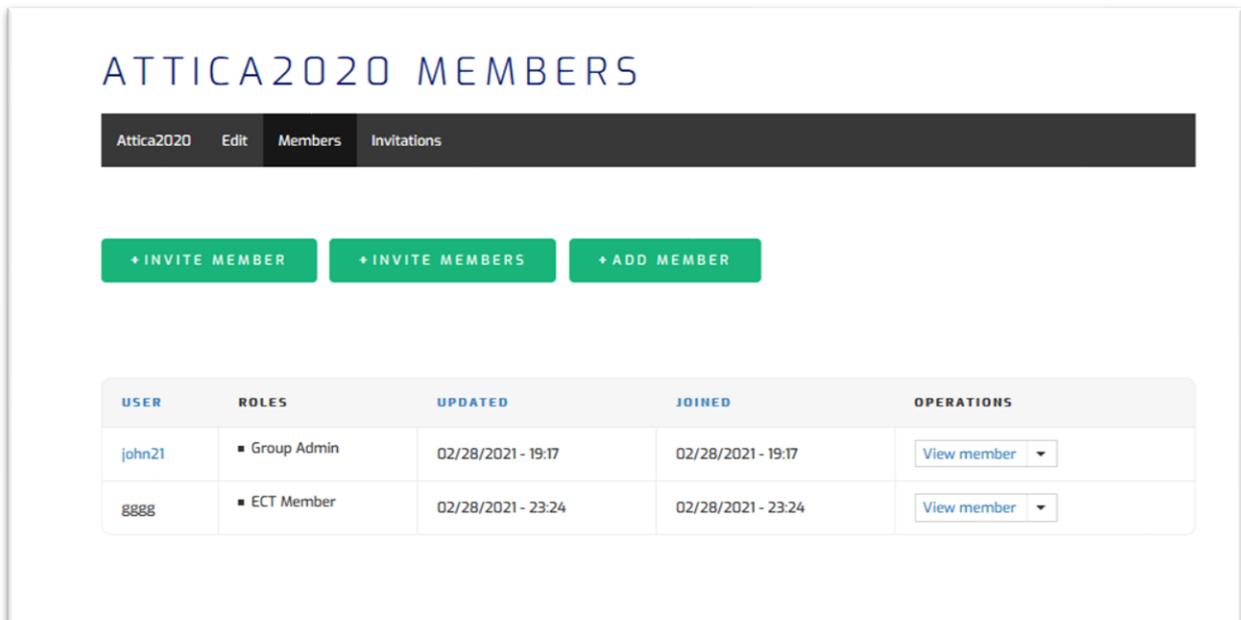


Figure 21 - Initiative Information (View/Edit)

1.8.2 Initiative Stakeholder & Invitations

The promoter of an initiative can either act on behalf of its stakeholders and convey in the Toolbox the results of collaborative exercises practised offline (i.e. Materiality Analysis), or invite its stakeholders to become registered members of the MULTI-ACT Toolbox and gain access to specific parts of the initiative's information, via the panel provided on the top of the initiative's page (Figure 22 - Initiative Members).



ATTICA2020 MEMBERS

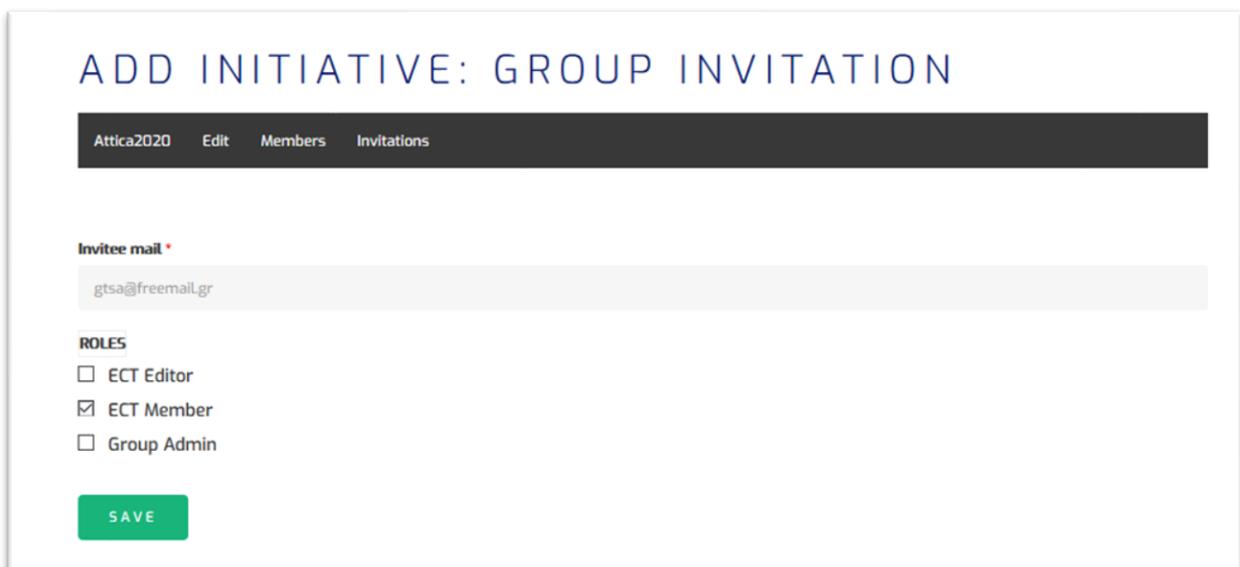
Attica2020 Edit Members Invitations

+ INVITE MEMBER + INVITE MEMBERS + ADD MEMBER

USER	ROLES	UPDATED	JOINED	OPERATIONS
john21	▪ Group Admin	02/28/2021 - 19:17	02/28/2021 - 19:17	View member ▾
8888	▪ ECT Member	02/28/2021 - 23:24	02/28/2021 - 23:24	View member ▾

Figure 22 - Initiative Members

This can be conducted by sending an email invitation to a specific member and appointing their role in the initiative (Figure 23 - Single Member Invitation).



ADD INITIATIVE: GROUP INVITATION

Attica2020 Edit Members Invitations

Invitee mail *

gtsa@freemail.gr

ROLES

ECT Editor

ECT Member

Group Admin

SAVE

Figure 23 - Single Member Invitation

Alternatively, the promoter can send invitation to multiple members' emails using the *Invite Members* link (Figure 24 Multiple Member Invitation).

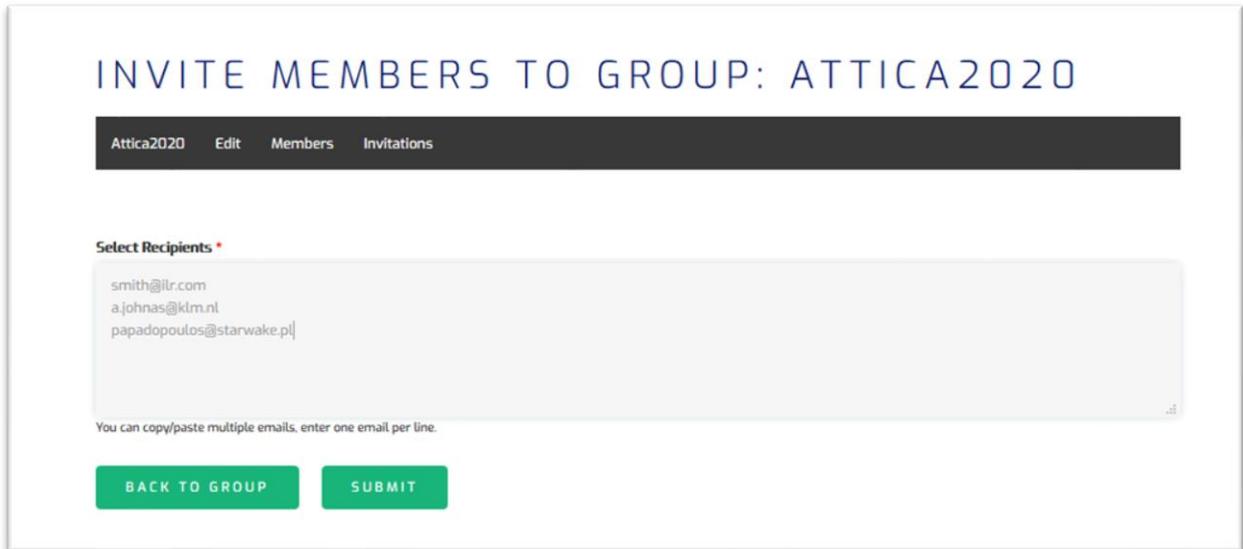


Figure 24 Multiple Member Invitation

For all of the invited members that are not yet registered at the MULTI-ACT Toolbox, email invitations are sent with information on how to register (Figure 25 User's Invitations).

Users can access their invitations by clicking the *My Invitations* on their account page and accept or decline.

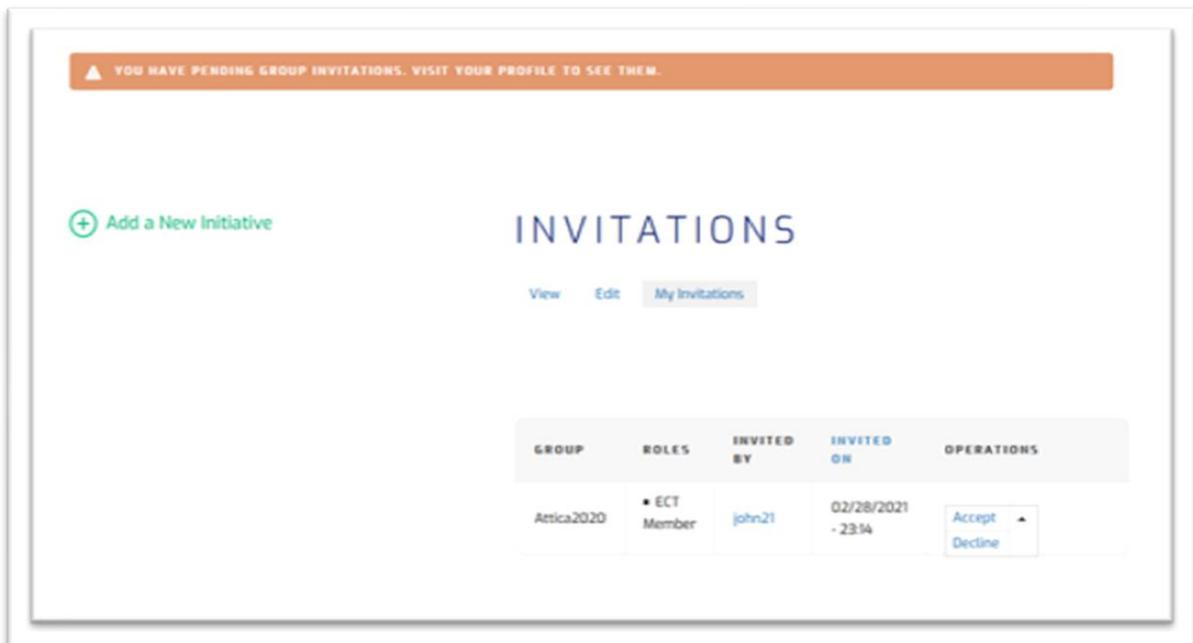
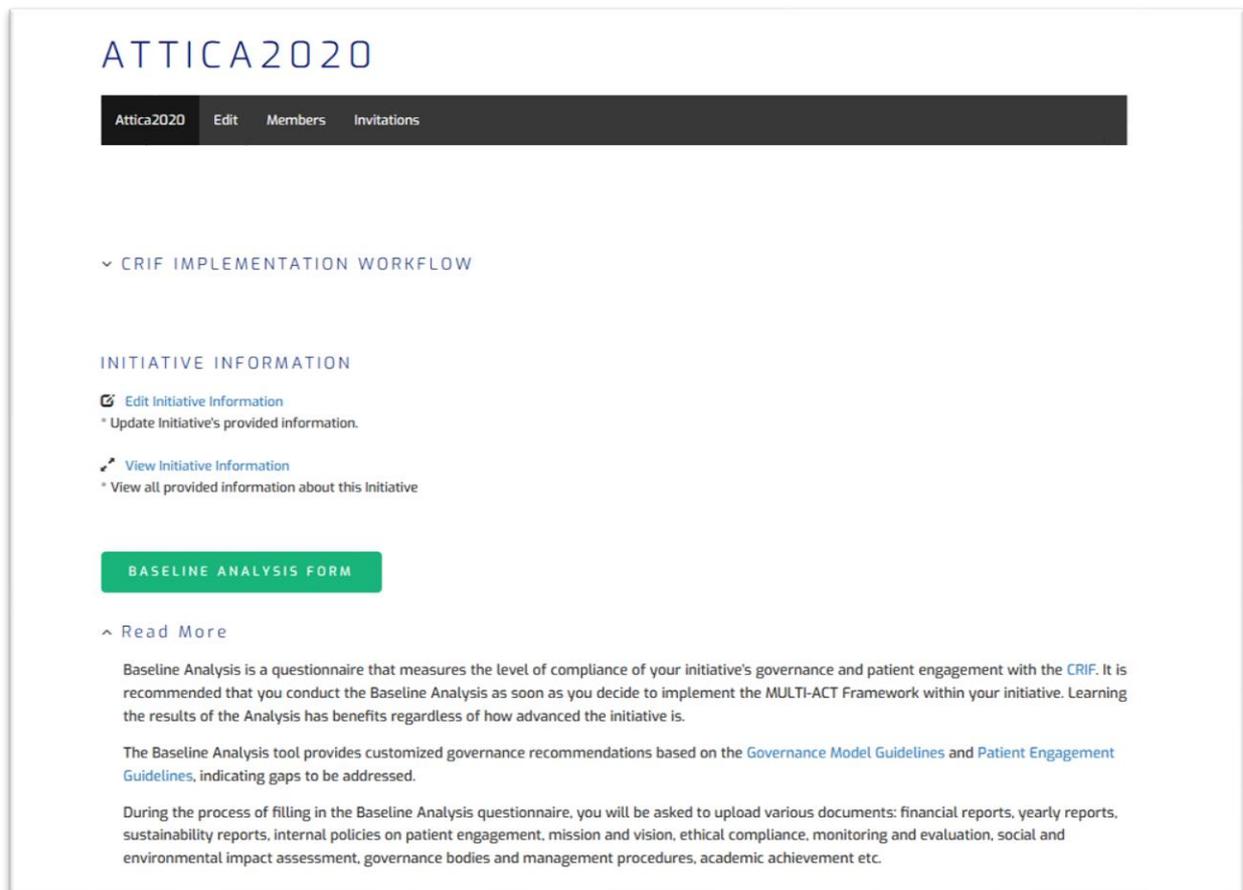


