REGIS

Creating and Preparing HREC Meetings

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Creating and Preparing HREC Meetings

What are meetings in REGIS?

Once the Executive Officer (EO) or research administrator has assessed a human research ethics application (HREA) as eligible for ethical review, the HREA and supporting documentation can be allocated to a meeting to be reviewed by the Human Research Ethics Committee (HREC), and where relevant, any subcommittee.

REGIS manages all documentation for HREC meetings. The system can generate agendas for, minutes of and actions from the meeting. These are completed and distributed in REGIS by the EO or research administrator. There are standard templates, which are to some extent editable, in REGIS for all NSW public health organisations (PHOs).

Relevant icons

The following icons will be referred to throughout this document.

	Edit
≡	Hamburger (more options)
	Tick to add selected
	Save

How it works in REGIS

The following diagram is an overview of the HREC meeting process in REGIS

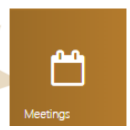
.

Create the meeting

Step 1
When you log in to REGIS, your home page
will have a Start menu in the top left-hand corner with a hamburger icon next to it.

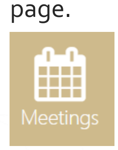
This icon will present you with tiles to navigate to your chosen section.

Step 2



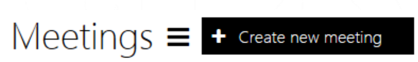
Select the Meetings tile

Step 3
There is only one option on the Meetings page.



Click on the Meetings icon to create or manage meetings

Step 4. Create a new meeting
To create a new meeting, click on the Hamburger icon next to 'Meetings' and select 'Create new meeting.'



Step 5. Complete meeting details
Complete the meeting details at the top of the screen. Under 'Type', select one of the following, for your PHO only:

- HREC
- Specialist Sub-Committee
- Other

Currently all meeting types function in the same way.

Select:

- 'HREC' for a full meeting
- 'Specialist Sub-committee' for HREC Executive Meetings
- 'Other' for Drug Committees, Clinical Trial Committees or PHO-specific meetings.

Note: REGIS requires the submission closing date to be at least 3 days before the meeting date.

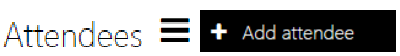
All actions described below are after selecting 'Edit'.

Assign attendees

Step 1

Click the Attendees tile on the left-hand side of the Meeting page.

Step 2



Click on the hamburger icon and then 'Add attendee'

Step 3

Use the Search function in the black pop out panel to find the meeting attendees. Search using first name, last name, user name or group name.

Select the checkbox next to the attendee and click the tick icon at the bottom of the panel.

Note: Attendees must have a REGIS account before you can select them.

Assign applications

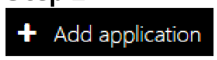
'Assigning applications' can be completed in the Meeting section (see 'In Meetings') or from the Applications section after completing Eligibility (see 'From the Application'). It is anticipated that 'From the Application' will be the most common method for adding an application to a meeting.

In Meetings

Step 1

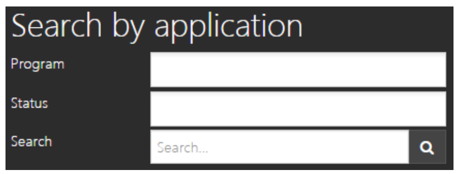
Click on the Applications tile on the left-hand side of the Meeting page.

Step 2



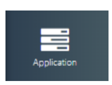
Click the hamburger icon to 'Add application.'

Step 3



Use the Search function in the black pop out panel to find the application. Filter by program, status or text search.

From the Application



Step 1

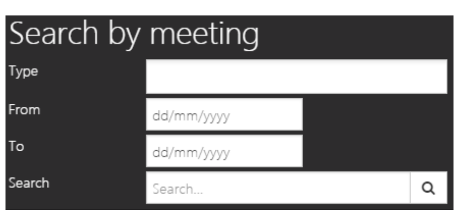
In the Application, select the Management tile on the left and select Meetings from the grey menu.

Step 2

Click the hamburger icon to 'Add meeting'.

If you don't see the hamburger select 'Edit' on the right-hand side of the screen.

Step 3



Use the Search function in the black pop out panel to find the meeting. Filter by meeting type', date' or 'title'.

Select the checkbox next to the meeting and click the tick icon at the bottom of the panel.

Manage assigned applications

This occurs in the meeting setup.

Step 1

Click on the Applications tile on the left-hand side of the Meeting page. A list of applications that have been assigned to the meeting will appear.

Step 2

Click the 'Edit' icon on the right-hand side of the screen. A row of new icons will appear next to each application.

Assign Lead Reviewers

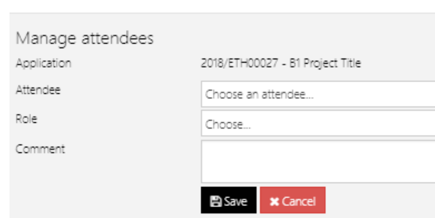
Step 3

Click on the Manage Attendees icon.

 Manage attendees

Step 4

The Manage attendees wizard will appear. Assign lead reviewers by selecting the attendee, their role and adding a comment. Press 'Save'. To add another lead reviewer select another attendee.



