Government of **Western Australia**
Department of **Health**

Research Governance Service (RGS)

All Users (Getting Started)
User Guide

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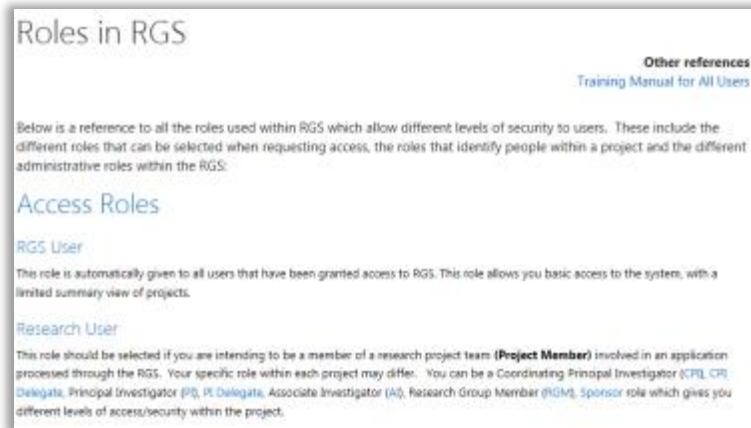
Contents

1. Roles in the RGS

'Roles in RGS' are defined in the Help Wiki. Within the RGS there are Access Roles (6), Project Roles (7) and Administrative Roles (9) which allow different levels of security to users.

You will be given different types of roles in the system depending on your role in a research project.

1.1 Access Roles

1.1.1 RGS User

This role is automatically given to all users that have been granted access to RGS. This role allows you basic access to the system, with a limited summary view of projects.

1.1.2 Research User

This role should be selected if you are intending to be a member of a research project team **(Project Member)** involved in an application processed through the RGS. Your specific role within each project may differ. You can be a Coordinating Principal Investigator (CPI), CPI Delegate, Principal Investigator (PI), PI Delegate, Associate Investigator (AI), Research Group Member (RGM) or Sponsor role which gives you different levels of access/security within the project.

1.1.3 Hospital Administrator (HA)

This role is allocated to a person, who is appointed to, or acting in, a position within the organisation that has to decide whether to provide resources or services to support a research project; or authorise the commencement of a project at a site. This may involve one or more of the following:

- Provision of information, including quotes, for departmental resources and/or services to enable the development of a budget for a project.
- Provision of either an authorisation or decline decision to provide departmental resources and/or services for a project on the governance application and budget.
- Review and decide whether to provide authorisation to conduct a project within a department or at a site.

This person can be a Data Custodian, Data Steward, Head of Research Department (HoD), Head of Supporting Department (HoSD), Business Manager (BM), Divisional Director (DD), Regional Director (RD) or Chief Executive (CE).

1.1.4 Committee Member

This role is allocated to a person that has been appointed to a position on a WA Health Human Research Ethics Committee (HREC) or their affiliated subcommittees.

1.1.5 Research Governance Officer (RGO)

This role applies to a person that has been appointed to an administrative position within a WA Health Research Governance (RG) Office. The role has the following responsibilities:

- Approves or declines a request for new project workspace creation.
- Reviews forms and supporting documents related to governance applications and administers site authorisation documentation.
- Provides recommendation for site authorisation to the CE or Delegate.
- Reviews and manages the monitoring of authorised research projects.
- Produces reports on behalf of the organisation.

1.1.6 Ethics Executive Officer (EEO)

This role applies to a person that has been appointed to an administrative position within a WA Health Ethics Office. The role has the following responsibilities:

- Provides administrative support and advice on the HREC, its subcommittees and the sponsoring institution's processes for ethical review of research projects conducted under the HREC's approval.
- Assigns projects to a meeting agenda.
- Creates and updates the minutes of the meeting.
- Drafts correspondence and produces reports on behalf of the committee(s).
- Performs the administrative requirements of the committee(s) as agreed and directed by the Chair.