Figure 25 User's Invitations

Depending on the members appointed role, they are given access to subsequent sections of the initiative's information.

1.8.3 Baseline Analysis

After completing the initiative's information, the Baseline Analysis section is revealed (Figure 26 Baseline Analysis Form).



ATTICA2020

Attica2020 Edit Members Invitations

∨ CRIF IMPLEMENTATION WORKFLOW

INITIATIVE INFORMATION

-  Edit Initiative Information
* Update Initiative's provided information.
-  View Initiative Information
* View all provided information about this Initiative

BASELINE ANALYSIS FORM

∧ Read More

Baseline Analysis is a questionnaire that measures the level of compliance of your initiative's governance and patient engagement with the CRIF. It is recommended that you conduct the Baseline Analysis as soon as you decide to implement the MULTI-ACT Framework within your initiative. Learning the results of the Analysis has benefits regardless of how advanced the initiative is.

The Baseline Analysis tool provides customized governance recommendations based on the [Governance Model Guidelines](#) and [Patient Engagement Guidelines](#), indicating gaps to be addressed.

During the process of filling in the Baseline Analysis questionnaire, you will be asked to upload various documents: financial reports, yearly reports, sustainability reports, internal policies on patient engagement, mission and vision, ethical compliance, monitoring and evaluation, social and environmental impact assessment, governance bodies and management procedures, academic achievement etc.

Figure 26 Baseline Analysis Form

The user, upon following the link to perform the MULTI-ACT Framework Baseline Analysis on a given Initiative, is taken to a multi-step questionnaire divided into different criteria (Figure 27 MULTI-ACT Framework Baseline Analysis 01). The questionnaire's content is dynamic; that means that specific questions/sections are shown depending on the user's choices in previous relative questions (Figure 28 MULTI-ACT Framework Baseline Analysis 02). The user can move freely between the different sections of the questionnaire, as well as temporarily save a draft with their answers and complete the questionnaire at a later stage.

MULTI-ACT FRAMEWORK BASELINE ANALYSIS

1

**CRITERION 1:
MISSION AND
AGENDA**

2

**CRITERION 2:
PARTICIPATORY
GOVERNANCE**

3

**CRITERION 3 :
CLEAR, EFFECTIVE
AND INCLUSIVE
METHODOLOGY OF
STAKEHOLDER
ENGAGEMENT**

4

**CRITERIA 4:
EFFECTIVE AND
EFFICIENT
MANAGEMENT AND
COORDINATION OF
THE INITIATIVE**

5

**CRITERION 5: CO-
ACCOUNTABILITY
ASSESSMENT**

6

COMPLETE

1 of 6 (0%)

1) Have you developed a shared mission for your initiative? *

Yes ▼

Mission defines your initiative's current and future role, what it wants to achieve, and how it wants to achieve it.

1.1) Please provide the mission statement and related documents to the mission.

Browse... No files selected.

Maximum 5 files.
50 MB limit.
Allowed types: txt, rtf, pdf, doc, docx, odt, ppt, pptx, odp, xls, xlsx, ods.

2) Do you have an agenda defining the priority areas, mid-term and long-term objectives and a set of actions to achieve the objectives of the initiative?

- None - ▼

Agenda is a list of fundamental transformative objectives agreed upon by stakeholders that an initiative aims to achieve to fulfil its mission , including a description of the main outputs and activities needed to achieve them.

4) Have you identified the intended beneficiaries of your research initiative?

- None - ▼

SAVE DRAFT

CRITERIA 2: PARTICIPATORY GOVERNANCE

Figure 27 MULTI-ACT Framework Baseline Analysis 01

MULTI-ACT FRAMEWORK BASELINE ANALYSIS

[BACK TO "ATTICA2020" OVERVIEW PAGE](#)

1

**CRITERION 1:
MISSION AND
AGENDA**

2

**CRITERION 2:
PARTICIPATORY
GOVERNANCE**

3

**CRITERION 3 :
CLEAR, EFFECTIVE
AND INCLUSIVE
METHODOLOGY OF
STAKEHOLDER
ENGAGEMENT**

4

**CRITERIA 4:
EFFECTIVE AND
EFFICIENT
MANAGEMENT AND
COORDINATION OF
THE INITIATIVE**

5

**CRITERION 5: CO-
ACCOUNTABILITY
ASSESSMENT**

6

COMPLETE

5 of 6 (80%)

20) Do you have a monitoring system for the implementation of the actions of the initiative and the performance of the initiative itself (ongoing) ?

Yes ▼

21) Have you defined an assessment system that allow to measure initiative's "long-term impact" ?

- None - ▼

22) Do you publish a progress report ?

- None - ▼

23) Do you communicate with stakeholders about the progress of the initiative ?

No ▼

24) Do you have a review process in place to improve the initiative's performance and practices (based on the results of the monitoring) ?

No ▼

25) Do you have a process in place to gather feedback from external stakeholders and the public? (For example a section on the website for public consultation, organization of specific events, etc.) ?

Yes ▼

25.1) Please describe

[SAVE DRAFT](#)

[CRITERION 4: EFFICIENT MANAGEMENT AND COORDINATION OF THE INITIATIVE](#)

[SUBMIT](#)

Figure 28 MULTI-ACT Framework Baseline Analysis 02

After the submission of the Baseline Analysis questionnaire, the Baseline Analysis assessment score is depicted providing a link leading to the recommendations that the initiative could implement to enhance its coherence to the MULTI-ACT model (Figure 29 - Baseline Analysis Completed) and (Figure 30 Baseline Analysis Recommendations).

▼ [CRIF IMPLEMENTATION WORKFLOW](#)

INITIATIVE INFORMATION

-  [Edit Initiative Information](#)
* Update Initiative's provided information.
-  [View Initiative Information](#)
* View all provided information about this Initiative

BASELINE ANALYSIS

You have completed the Baseline Analysis. The results indicate which recommendations from the Governance Criteria you should look into and implement. We suggest you familiarize yourself with the whole Governance Chapter of the Manual. You can repeat the Baseline Analysis to monitor your progress towards compliance.

-  [Completed](#)
-  [Score: 9.44%](#)

▼ [Read More](#)

PATIENT ENGAGEMENT PLAN

▼ [Read More](#)

[ADD PATIENT ENGAGEMENT PLAN](#)

Figure 29 - Baseline Analysis Completed



Figure 30 Baseline Analysis Recommendations

The users can return at a later time and edit their answers in the Baseline Analysis questionnaire, which will dynamically produce a different Baseline Analysis score and set of recommendations (Figure 31 Baseline Analysis PDF Export). Furthermore, the users are able to export both their complete Baseline Analysis questionnaire as well as the Recommendations in a PDF format (Figure 32 Baseline Analysis Recommendations PDF Export).

{Empty}

or provide documentation
{Empty}

18) Do you have a process in place to ensure that there is a right balance between an efficient management process and the opportunities for engaging a wide range of participants?
{Empty}

19) Have you developed a contingency plan/risk management approach?
{Empty}

Criterion 5: Co-accountability assessment

20) Do you have a monitoring system for the implementation of the actions of the initiative and the performance of the initiative itself (ongoing) ?
Yes

21) Have you defined an assessment system that allow to measure initiative's "long-term impact" ?
{Empty}

22) Do you publish a progress report ?
{Empty}

23) Do you communicate with stakeholders about the progress of the initiative ?
No

24) Do you have a review process in place to improve the initiative's performance and practices (based on the results of the monitoring) ?
No

25) Do you have a process in place to gather feedback from external stakeholders and the public? (For example a section on the website for public consultation, organization of specific events, etc.) ?
Yes

25.1) Please describe
{Empty}

[DOWNLOAD PDF](#)

Figure 31 Baseline Analysis PDF Export

3.4.1 Ensure that there is a right balance between an agile management process and the opportunities for engaging a wide range of participants. In particular, set in place processes to mitigate the challenges faced by collaborative groups, such as competition, conflict, cultural and behavioral differences, equity, resource sharing, communication, confidentiality concerns, and geographical dispersion

CRITERION 5: CO-ACCOUNTABILITY ASSESSMENT

Score: 4/18

Lacking: the initiative is not line with MULTI-ACT recommendations.

SUB-CRITERION 5.1

Define a shared assessment system

5.1.1 Enable the co-selection of relevant aspects, according to the different impact dimensions, in order to identify the topics that matter the most to the initiative and its stakeholders

5.1.2 Select appropriate indicators from the list of relevant aspects according to different impact dimensions and stakeholder perspectives in order to comprehensively assess the impact of health research

5.1.3 Ensure that the list of selected indicators consider the impact on patients

5.1.4 Establish a shared assessment system consisting of a set of indicators consistently tracked over time and a shared data collection process

5.1.5 Ensure that the shared assessment system (Master Scorecard) is coherent to the mission and the agenda of the initiative over time, guaranteeing its alignment to stakeholder perspective

5.1.6 Transparently report and communicate the initiative's results and progresses to the public

5.1.7 Constantly review the initiative according to the results of the assessment

5.2.1 Implement structures and processes allowing to inform, engage, and seek feedback from internal and external stakeholders, including concerns about the initiative and its development



Figure 32 Baseline Analysis Recommendations PDF Export

1.8.4 Patient Engagement Plan

After the completion of the Baseline Analysis, the Patient Engagement Plan section (Figure 33 Patient Engagement Plan) is revealed.

BASELINE ANALYSIS

You have completed the Baseline Analysis. The results indicate which recommendations from the Governance Criteria you should look into and implement. We suggest you familiarize yourself with the whole Governance Chapter of the Manual. You can repeat the Baseline Analysis to monitor your progress towards compliance.

