Report on the Online Exchange of Information Tool (D.I.2)

19th December 2022

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1. Introduction

The purpose of this document is to support both, the European Reference Networks (ERNs) and Healthcare Provider Centers (HCPs) teams through the evaluation process within the Online Exchange of Information Tool (OEIT). This guide will indicate how each HCP member of the ERN can access their own project on the platform, to evidence each measurable element and complete the self-evaluation. In addition, other utilities of the OEIT will be explained, such as consulting relevant documents or how to access the communications area.

The OEIT provides comprehensive support, as well as being a valuable source to manage information for all the stakeholders involved in the whole evaluation process (such as the evaluators or members of the Independent Evaluation Body (IEB) among others). All information regarding current and previous projects is accessible to each stakeholder (with different access permissions) involved in the evaluation process.

2. Access to the Platform

The OEIT can be accessed through the following link:

https://www.ern-assessment.com/

From this site, each user can **log in** or ask for a **reminder** of the access information, as shown in Figure 1.
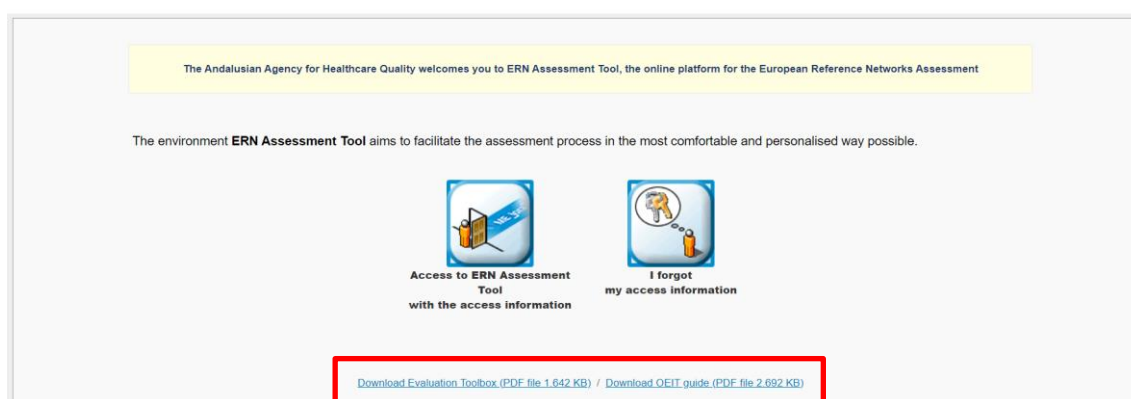

Figure 1: Home page for the log in.

In addition, **the Evaluation Manual and the Evaluation Technical Toolbox,** and **the OEIT guide** can be **downloaded** from this homepage by clicking on the corresponding link.

3. Home page

The home page provides access to the evaluation projects (2022-2023) and previous assessment projects (from 2016). It also allows access to unread messages in a section called *Communication Area*, which will be explained later in the manual.

