

APPENDIX A: Project Reporting via FORUM

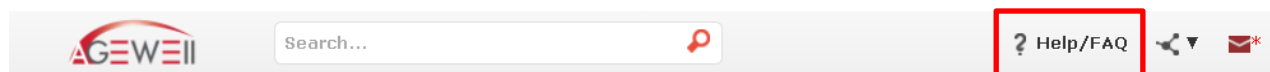
The AGE-WELL Forum Research Portal (https://forum.agewell-nce.ca/index.php/Main_Page) serves two fundamental purposes:

- i) To enable the AGE-WELL administration to collect the information it needs for reporting to the NCE Secretariat.
- ii) To enable AGE-WELL researchers to communicate information of interest with project collaborators, the AGE-WELL members, and potential community receptors.

Specific reporting instructions are e-mailed to AGE-WELL members as necessary; however, AGE-WELL members should ensure that information available on their own profile and projects is correct and up-to-date on Forum.

The end of a fiscal year (i.e. March 31) represents a major reporting period in order for AGE-WELL to collect the metrics required to develop and submit an annual report to the NCE. It is important that all partner contributions, outputs and activities by AGE-WELL projects and HQP from the past fiscal year have been reported on Forum.

Note that members should refer to the Help/FAQ section on Forum for general instructions on how to find, add and edit information.



Workpackage Coordinators are also available to support AGE-WELL members in their efforts to add people, new contributions, outputs and assist with reporting requirements.

There are 3 main categories to report on the AGE-WELL Forum Research Portal:

1. Adding People
2. Adding Contributions
3. Adding Outputs

1. Adding People

Upon joining the Network, individuals must read and complete the **AGE-WELL Conflict of Interest Policy Guidelines and Declaration** form, which is intended to enable AGE-WELL members to recognize and disclose situations that may be open to question and to ensure that such situations are appropriately resolved. In addition, the **AGE-WELL Confidentiality and Non-Disclosure Agreement** must be completed.

Both of these forms can be found on the AGE-WELL Intranet: <http://members.agewell-nce.ca/network-management/>

Individual members can make sure their information is up-to-date by clicking on “My Profile”, and “Edit Bio”. There are various types of users on Forum, and a member can assume multiple roles at the same time. See the [FAQ](#) for an explanation of the roles available on Forum.

2. Reporting Contributions

All contributions (e.g. Cash and In-Kind, Grant, Scholarship, etc.) received from partners (e.g. research partners, Mitacs, etc.) and other sources (e.g. home university, grant agency) over the past fiscal year that have enhanced AGE-WELL funded activities must be entered in Forum.

See link to manage contributions: <https://forum.agewell-nce.ca/index.php/Special:Contributions>

To add a new contribution:

- i) Click “Manage Contributions” on the left hand side of the Forum homepage and then “Add Contribution”.
- ii) Add the required information as it relates to the contribution including a title, the people involved and a brief description.
- iii) When you click “Add Partner”, the following information is required:
 - a. Partner name
 - b. Contact information – note that the partner organization will not be contact by the Network Management Office
 - c. Sector
 - d. Level
 - e. Type (i.e. Cash; Cash and In-Kind; In-Kind; Grant; Research Chair; Scholarship; Fellowship; Contract) and Sub-Type (i.e. Salaries; Equipment, Software; Materials, etc.)
- iv) Select the AGE-WELL project(s) that the contribution relates to.
- v) When all fields are complete, click “Create Contribution”.
 - a. Note that if you accidentally click “Add Partner” again, you must then click “Delete Partner” to remove the second set of blank fields.

To edit an existing contribution:

- i) Click “Manage Contributions” on the left hand side of the Forum homepage and search for the contribution that has already been reported.
- ii) Click on the title of the contribution and click “Edit Contribution” at the bottom of the page.

3. Adding Outputs

All project outputs and activities partially funded by AGE-WELL and/or related to the AGE-WELL research agenda should be entered in Forum. A list of reportable outputs is found below.