1.2 Project Roles within RGS

1.2.1 Coordinating Principal Investigator (CPI)

Within the RGS, there is only one CPI per project and **must be the person communicating with the HREC**. The CPI may also be known as the Chief Investigator/Researcher, Lead Investigator/Researcher. The role has the following responsibilities:

- Overall responsibility for the conduct, monitoring and reporting related to the research project for all sites under the HREC's approval.
- Submits a request to create a project workspace through 'Create Project' form, which designates them the role of CPI.
- Nominates the sites where the project will be conducted.
- Invites Project Members to the project, including their delegate. **The CPI must invite the PIs. Ensure external sponsors are only given the Sponsor role.**
- Authorises in Project Details - Project Header, Ethics Information and Investigator Contact Information.
- Completes the ethics application forms and uploads supporting documents.
- Authorises the ethics application forms and supporting documents included in an ethics application submission.
- Submits ethics applications for scientific and ethical review by the HREC.
- Corresponds between the HREC (and subcommittee) Chair, the Sponsor (if applicable) and PI.

- In a single-centre research, the CPI and PI may be the same person. In RGS, all sites must be allocated a PI, including those involved in an Access Request.

1.2.2 CPI Delegate

In the RGS, the CPI can appoint one Project Member to be their CPI Delegate. This position can be changed to another person at any time. The CPI Delegate can fulfil most of the CPI responsibilities in the RGS. If the person holding the CPI position leaves the project the CPI Delegate automatically leaves their position and becomes a RGM of that project.

The CPI Delegate has the same access/security rights for the research project as the CPI within RGS, with the exception of authorising the ethics application form for submission.

1.2.3 Principal Investigator (PI)

Within the RGS, the CPI is responsible for nominating the PIs for a project. A PI can be PI of more than one site and **must be the person communicating with the WA Health RG Office**. The PI may also be known as the Site PI. The role has the following responsibilities:

- The conduct, management and reporting related to the research project for their site(s) and reports to the CPI.
- Invites Project Members to join the project at their site (including their delegate) and manages memberships within the site(s). **Ensure external sponsors are only given the Sponsor role.**
- Authorises in Project Details - Governance Information.
- Completes the governance application forms and uploads supporting documents.
- Authorises the research governance application forms and supporting documents included in a governance application submission for their site(s).
- Submits governance applications for review and authorisation by the RG Office and CE for their site(s).
- Corresponds between the CPI, AIs, RGMs, HoD, HoSD, BM, DD, RD and RGO.
- In a single-centre research, the CPI and PI may be the same person. In RGS, all sites must be allocated a PI, including those involved in an Access Request.

1.2.4 PI Delegate

In the RGS, the PI can appoint one Project Member to be their PI Delegate. This position can be changed to another person at any time. The PI Delegate can fulfil most of the PI responsibilities in the RGS. If the person holding the PI position leaves the project the PI Delegate also leaves their position and becomes a RGM of that project.

The PI Delegate has the same access/security rights for the research project as the PI within RGS, with the exception of authorising the research governance application form for submission.

1.2.5 Associate Investigator (AI)

Within the RGS, the AI is any other investigator at a site who is not the PI but is a named investigator on the research project; they have the same access/security rights as an RGM within RGS. The AI is also known as the Assistant Investigator, Sub-investigator, Co-investigator/Researcher.

1.2.6 Research Group Member (RGM)

This is default membership given to anyone invited to the project as a Project Member who has not been given a project specific role. Within RGS they can provide information and edit project

forms and upload supporting documents to which they are assigned according to their security and access rights.