Click on **"Listing of Evaluation Projects"** (as in Figure 2) to have a view of the evaluation projects to which each user has access to.
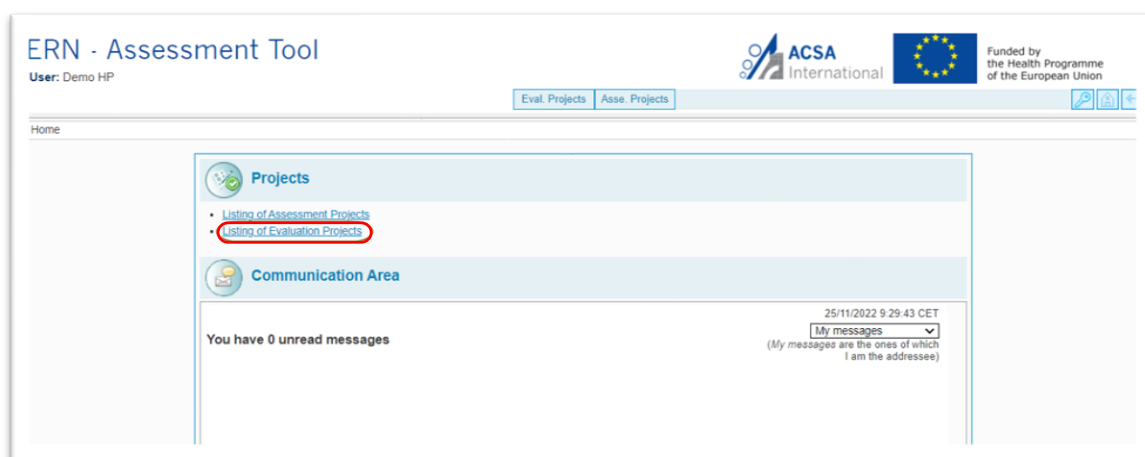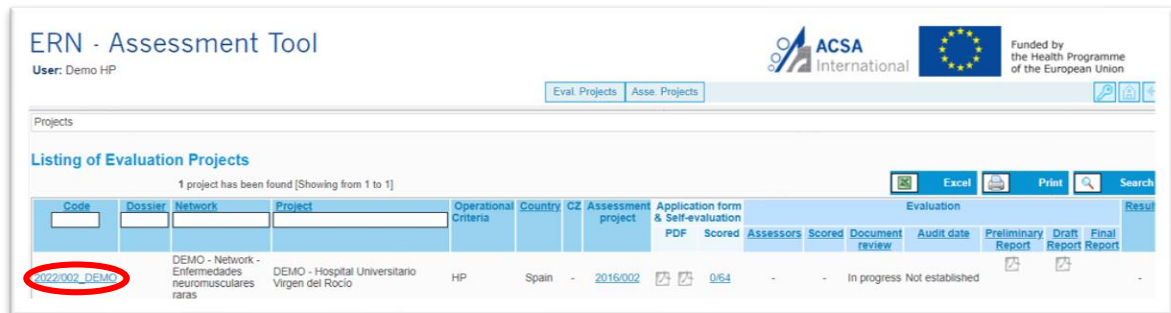

Figure 2: Link to the list of evaluation projects.

4. HCP and ERN self-evaluation

A specific project has been created for the evaluation of each ERN and each HCP.
The Evaluation Projects List (shown in Figure 3) allows the user to browse through the projects registered in the information system. It provides information about the project stage, as well as shortcuts to the assessment project developed in 2016, the communication area, access to the different reports, etc.

Select the project for self-evaluation by clicking on the **Code** number (i.e., 2022/002_DEMO).

Figure 3: Listing of evaluation projects each user has access to.

Once in the evaluation project, HCPs and ERNs representatives must fulfill the self-evaluation. It should reflect on the activities carried out during the first five years (2017 until December 2021) to check to which extent the objectives have been achieved.

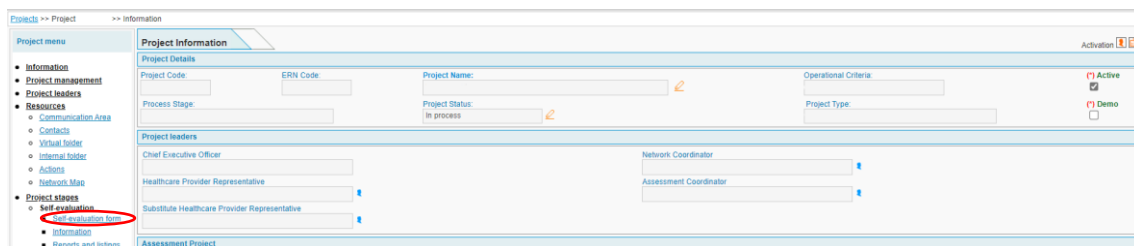The self-evaluation consists of:

A. Form to answer specific questions for the identification of the ERN/HCP, its area of expertise and stakeholders involved among others.
B. Criteria and measurable elements with the scoring options (in its "Comments" section, the corresponding evidence or explanations deem appropriate can be added).
C. Section "Evidence" to incorporate the references that show compliance with each measurable element (documents such as financial plan, description of mechanisms used in the ERN, list of results, guidelines used, etc.).

4.1. Self-evaluation Form

In this section, the requested documents shall be downloaded, completed and attached to allow the collection of information necessary for the self-evaluation.

Step 1. to complete the **Self-evaluation form,** go to:
Project Menu >>Project stages >>Self-evaluation >>**Self-evaluation Form** (Figure 4)
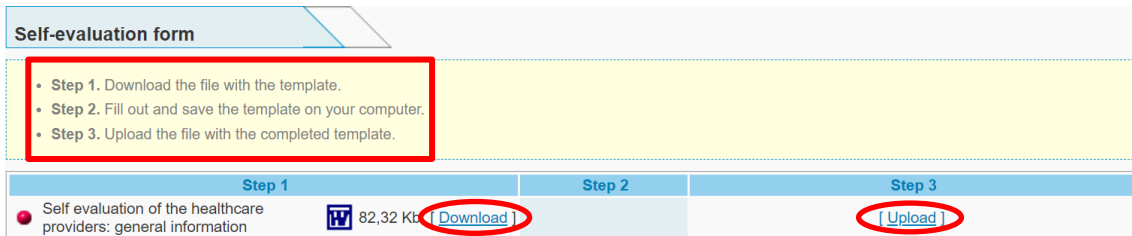
Figure 4: Self-evaluation form.

