



## Creating and Managing Reviews

QUICK REFERENCE GUIDE

FOR RESEARCH OFFICES

# Creating and managing lead, scientific or expert reviews

Depending on the processes of the individual Research Office (RO) and the Human Research Ethics Committee (HREC), a committee member who has been allocated as a Lead Reviewer against a new application may be required to submit a review of the application prior to the HREC meeting.

There may also be instances where a RO requests an external expert provide a review or another type of review. The same process to access the application and provide the review should be followed.

The review process is managed through REGIS from the Reviewers receiving an initial email alert to accessing the applications and supporting documents and finally to the reviewer submitting their review through REGIS to the RO.

**Note:** *The review functionality is a separate process to accessing the general meeting papers. If you are wanting to add an application to a meeting you should access:*

### **Quick Reference Guide - Research Office - Creating and Preparing HREC Meetings**

Reviews can be created in advance however, do not assign attendees until you are ready for the system generated email to be forwarded to the reviewers.

## How does it work in REGIS?



## Create the review

### Step 1

Select 'Reviews' from the left-hand menu.



### Step 2 Create a new review

To create a new review, click '+ Create application review.'

## Manage reviews

**+ Create application review**

### Step 4 Complete review details

Complete the 'Name' section and under 'Review Type' select one of the following:

- ❖ Expert Review
- ❖ Full Committee Review
- ❖ Expedited Review
- ❖ Other

All review types function in the same way.

### Select:

- ❖ 'Expert Review' for a review created for scientific assessors
- ❖ 'Full Committee Review' for a review that corresponds to a full HREC meeting
- ❖ 'Expedited Review' for a review that corresponds to an executive meeting
- ❖ 'Other' for a review that corresponds to Drug Committees, Clinical Trial Committees or PHO-specific meetings.

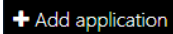
## Assign applications

Assigning applications can be completed in the New Application Review section (see '[In Review](#)') or from the Applications section (see '[From the Application](#)').

## In Review

### Step 1

Click '+ Add application' at the bottom of the 'New Application Review' page.



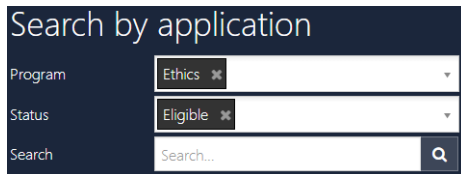
The pop out search panel will appear.

*Tip: If you do not see the '+Add application' icon, click 'Edit'.*

### Step 3

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

*E.g; If a RO wants to assign all applications, on or just after a submission closing date, that have a status of Eligible that will be assigned to a HREC meeting, to a Review then the search filters would be:*



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

## From the Application

*Note: This step requires the review to have already been created.*

### Step 1

In the application, select the 'Management' tile and select 'Reviews'



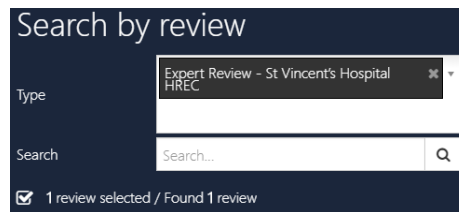
### Step 2

If a specific review has not yet been created you can select '+ Create new review' and follow the instructions above in section 'Create the Review' Steps 1-3.

### Step 3a

Use the search function to filter by review type and free text search.

*E.g; Add the type of review to show only those specific review types and then select the checkbox next to the review*



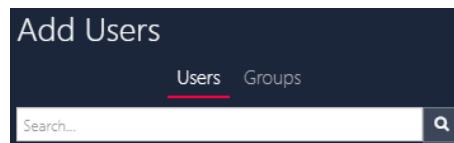
Select the checkbox next to the review and click the tick icon.

## Assign Reviewers

Assigning reviewers and managing documents can only be done in the Review.

### Step 1

Select the 'Reviewers' heading and select '+ Add reviewer' and a pop out panel will appear.



### Step 2

Use the Search function in the pop out panel to find the reviewers. If searching for individual users, then select "Users" or "Groups" for group names (e.g. HREC group). Search using first name, last name, user name or group name.

Select the checkbox next to the review or group and click the tick icon at the bottom of the panel.

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

## Assign Reviewer Roles

Return to the heading Applications of the review.

### Step 3

Click on the Manage Reviewers icon.

### Step 4

The Manage reviewers wizard will appear. A list with all reviewers will appear. Select the role for each of the reviewers for that application. The options available are:

- ❖ HREC Member
- ❖ Lead Reviewer
- ❖ Reviewer

Give a role to only those who you want or expect a review to be submitted from.

Click 'Save' in the wizard.

*New functionality: System versioning allows you to see what version of the application has been submitted, the most current version is identified with an \*.*

## Managing Documents

### Step 1

Manage the documents that are viewed by the Reviewers.

Click on the 'Select documents' icon.

Use the Select documents function to indicate which documents the reviewers can view in the external portal.

## Controlling who needs to submit a review

The Application Review section allows greater control to the RO when using the Reviews in REGIS.

Application reviewer allows the RO to indicate who is required to submit a review and remove those not required to submit the review for each application.

## Application reviewers

### Step 1

Click on the heading 'Application Reviewers'.

Reviewer role	Review status	Review stage	Active	Col	Allow report submission
HREC Member	Pending	Review	Yes	Pending	<input type="checkbox"/> Yes
Lead Reviewer	Pending	Review	Yes	Pending	<input type="checkbox"/> Yes

This page will show a line for each application and each reviewer. The roles allocated when Managing Reviews will show here.

### Step 2

Select the 'Delete Item' icon for each line that a review is not required.

If you do not complete this step everyone will be assigned a review for all applications.

## Sending the review request

Once all aspects of the review are complete click 'Save' on the far right menu. A system notification will be sent to all reviewers.

As soon as reviewers are assigned to a review and the 'Save' icon is selected the system generated email will be sent.

## Viewing submitted reviews

### From the homepage

When a reviewer submits a completed review it will appear in the 'Reviews' tile on the homepage (if created).

### From the application

Once a review has been submitted it can be accessed via the Application. Select 'Management' and then 'Reviews'.

Select the 'View submitted review' icon and you will be taken to the reviewer feedback.

*Note: A review cannot be seen by other reviewers or the applicant.*

## Adding a completed Review to a Meeting.

There are two ways to allow comments from a review to be available to meeting attendees with the meeting papers. Both are accessed through the 'Meeting Documents & Other Business' heading.

### 1. Copy and paste review details into agenda

Copy and Paste the details from the review into the agenda or a separate document. This may be useful if you want to rephrase comments before they are distributed.

### 2. Include PDF in meeting papers

The review report can be included in the meeting papers when managing the meeting documents. See QRG *Creating and Preparing HREC Meetings*.