1.2.7 Sponsor

This is the designated representative of an entity that provides funding for a research project. The sponsoring organisation may be a pharmaceutical/technology company, a Contract Research Organisation (CRO), collaborative research group, a higher education institution, a research institute, or the health or medical organisation where the research is to take place. The Sponsor can assist with the completion of the ethics application forms and supporting documents. **This security access does <u>not</u> allow for viewing of the site Budget Form.**

1.3   Administrative Roles

1.3.1   Head of Research Department (HoD)

This role applies to a person that has been appointed to, or acting as a Head of Department within an organisation where the research project will be conducted i.e. the department which is spearheading the project at a site. The role has the following responsibilities:

- Reviews the project, including the feasibility of conducting it within their department.
- Provides authorisation for the project to be conducted within the research department, including agreeing with the resources, services, costs and funding outlined in the budget form.

1.3.2   Head of Supporting Department (HoSD)

This role applies to a person that has been appointed to, or acting as a Head of a Supporting Department within an organisation where the project will be conducted i.e. the department which is providing resources or services to support the project. The role has the following responsibilities:

- Provides information and estimated costs in the budget, for their department to provide resources and/or services required for the conduct of the project.
- Provides either an authorisation or decline decision to provide departmental resources and/or services for a project on the budget form.

1.3.3   Business Manager (BM)

This role applies to a person that has been appointed to, or acting as a Business Manager responsible for the department intending to conduct a research project. The role has the following responsibilities:

- Reviews the budget to ensure that the costs that impact on the site is accurately reflected and funding for services and resources are identified and agreed to.
- Provides authorisation on the research governance form.

1.3.4   Divisional Director (DD)

This role applies to a person that has been appointed to, or acting as a Divisional Director with responsibility for the Division intending to conduct a research project. The role has the following responsibilities:

- Reviews the project to ensure that the services and resources are adequate to conduct the research project within the Division.
- Provides authorisation on the research governance form.

1.3.5   Regional Director (RD)

This role applies to a person that has been appointed to, or acting as, a Regional Director, within WA Country Health Services (WACHS), with responsibility for the site(s) where the research project will be conducted. The role has the following responsibilities:

- Reviews the project to ensure that the services and resources are adequate to conduct the research project within the Region.
- Provides authorisation on the research governance forms.

1.3.6   Chief Executive (CE)

This role applies to a person that has been appointed to, or acting as, the Chief Executive of the organisation. The role has the following responsibilities:

- Decides whether site authorisation should be given to a project, based on the HREC and research governance reviews, at a site to which they have responsibility.
- Provides site authorisation related to monitoring forms and supporting documents.
- Can suspend a project at a site if required.

1.3.7   CE Delegate

The CE can delegate their authorisation rights to a person within their organisation. The CE Delegate has the same access/security rights as the CE within RGS.

1.3.8   HREC Chair

This role applies to a person that has been appointed to the position by the CE of the sponsoring organisation of the HREC. A committee member can act as the HREC Chair for a specific meeting and is noted in the minutes of the meeting. The role has the following responsibilities:

- Chairs the HREC meetings.
- Provides an ethical approval decision on a research project following the HREC review.
- Approves minutes and correspondence compiled by the EEO.

1.3.9   HREC/Subcommittee Member

This role applies to a person that has been appointed to a position on an ethics committee. This person can assume the role of Chair for a meeting but can't hold dual roles for the meeting. The role has the following responsibilities:

- Reviews forms and supporting documents related to ethics applications and monitoring.
- Corresponds with the HREC Chair and EEO.

1.3.10 RGS Administrator

This is a business administrative role within RGS to assist users with business support. The person may hold additional administrative roles within RGS at the same time, such as EEO or RGO. The role has the following responsibilities:

- Responsible for user management and granting access to the RGS.
- Responsible for the upkeep and configuration of data stored and managed in RGS.
- Manages organisation and committee structures within RGS.
- Assists in RGS user enquiries.

1.3.11 RGS Support

This is a technical administrative role within RGS to assist users with technical issues. The person may hold additional administrative roles within RGS at the same time, such as RGS Administrator.

2. Complete the New User Sign Up Form

The RGS is restricted to stakeholders conducting human research projects within WA Health or accessing WA Health participants, their tissue or data.

Prior to receiving access to the RGS, new users will be required to complete the New User Sign Up form and submit it to the RGS Administrator for approval. Approval may take 1-2 working days.

