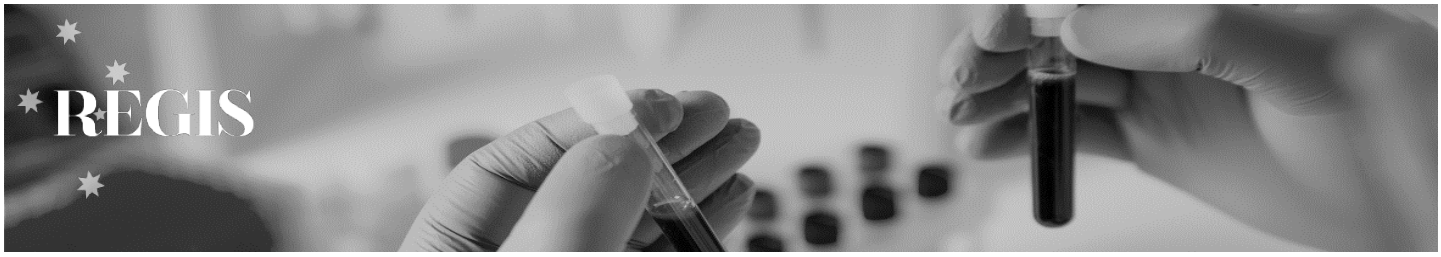


QUICK REFERENCE GUIDE FOR RESEARCH OFFICES

Adding or Removing Head of Department (HOD)

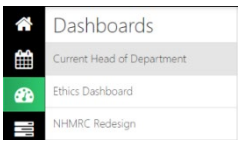
This guide has been designed for Research Offices to describe the process of requesting the addition or removal of Head/s of Department (HOD/s) in REGIS. The process for requesting REGIS access (Ethics or Governance) for new Research Office team members will also be described.

How do Research Offices request HOD updates/changes?

Research Offices are required to send any HOD update request to the eHealth REGIS team via REGIS@health.nsw.gov.au using the 'HOD Update Template' spreadsheet, available opposite this QRG.

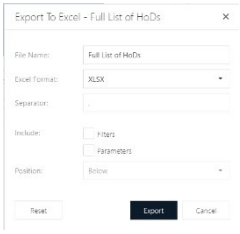
Step 1. Confirming HOD Details via the Current Head of Department dashboard

The 'Current Head of Department' dashboard is your best tool in finding the exact details needed to request a HOD update. This dashboard provides you with the details exactly as the appear in REGIS and exactly how they need to be provided when completing the 'HOD Update Template' spreadsheet, in particular the ***Email Address, Position Title*** and ***Department*** must match exactly what is currently in REGIS for a change to occur.



Step 1a. From the left-hand menu, select Dashboards and then 'Current Head of Department'.