- ✓ Completed
- ☰ Score: 9.44%

∨ Read More

PATIENT ENGAGEMENT PLAN

∧ Read More

The Patient Engagement Plan is a framework that allows your initiative to plan patient engagement in a systematic manner consistent with progress towards fulfilling the mission. Its purpose is to provide you with a tool to facilitate the design of operative patient engagement plans that are compliant with the CRIF guidelines.

The Patient Engagement Plan is developed by the Engagement Coordination Team. We encourage you to familiarize yourself with the [Patient Engagement Guidelines](#) and the [relevant chapter of the Manual](#) before proceeding.

[ADD PATIENT ENGAGEMENT PLAN](#)

Figure 33 Patient Engagement Plan

The user is then requested to create the initiative's Patient Engagement Plan via a dynamic form while being provided with all necessary information on how to populate all the form sections (Figure 34 Patient Engagement Plan A) and (Figure 35 Patient Engagement Plan B).

ADD INITIATIVE: GROUP NODE (ENGAGEMENT PLAN)

Attica2020
Edit
Members
Invitations

Title *

Attica2020 - Patient Engagement Plan

Initiative Type

Programme

MISSION/SCOPE *

Briefly describe the mission and vision and its specific objectives in a language that is clear and understandable by multi-variate stakeholders. If you have uploaded a Mission and Agenda in the baseline analysis you might summarize the main point here.

B I |         | Normal | Source

Describe the mission and vision and its specific objectives in a language that is clear and understandable by multi-variate stakeholders. If you have uploaded a Mission and Agenda in the baseline analysis you might summarize the main point here.

body p

[About text formats ?](#)

PURPOSE OF PATIENT ENGAGEMENT

Briefly describe what are the main challenges to meet the mission and how patients can help to meet the challenges and to overcome barriers.

Action 1

Figure 34 Patient Engagement Plan A

Upload document to be prepared and other technicalities

No file selected.

One file only.
50 MB limit.
Allowed types: txt pdf csv doc docx xls odt ods zip.

Upload the timeline GANTT

No file selected.

One file only.
50 MB limit.
Allowed types: txt pdf csv doc docx xls odt ods zip.

SELECT THE METHODS AND DEFINE HOW YOU CAN USE IT TO ENGAGE PATIENTS IN YOUR PLAN.

Select the methods and briefly describe the modality and the added value of using it to engage patients. You can find a description of the methods in the Engage2020 Action Catalogue.

- Focus Group
- Democs Cards Games
- World Café
- Consensus Conference
- Community Advisory Board
- Delphi Method
- Citizens Hearing
- Serious Gaming
- Other

Figure 35 Patient Engagement Plan B

After submitting the form, the users can at any time return to further edit it via the *Edit Patient Engagement Plan* link (Figure 36 Submitted Patient Engagement Plan). Furthermore, by using the *View Patient Engagement Plan* users can view Patient's Engagement Plan provided information, participate in group discussions as well as export the produced document in PDF format (Figure 37 Patient Engagement Plan Discussion and PDF Export).

BASELINE ANALYSIS

You have completed the Baseline Analysis. The results indicate which recommendations from the Governance Criteria you should look into and implement. We suggest you familiarize yourself with the whole Governance Chapter of the Manual. You can repeat the Baseline Analysis to monitor your progress towards compliance.

✓ Completed
☰ Score: 9.44%

∨ Read More

PATIENT ENGAGEMENT PLAN

∨ Read More

✎ Edit Patient Engagement Plan
* Update Patient's Engagement Plan provided information.

👁 View Patient Engagement Plan
* View Patient's Engagement Plan provided information and participate to group discussions

PERFORM MATERIALITY ANALYSIS

∨ Read More

Figure 36 Submitted Patient Engagement Plan

10. COMPLIANCE OF THE PLAN TO THE MULTI-ACT CRITERIA

-

11. TECHNICALITIES, OPERATIONAL ASPECTS

[Export PDF](#)

GROUP DISCUSSIONS

new

SUGGESTIONS OVER COMPLIANCE

George21 Sun, 02/28/2021 - 20:50 [EDIT](#) [REPLY](#)

COMPLIANCE OF THE PLAN TO THE MULTI-ACT CRITERIA should be further elaborated

ADD NEW COMMENT

Subject

Comment *

B *I*       Format -  Source

[About text formats](#)

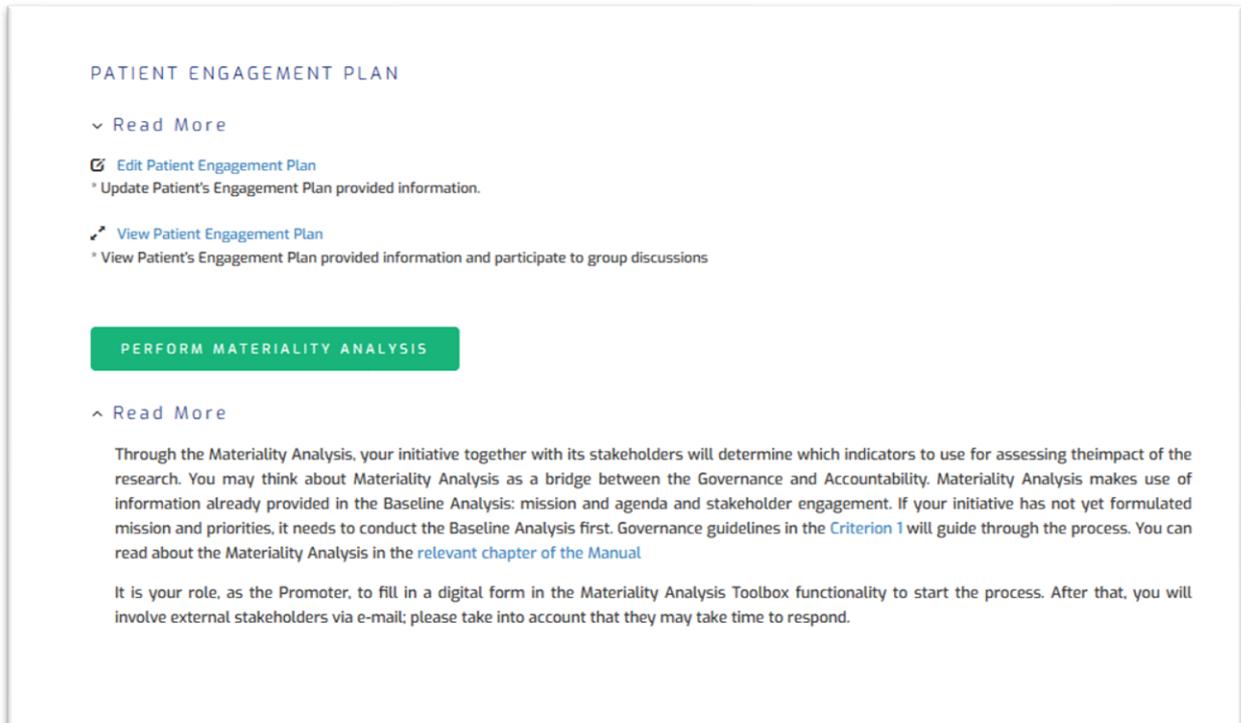
[SAVE](#) [PREVIEW](#)

Figure 37 Patient Engagement Plan Discussion and PDF Export

1.8.5 Materiality Analysis

After completing the Patient Engagement Plan, the Materiality Analysis section is revealed (Figure 38 Materiality Analysis).

Materiality analysis is the process through which promoters identify the material aspects which most matter to the initiative's relevant stakeholders, thus enabling to include their perspective into the agenda.



PATIENT ENGAGEMENT PLAN

∨ Read More

✎ Edit Patient Engagement Plan
* Update Patient's Engagement Plan provided information.

👁 View Patient Engagement Plan
* View Patient's Engagement Plan provided information and participate to group discussions

PERFORM MATERIALITY ANALYSIS

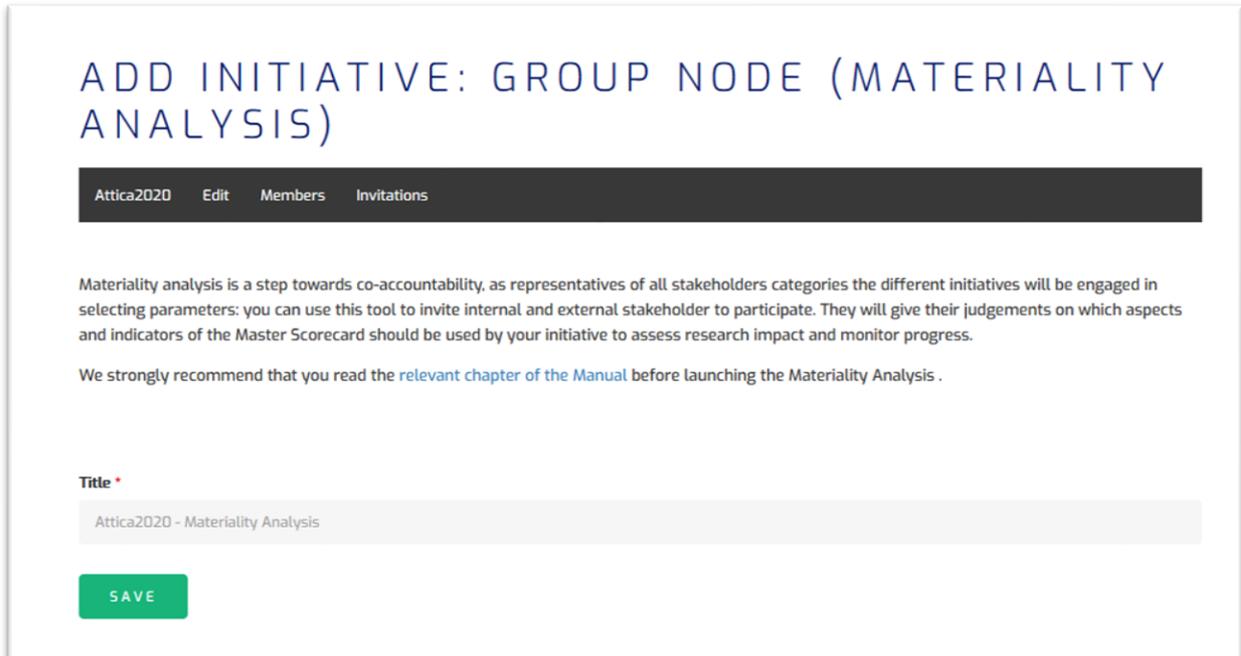
^ Read More

Through the Materiality Analysis, your initiative together with its stakeholders will determine which indicators to use for assessing the impact of the research. You may think about Materiality Analysis as a bridge between the Governance and Accountability. Materiality Analysis makes use of information already provided in the Baseline Analysis: mission and agenda and stakeholder engagement. If your initiative has not yet formulated mission and priorities, it needs to conduct the Baseline Analysis first. Governance guidelines in the [Criterion 1](#) will guide through the process. You can read about the Materiality Analysis in the [relevant chapter of the Manual](#)

It is your role, as the Promoter, to fill in a digital form in the Materiality Analysis Toolbox functionality to start the process. After that, you will involve external stakeholders via e-mail; please take into account that they may take time to respond.

Figure 38 Materiality Analysis

The user can perform a new Materiality Analysis instance by clicking the relative link and clicking Save (Figure 39 New Materiality Analysis), which reveals the links to Administration Panel (Figure 40 Materiality Analysis Admin Panel).



ADD INITIATIVE: GROUP NODE (MATERIALITY ANALYSIS)

Attica2020 Edit Members Invitations

Materiality analysis is a step towards co-accountability, as representatives of all stakeholders categories the different initiatives will be engaged in selecting parameters: you can use this tool to invite internal and external stakeholder to participate. They will give their judgements on which aspects and indicators of the Master Scorecard should be used by your initiative to assess research impact and monitor progress.