See link to manage outputs: <https://forum.agewell-nce.ca/index.php/Special:ManageProducts>

To add a new output:

- i) Click “Manage Outputs” on the left hand side of the Forum homepage and then select “Add Output”.
- ii) Add the required information as it relates to the output including a title, authors, and a brief description.
- iii) Select a category from the following options (see list of all reportable outputs below):
 - a. Scientific Excellence – Advancing Knowledge
 - b. Scientific Excellence – Leadership

- c. Networking and Partnerships
- d. KTEE – Knowledge Mobilization
- e. KTEE – Commercialization
- f. HQP Training
- g. Products
- iv) Based on the selected category, select the type of output (i.e. Book Chapter; Oral Presentation; Poster; Project Meeting; Educational Outreach; Provisional Patent; Master's Thesis; Toolkit, etc.).
- v) Select the AGE-WELL project(s) that the output relates to.
- vi) Click "Save Output".

Alternatively, you may choose to upload AGE-WELL outputs from your Canadian Common CV (CCV; XML file). Note that all of the publications from your CCV will be populated on Forum. You are able to select which outputs you want to release and report on Forum. See the [FAQ](#) for more information on how to upload your CCV.

Individuals who are not AGE-WELL members may be added as authors to the Output by typing their name in the "Search/Add authors" field and then move their name over by clicking the << box.

Metrics are auto-populated from the information reported in Forum and associated with each project. Therefore, it is important to ensure that all outputs are up-to-date in order to provide accurate metrics in the end of term report required by 12-month projects (i.e. Catalyst and SIP Accelerator projects).

Reportable Outputs and Activities on Forum

The following is a list of outputs and activities that should be reported on Forum. Note that only outputs and activities partially funded by AGE-WELL and/or related to the AGE-WELL research agenda should be entered in Forum.

Scientific Excellence – Advancing Knowledge		Scientific Excellence – Leadership
<ul style="list-style-type: none"> • Book • Book Chapter • Book Review • Collections • Conference Paper • Conference Abstract • Conference Attendance • Conference Paper • Edited Book • Invited Paper • Journal Abstract • Journal Paper • Manual • Oral Presentation 	<ul style="list-style-type: none"> • Proceedings Paper • Research Brief • Seminar • Presentation • Scoping Review • Symposium • Teaching • Seminar • Tech Report • Technology Demonstration • White Paper • Workshop • Attendance • Workshop Presentation 	<ul style="list-style-type: none"> • Award (HQP receiving awards/scholarships should also add the award as a contribution if it's contributing to their AGE-WELL work. When adding it as a contribution for Project select 'NMO project'). • Certification • Ethics Application • Invited Presentation • Leadership Position • Work on Committee

<ul style="list-style-type: none"> • Panel Presentation • Poster 	<ul style="list-style-type: none"> • Misc 	
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Networking and Partnerships
<ul style="list-style-type: none"> • Project Meeting • Industry Partner Meeting - In-Person • Industry Partner Meeting -Teleconference • Community Partner Meeting - In-Person • Community Partner Meeting-Teleconference • Policy Partner Meeting- In-Person • Policy Partner Meeting-Teleconference • Older Adult and/or Caregiver Meeting - In-Person • Older Adult and/or Caregiver Meeting – Teleconference • Memorandum of Understanding • Misc

