

## Eligibility of SSA

### QUICK REFERENCE GUIDE

### FOR RESEARCH OFFICES

# Review Eligibility of Site Specific Assessment

## Eligible is the default.

For a site application to be submitted in REGIS the system requires the following to have occurred:

- ❖ Project Registration completed
- ❖ Protocol/Project Plan uploaded
- ❖ HREA submitted and
- ❖ Site application/s completed including all Head of Departments having made a decision.

If an application has been successful in being submitted in REGIS it has met the minimum system requirements to be 'Eligible'.

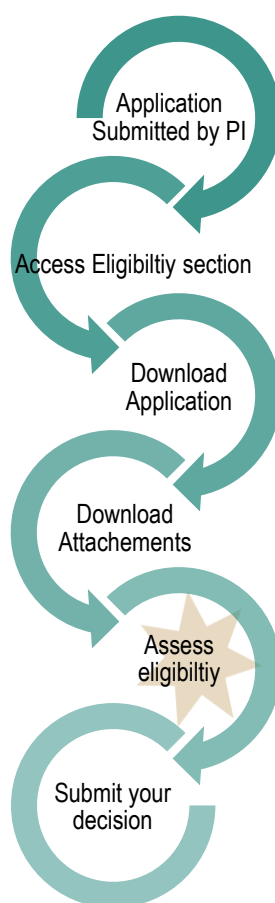
The RGO/research administrator should only mark an application as ineligible for the following reasons:

- ❖ The site application appears to have dummy responses.
- ❖ The submitted documents do not match the description. E.g. incomplete template.
- ❖ The site application is submitted without Head of Department support without prior consultation of the RO

It is recommended that the RO contact the applicant to discuss prior to marking the application as Ineligible.

## How does it work in REGIS?

The following diagram is an overview of the Eligibility Review process in REGIS.



## Eligible and Valid

Site applications have a preliminary eligibility status to allow the RO to easily identify an eligible application that is pending ethics approval.

Eligibility and review should begin as soon as the application is submitted.

If the RGO answers both eligibility questions as 'Yes' the system will mark the application as 'Valid' if ethics approval has not been confirmed in the system.

After ethics approval is confirmed the system will change the status of the application to 'Eligible'.

When an application is in the 'Valid' status the RGO is able to complete all actions up to RGO recommendation.

## Completing eligibility in REGIS.

A new Site application will have a status of 'Submitted'.

*Note: this QRG assumes you have already set up your homepage tiles. See [QRG – Research Offices – Setting up a Homepage](#) and [REGIS User Manual guide](#) - [Homepage tiles](#)*

### Step 1

Select the new application to complete the eligibility.

### Step 2

Click on the Management tile in the left-hand menu and then select Eligibility.

## MANAGEMENT

Comments  
Contacts  
Decisions  
Eligibility

**Step 3**

Click edit on the right-hand menu to be able to edit the eligibility page.



Click Edit

**Step 4**

Select the hamburger icon next to the Eligibility heading to 'Add Eligibility assessment'

Eligibility **+ Add Eligibility assessment**

**Step 5**

Download the Application and Attachments by clicking the download buttons.

Download application  
 Download attachments

The attachments will download as a temporary zip folder and includes the application form.

Assess eligibility taking into consideration the examples on page 1 'Eligible is the default.'

**Step 6****Eligibility Review - Criterion 1/1**

After completing the eligibility review, indicate the eligibility status of the application.

Criterion eligibility Please select

Click to select Yes or No from the dropdown menu.

Comments added into this field are recorded in the eligibility report but are not seen by the applicant.

Click the blue arrow on the right side of the page to progress

**Step 7**

If ineligible add the comments into the free text field as they should appear to the applicant.

If eligible, comments made here will not be seen by the applicant.

**Step 8**

After completing any comments in the review section indicate the eligibility status of the application. This should be the same selection as the Eligibility Review.

It is this second eligibility toggle that determines the overall status of the application.