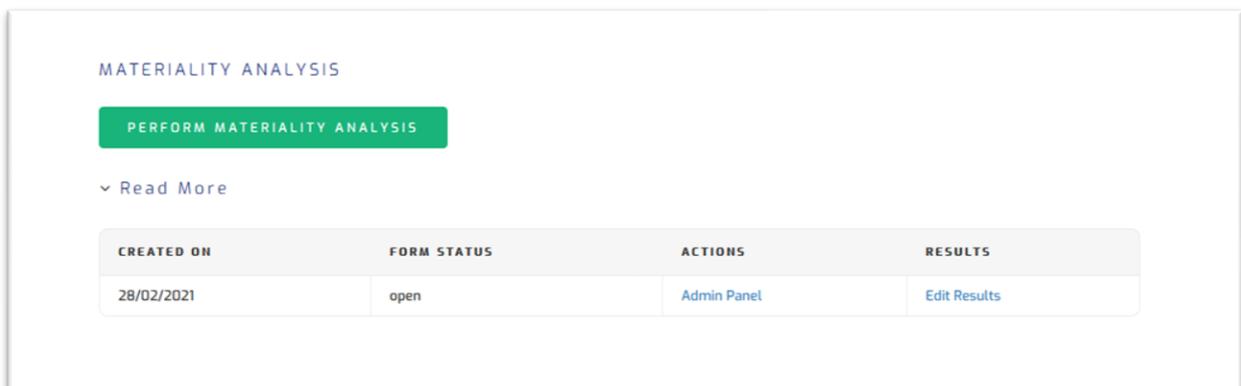
We strongly recommend that you read the [relevant chapter of the Manual](#) before launching the Materiality Analysis .

Title *

Attica2020 - Materiality Analysis

SAVE

Figure 39 New Materiality Analysis



MATERIALITY ANALYSIS

PERFORM MATERIALITY ANALYSIS

Read More

CREATED ON	FORM STATUS	ACTIONS	RESULTS
28/02/2021	open	Admin Panel	Edit Results

Figure 40 Materiality Analysis Admin Panel

1.8.5.1 Administration Panel – Materiality Analysis Initializing

The administration panel (Figure 41 Administration Panel 01) provides all tools and information necessary for conducting a Materiality Analysis.

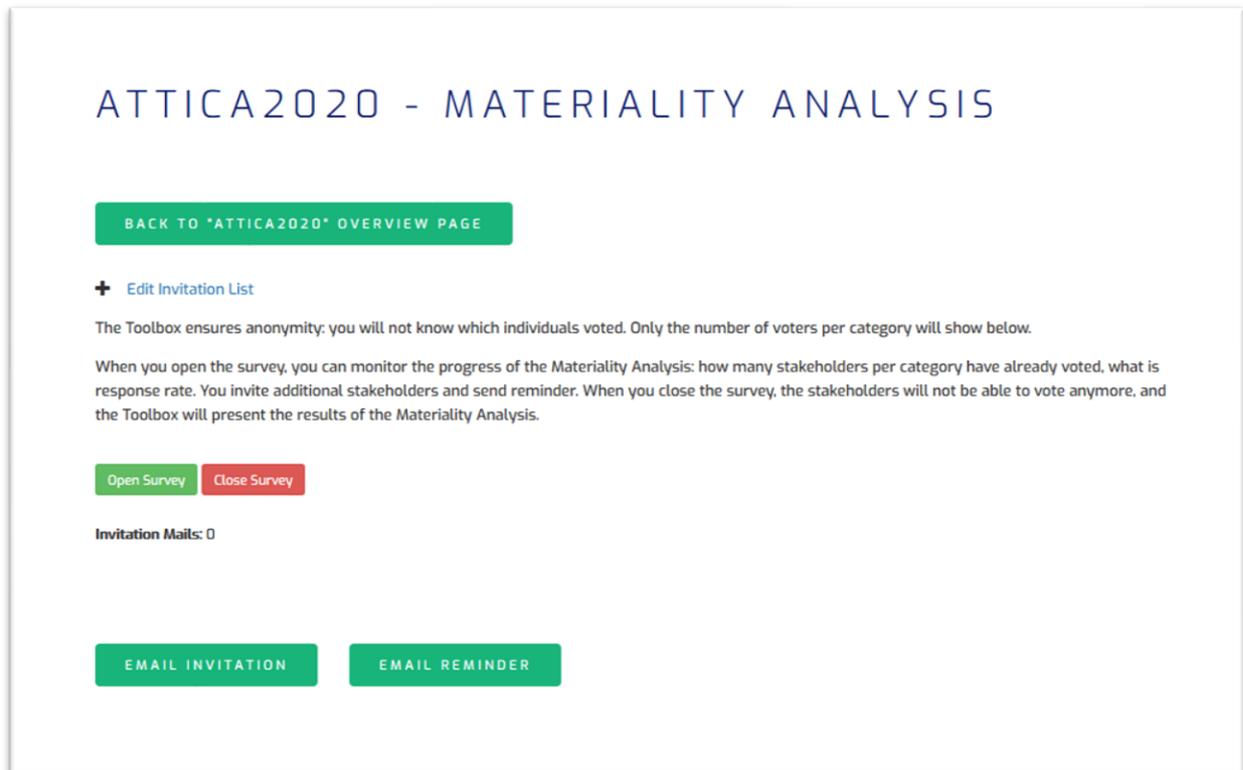
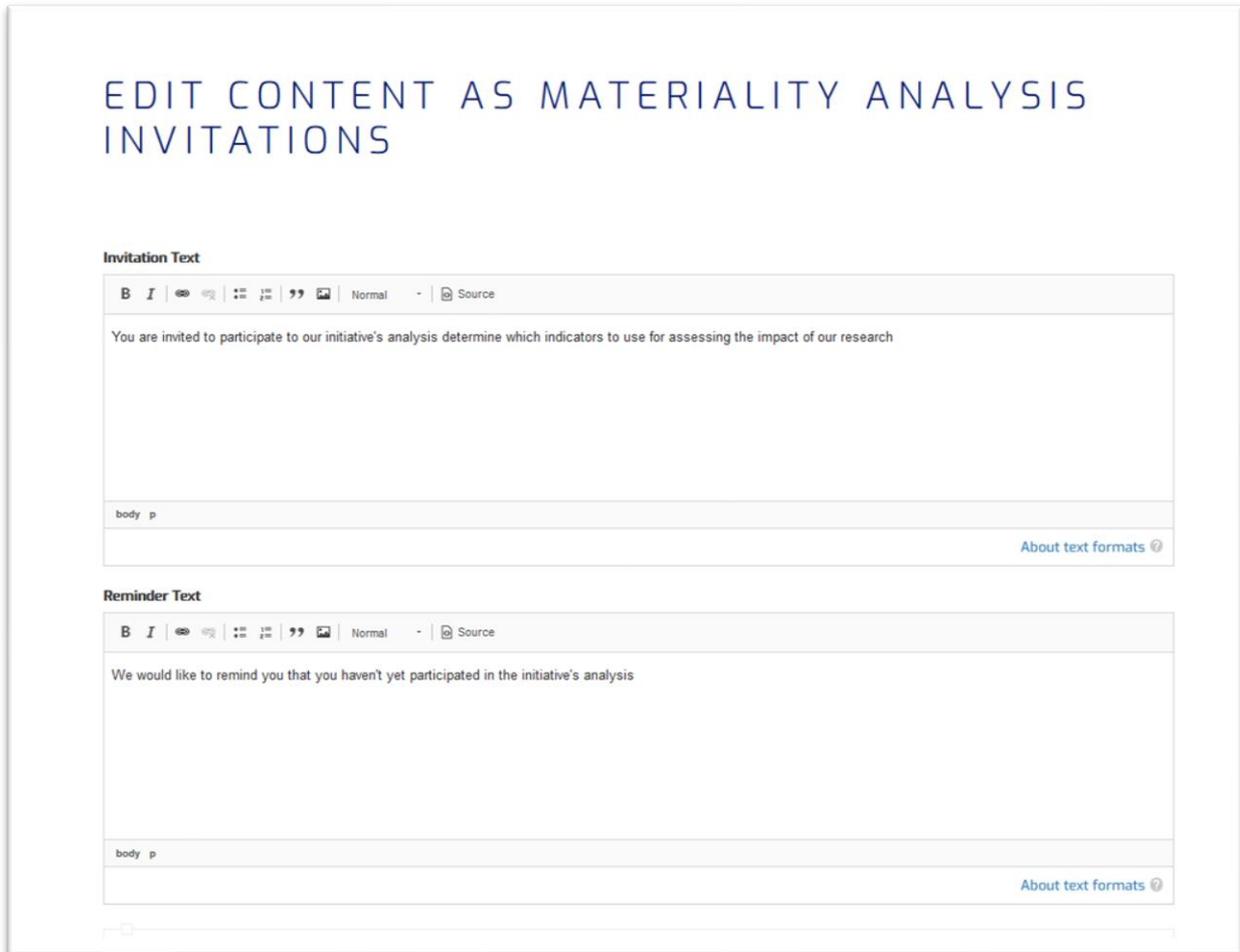


Figure 41 Administration Panel 01

The user can define the email content to be used for the initial invitation to external stakeholders as well as for the subsequent reminder emails to members that have not yet provided their inputs (Figure 42 Materiality Analysis Email Content).



EDIT CONTENT AS MATERIALITY ANALYSIS INVITATIONS

Invitation Text

B I |       | Normal - |  Source

You are invited to participate to our initiative's analysis determine which indicators to use for assessing the impact of our research

body p [About text formats](#)

Reminder Text

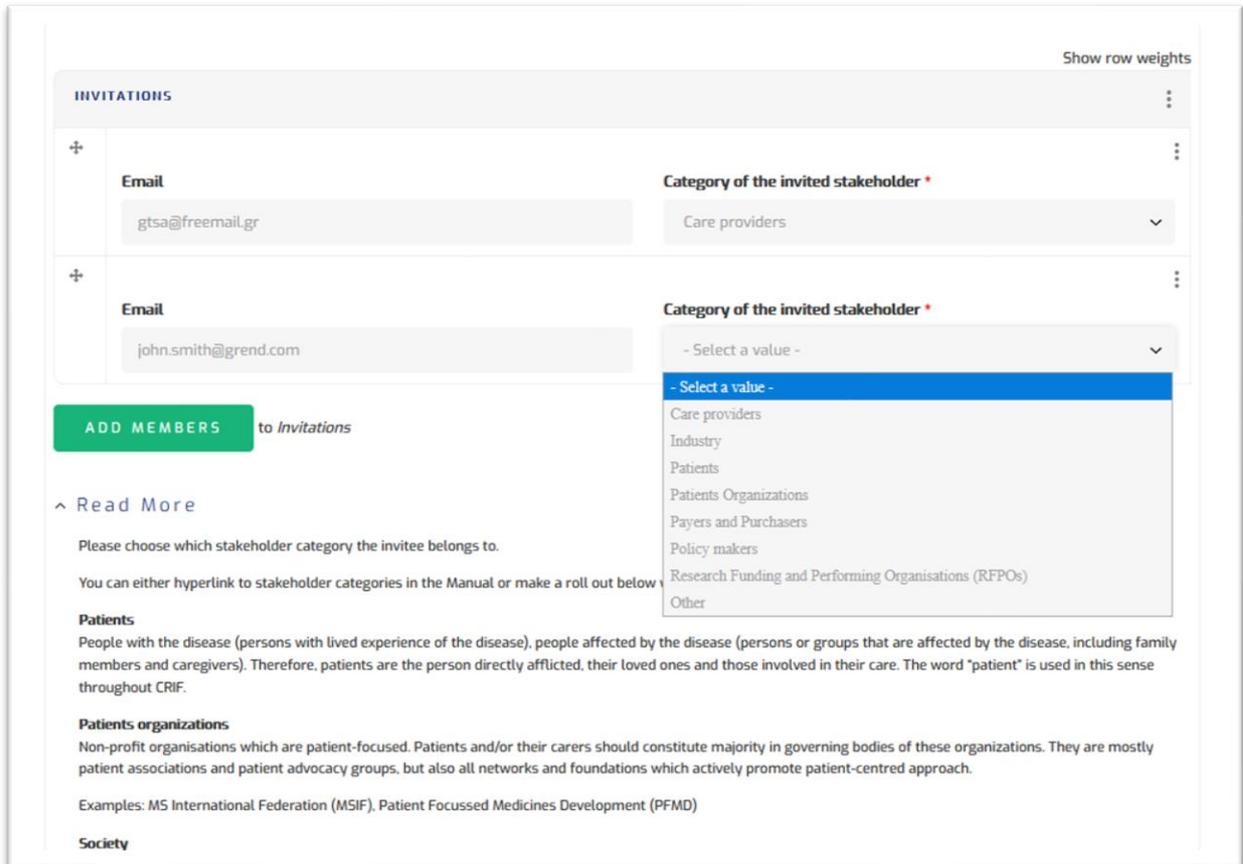
B I |       | Normal - |  Source

We would like to remind you that you haven't yet participated in the initiative's analysis

body p [About text formats](#)

Figure 42 Materiality Analysis Email Content

The promoter then proceeds to populate the list of the initiative's stakeholders that will take part in the Materiality Analysis (Figure 43 Invitees' Email & Stakeholder Category) by adding their email addresses as well as defining their stakeholder group category. This is necessary in order to make sure that all stakeholder categories will be adequately represented in the procedure (Figure 44 Invitees' Email submission).