Step 2. On this screen (Figure 5), the steps to follow to complete this section are indicated:

- **I.** Download the file with the template.
- **II.** Fill out and save the template on your computer.
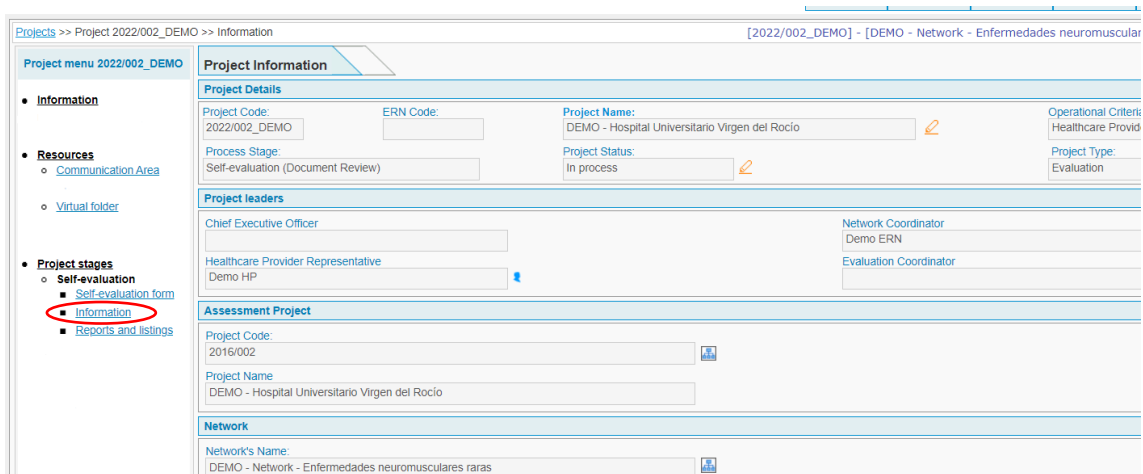- **III.** Upload the file with the completed template.

Figure 5: Steps to follow for the self-evaluation.

Step 3. Once the document(s) have been attached, the sphere on the left will turn from red to green.

4.2. Self-evaluation of Operational Criteria

Step 1. To complete the **measurable elements**: go to Project Menu>>Self-evaluation>>**Information.** As shown in Figure 6.
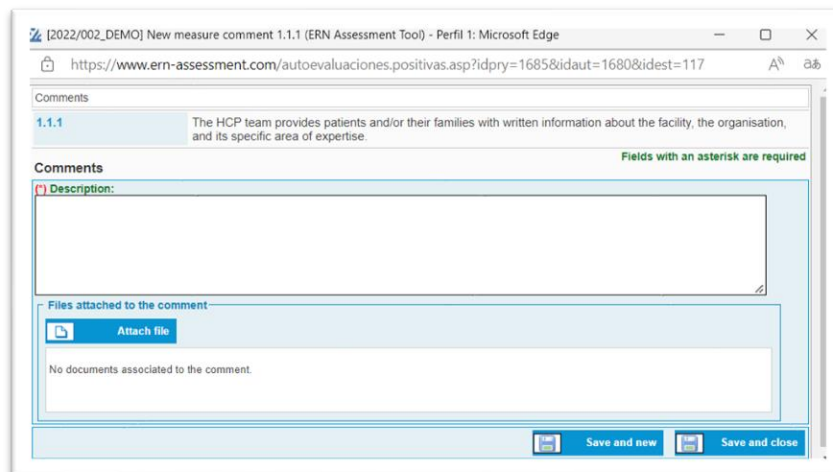

Figure 6: "Information" section of the self-evaluation.

Step 2. Once in the form, different screens with each measurable element will appear. Click on **"Add a comment"** (Figure 7), and pop-up window will appear where you can introduce any relevant information (Figure 8). It also gives the possibility to attach a file. Remember to **save** the changes.

Figure 7: Example of a measurable element and where to click to add a comment.

Figure 8: Pop-up window to add a comment.