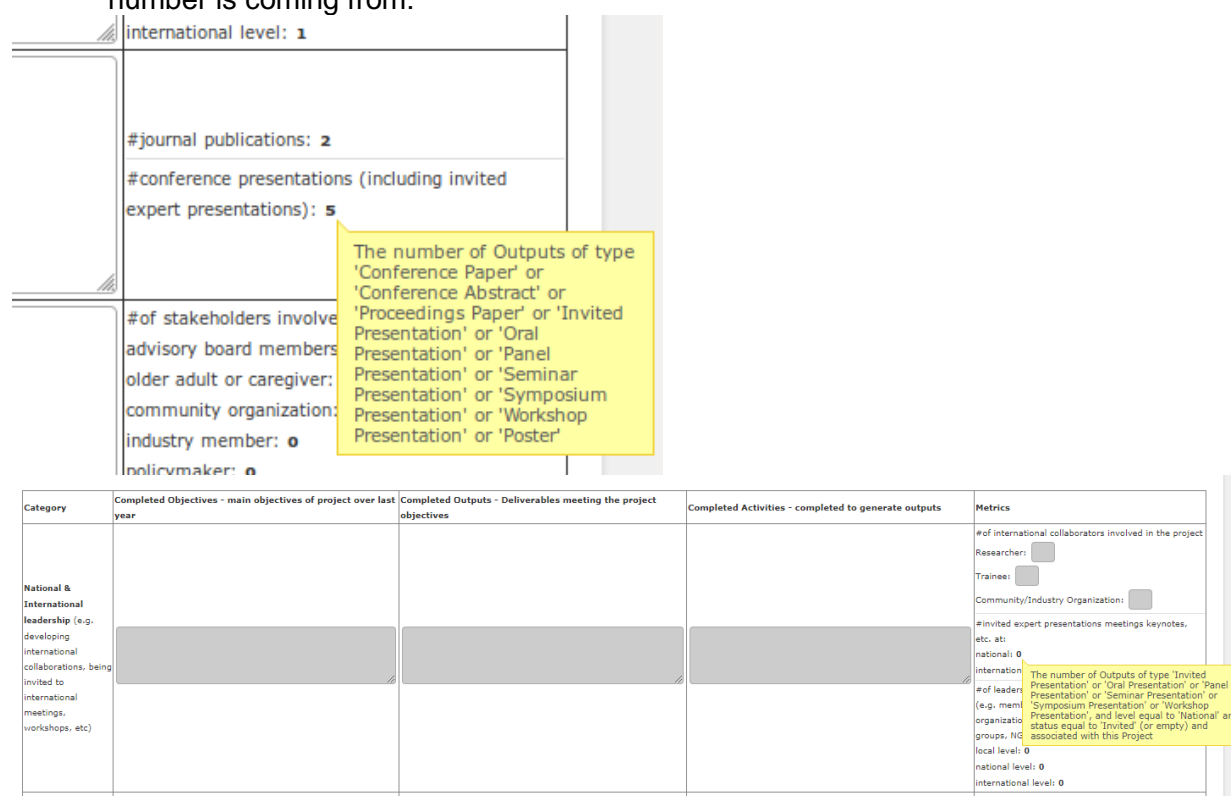
KTEE – Knowledge Mobilization	KTEE – Commercialization
<ul style="list-style-type: none"> • Arts-based KM (e.g. play) • Blog - maintains a blog regularly (does not refer to writing a blog post). • Champions • Community of Practice • Digital News Interview • Educational Materials • Educational Outreach • Event Organization • Event • Interactive Small Group Workshop • Interviews • Knowledge Café • Magazine/News paper Article • Mass Media Campaign • Networking • Opinion Leaders • Policy Brief • Press Release • Print Media Interview • Radio Interview • Social Media • Testimonials • Transdisciplinary Collaboration • TV Interview • Webinar • Misc 	<ul style="list-style-type: none"> • Business to Business Distribution • Business to Customer Distribution • Copyright • Ideathon • IP Disclosure • Joint-Venture • License Agreement • Marketing • Patent • Patent Cooperation Treaty (PCT) • Pitch Presentation • Provisional Patent • Report of Invention • Start-Up • Trade Show Exhibition • Trademark • Misc

HQP Training	Product
<ul style="list-style-type: none"> • Bachelors Thesis • EPIC Training Program Component • Internship 	<ul style="list-style-type: none"> • Algorithm • App • Data Set - to be shared and used for

<ul style="list-style-type: none"> • Masters Dissertation • Masters Thesis • PhD Dissertation • PhD Thesis • Student Exchange • Student Volunteering • Summer Institute Attendance • Misc 	<p>research, or a collection of interesting elements accessible through the web – a website or an app.</p> <ul style="list-style-type: none"> • Framework • Practice Guideline • Software • Technology • Toolkit • Video/Film • Website
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Tips for Project Reporting on Forum

1. In a project report, you can hover over all of the metrics and it will show you where that number is coming from:



2. Multimedia outputs are any media form which has been produced as a result of AGE-WELL participation.
 - a. The following formats can be uploaded on Forum: png, jpg, jpeg, gif, tif, tiff, svg, psd, pdf, ppt, pptx, doc, docx, xls, xlsx, tgz, zip, rar, flv, mov, avi, mpeg, ogv, mp4, mkv, m4v, mp3, flac, ogg, wmv, wav, txt, as well as YouTube and Vimeo videos.
 - b. Click “Add/Edit Multimedia” on the left hand side of the Forum homepage and then enter the required information and associated project(s)