INVITATIONS Show row weights

+	Email <input type="text" value="gtsa@freemail.gr"/>	Category of the invited stakeholder * Care providers
+	Email <input type="text" value="john.smith@grend.com"/>	Category of the invited stakeholder * - Select a value -

ADD MEMBERS to *Invitations*

^ Read More

Please choose which stakeholder category the invitee belongs to.

You can either hyperlink to stakeholder categories in the Manual or make a roll out below

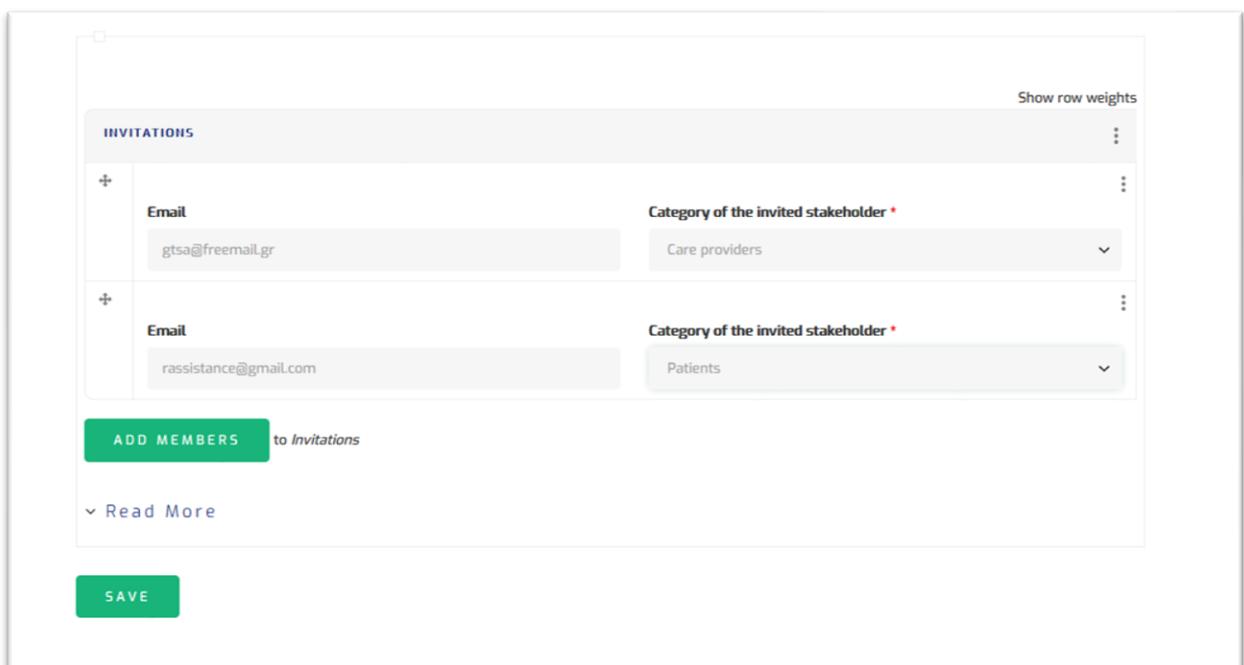
Patients
 People with the disease (persons with lived experience of the disease), people affected by the disease (persons or groups that are affected by the disease, including family members and caregivers). Therefore, patients are the person directly afflicted, their loved ones and those involved in their care. The word "patient" is used in this sense throughout CRIF.

Patients organizations
 Non-profit organisations which are patient-focused. Patients and/or their carers should constitute majority in governing bodies of these organizations. They are mostly patient associations and patient advocacy groups, but also all networks and foundations which actively promote patient-centred approach.

Examples: MS International Federation (MSIF), Patient Focussed Medicines Development (PFMD)

Society

Figure 43 Invitees' Email & Stakeholder Category



INVITATIONS Show row weights

+	Email <input type="text" value="gtsa@freemail.gr"/>	Category of the invited stakeholder * Care providers
+	Email <input type="text" value="rassistance@gmail.com"/>	Category of the invited stakeholder * Patients

ADD MEMBERS to *Invitations*

v Read More

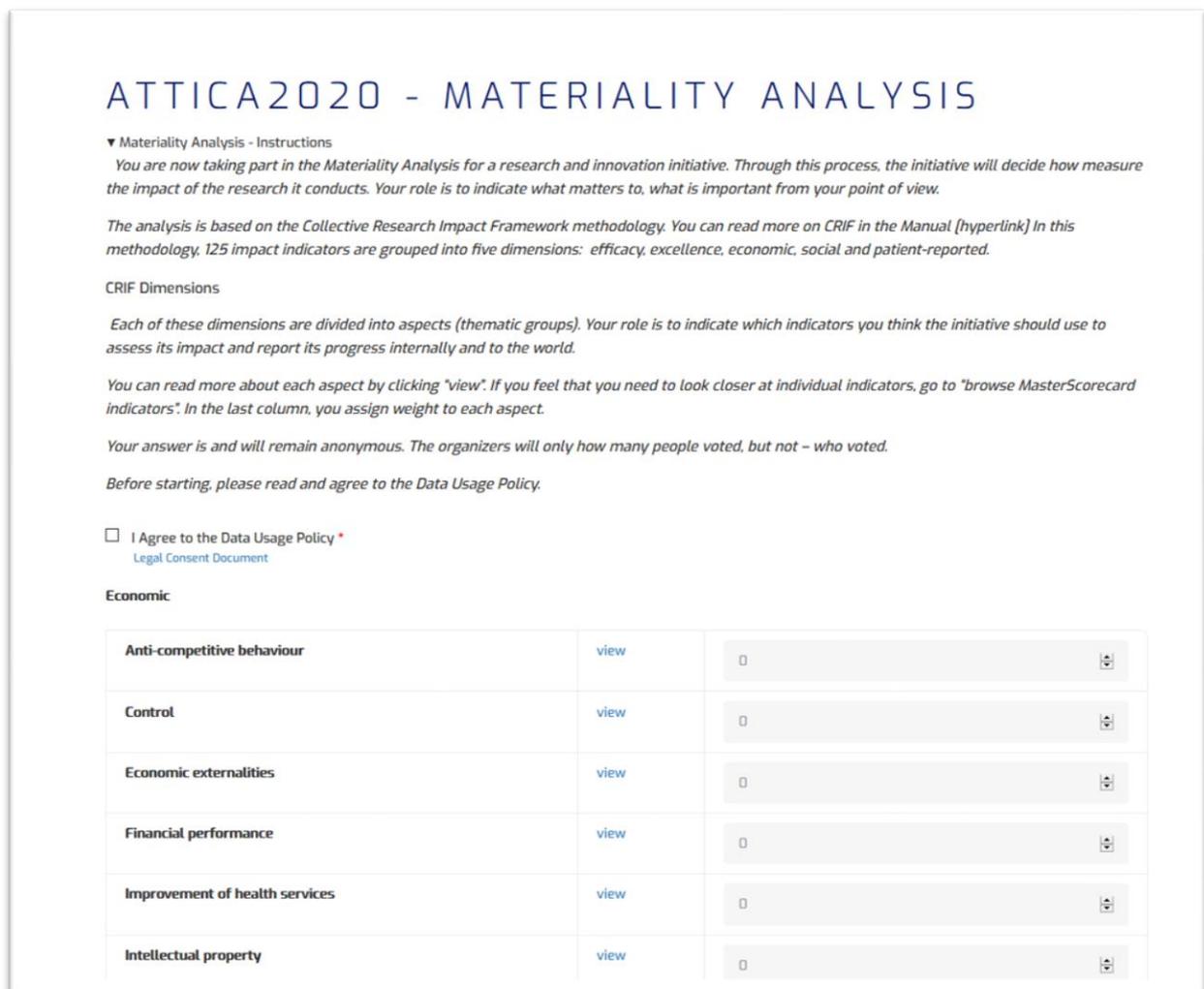
SAVE

Figure 44 Invitees' Email submission

The promoter then sends out the invitations by using the *EMAIL INVITATION* link in the administration panel.

1.8.5.2 Materiality Analysis – Survey

All invited stakeholders are sent an invitation email containing a personalized link to access the Materiality Analysis webform. The webform provides to the users all necessary instructions on how to complete the form (Figure 45 Materiality Analysis Webform Instructions). Additionally it provides a Legal Disclaimer document regarding the Data Usage Policy of the stakeholder’s data requiring their consent.



ATTICA2020 - MATERIALITY ANALYSIS

▼ Materiality Analysis - Instructions
You are now taking part in the Materiality Analysis for a research and innovation initiative. Through this process, the initiative will decide how measure the impact of the research it conducts. Your role is to indicate what matters to, what is important from your point of view.

The analysis is based on the Collective Research Impact Framework methodology. You can read more on CRIF in the Manual (hyperlink) In this methodology, 125 impact indicators are grouped into five dimensions: efficacy, excellence, economic, social and patient-reported.

CRIF Dimensions

Each of these dimensions are divided into aspects (thematic groups). Your role is to indicate which indicators you think the initiative should use to assess its impact and report its progress internally and to the world.

You can read more about each aspect by clicking "view". If you feel that you need to look closer at individual indicators, go to "browse MasterScorecard indicators". In the last column, you assign weight to each aspect.

Your answer is and will remain anonymous. The organizers will only how many people voted, but not – who voted.

Before starting, please read and agree to the Data Usage Policy.

I Agree to the Data Usage Policy *
Legal Consent Document

Economic

Anti-competitive behaviour	view	0 <input type="text"/>
Control	view	0 <input type="text"/>
Economic externalities	view	0 <input type="text"/>
Financial performance	view	0 <input type="text"/>
Improvement of health services	view	0 <input type="text"/>
Intellectual property	view	0 <input type="text"/>

Figure 45 Materiality Analysis Webform Instructions

The participants then fill in the form by giving a preference score ranging from 1 to 5, to at least 2 aspects per each CRIF Dimension. To ease their decision, they can also read the provided description per aspect by clicking on the *view* link (Figure 46 Materiality Analysis Aspect Descriptions.)

Fatigue	view	3	
Locomotion	view	0	
Patient satisfaction	view	0	
Quality of life	view	0	
Return on Engagement	view	0	
Upper-limb dexterity	view	0	
Social			
Corporate reputation			
Ethical marketing			
Labour	view	2	
Political externalities	view	0	
Socio-environmental impacts	view	4	
Stakeholder engagement	view	0	

Corporate reputation			
Corporate reputation focuses on how society perceives the initiative/project.			

SUBMIT

Figure 46 Materiality Analysis Aspect Descriptions.

1.8.5.3 Administration Panel – Materiality Analysis Monitoring

The promoter supervises the Materiality analysis via the administration panel (Figure 47 Materiality Analysis Admin Panel) with the help of detailed information such as the percentage of stakeholders that have submitted their preference, the frequency of submissions.