Step 3. When supporting documentation is required, it will appear the **"Supporting documentation"** section. Click on **"Attach new document"** to add the required document (Figure 9).
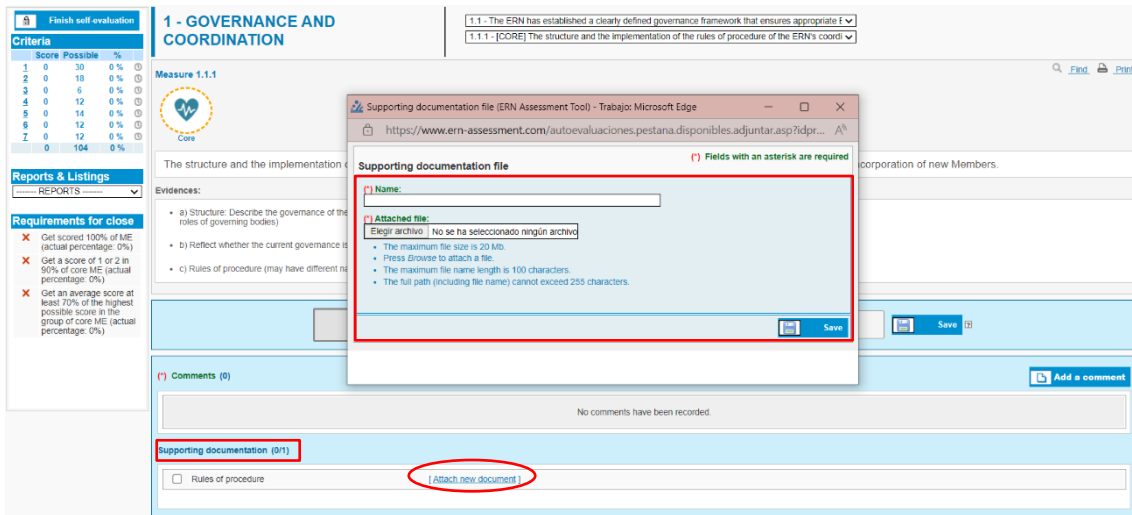

Figure 9: Supporting documentation section.

Step 4. Once it has been completed the description and uploaded the evidence (when required), **select the rating box** that best describes the current compliance with the measure (the scoring guidelines can be found by clicking on the character **"?"** for ERNs or directly as **"Scoring guide"** for HCPs). Then click **"Save"**. These steps are shown set forth in Figure 10a/10b respectively.
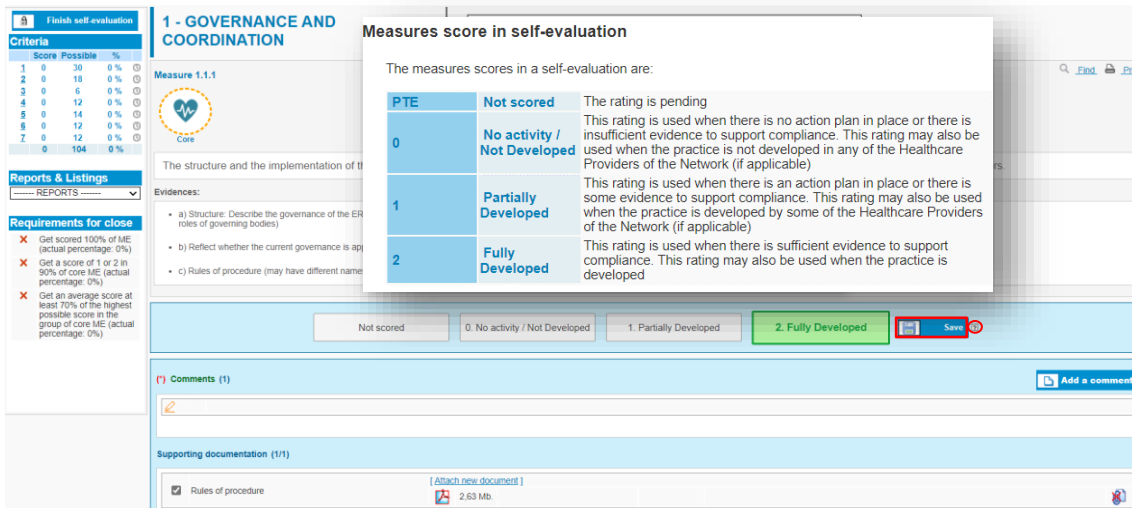

Figure 10a: Process of scoring each measurable element in ERNs.

Figure 10b: Process of scoring each measurable element in HCPs.