Click on 'Sign Up' to launch the form. It is situated on the left-hand side of the RGS screen.
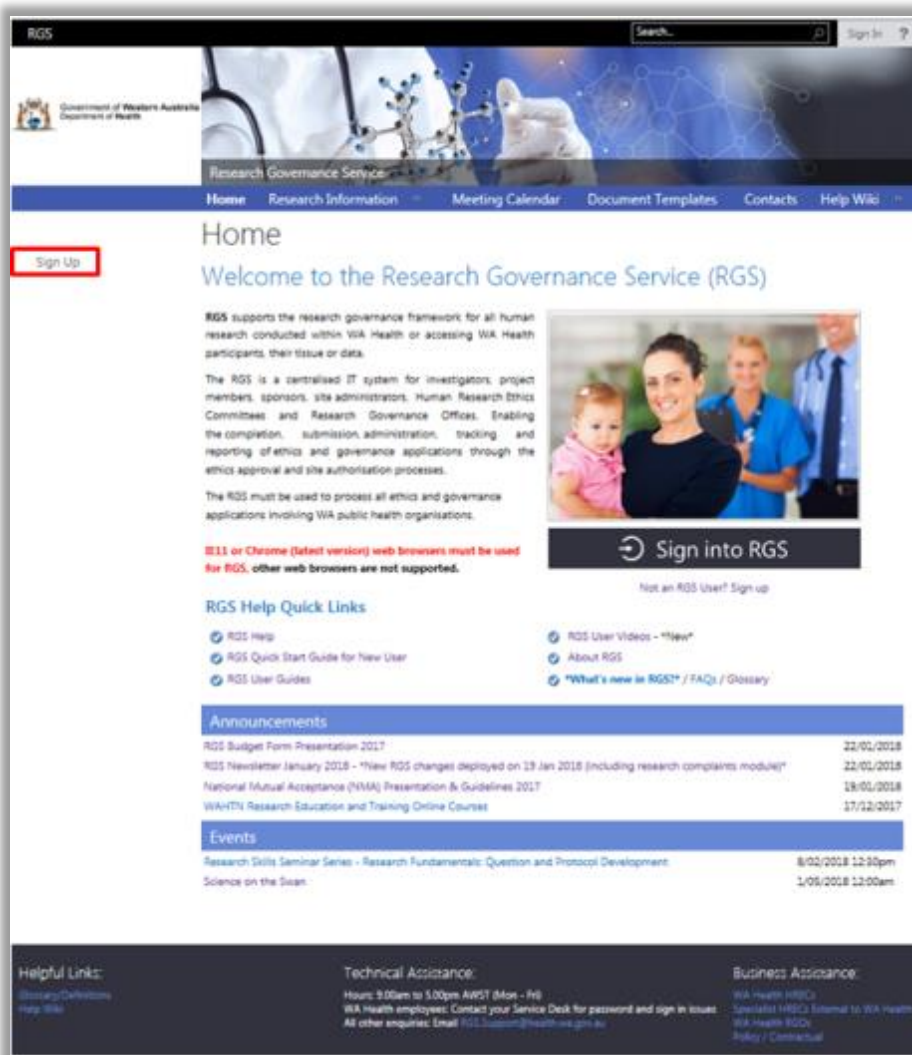
The 'Sign Up' form will launch. All mandatory fields have a red asterisk (*) next to them.

> **User tip:**
> - Hover your pointer over the information icon 🛈 on the right hand of the screen will provide you with tool tips and information that can assist you in completing that particular part of the form
> - Refer to the Help Wiki for guidance using the RGS.

Details entered in the 'Sign Up' form may be updated later on, after your access request has been approved. Refer to [Help Wiki: Update Your Profile](#) for the steps.

Enter your **password** in line with the password policy and then re-enter the password.

Sign Up

The RGS is restricted to stakeholders conducting human research projects within WA Health or accessing WA Health participants, their tissue or data.