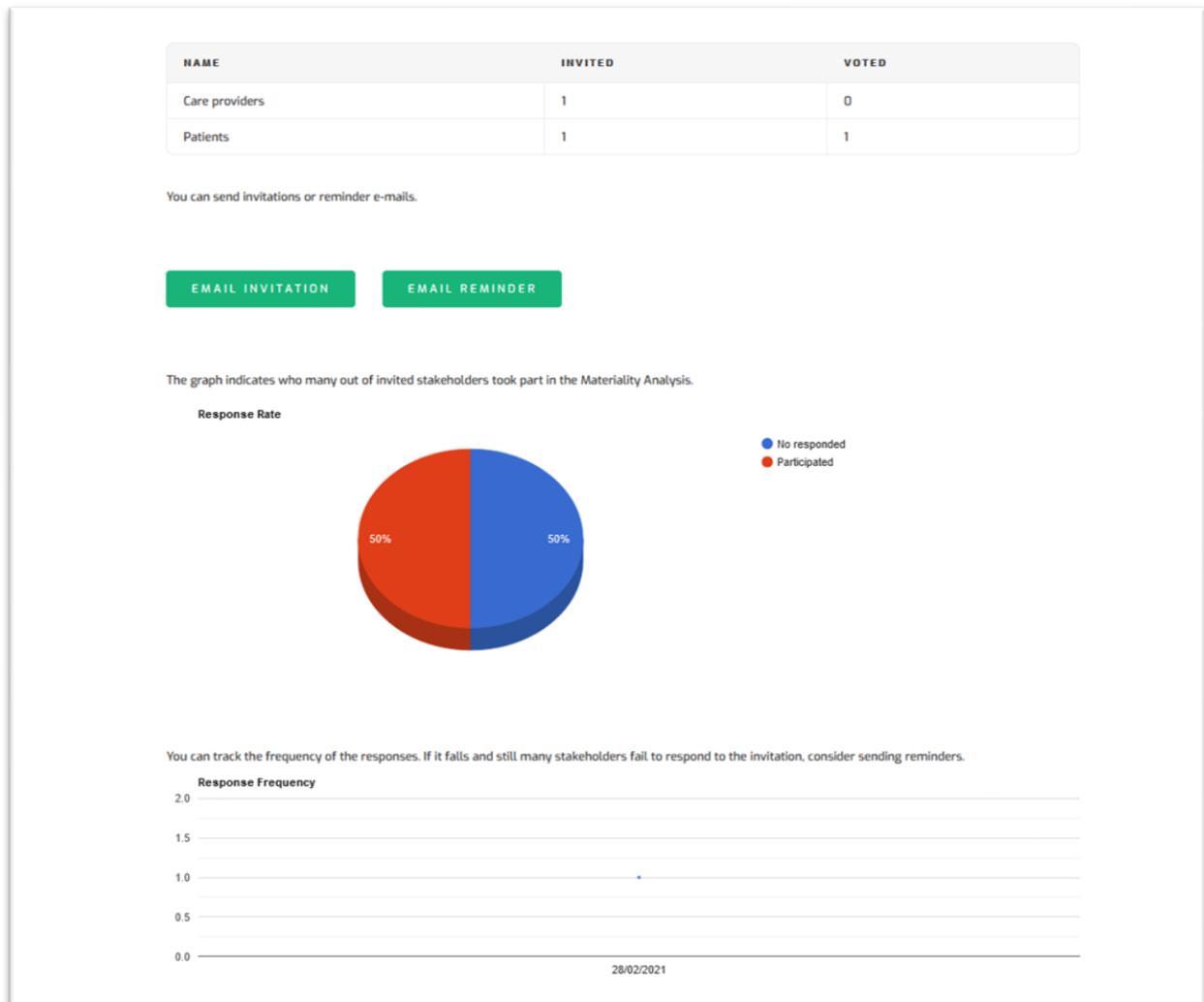


Figure 47 Materiality Analysis Admin Panel

When the prerequisite of the minimum number of participants per stakeholder groups is met, the promoter is then allowed to conclude the Materiality Analysis by selecting the *Close Survey* link (Figure 48 Materiality Analysis Score Results).

As a last step of the Materiality Analysis the promoter uses the *Edit Results link* and accesses the final score results.

MATERIALITY ANALYSIS SCORE

BACK TO "ATTICA2020" OVERVIEW PAGE

ADD ROWS

CRIF DIMENSION	ASPECT	ASPECT DESC	INDICATOR	INDICATOR INFO	COUNT
Excellence	Anticipatory design	view	Anticipatory health research ▼	Degree of anticipatory design in health research processes.	4
Efficacy	Drug supply to patient	view	Increase in medication use ▼	Average and increase/decrease of the number of medications used to treat a certain disease.	2.5
Social	Labour	view	Safety & security policy ▼	Number of employee accidents and infections in laboratory facilities.	2.5
Excellence	Academic production	view	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Publications ▼ Publications Collaborative publications Open access publication </div>	Number of publications produced by the initiative/project, differentiating the key subject under study and whether or not they are peer-reviewed, and percentage of those articles published in high-impact journals.	2.5
Efficacy	Influence on patient behaviour	view	Health and safety plan (HSP) ▼	A safety plan documents the process for identifying and managing the possible physical and health hazards as well as the specific safety goals related to the work environment.	2
Social	Ethical marketing	view	Ethical marketing & anti-corru ▼	Indication of whether the initiative/project has clearly defined enforcement procedures and, if there have been misconducts, evidence of taking disciplinary action against employees or third parties who have violated its code of conduct for ethical marketing or anti-corruption. The initiative/project provides evidence of follow-up actions taken to mitigate the risk of future breaches.	2
Social	Socio-environmental	view	Environmental auditing ▼	Number of environmental audits conducted within the initiative/roiect.	2

Figure 48 Materiality Analysis Score Results

For each of the voted aspect, the promoter can select an additional available indicator. Also, the promoter can limit or extend the final list of aspects by a total of three by using the *ADD ROWS* field.

1.8.6 Impact Assessment Dashboard

Upon the final submission of the Materiality Analysis results by the promoter the section Impact Assessment Dashboard is revealed (Figure 49 Impact Assessment Dashboard). The promoter and the initiative's stakeholders can view the final produced initiative indicator scorecard by clicking on the *Final Results* link (Figure 50 Final Results 1).

IMPACT ASSESSMENT DASHBOARD

^ [Read More](#)

Below you will see results of the Materiality Analysis sessions you had conducted. These results are your customised scorecard – a set of indicators you can use to monitor the operations and assess the impact of your research. You can read more in the [relevant section of the Manual](#) .

CREATED ON	FORM STATUS	RESULTS
29/01/2021	closed	Final Results

Figure 49 Impact Assessment Dashboard

WHO VOTED

Here you can check how many stakeholders from each category voted.

NAME	INVITED	VOTED
Policy makers	1	1
	1	0
Industry	2	0

FINAL RESULTS

CRIF DIMENSION	ASPECT	ASPECT DESC	INDICATOR	INDICATOR INFO	COUNT
Social	Corporate reputation	view	Social reputation	view	4
Patient Reported	Anxiety and depression	view	HADS - Hospital Anxiety and Depression Scale	view	4
Efficacy	Health service assessment	view	Overview of health benefits	view	3
Efficacy	Patient quality of life	view	Quality-adjusted life year	view	2
Social	Stakeholder engagement	view	Community engagement activities	view	1
Patient Reported	Upper-limb dexterity	view	Abilhand - Manual ability for adults with upper limb impairment	view	1
Excellence	Academic production	view	Publications	view	1
Excellence	Bibliometric	view	Academic citations	view	1

[EXPORT TO PDF](#)

Figure 50 Final Results 1

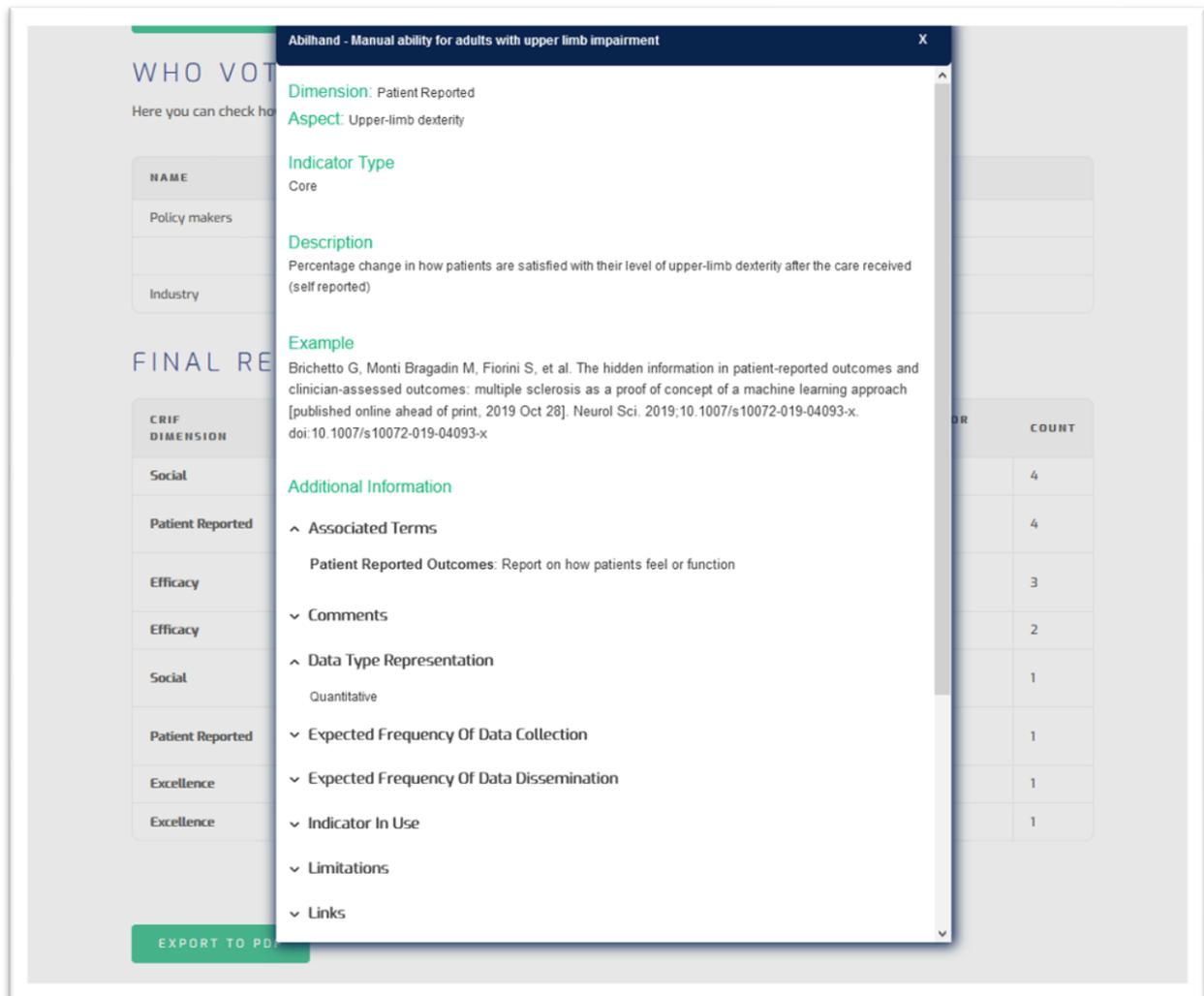


Figure 51 Impact Assessment Dashboard Indicator View

1.8.7 Impact Assessment (PRO)

Regardless of the produced list of the initiative's indicators, the MULTI-ACT Toolbox provides the additional functionality of assessing an initiative's impact via the use of Patient Reported Outcomes (PRO) data, a relevant family of indicators of the Patient Reported dimension. The link to the relevant functionality is always available at the bottom of the initiative's page (Figure 52 Patient Reported Outcomes).

The explicit driver of the innovative co-accountability approach of MULTI-ACT are the Patient Engagement (PE) guidelines to enable science with and of patient input. Within the MULTI-ACT project, we offer the functionality to collect Patient Reported dimension via PROs in a digital manner. PROs indeed represent an innovative RRI indicators enabling the measurement of the impact of Research & Innovation on outcomes that matter most to patients and therefore representing an explicit driver to bridge excellence with validity and relevance in the health domain meeting the needs of different stakeholders and thus their accountability for a give mission.