Step 5. To continue with the self-evaluation, select the next **criterion** (i.e., 1.2) and the **measure** (i.e., 1.2.1), as shown in Figure 11.

Figure 11: Selection of the next criterion and its measure.
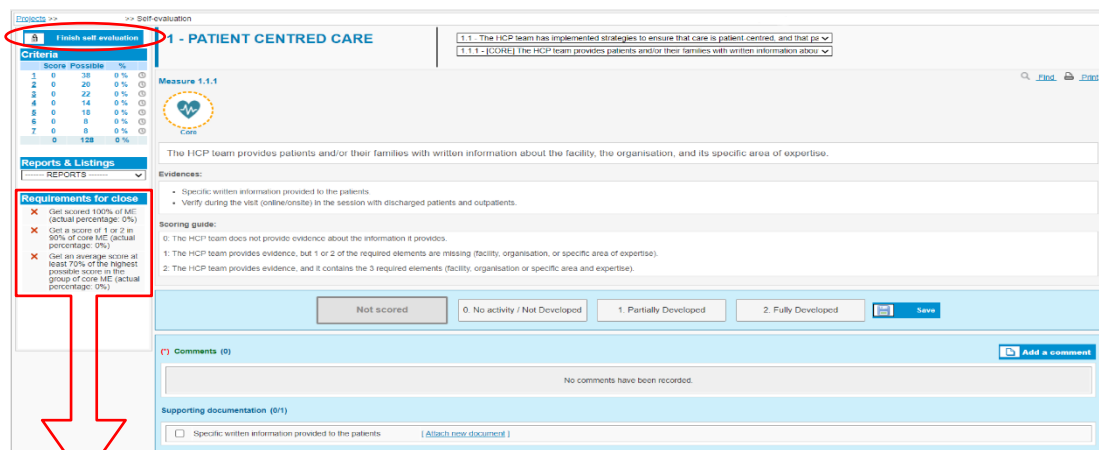
Step 6. Before finalizing the self-evaluation, make sure that the **"requirements for close"** are met (bottom left of the screen, Figure 13). Once all the information is completed, **finish the self-evaluation** by clicking the top left button.

In the top left box labeled as "Criteria", Figure 2, the following information can be found:

1. Track of the average number of scores for each criterion.

2. The maximum possible score in total for each criterion.

3. In addition to the percentage to which that score would be equivalent.

Figure 12: Information of the criteria, their score and percentage.

Figure 13: Button for finishing the self-evaluation and the requirements for closure.

5. Network Coordinator acknowledgement

Each HCP must complete their own self-evaluation through the OEIT, and it is the Network Coordinator's responsibility to submit their ERN self-evaluation, as well as to ensure that all Members to be evaluated have completed their self-evaluations.

The role of the Network Coordinator in the HCP self-evaluation process is aimed at checking whether the process has been completed on the platform.

The HCP acting as the Coordinating Member of the Network will have access to all the projects of the members of the network. The Network Coordinator will have access to them through the **List of Evaluation Projects**.

As previously said, the ERNs self-evaluation process will be the same as for the HCPs (See section 4: HCP and ERN self-evaluation). It is accessed by clicking on the project code (Figure 14), which in this case, will include the operational criteria for the ERN.

Figure 14: Listing of Evaluation Projects view

In addition to the self-evaluation, the Coordinating Member of the Network has to acknowledge the submission of the self-evaluation projects of the Network. This can be found in the project menu, as a subcategory of the "Self-evaluation" (Figure 15).
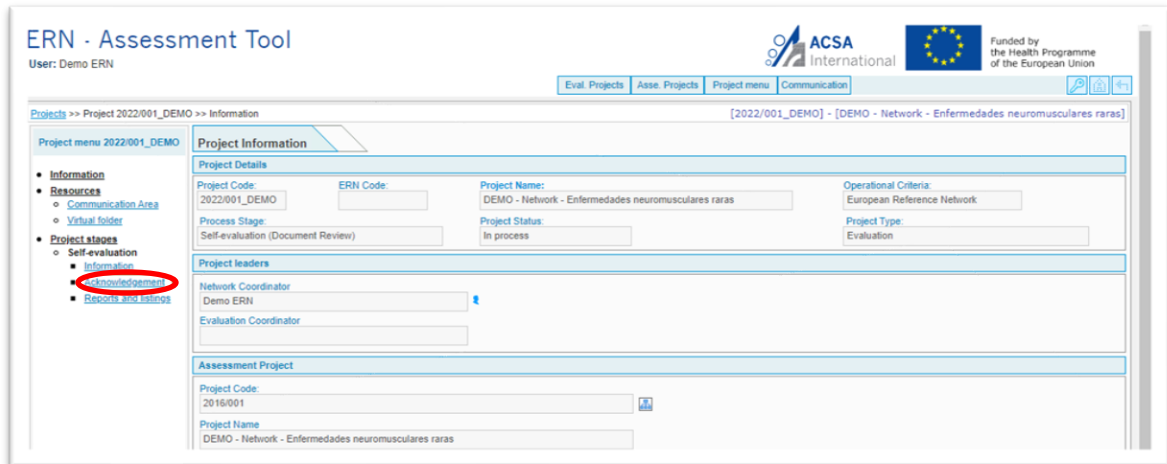
Figure 15: Acknowledgement position in the index