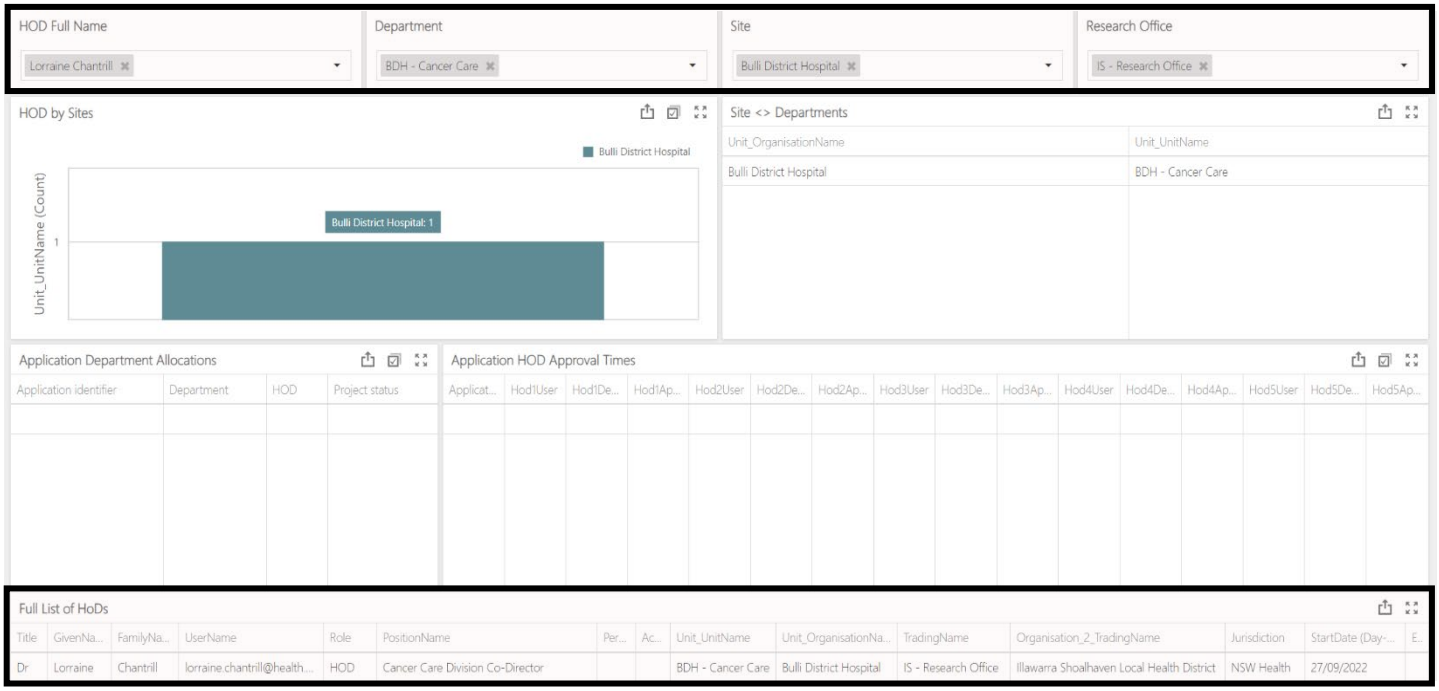
Step 1b. To find the HOD details, use the filter options at the top of the screen; *Research Office, Site, Department* and *HOD Full Name*.

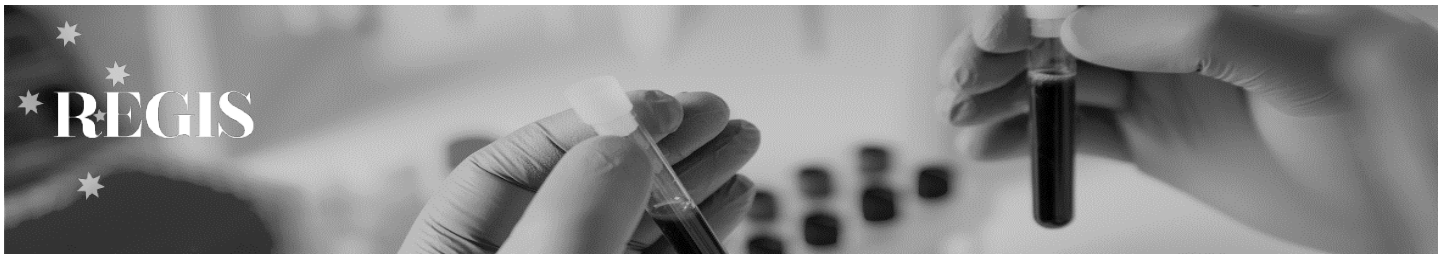


Step 1c. Once the data appears, export it by using the export option ( ) located on the right-hand side of the 'Full List of HoDs' table. Once clicked, export the data via the Excel option as this will make it easy to copy and paste the correct data required in the 'HOD Update Template' spreadsheet.

Example: *Below is an example of what data can be found when utilising the filtering options.*

The filters at the top have been used to narrow down the data search and at the bottom you will see the 'Full List of HoDs' which will provide you with the ***exact details*** *of the HOD that is required to complete the 'HOD Update Template' spreadsheet.*



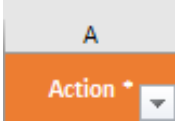


QUICK REFERENCE GUIDE FOR RESEARCH OFFICES

Step 2. Completing the 'HOD Update Template' spreadsheet

There are certain mandatory fields in the spreadsheet that must be completed for the request to be actioned. Below will provide you with guidance around mandatory fields, dropdown menus available within the spreadsheet and when manual data is required.