IMPACT ASSESSMENT DASHBOARD

[▼ Read More](#)

CREATED ON	FORM STATUS	RESULTS
03/11/2020	closed	Final Results

[📌 Impact Assessment \(PRO\)](#)

[^ Read More](#)

Click below to upload data related to Patient Reported Outcomes. We recommend reading more on Patient Reported Outcomes and the Patient Reported Dimension in the [Patient Engagement Guidelines](#) and the [Manual](#).

Figure 52 Patient Reported Outcomes

The promoter can download an example delimited file (Figure 53 - Impact Assessment Interface) to populate with **anonymized** patient data containing their periodical Hospital Anxiety and Depression Scale assessment and upload it back to the Toolbox.

IMPACT ASSESSMENT (PRO)

Please upload CSV files with Patient Reported Outcomes data. The tool will automatically compile them and present it in a visual format.

UPLOAD PATIENT'S DATA

File Upload *

Upload CSV Files. [Download an example file here.](#)

No file selected.

One file only.
2 MB limit.
Allowed types: csv.

Displaying 1 - 3 of 3 Imported Patient's Data.

Patient ID	REHAB TREAT	Gend (F/M)	DRUG	COUR	Date	And
<input type="text"/>						

Figure 53 - Impact Assessment Interface

By using the imported data, the Toolbox is able to produce detailed dynamic graphs, with the use of multiple filters, to portray the progress of the collective number of patients or of individual ones (Figure 54 - Impact Assessment Filters & Graphs).



Figure 54 - Impact Assessment Filters & Graphs

Furthermore, the promoter is able to access individual patient's data by selecting one at the bottom of the page (Figure 55 - Patient list) and (Figure 56 - Patient Data).

PATIENT ID	DATE	OPERATIONS LINKS
Single patient (PT1)	01-11-2018	Edit ▼
Single patient (PT2)	01-12-2018	Edit ▼
Single patient (PT3)	15-01-2019	Edit ▼

Figure 55 - Patient list

EDIT PATIENT DATA SINGLE PATIENT (PT1)

Title *

Single patient (PT1)

initiative

EBRA EPI-Cluster (593)

OTHDIS

Yes

OTHER DISEASES

AGE (y)

66

AGEO (y)

47

Age of Onset

AGED (y)

52

Age of Diagnosis

Gend (F/M)

Male

Gender

Figure 56 - Patient Data

1.9 MS Care Unit Surveys

As described in Deliverable D2.2⁴, in order to help the multistakeholder MS Care Unit initiative, (employed as MULTI-ACT case study) collect information from their stakeholders, a web survey was implemented in the Toolbox aimed to gather and assess data worldwide, concerning Multiple Sclerosis. MS Care Unit is a patient-centered initiative that aims to provide the highest possible leading-edge interdisciplinary care model for people with and affected by MS, while advancing research to prove its cost-effectiveness for the society (sustainability). The collection of the data via the digital toolbox will facilitate to measure the impact of research on MULTI-ACT multidimensional domains (e.g., the patient-reported one). This functionality is specific to the MS Care Unit initiative and not a feature of the Toolbox offered to the rest of its users. Therefore, its administrative interface (Figure 57 MsCare Unit Account – Survey) is only available for the specific initiative, and accessible via a link contained in the *Surveys* section in their account page.

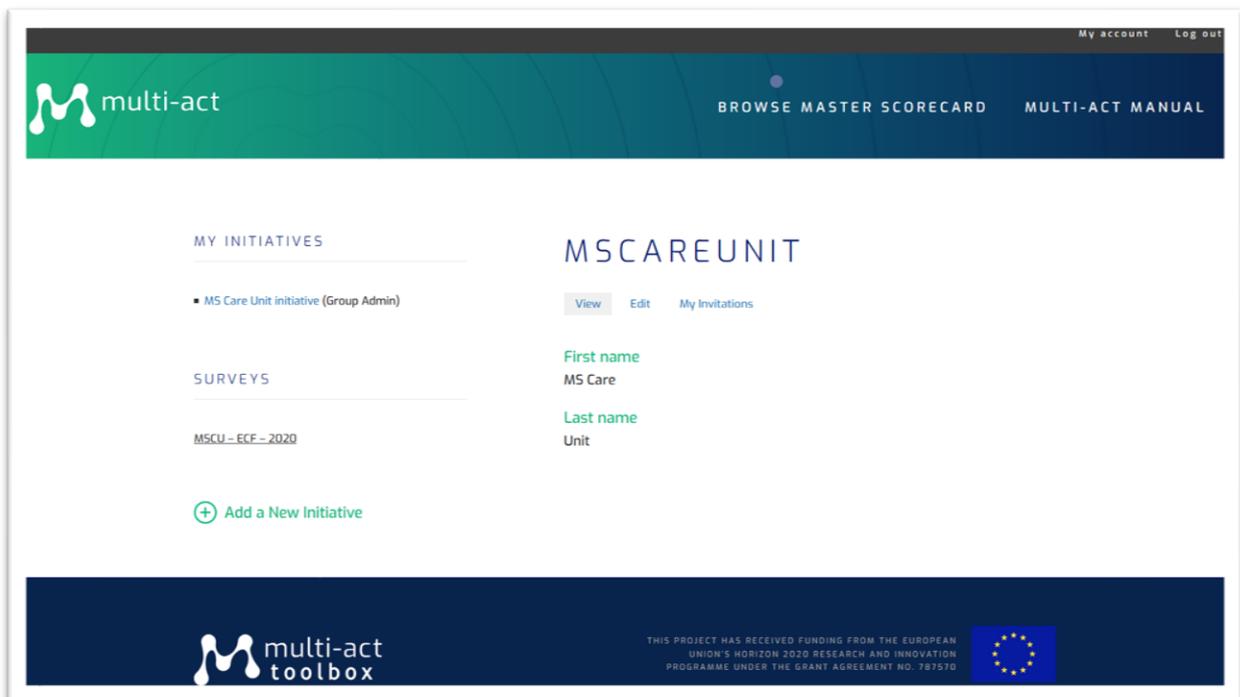


Figure 57 MsCare Unit Account – Survey

The administration survey interface (Figure 58 Ms Care Unit Survey Admin Panel) is similar to that of the Materiality Analysis admin panel. The initiative's promoter populates the list of the survey participants by clicking on the *Invitation List* link and sends out email invitations or reminders by using the respective links available.

All invitees receive an email invitation containing the link to the survey Toolbox web form.

⁴ D2.2 MULTI-ACT content and data collection manual (INTRASOFT - 29/02/2020)

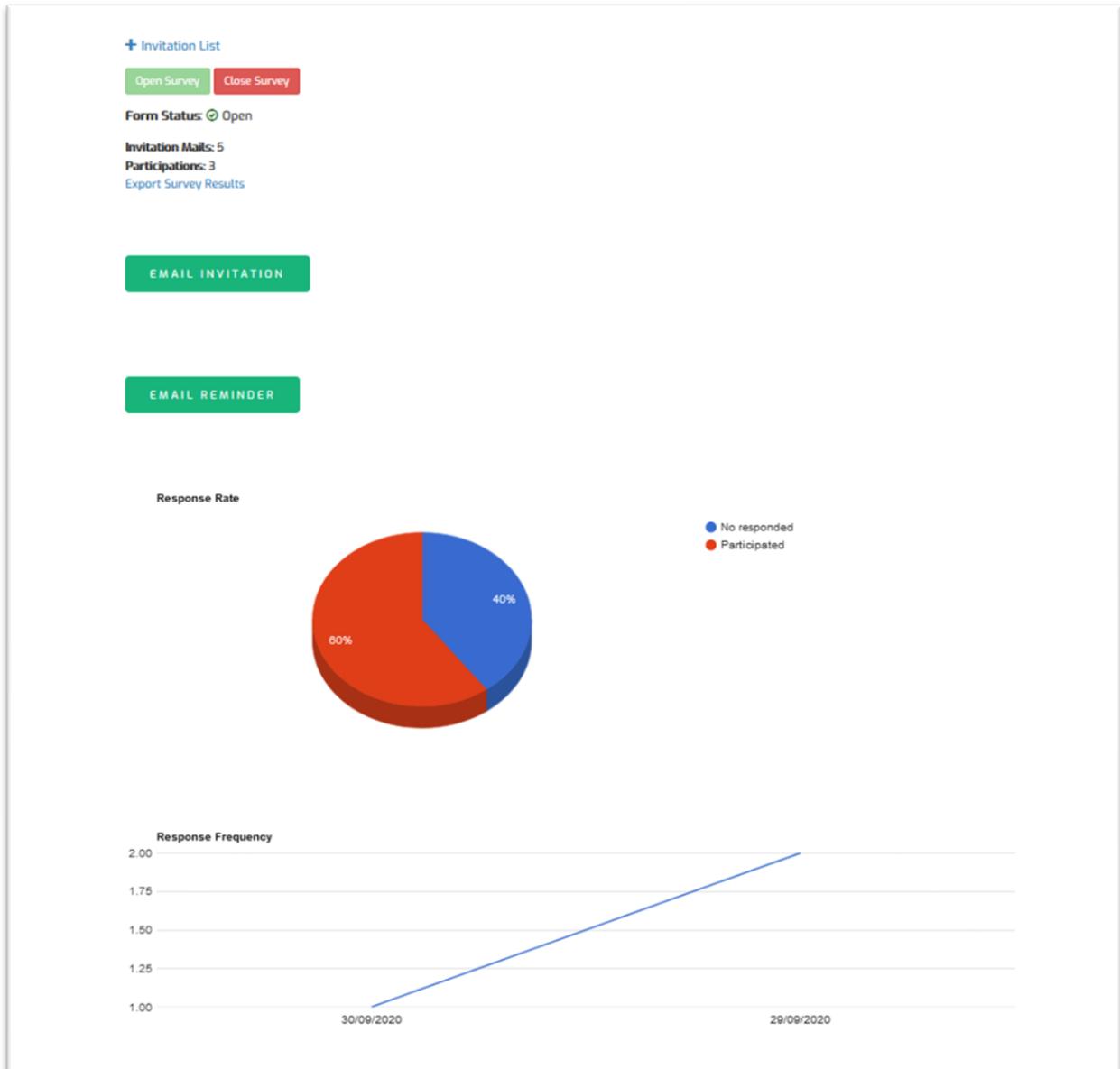


Figure 58 Ms Care Unit Survey Admin Panel

Finally, the promoter can conclude the survey using the *Close Survey* button (Figure 59 - MS Care Unit Survey Results Export A) and proceed to export and download the collected survey data using a list of various options regarding the exported file format (Figure 60 MS Care Unit Survey Results Export B) etc.

[Expand all](#)

Format options

Export format ?

Delimited text ▼

▲ WARNING: OPENING DELIMITED TEXT FILES WITH SPREADSHEET APPLICATIONS MAY EXPOSE YOU TO FORMULA INJECTION OR OTHER SECURITY VULNERABILITIES. WHEN THE SUBMISSIONS CONTAIN DATA FROM UNTRUSTED USERS AND THE DOWNLOADED FILE WILL BE USED WITH MICROSOFT EXCEL, USE 'HTML TABLE' FORMAT.

Delimiter text format ? *

Comma (,) ▼

Generate Excel compatible file ?

Element options

Element multiple values delimiter ? *

Semicolon (;) ▼

Header options

COLUMN HEADER FORMAT ? *

Element titles (label)

Element keys (key)

Include an element's title with all sub elements and values in each column header

Column header label delimiter *

:

Select menu, radio buttons, and checkboxes options

OPTIONS SINGLE VALUE FORMAT ?

Compact, with the option values delimited by commas in one column. ?

Separate, with each possible option value in its own column. ?

Figure 59 - MS Care Unit Survey Results Export A

Select menu, radio buttons, and checkboxes options

OPTIONS SINGLE VALUE FORMAT ?

Compact, with the option values delimited by commas in one column. ?

Separate, with each possible option value in its own column. ?

OPTIONS MULTIPLE VALUES FORMAT ?

Compact, with the option values delimited by commas in one column. ?

Separate, with each possible option value in its own column. ?