Once you click on "Acknowledgement" section, the screen displays the status of the self-evaluation of all members. To acknowledge the submission of the self-evaluation of a specific member, click on "accept" box, Figure 16. In order to acknowledge the submission of each self-evaluation, 100% of the measurable elements must be completed and scored.
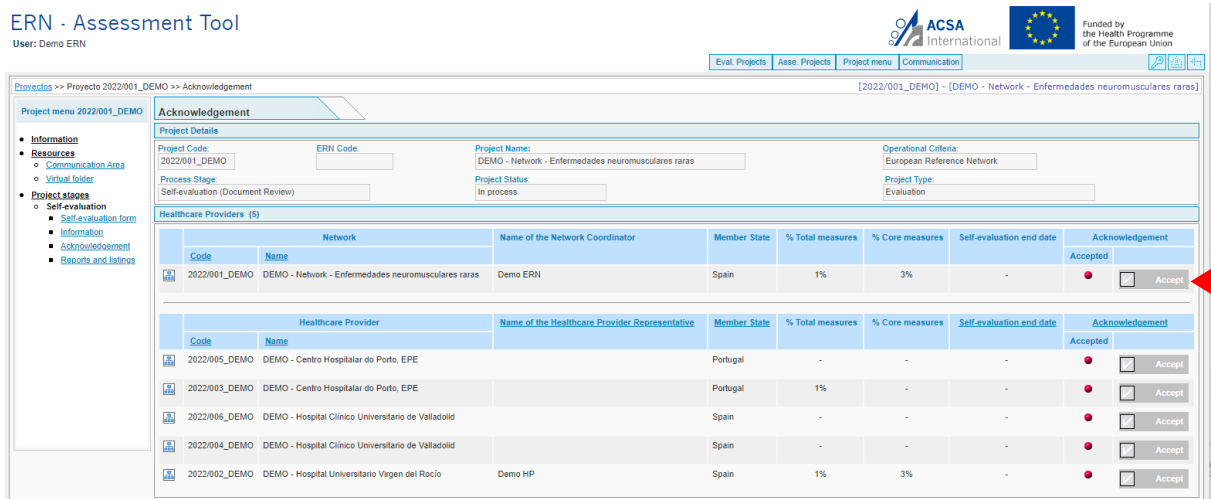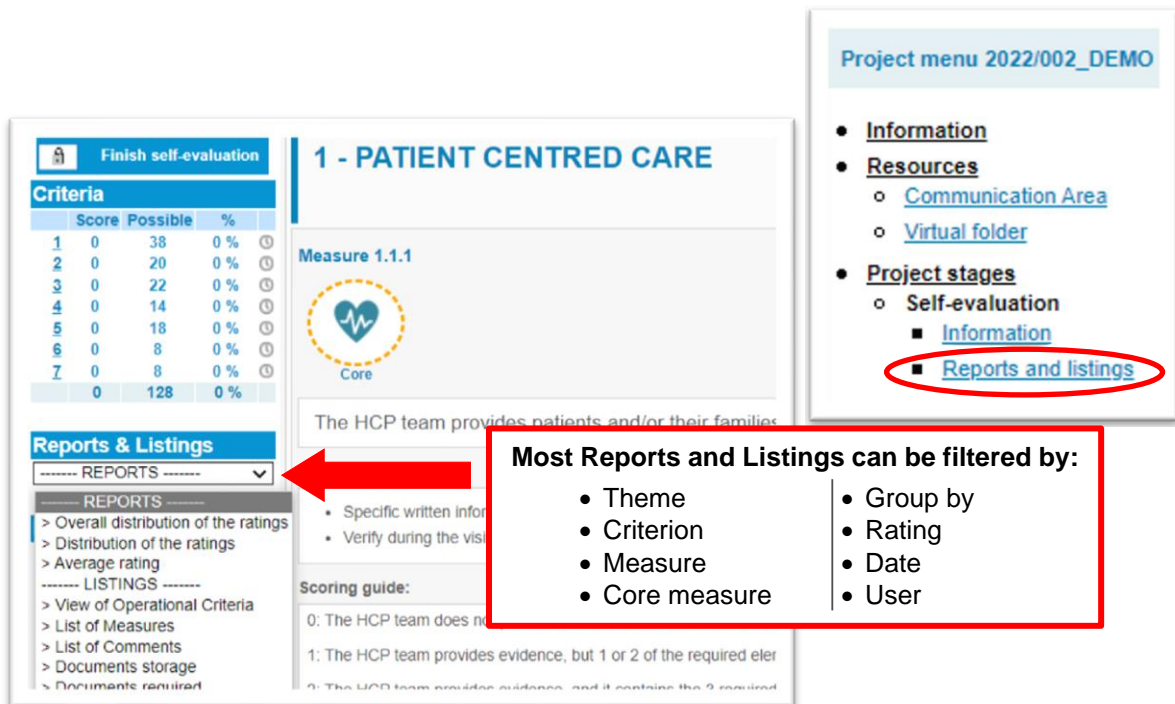
Figure 16: Acknowledgement "Accept" button