Prior to receiving access to the RGS, new users will be required to complete the New User Sign Up form and submit it to the RGS Administrator for approval. Approval may take 1-2 working days.

Access to the RGS will require two-step authentication, involving password entry and an additional access code sent to the user's nominated email.

Once logged in to the RGS, the new user will have access to their own Landing Page and any Project that they are affiliated with.

RGS Account Details

Password:* [   ]

Confirm password:* [   ]

RGS Password Policy

- A minimum password length of any thirteen (13) characters, which could be a simple phrase;

OR

- A minimum password length of ten (10) characters that consist of at least three of the following character sets:
    1. lowercase characters (a-z)
    2. uppercase characters (A-Z)
    3. digits (0-9)
    4. special characters

Reason for requesting access to RGS:

(choose as many roles as appropriate)

If you choose a role that is not appropriate to your current business role, your request will be declined and you will have to request access again.

- ☑ RGS User
- ☐ Hospital Administrator
- ☐ Committee Member
- ☐ Research Governance Officer
- ☐ Ethics Executive Officer
- ☐ Research User

Provide Us with Your Details

All users of RGS are assigned the default of 'RGS User'. In addition, you must select your **reason for requesting access** (i.e. the type of user you will be in the system) from one or more of the RGS roles:
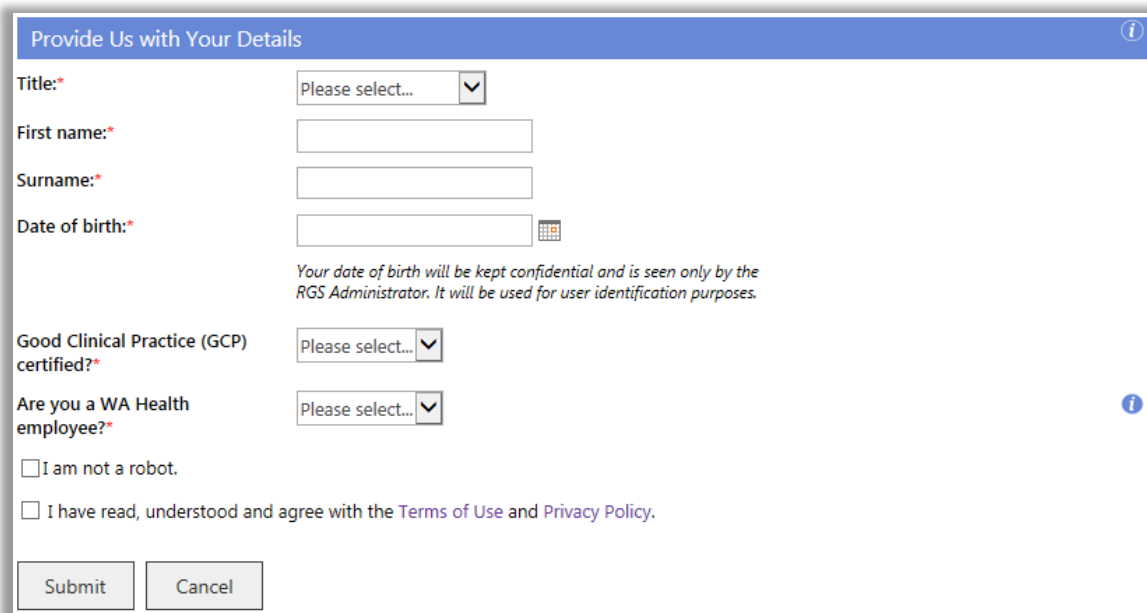
1. Research User
2. Hospital Administrator
3. Committee Member
4. Research Governance Officer
5. Ethics Executive Officer

These roles are described in section 4. You will be prompted to confirm the role selected, as an incorrect selection will result in your application being denied. Click 'OK' to continue with the role selected, or 'Cancel' to undo the selection.

Message from webpage

An RGS Administrator will validate all roles included in this application. If this role is inappropriate to your current role/position, your entire application will be rejected and you may have to sign up again. Are you sure this is correct?

