



Review SSA & Requesting Info
FOR RESEARCH OFFICES

QUICK REFERENCE GUIDE

Review Site Application & Requesting Information

Research projects to be conducted at sites under the control of a Public Health Organisation (PHO) will undergo site specific assessment before authorisation can be granted by the Chief Executive or their delegate.

Eligible vs. Valid

Eligible: Application has received ethics approval.
Valid: Application is pending ethics approval.

How does it work in REGIS?

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](#)



Review the SSA in REGIS

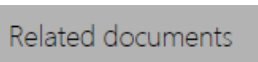
A Site application with a status of 'Valid' or 'Eligible' can progress to RGO review.

Step 1 Select Application

Select the application, from the homepage tile, that you want to begin review.

Unless specified all actions are in the Management menu. Access the menu option by clicking on the 'Management' Tile on the left-hand menu

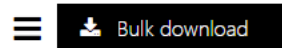
Step 2 View Documents



View the following documents in this section:

- ❖ Site Application form
- ❖ Site Specific documents
- ❖ Initial Ethics application and documents (.zip)
- ❖ Approved Ethics application and documents (if/when available)
- ❖ Project Registration

This document in 'Inherited from...' a related application. E.g. Ethics application and is the approved document.



Bulk download by selecting the checkbox next to the documents and then 'Bulk download'.

Step 4 Reviewing HOD

Heads of Department/s (HODs) outcome will be:

- ❖ **Able to undertake the investigations/ services**, indicating support for the project to go ahead. There are no conditions on this decision.
- ❖ **Able to perform the investigations/services indicated, if the following financial assistance is provided**, the application should show that the PI has addressed any listed requirements.
- ❖ **Unable to undertake the investigations/services indicated, on the following grounds**, in this instance the PI should have discussed this decision with the HOD and/or the nominated RGO.



If the application has multiple HOD they can all be seen and managed within this line.

If one or more Decision is 'Unable' or 'Assistance required' the overall outcome will show as 'Unable to undertake' to indicate the RGO may need to investigate further.

Decisions

Found 1 item	
Type	
	Head of Department Support for Site Specific Assessment



View and manage each individual user decision. A black panel will appear. Click on the decision to manage. (override)



Quick View all user decisions. But no edit.



Edit/Override overall (All) outcome.



Permanently Delete all decisions.

Request More Information

After completing the review a Decision needs to be made. Request for Information or RGO Recommendation.

Request for Information

- ❖ **Recommendation pending further information** – this option will create the 'more information' form. This option is selected when the RGO requires information before the recommendation but no changes to the application or documents.
- ❖ **Decision pending further information** – select this option if changes to the application or documents are required. This option will create a new version of the site application and enable the applicant to edit it.

For details on how to make the RGO Recommendation and CE/Delegate Decision see QRG - Approvals not associated with meetings.

Step 1

Decisions

Click on 'Decisions'



Click 'Edit' on the right-hand side of the screen


Step 2

Select the hamburger next to the Decisions tile, then 'Add Decisions'

Decisions  

The Decisions wizard will appear.

Step 3

 Select the 3 dots at the end of the 'Type' cell to search for the decision type.

A black panel will appear.

Step 4

Select '**More Information Required – SSA**'

Click on the checkbox next to the Decision and then on the tick icon at the bottom of the panel.

Do not change the entity.

Select

Click select the end of the 'User' cell to search for the person requesting information (RGO)

A black panel will appear.

Step 5

Add Users

Search for the User by typing in their first or last name or email address.

The system will only display Users who fit the search criteria.

The User must have a REGIS account, and can be anyone with a REGIS account.

Click on the checkbox next to the Decision and then on the tick icon at the bottom of the panel.



Click 'save' within the wizard (underneath the 'users name').

Step 6



View and manage more information decision
A black panel will appear.
Click on the decision to manage.

Select the Decision outcome 'recommendation pending' or 'decision pending' as discussed above.

Click 'save' in the panel.

Step 7



A 'Send email' icon will now appear on the decision line.
Click on the icon for the more information email to appear.

Step 9

Edit the template and click 'send'.

The email sent notification will show at the bottom of the screen and the 'Email sent' icon will appear on the decision line.

 Email sent



For technical assistance, contact
REGIS HELP DESK

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