6. Reports and Listings

The self-evaluation area provides a set of reports and listings to track and manage the status of the self-evaluation, for both ERN and HCP. These reports/listings can be filtered by different categories.

In Figure 17 it is shown how to reach the reports and listings. It can be accessed through the self-evaluation screen or through the project menu.

Figure 17: Route to Reports & Listings and their categories.

6.1. Reports

Table 1 presents the different reporting options for both ERNs and HCPs, their description, and the type of format in which they can be produced.

Table 1: Reports available for both ERNs and HCPs.

Reports	Description	Type
Overall distribution of the ratings	This report shows the distribution of the reached score at a global level. The pie chart represents the overall percentage of scores for the measurable elements.	Table / Chart
Distribution of the ratings	This report allows to analyse the implementation level achieved in the self-evaluation according to the themes and criteria set out in the manual.	Table / Chart
Average rating	Average rating reached in all manual themes and criteria.	Table / Chart

Table 2 presents the different reporting options, only available for ERNs, their description and the type of format in which they can be elaborated.

Table 2: Reports only available for ERNs.

Reports	Description	Type
Distribution of the rating for HCP	This report allows to analyse the level of implementation achieved for every HCP belonging to the respective ERN according to the topics and criteria set out in the manual.	Table / Chart
Average rating for HCP	Average rating for every HCP belonging to the respective ERN.	Table / Chart

6.2. Listings

The different listing options and their description, available for both ERNs and HCPs, are described in Table 3.

Table 3: Listings available for both ERNs and HCPs.

Listing	Description
View of Operational Criteria	This list summarises how each measure stands in the self-evaluation, giving an immediate overview of the status of each measure (self-evaluation information as a list).
List of Measures	This list summarises each measure by its code, providing a view of the guideline information and with them its core classification, rating and comments.
List of Comments	This list enumerates the comments and their author, which is evidence that the objective has been met.
Documents storage	This report shows the documents attached to the comments registered for each measure.
Documents required	This report shows the required documents for each measurable element.

Table 4 presents the different listing options, only available for ERNs, and their description.

Table 4: Listings only available for ERNs.

Listing	Description
View of Operational Criteria for HCP	This list summarises the status of each measure in the self-evaluation of the HCPs corresponding to the self-evaluation ERN, providing an overview of the status of each measurable element (self-evaluation information in list form).
List of Measures for HCP	This list summarises each measure of the HCPs self-evaluation pertaining to the corresponding ERN, by its code, providing an overview of the information in the guideline and with them its basic classification, rating and comments.

7. Communication area

Each evaluation project has been assigned a specific virtual space to allow communication between the ERN/HCPs and their evaluation teams.

Find in Figure 18 how to get to this area, either directly through the "Home Page" or by going to: Project menu >> Resources >> **Communication area** (Figure).