## Review

Comments	When eligible this comment does not go to applicant
Eligibility	<input checked="" type="checkbox"/> Eligible - satisfies all criteria
Eligibility Reviewer name	Kylie Becker
Request approval	<input type="checkbox"/> No

**Request approval is only used when Eligibility approver B is used - see page 3.**

Click the blue arrow on the right side of the page to progress

**Step 9**

Manually select the email template at the top of the page.

Do this by clicking on the Email template cell and selecting the appropriate template.

## Eligibility Review - Email

Email template Application SSA Eligible Notification  
Email template Application SSA Ineligible Notification

**Step 10**

Edit the email as required.  
Add any attachments by clicking or dropping the files in the section indicated

Click or drop your files here



Click the green tick to finish the eligibility assessment.



An alert will come up at the bottom of the screen

The status of the application will change to either 'Ineligible' or 'Eligible' or 'Valid'.

**Note: The status will also be changed in the external portal.**

'Eligible' and 'Valid' applications can now progress to RGO review.

A 'Valid' application is able to progress upto RGO recommendation before Ethics approval is confirmed.

'Ineligible' applications will require another eligibility review once resubmitted.

For technical assistance, contact  
REGIS HELP DESK

support.f1solutions.com.au  
**1300 073 447**

# Using the Eligibility approved B functionality

## Requesting Eligibility Approver B

If the Research Office uses a dual eligibility process e.g. the admin team complete the initial eligibility but require confirmation from the RGO

**Initial Approver** - During **Step 8**, before selecting the blue arrow.

Select the outcome to be reviewed (Eligible or Ineligible) by Approver B.

Request approval and Send Notification should be Yes.

Add the name of the person to complete the Eligibly review.

Review

Comments	this is a yes decision. Requesting <b>approver B</b> to confirm eligibility
Eligibility	<input checked="" type="checkbox"/> Eligible - satisfies all criteria
Eligibility Reviewer name	Kylie Becker
Request approval	<input checked="" type="checkbox"/> Yes
Send Notifications to Eligibility Approver B	<input checked="" type="checkbox"/> Yes
Approver	Pamela Hughes
Eligibility B approval	<input type="checkbox"/> Not determined

Click the blue arrow on the right side of the page to progress



Click the green tick to finish the eligibility assessment.



An email will be sent to the person listed as approver B

Pending

Office Tasks

Eligibility Approver B review

The eligibility approval will show as Pending  
REGIS will also create a task against the application. This can be seen in a Task Homepage tile.

## Eligibility Approver B confirmation

On receiving the email or Task indicating you have been selected as the approver on an eligibility assessment, locate the application.

Locate the pending eligibility by repeating **Step 2**



Next to the Pending eligibility select 'Assess eligibility'

To download the application and supporting documents repeat **Step 5**

Review the comments made at Criterion 1

Click the blue arrow on the right side of the page to progress

If you agree with the eligibility review select Approve recommendation at Eligibility B approval.

Eligibility B approval ☒ Approve recommendation

To change the eligibility outcome change at the Eligibility toggle. If ineligible add comments and then Approve recommendation at Eligibility B approval.

Comments	Make notes if required
Eligibility	<input type="checkbox"/> Ineligible - does not satisfy all criteria
Eligibility B approval	<input checked="" type="checkbox"/> Approve recommendation

Click the blue arrow on the right side of the page to progress

Follow instructions for **Step 9** to manually select the email template at the top of the page



Click the green tick to finish the eligibility assessment.



An alert will come up at the bottom of the screen

The PI will receive the email notifying them of the outcome of the eligibility review.

## Clear Task

Locate the task from either the homepage tile or via the application, Management → Tasks

MANAGEMENT Tasks

Locate the Task 'Eligibility Approve B required'



Click Edit



Click Edit item

The task wizard will appear.

Add the day the task was completed to clear the task.

Date due



The Active toggle will change to No



Click Ok



Click Save

For technical assistance, contact  
REGIS HELP DESK

support.f1solutions.com.au  
1300 073 447