[OK]   [Cancel]
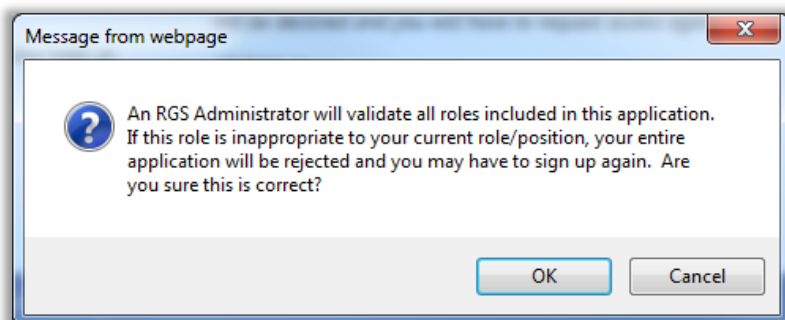
2.1 Completing your Profile

- Complete your details: **Title, First Name, Surname, and Date of Birth**. Your date of birth is only seen by the RGS Administrator and only used for identification purposes if you forget your password.

- Answer the **Good Clinical Practice (GCP)** question. This is a profile information question for all researchers, and answering 'No' will not restrict your ability to access to the RGS.

- **'Are you a WA health employee'** is a mandatory field that has a Yes/No drop down menu. Depending on your employment you will be asked to sign up as a WA Health employee or non-WA Health employee. If you have a dual appointment sign up as a WA Health employee and add an additional address.

3. Sign up as a RGS User (WA Health Employees)

You have answered 'Yes' to: **Are you a Public Health employee?**

- Type in your **HE number**.
- Complete the mandatory fields regarding your organisation. The address will default to the organisation's address. You can add your physical location e.g. a unit within a department, a floor within a building or a building within a complex in the Unit/Leve field which is free text. If you cannot find your organisation, division or department in the drop down lists, contact the RGS Support to request to be added. Note that you will not be able to submit this Sign Up form until your organisation, division or department has been added in RGS. You will be notified when your request has been completed.

- Enter you **Position/Job title** within the organisation.

- Enter the **Primary email** address you will be using in relation to RGS. Your primary email will be used as your RGS username, as well as for receiving the security code that you need to enter each time you logging in to RGS. You are required to enter your primary email address a second time to confirm it.

- Enter an **Alternate email** address. This can be your private/personal email address, it can't be the same as your primary email, and is used to contact you if you do not have

access to your primary email address. This is also the back-up email for receiving the security code, in the event that you cannot access your primary email.

- **Phone (Business)** should be the number to reach you during normal working hours. Data input allows for **+**, brackets, numbers and spaces. Enter the extension number (maximum of six (6) numbers) only where relevant. Be aware that this number will be visible to other users and possibly the public if you agree to be on the Investigator Speciality list.

- **Mobile number** is an optional field. Data input allows for **+** and numbers.

- Response to **Provide Secondary Address** is mandatory. You can select **'No'** and provide the information through updating your profile once your account has been established. Selecting **'Yes'** will give you a further series of questions to answer.

  o If you answer yes to the question 'Is this address located at a WA Health Facility', you will have to select from the organisations listed under WA Health. If you cannot find your organisation, division or department in the drop down lists, contact the RGS Administrator to request to be added. Note that you will not be able to submit this Sign Up form until your organisation, division or department has been added in RGS. You will be notified when your request has been completed.

  o If you answer no to the question 'Is this address located at a WA Health Facility' you will have to enter the organisation's details. Enter the full official name of the organisation, please don't use acronyms. To enter the organisation's address start typing it in the 'Find Address' field and then select the address when it appears in the drop down list.

- Make sure 'I am not a robot' is ticked. Type the characters in the picture provided. You may wish to get a new set of characters by clicking 'Get a new code'. The code is not case sensitive.