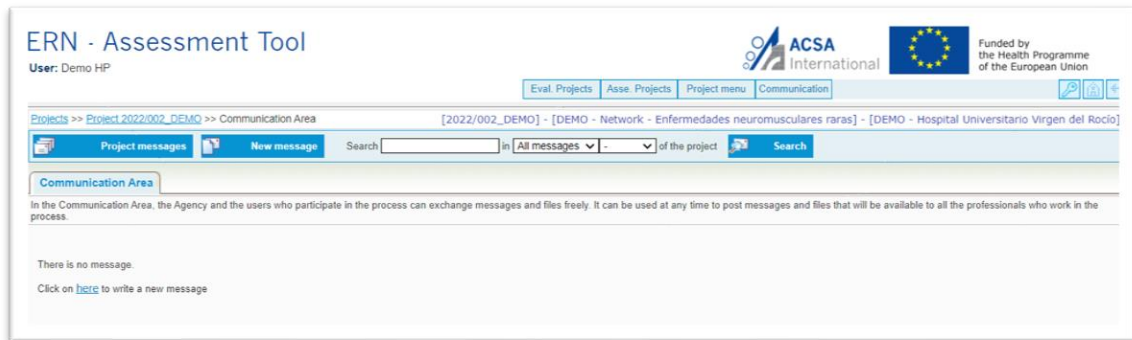*Figure 18: Access to the "Communications area".*

Figure 19: Communication area section.

To send a new message, fill in the "subject" box, the "message" and add the selected recipients in the column in the left side. Find these sections .

It is possible to attach files by:

- Clicking on the symbol
- Adding a name for the document
- Attaching the file
- Saving it

Once "Send" has been clicked on, all recipients will receive a notification to the e-mail address they used to register in the platform (Figure 20).
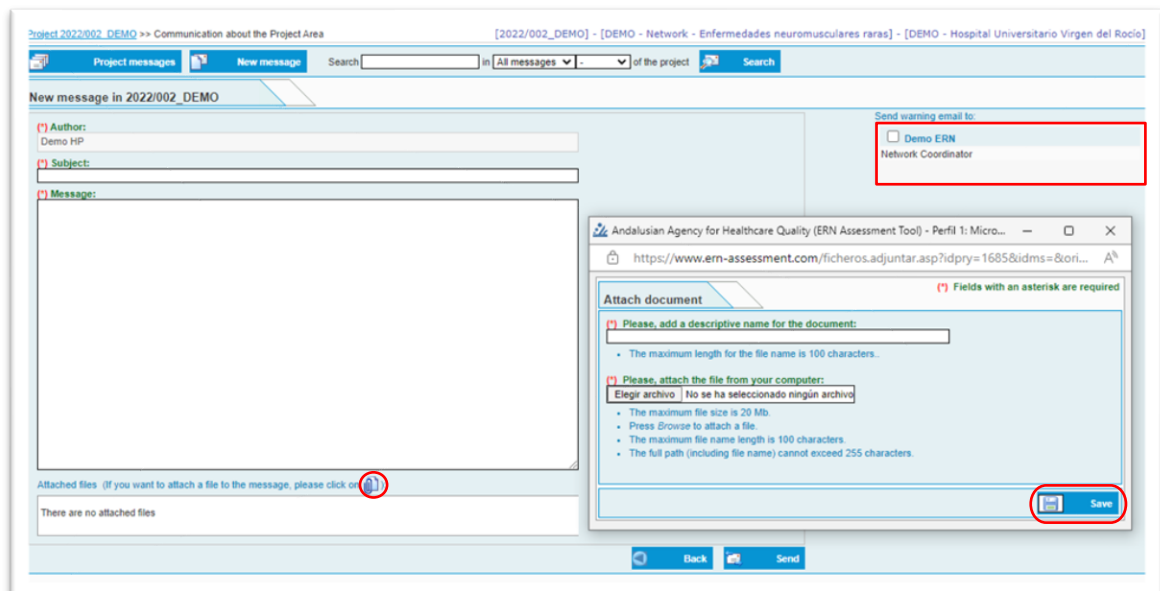

Figure 20: Pop-up window for communication area.

8. Virtual Folder

Each evaluation project has a virtual folder where relevant documents, such as the evaluation report, are uploaded.
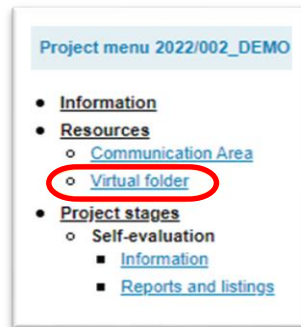

Figure 21: Project menu index.

The virtual folder can be accessed from the project menu (Figure 21).

Once the virtual folder has been accessed, the list of documents contained in this virtual space is displayed. It is shown in the Figure 22.

Figure 22: Virtual folder section.