REGIS

APPROVING DELEGATE SUBMITTER ACCESS REQUESTS

QUICK REFERENCE GUIDE

FOR COORDINATING PRINCIPAL INVESTIGATORS (CPI) AND PRINCIPAL INVESTIGATORS (PI)

Approving Delegate Submitter Access Requests

The Coordinating Principal Investigator (CPI) or Principal Investigator (PI) can review and record their decision via the Request for Delegate Access notification email without logging in to REGIS. This is done by using the links provided in the email which will take them directly into the decision, for quick and easy actioning.
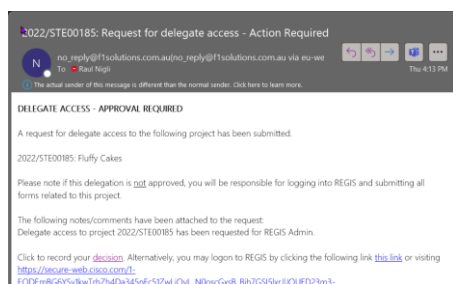
If you do not action the request within 14 days, you will need to log in to REGIS to action the request.

How to Provide Declaration of Support Directly from Your Email

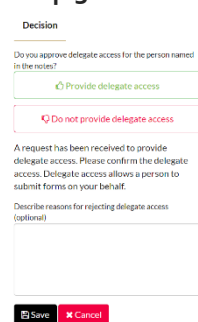❖ **Click here to see How to Provide Declaration of Support in REGIS**

Step 1
You will receive an email which has a direct link to record your decision for the delegate requesting 'submit' access.

### Step 2
Review the request and then click the 'decision' link which will take you directly into the decision in REGIS without having to log in.

Step 3

Select your decision from the 'Decision' options to the right of the screen. If you chose the option 'Do not provide delegate access' you will need to provide a comment in the free text box, this will be sent to the user requesting delegate submit access.
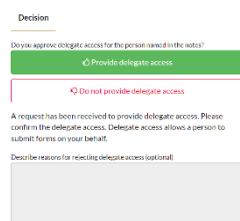
Click 'Save'. Your decision will be saved.

How to provide a Declaration of Support in REGIS

❖ **Click here to see How to Provide Declaration of Support from your email.**

Step 1
You will receive an email which has a direct link to record your decision for the delegate requesting submit access.

Step 2
Log in to REGIS; you will see the 'Decisions' icon at the top of the page or the approvals icon under 'Your activities' at the bottom of the page. Both will take you to the Approvals page.

Step 3a
You can review and provide a decision on the Approvals page or from within the decision.

Approvals Page: Clicking anywhere on the decision row, except the title, will open a quick view of the delegate request you intend to review.

If needed, provide any comments in the free text box 'Reasons for rejecting delegate access'. Select your decision from the 'Decision' options in the center of the screen. A notification will pop up saying that your decision has been saved.
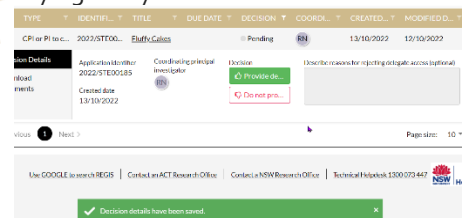
NOTE: Decisions in the status of 'Pending' identify submitter approvals requiring review.

Step 3b
Within Decision: Click on the study identifier to be taken directly into the decision.

Step 4
You are taken to the Details page where you are presented with the basic study details, the requester's name, and a place to provide your decision.

Step 5

Select your decision from the 'Decision' options to the right of the screen. Provide any comments in the free text box.

Click 'Save'. A system notification will appear advising that the decision has saved.

Reminder Notifications

REGIS will send reminder notifications at designated time points if a decision remains Pending.

● Pending

What Next?

The decision and any comments made will be visible to the user requesting delegate access.