Manage Documents

Step 5

Manage the documents that are viewed by the HREC.

Click on the 'Select Document' icon.

 Select Documents

Select documents

5 documents selected / Found 7 documents

	Title	Output Form
☑	Date modified	21/06/2018
	Type	Application

Use the Select documents function. to indicate which documents the HREC are able to view in the external portal.

Documents selected

6

Number of Documents available to HREC

Milestones

MILESTONES

Milestones in REGIS are Progress Reports (ETH) and First Patient In (STE).

Step 1
Click on the Milestones tile on the left-hand side of the Meeting page.

Step 2

+ Add milestone

Click the hamburger icon to 'Add milestone.'

Step 3

Search by milestone

Program

Status Received ✖

Search Search...

Use the Search function in the black pop out panel to find the milestone. Filter by program, status or text search.

Projects

PROJECTS

A project is the post approval entity.

A project can be assigned to a meeting in the same way an application is assigned to a meeting.

See Assigning applications In Meetings and From the Application.

Forms

FORMS

Forms in meetings relates to amendments and safety reporting.

Step 1
Click on the Forms tile on the left-hand side of the Meeting page.

Step 2

+ Add form

Click the hamburger icon to 'Add form.'

Step 3

Search by form

Form

Search Search...

Use the Search function in the black pop out panel to find the forms. Filter by form type, or text search for form identifier.

Step 4
Select the documents that were submitted with the form (e.g. amendment) to be viewed by the HREC.

Click on the 'Select Document' icon.

Select Documents

Select documents

☑ 3 documents selected / Found 3 documents

	Title	Notification of an amendment to a research study - General Amendment
☑	Date modified	
	Type	General Amendment

Use the Select documents function. to indicate which documents the HREC are able to view in the external portal.

Other Notifications

OTHER NOTIFICATIONS

Related documents

Step 1
Click on the Other Notifications tile on the left-hand side of the Meeting page.

Step 2

+ Add related document

Click the hamburger icon to 'Add related document.'

Step 3

Documents

Type Project

Program

Document type

Search Search...

Use the Search function in the black pop out panel to find the related document. Filter by type (application/pre approval or project/post approval), program, document type or text search.

Meeting Documents and Other Business

MEETING DOCUMENTS & OTHER BUSINESS

Agenda other manually uploaded documents.

Step 1
Click on the Meeting Documents & Other Business tile on the left-hand side of the Meeting page.

Step 2

+ Add document

Click the hamburger icon next to the 'Meeting Documents & Other Business' heading and '+ Add document'

Step 3
Drag and drop the document into the area that has appeared or click to browse for the document.

Upload Then click 'Upload'.

Create an agenda

Once all the attendees, applications, milestones, projects, forms/amendments and other documents have been assigned to the meeting, the agenda can be completed using the REGIS template.

Step 1
Click on the hamburger icon next to the Meeting title at the top of the screen in the meeting page.

Note: If an icon hasn't appeared, you need to click Edit first.

Step 2
Select 'Generate Meeting Agenda'

Generate Meeting Agenda

Step 3
The agenda has been created in the 'Meeting Documents & Other Business' tab

Step 4

To edit the agenda download the document, edit it and save to your desktop or hard drive.

Step 5
Upload the new version of the agenda by selecting the hamburger icon next to the 'Meeting Documents & Other Business' heading.

+ Add document

Step 6
Drag and drop the document into the area that has appeared or click to browse for the document.

Upload Then click 'Upload'.

You can also upload an externally created agenda to this section.

Note: Delete the old version of the document by using the trash icon next to the old document.

Distribute the agenda and papers

Complete this process once the agenda has been created.

Step 1
Click on the hamburger icon next to the meeting heading and click 'Circulate Meeting'

Circulate Meeting

Note: If an icon hasn't appeared, you need to click Edit first.

Step 2
The Meeting Email wizard will appear. You can change the body text, the subject line and the recipients, and add attachments as required. Once you are happy with the email, press 'Send'.

Send

How to manage attendance

The research officer can manage meeting attendance at any time before or during a meeting.

If committee members advise their attendance/apologies before the meeting

Step 1
Log in to REGIS, follow **Step 1-3** 'Create the meeting'.

Step 2. Search for meeting
Click 'Find' to see all meetings or drag and drop the filters on the left-hand side of the page to refine your search, e.g. Meeting Types.

Locate the meeting.

Click on the Edit icon to go into the meeting.

Step 3
Click on the 'Edit' icon at the top right-hand side of the page to manage attendees. Note that a number of new icons have appeared next to each attendee.

Step 5
Change the status of each attendee by clicking on Attendance column. Select Attending, Pending, Not attending.

Attendance
Attending

Step 6
Once you have updated the attendance list, click the Save icon.

What next?

Refer to ***Quick Reference Guide - Research Office – Setting up and Managing Reviews*** and/or ***Quick Reference Guide - Research Office - Managing HREC Meetings and Processing Decisions.***

For technical assistance, contact
REGIS HELP DESK

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