



QUICK REFERENCE GUIDE

REGIS

Creating and Preparing HREC Meetings

FOR RESEARCH OFFICES

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. It can generate agendas, minutes and actions. 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.

*A Greater Than Low Risk application **MUST** be assigned to a meeting for metrics 3 to be captured.*

You will need to use several icons in this process at regular intervals.

	Edit
	Tick to select
	Tick to add
	Save

How it works in REGIS

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



Create the meeting

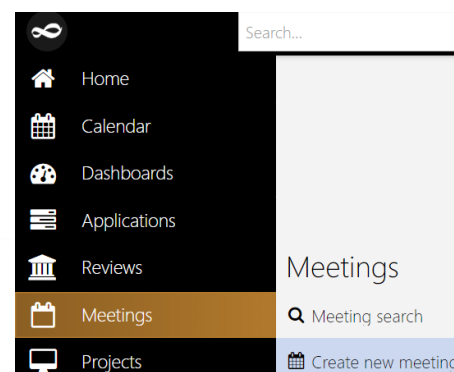
Login to REGIS and select 'Meetings', this will bring you to the 'Meetings & Panels' screen. Select 'Create new meeting'

Meetings & Panels

Define meetings to discuss applications,

- Search for meetings
- **Create meeting**

You can also hover over the 'Meetings' icon and select 'Create new meeting' from the pop-out menu.



Complete the meeting details at the top of the screen.

Under 'Type', select one of the following, for your PHO only:

- ❖ *HREC*
- ❖ *Other*
- ❖ *Specialist Sub-Committee*

Currently all meeting types function in the same way.

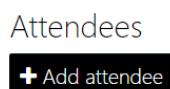
Select:-

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

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

Assign attendees

Click the '+ Attendees attendee' icon at the bottom of the page.



Use the Search function in 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, click the tick icon at the bottom of the panel and click Save.



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

Assign applications

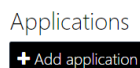
'Assigning applications' can be completed in the Meeting section (see 'In Meetings') or from the Applications section after completing Eligibility (see 'From the Application'). It is anticipated that 'From the Application' will be the most common method for adding an application to a meeting.

In Meetings

Click on the 'Applications' heading

Attendees Applications Milestones

Click the 'Add application' icon

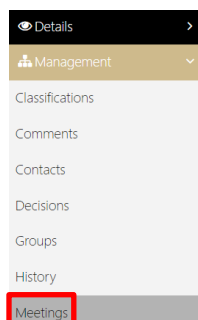


Use the Search function in the pop out panel to find the application. Filter by Program, Status or text search.

Select the application and click Save.

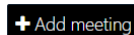
Now progress to "Manage assigned applications".

From the Application



In the application, select the Management tile, then Meetings.

Click the 'Add meeting' icon



If you don't see the + Add meetings icon select 'Edit' on the right-hand side of the screen.

Use the Search function in the pop out panel to find the meeting. Filter by Type, From, To or text search.

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. Click on the 'Applications' heading, a list of applications that have been assigned to the meeting will appear.

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

Click on the Manage Attendees icon.



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

Manage the documents that are viewed by the HREC.

Click on the Select documents icon



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

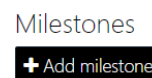
Group and Order Applications.

See "Grouping" and "Display Ordering"

Milestones

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

Click on the 'Milestones' heading, then select 'Add milestone.'



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

Group and Order Milestones.

See "Grouping" and "Display Ordering"

Hint: Filter by "received" to see milestones that have not yet been processed.

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.*

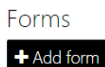
In practice projects would not be added to a meeting, 'Forms' would fulfil this requirement.

For further assistance if needed, contact your local research office at these links – [NSW](#) or [ACT](#).

Forms

Forms in meetings relates to amendments and safety reporting.

Click on the 'Forms' heading, then Add Form.



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

Search by form

Form: Notification of an amendment to a research study

Status: Submitted

Search: 014884

1 form selected / Found 1 form

Identifier	014884
Title	Notification of an amendment to a research study
Status	Submitted
Application identifier	
Project identifier	2020/ETH-00024

Hint: filter by "submitted" to see forms that have not yet been processed.

Select the documents that were submitted with the form (e.g. amendment) to be viewed by the HREC and click Save.

Click Edit Click and use the Select documents function to indicate which documents the HREC are able to view in the external portal.

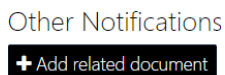
Group and Order Forms.

See "Grouping" and "Display Ordering"

Other Notifications

Related documents

Click on the 'Other Notifications' heading then select + Add related document



Use the Search function in the pop out panel to find the related document.

Filter by type (Application/pre approval or Project/post approval), Program, Document type or text search and click Save.

Group and Order Forms.

See "Grouping" and "Display Ordering"

Meeting Documents and Other Business

Agenda and other manually uploaded documents.

Click on the 'Meeting Documents &

Other Business' heading then select '+ Add document'.

Drag and drop the document into the 'Click or drop your files here' or click that section to browse for the document. Then click 'Upload'.

Order Meeting docs and other business.

See "Display Ordering"

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.

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

Select Generate Meeting Agenda



The agenda will download at the bottom of your page. You will need to save it before editing it. Click on the document to open it and then save it to your desktop or hard drive.

Upload the new agenda by selecting the heading 'Meeting Documents & Other Business' and then drag and drop the document and click Upload



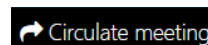
You can also upload an externally created agenda to this section.

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.

Click on 'Circulate Meeting'



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

The **Meeting Email wizard** will appear. You can change the body text, the subject line and the recipients and add attachments as required. Press Send when the email is complete.

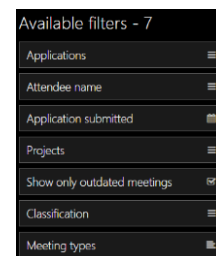
How to manage attendance

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

If committee members advise their attendance/apologies before the meeting:

Log in to REGIS, and follow the initial steps from 'Create the meeting' above.

Then 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 – to enter it, click on the 'Edit meeting' icon to manage attendees.

For further assistance if needed, contact your local research office at these links – [NSW](#) or [ACT](#).

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

Once you have updated the attendance list, click Save.

Grouping

New functionality introduced in the Omni 4.9 release (17 March 2020) allows the research office to group like categories in the meetings. When grouped items will appear in the external portal in the groupings.

Current categories include:

Applications

- Application – New
- Application – Response

Milestones

- Annual Report – New
- Annual Report – Response
- Final Report – New
- Final Report – Response

Forms

- Amendment – New
- Amendment - Response
- Safety Notification - New
- Safety Notification - Response

Other Notifications

- General Correspondence

If groups are not selected the items will appear under the broad category e.g. Applications

Ordering

New functionality introduced in the Omni 4.9 release (17 March 2020) allows the research office to select the order within a category.

By selecting the up/down arrows at the end of the application/milestone/form the Research Office can determine what order the item will appear.



What next?

Refer to these other QRGs on our website: [QRG - Research Office – Setting up and Managing Reviews and/or QRG - Research Office - Managing HREC Meetings and Processing Decisions.](#)

For further assistance if needed, contact your local research office at these links – [NSW](#) or [ACT](#).