



Sharing Access to an Application/Project

Depending on your role, REGIS will give you automatic access to view, edit or submit the application/project. Specific roles can share access.

An application/project can be shared with anyone with a REGIS account. This includes people that are not part of the research team e.g., Sponsors, Coordinators or Collaborators.

Project Registration

Anyone with a REGIS account can create and submit a Project Registration. This person is the **Owner** of the Project Registration form.

The **Owner** can share access to Project Registration before it is completed/submitted.

Anyone who is given view/edit access at Project Registration will have this access across the ethics and site applications.

For Ethics, the **Owner/CPI** can delegate the responsibility of submitting the application to another REGIS user.

For Sites, the **Owner/PI** can delegate the responsibility of submitting the application to another REGIS user.

Ethics Application

The **Owner** of the ethics application is the person who was indicated as the Coordinating Principal Investigator (CPI) at Project Registration or through an amendment.

The **Owner/CPI** has responsibility for the management of the study.

The person who created Project

Registration (if different to the CPI) has automatic **Edit** access to the ethics application. They can also share the ethics application with other users.

Anyone who was given access at Project Registration will retain the same access for ethics.

Sharing Site Applications

The **Owner** of the site application is the person who was indicated as the Principal Investigator (PI) at Project Registration or through an amendment.

The **Owner/PI** has the responsibility for the study at the site.

The person who created Project Registration (if different to the PI) has automatic **Edit** access to the site application. They can also share the site application with other users.

The CPI is allocated automatic **Edit** access to the site application and is also able to share the application further.

Anyone who was allocated shared access at Project Registration will retain this access for the site application.

Sharing and Roles

Share with View Access: User can only view the application and forms, but not make changes.

Share with Edit Access: User can view the application and forms and make changes.

Share with Edit & Submit Access: User can view the application and forms, make changes, and submit on behalf of the CPI or PI.

Administration: User is copied into all email communications from REGIS & can also be given submit access.

How to Share Project Registration

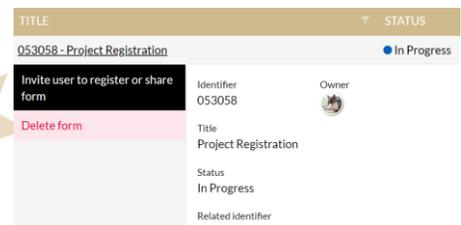
Sharing the Project Registration should be done **BEFORE** Project Registration is submitted. If the Project Registration has been completed (in a status of **Registered**) you should follow the steps detailed in [How to Share Ethics/Site Applications](#).

Step 1

Click 'Projects' at the top of the screen



Click anywhere (except the title) on the Project Registration row you want to share. This will expand the row.



Click the black 'Invite user to register or share form'. Here, you can invite people who do not have a REGIS account AND share the Project Registration with current users too.

This button also appears during project registration at:

- Part C:** Research Site/s
- Part D:** Coordinating Principal Investigator

Step 2

The 'Invite user to register or share'

wizard will pop up.

 Invite user to register, share & manage access

Click  Add another user

Enter the REGIS email address of the person who needs shared access.

If the email address is **not** registered in REGIS, the user will automatically be sent an invitation email.

nicole.becker@health.nsw.gov

Invite nicole.becker@health.nsw.gov

No user is found. An invitation will be sent to this email address

Select the level of access you are requesting for the user.

Invite only 
 Invite only
 Invite and share with view access
 Invite and share with edit access
 Invite and share with edit and submit access

If the email address is registered in REGIS, a message will pop up and you will be guided to Share.

User corinne.mcdonough@health.nsw.gov.au is found. A notification will be sent to this email address and the user will be able to access this form

Select the level of access you are requesting for the user.

Share with view 
 Share with view access
 Share with edit access
 Share with edit and submit access

Step 3

You can add more users by clicking on

 Add another user

You can remove users by clicking on



Step 4



This icon will appear next to each Project Registration that has been shared with others.

How to Share Ethics/Site Applications

Step 1 Locate your application

When you log in to REGIS, your home page will show your top five projects.

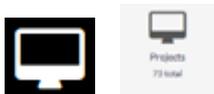
 Top 5 projects

2021/PID01115 New UX

If you can see the project here, open it by clicking on the PID number or on the title; this will take you to the Study Details home page.

The study title will appear at the top of the screen & you will see the ethics and site applications associated with it.

If the study is not listed in your 'Top 5 projects' click the 'Projects' icon or the 'View all' button



Project > 2021/PID01115 - New UX

Step 2

You can share access to the application from two sections: via the study row or from within the application itself.

Study Row: Except the title, click anywhere on the study row to expand the row.

053609 - Project Registrati
 Invite user to register or share form
 Delete form

Click 'Invite user to register or share form' (then follow **Step 2a**).

Within Application:

Click the hyperlinked 'Identifier' or Title of the Ethics/Site Application you wish to share access and in the top right-hand corner, select the 'Invite user to register or share application' and then follow **Step 2a**.

 Invite user to register or share application

Step 2a

In the box that pops up, click the '+ Add another user' button

Enter the REGIS email address of the person who needs shared access.

If the email address is **not** registered in REGIS, the user will automatically be sent an invitation email.

nicole.becker@health.nsw.gov

Invite nicole.becker@health.nsw.gov

No user is found. An invitation will be sent to this email address

Select the level of access you are requesting for the user.

Invite only 
 Invite only
 Invite and share with view access
 Invite and share with edit access
 Invite and share with edit and submit access

If the email address is registered in REGIS, a message will pop up and you will be guided to Share.

User corinne.mcdonough@health.nsw.gov.au is found. A notification will be sent to this email address and the user will be able to access this form

Select the level of access you are requesting for the user.

Share with view 
 Share with view access
 Share with edit access
 Share with edit and submit access

Step 3

You can add more users by clicking on

 Add another user

You can remove users by clicking on



Step 4



This icon will appear next to each site application that has been shared.

Manage/Edit Shared Access

Who can manage/edit shared access?

Project Registration: Only the Owner.

Ethics: The Owner (CPI) of the ethics application and the Owner of the project registration.

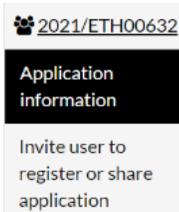
Site: The Owner (PI) of the site application, the Owner (CPI) of the Ethics application and the Owner of the Project Registration.

How to manage/edit Shared Access

 This icon will appear next to each application/project that has been shared.

Step 1

 Select the 'Shared' icon to the left of the Ethics/Site Application and then select 'Invite user to register or share'.



Step 2

The 'Manage Access' wizard will pop up.



The list of users currently assigned to the application are listed here.

MODIFY ACCESS
Share with edit ac

Click the drop-down list next to each name to modify the level of access per user



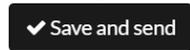
Delete access by selecting this icon.



To resend an invitation link, tick the checkbox next to a person's name

Step 3

Click 'Save and Send' to save your changes.



Click cancel to close out and not make or save any changes



Post Approval Access

After an application is approved, all shared access will transfer to the ETH or STE project. The project is where the post approval management of a study occurs.

To manage/edit shared access after the approval/authorisation, follow the steps provided above in the '[How to share Ethics/Site Applications](#)' instructions.

NOTE: To access the Project, clicking anywhere on the ETH/STE row, except the identifier/number for an approved or authorised study will open the study row details.

Select the 'Invite user to register or share project' and follow from **Step 2** above.

| IDENTIFIER | TITLE |
|---|-------|
| 2021/ETH00549 | Res |
| Application information | |
| Project information | |
| Invite user to register or share application | |
| Invite user to register or share project | |

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