- Tick the box stating that you have read, understood and agreed with the Terms of Use and Privacy Policy. Both of these documents can be accessed via the Help Wiki under the Disclaimer section.

- Click 'Submit', and if all field validation rules have been met, a confirmation screen will be shown. Applications are typically processed within 1-2 working days by the RGS Administrators and you will receive an email approving or declining your request.

- You will receive a confirmation email with an application reference number.

4. Sign up as a RGS User (Non WA Health Employees)

You have answered 'No' to: **Are you a WA Health employee?**

- Complete the mandatory fields regarding your organisation. Enter the full official name of the **Organisation/Company** you are affiliated with, no acronyms please.

- Find your organisation/company's business address by starting to type the address. Select the address from the list of address suggestions. The other address fields will automatically populate based on the address you have selected.

- Enter you **Position/Job title** within the organisation.

- Enter the **Primary email** address you will be using in relation to RGS. Your primary email will be used as your RGS username, as well as for receiving the security code that you need to enter each time you logging in to RGS. You are required to enter your primary email address a second time confirm it.

- Enter an **Alternate email** address. This can be your private/personal email address different from your primary email, and is used to contact you if you do not have access to your primary email address. This is also the back-up email for receiving the security code that you need to enter when logging in to RGS, in the event that you cannot access your primary email.

- **Phone (Business)** should be the number to reach you during normal working hours. Data input allows for +, brackets, numbers and spaces. Enter the extension number

(maximum of six (6) numbers) only where relevant. Be aware that this number will be visible to other users and possibly the public if you agree to be on the Investigator Speciality list.

- **Mobile number** is an optional field. Data input allows for + and numbers.

4.1 Providing a WA Health Referee

As a non-WA Health employee you will have to provide a WA Health Employee as a referee. This person must be able to confirm that you are a real person and the information you have provided in this form is correct. The referee should provide you with the information necessary for you to complete this section.

- Complete the mandatory fields regarding your referee, they will be able to supply you with this information.

- Enter the person's **Title**, **First name** and **Surname**.

- Enter the **Jurisdiction** which will be Western Australia.

- Enter the **Region**, **Organisation**, **Division** and **Department** from the drop down menus provided.

- Enter their **position/job title** within the organisation.

- Enter their **primary email address**.

- **Phone (Business)** should be the number they can be reached during normal working hours. Enter the extension number (maximum of six (6) numbers) only where relevant.

- **Mobile number** is an optional field and will be used to contact them if they are unavailable on the **Phone (Business)** number.

- Make sure 'I am not a robot' is ticked. Type the characters in the picture provided. You may wish to get a new set of characters by clicking 'Get a new code'. The code is not case sensitive.

- Tick the box stating that you have read, understood and agreed with the Terms of Use and Privacy Policy. Both of these documents can be accessed via the Help Wiki under the Disclaimer section.

- Click 'Submit', and if all field validation rules have been met, a confirmation screen will be shown. Applications are typically processed within 1-2 working days by the RGS Administrators and you will receive an email approving or declining your request.
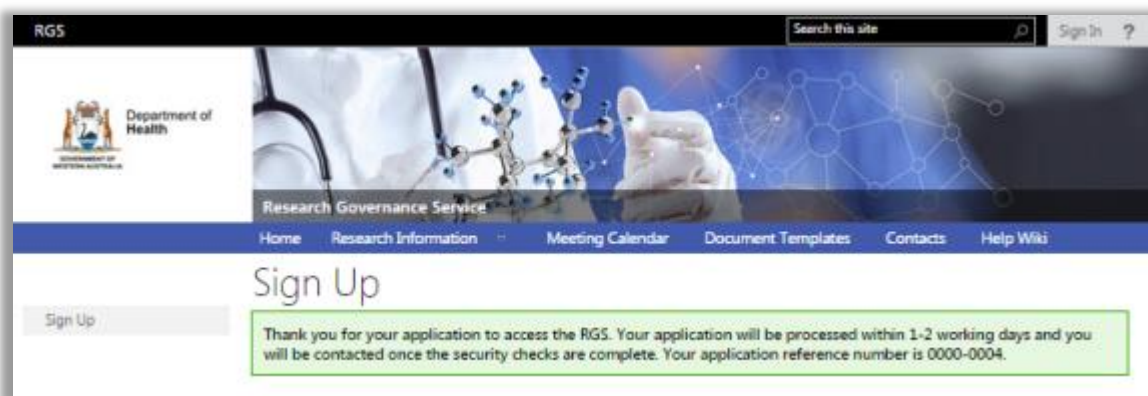
- You will receive a confirmation email with an application reference number.