Mandatory Fields: Action*, Email Address*, Role*, Department*, Site*, Research Office*, Centre* and Jurisdiction* Note: When adding a HOD that already has a REGIS account, you need to use their current REGIS username (email address) otherwise a new user account will be created.



Dropdown Menus: The row below each header indicated below has a dropdown menu for easy selection

Manual Data Entry: All other rows will require manual data entry appropriate for the request. Data needs to match exactly as it appears in REGIS, incorrect data cannot be processed and will be returned to the requesting Research Office for amending.

Step 2a. Open your 'Full List of HoDs' spreadsheet that you exported from the 'Current Head of Department' dashboard in REGIS and then open the 'HOD Update Template' spreadsheet. Complete the 'People and Positions' tab (see the bottom of the spreadsheet). ***Tip:*** *Copy and paste data from the 'Full List of HoDs' spreadsheet into the 'HOD Update Template' spreadsheet for correct data.*

Step 2b. When adding or removing a HOD, you must complete the fields indicated below.

Action: *Indicate if you are you adding or removing a HOD (use the dropdown menu available)*
Title: *i.e. Dr (use the dropdown menu available)*
First Name: *i.e. John*
Last Name: *i.e. Smith*
Email Address: *i.e. John.Smith@email.nsw.gov.au*
Role: *i.e. HOD (use the dropdown menu available)*
Position Title: *i.e. Acting Director of Critical Care and Surgical Services*

Department: i.e. *CMN – Anaesthetics – all depts (prefixes are extremely important, see Common Errors below)*
Site: *i.e. Calvary Mater Newcastle Hospital*
Research Office: *i.e. CM – Research Office (use the dropdown menu available)*
Centre: *i.e. Calvary Mater Newcastle (use the dropdown menu available)*
Jurisdiction: *i.e. NSW Health (use the dropdown menu available)*

Action *	Title	First Name	Last Name	Email Address *	Role *	Position Title	Permission Group (Leave Blank for HOD / CE)
Add position	Dr	John	Smith	john.smith@health.nsw.gov.au	HOD	Acting Director of Critical Care and Surgical Services	
Remove position	Professor	Jane	Smith	jane.smith@health.nsw.gov.au	HOD	Acting Director of Critical Care and Surgical Services	

Access Rule Group (Leave Blank for HOD / CE)	Department*	Site* (Leave blank for RGO /CE)	Research Office *
	CMN - Anaesthetics - all depts	Calvary Mater Newcastle Hospital	CM - Research Office
	CMN - Anaesthetics - all depts	Calvary Mater Newcastle Hospital	CM - Research Office

Centre *	Jurisdiction *
Calvary Mater Newcastle	NSW Health
Calvary Mater Newcastle	NSW Health

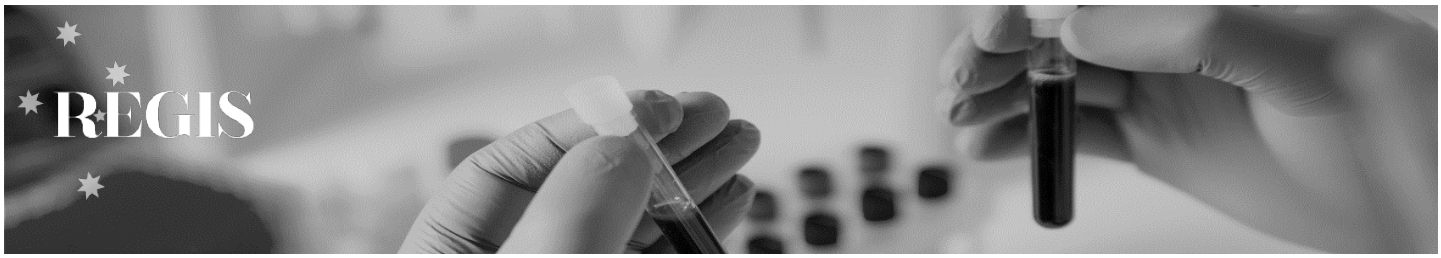
Step 2c. Once the spreadsheet is completed, save it and send the request to the eHealth REGIS team REGIS@health.nsw.gov.au. If the request is urgent, please indicate this in the email subject line and mark it as urgent.