OPTIONS ITEM FORMAT

Option labels, the human-readable value (label)

Option values, the raw value stored in the database (key)

Entity reference options

ENTITY REFERENCE FORMAT *

ID, an entity's unique identified

Title, an entity's title/label

URL, an entity's URL

Download options

Download export file ?

Limit to

All ▼

Order ?

Sort ascending ▼

Starred/flagged submissions ?

DOWNLOAD

SAVE SETTINGS

RESET SETTINGS

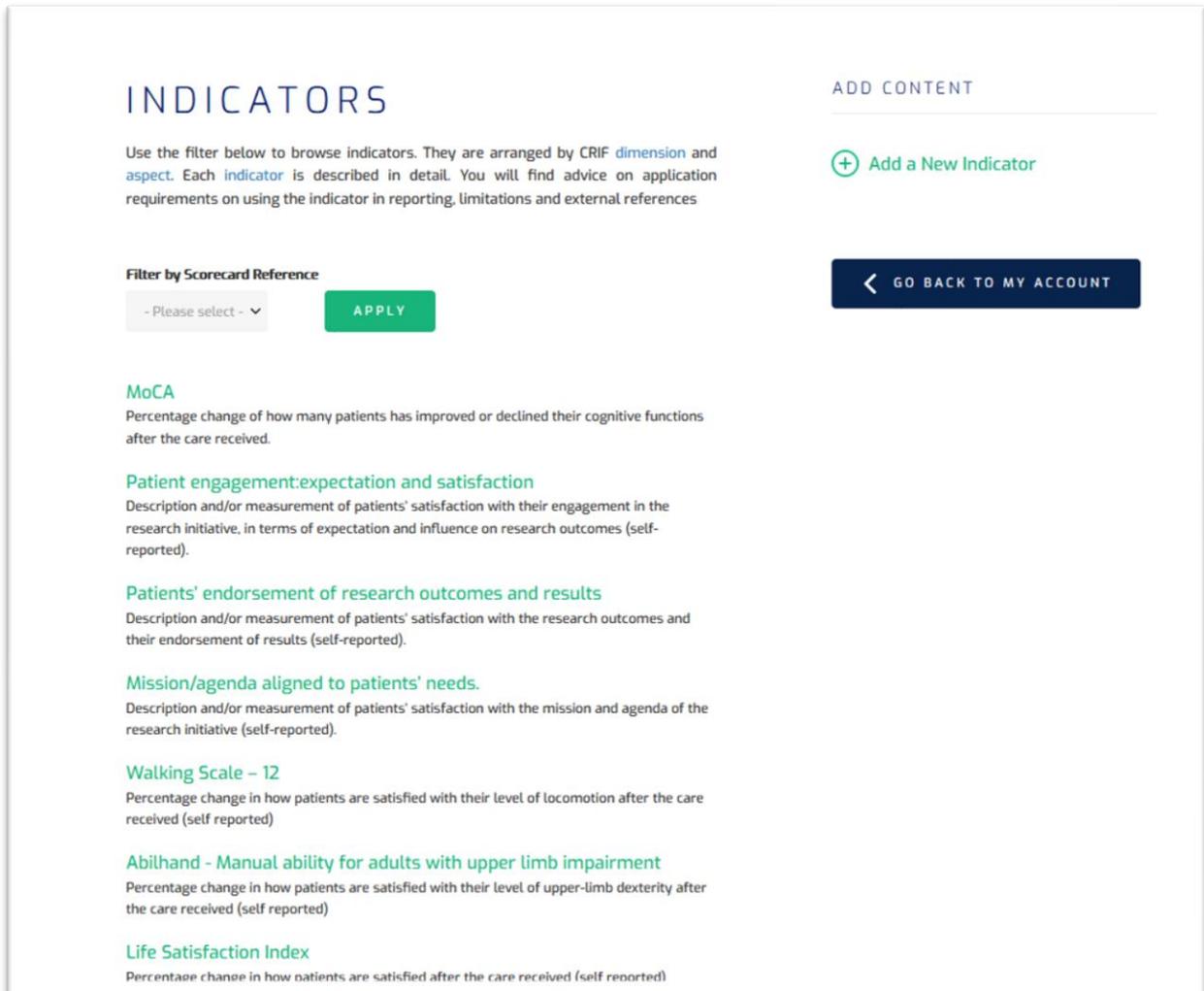
Figure 60 MS Care Unit Survey Results Export B

1.10 Author Role

To aid to the need of editing and enriching the Master Scorecard, a new authoring role has been defined. All users that are appointed the role of an Author -upon logging in- have the option to use the Indicators Page.

1.10.1 Indicator Addition

Users that hold the Author role can add new indicators in the Master Scorecard by the *Add a New Indicator* link (Figure 61 - Master Scorecard Add Indicator) in the Master Scorecard page.



The screenshot shows the 'INDICATORS' page. At the top right, there is an 'ADD CONTENT' section with a green '+ Add a New Indicator' button. Below this is a dark blue button with a white left arrow and the text 'GO BACK TO MY ACCOUNT'. On the left side, there is a 'Filter by Scorecard Reference' section with a dropdown menu showing '- Please select -' and a green 'APPLY' button. The main content area lists several indicators with their titles and descriptions:

- MoCA**: Percentage change of how many patients has improved or declined their cognitive functions after the care received.
- Patient engagement: expectation and satisfaction**: Description and/or measurement of patients' satisfaction with their engagement in the research initiative, in terms of expectation and influence on research outcomes (self-reported).
- Patients' endorsement of research outcomes and results**: Description and/or measurement of patients' satisfaction with the research outcomes and their endorsement of results (self-reported).
- Mission/agenda aligned to patients' needs.**: Description and/or measurement of patients' satisfaction with the mission and agenda of the research initiative (self-reported).
- Walking Scale – 12**: Percentage change in how patients are satisfied with their level of locomotion after the care received (self reported)
- Abilhand - Manual ability for adults with upper limb impairment**: Percentage change in how patients are satisfied with their level of upper-limb dexterity after the care received (self reported)
- Life Satisfaction Index**: Percentage change in how patients are satisfied after the care received (self reported)

Figure 61 - Master Scorecard Add Indicator

By clicking the Add Indicator link, an Author can create a new Indicator (Figure 62 Indicator Addition 01) and associate it to an existing node of the Master Scorecard Taxonomy (Figure 63 Indicator Addition Scorecard Reference).

CREATE INDICATOR

Title *

Description *

Description of the indicator.

Rationale

Relevance of the indicator and advantages for its use.

Core/ Additional *

- Select a value -

Type of indicator within each aspect. Core indicators are key to evaluate each aspect. Additional indicators evaluate some areas which are not covered by the core indicators but that are relevant to provide a more in depth evaluation of the aspect. Additional indicators can also be provided when computing the core indicator is not feasible.

Associated terms *

B I [bulleted list] [numbered list] [link] [image] | Format | Source

Figure 62 Indicator Addition 01

Text format About text formats ?

Basic HTML ▼

Additional comments.

Monitoring & Evaluation Framework *

Input ▼

Levels of the results chain framework. Thus, indicate the stage of research process to which the indicator relates - Input (resources used) - Process (actions carried out) - Output (goods & services directly produced) - Impact or final outcome (long term changes)

Data Type Representation *

Qualitative ▼

Type of indicator: Qualitative/Quantitative For quantitative indicator, provide additional classifier: percentage, ratio, absolute number.

Type of information to be reported by the initiative *

Number in monetary units ▲

Number in physical units ▼

Ordinal option list ▼

Percentage, with numerator and denominator ▼

Proportion/Ratio, with numerator and denominator ▼

Indicate the type of information that the initiative must provide to disclose the indicator. This information helps to determine the input areas that the users will need to feed into the Toolbox.

Scorecard Reference *

- Select a value - ▲

Economic ▼

-Anti-competitive behaviour ▼

-Anti-competitive behaviour ▼

Figure 63 Indicator Addition Scorecard Reference

1.10.2 Editing an Indicator

When an existing indicator is selected, all relative information is presented to the user (Figure 64 Indicator View), together with the ability to edit the indicator (Figure 65 Indicator Editing).

PATIENT ENGAGEMENT: EXPECTATION AND SATISFACTION

View
Edit

Dimension: Patient Reported

Aspect: Return on Engagement

Indicator Type
Core

Description
Description and/or measurement of patients' satisfaction with their engagement in the research initiative, in terms of expectation and influence on research outcomes (self-reported).

Example
Example of qualitative assessment is:
· report describing the degree of patient satisfaction with the outcomes of the engagement and with the follow-up actions taken by the initiatives.

Examples of quantitative assessment are:

- rate from 1 to 10 to what degree the engagement responded to your needs and expectation (e.g. 7/10);
- rate from 1 to 10 to what degree you feel that your engagement influenced the research process and results (e.g. 6/10);
- rate from 1 to 10 how you endorse the actions taken by the initiative to meet the needs and expectation emerged with the engagement (e.g. 8/10);
- number of patient engagement activities that have satisfied you (e.g. 6/8);
- number of patient engagement activities that have met your expectations (e.g. 6/8).

MULTI-ACT Patient Engagement Guidelines, short version v0.1 May 30th 2020

Additional Information

▼ Associated Terms

Figure 64 Indicator View

EDIT INDICATOR MOCA

Title *

MoCA

Description *

Percentage change of how many patients has improved or declined their cognitive functions after the care received.

Description of the indicator.

Rationale

The indicators provides a reference on the improvement or decline due to the care received in some cognitive domains, in particular attention, working memory, information processing speed.

Relevance of the indicator and advantages for its use.

Core/ Additional *

Core

Type of indicator within each aspect. Core indicators are key to evaluate each aspect. Additional indicators evaluate some areas which are not covered by the core indicators but that are relevant to provide a more in depth evaluation of the aspect. Additional indicators can also be provided when computing the core indicator is not feasible.

Associated terms *

B I |  |  |  |  |  |  |  | Format |  Source

Clinical Assessment: Report on how patients have increased or decreased their level of cognitive function.

Figure 65 Indicator Editing.

1.11 Taxonomy Editing

The Master Scorecard was utilized in the MULTI-ACT Toolbox by cross-referencing Indicator objects with the imported Scorecard Taxonomy.

This produced as added value the seamless ability of editing and enlarging the Master Scorecard, in a dynamic & user-friendly way. As per the Addition of Indicators, an administrative user has the ability of editing the taxonomy by a simple drag & drop action, causing all associated indicators to be automatically moved respectively (Figure 66 Taxonomy Editing - Rearranging).

Master Scorecard ☆

List Edit Manage fields Manage form display Manage display

Home » Administration » Structure » Taxonomy » Edit Master Scorecard

[+ Add term](#)

Master Scorecard contains terms grouped under parent terms. You can reorganize the terms in Master Scorecard using their drag-and-drop handles.

NAME	OPERATIONS
+ CRIF Dimensions	Edit ▾
+ Economic	Edit ▾
+ Anti-competitive behaviour	Edit ▾
+ Anti-competitive behaviour	Edit ▾
+ Control	Edit ▾
<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Drag to re-order + Control process </div>	Edit ▾
+ Economic externalities	Edit ▾
+ Indirect economic impact	Edit ▾
+ Financial performance	Edit ▾
+ Financial stability	Edit ▾
+ Profitability	Edit ▾
+ Revenue	Edit ▾

Figure 66 Taxonomy Editing - Rearranging

CONCLUSIONS

Deliverable D2.4 has presented the full set of features and functionalities of the MULTI-ACT Toolbox in its final version. In order to fully implement these, given the ongoing work and processes in other WPs of the project for completing the MULTI-ACT framework, methods and procedures, including the devised guidelines from WP6, the present Deliverable along with the release of the final version of the MULTI-ACT Toolbox has been agreed at consortium level to be submitted at an extended deadline by M35, which was further formally submitted, among others, as amendment request. This also allowed the finalization of the relevant legal aspects on Privacy Policy, Data processing terms and Terms of Use of the toolbox.

The final version of the Toolbox has been significantly restructured to fully support multi-stakeholder features and functions, as dictated from the final version of the MULTI-ACT model and to meet co-accountability innovative strategy of the MULTI-ACT CRIF via co-creation approach. The MULTI-ACT Toolbox, in its final release, is accessible at <https://toolbox.multiact.eu>.