You will be notified once your request is actioned and successfully processed or not. If the data provided is incorrect, you will receive an email explaining what is incorrect which you will need to amend and send back to REGIS@health.nsw.gov.au to be actioned.

Common Errors

Incorrect data is the number one reason that your request cannot be fulfilled. The most common errors we see are related to *Position Titles, Departments* and *Sites*. It is very important that your data matches exactly what is in REGIS.

For example, providing the Department as 'Anaesthetics' instead of 'CMN – Anaesthetics – all depts' will cause an error as each department has a prefix and this is what the system searches for when actioning your request. If you do not provide data pulled directly from the 'Current Head of Department' dashboard, you are very likely to have incorrect data which will delay your request.



QUICK REFERENCE GUIDE FOR RESEARCH OFFICES

How do Research Offices request REGIS access for new team members?

Research Offices are required to send any requests for REGIS access (Ethics or Governance) for new team members via REGIS@health.nsw.gov.au using the 'HOD Update Template' spreadsheet, available opposite this QRG.

Step 1a. Open the 'HOD Update Template' spreadsheet and complete the 'People and Positions' tab (see the bottom of the spreadsheet).

Step 1b. When adding a new team member, you must complete the fields indicated below.

Action: *Indicate if you are you adding a new team member (use the dropdown menu available)*
First Name: *i.e. Jane*
Last Name: *i.e. Smith*
Email Address: *i.e. Jane.Smith@email.nsw.gov.au*
Role: *i.e. RGO for Governance or EO for Ethics (use the dropdown menu available)*
Position Title: *i.e. RGO for Governance or EO, Ethics Officer for Ethics (RGO must be used for Governance roles)*
Permission Group: *i.e. REGAdmin (this will give new team members access to the internal portal, use the dropdown menu available)*

Access Rule Group: *i.e. NMB – Research Office – Site or Nepean Blue Mountains Local Health District HREC - Ethics (this will give new team members access to Ethics or Governance activities in REGIS, use the dropdown menu available)*
Site: *i.e. Nepean Hospital*
Research Office: *i.e. NBM – Research Office (use the dropdown menu available)*
Centre: *i.e. Nepean Blue Mountains Local Health District (use the dropdown menu available)*
Jurisdiction: *i.e. NSW Health (use the dropdown menu available)*

Action *	Title	First name	Last name	Email address *	Role *	Position title (must be RGO when adding RGO, removal needs to match exactly)
Add position		Jane	Smith	Jane.Smith@email.nsw.gov.au	RGO	RGO

Permission group (leave blank for HOD / CE)	Access rule group (leave blank for HOD / CE)	Department (Leave blank for RGO / EO)
REGAdmin	NBM - Research Office - Site	

Site (Leave blank for RGO /CE)	Research office *	Centre *	Jurisdiction *
Nepean Hospital	NBM - Research Office	Nepean Blue Mountains Local Health District	NSW Health

Step 1c. Once the spreadsheet is completed, save it and send the request to the eHealth REGIS team via email REGIS@health.nsw.gov.au. If the request is urgent, please indicate this in the email subject line and mark it as urgent.

Once actioned by the eHealth REGIS team you will be notified if your request was successfully processed or not. If the data provided is incorrect, you will receive an email explaining what is incorrect which you will need to amend and send back to the eHealth REGIS team to be actioned.

How do Research Offices request edits, additions or removals of Departments, Units and/or Sites?

Research Offices can send an email request to the eHealth REGIS team via REGIS@health.nsw.gov.au requesting assistance with any addition, removal or edit of Departments, Units and Sites.