Thank you for your application to access the RGS. Your application will be processed typically within 1-2 working days, and you will be contacted once the security checks are complete. Your application reference number is **0000-1185**.

Please use the above REF number if you ever need to contact us regarding this request.

Regards,
The RGS Team
RGS.Support@health.wa.gov.au

Department of Health: Research Governance Service
(http://rgs.health.wa.gov.au)

This is an automated email. Please DO NOT REPLY to this email.

5. Signing In

1. Click on 'Sign In' to log onto RGS. It is situated on the upper right-hand corner of the RGS screen or under the picture.

2. The 'Sign In' screen will launch. Enter your username (primary email address) and password and click 'Sign In'. The RGS will validate whether your username and password are correct.
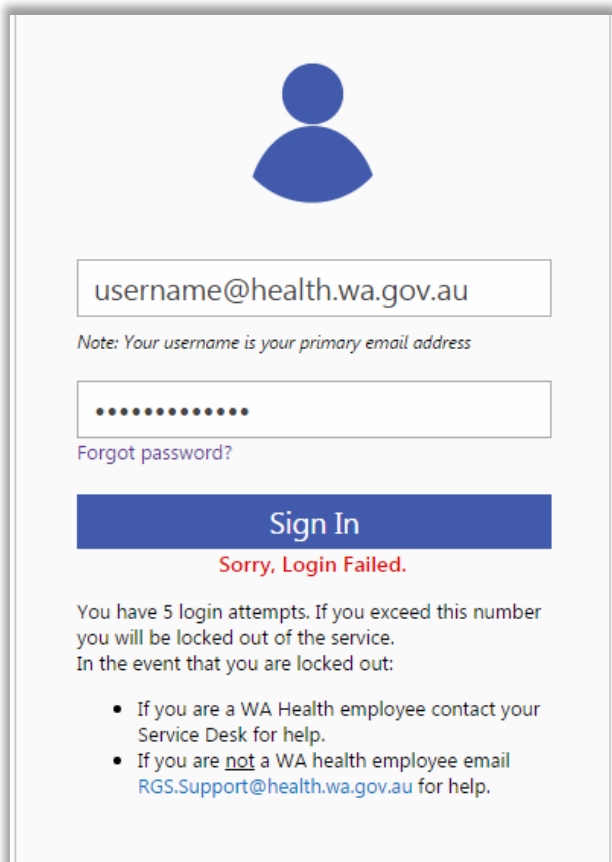
If you have entered the incorrect primary email or password you will see the below screen. You will be given 5 attempts at entering a valid username and password then you will be locked out of RGS. To unlock your access, if you are a WA Health employee contact your service desk if you are <u>not </u>a WA Health employee email RGS.Support@health.wa.gov.au.

3. Upon confirmation of a valid username and password, an email will be sent to your primary email address, containing your Unique Security Code this may take a few seconds/minutes depending on your internet connection. Click 'Send/Receive All Folders' in Outlook to speed this process up.

You will be sent a new code each time you click 'Sign In'. **Please ensure you enter the latest code sent after you have clicked 'Sign In'. A previously sent code will not work and you will be directed back to the Login TO RGS page again.**

4. Copy/paste or enter this numeric code in the screen, without spaces or special characters, and click 'Verify'.

If you don't receive an email, you can click 'Resend'. You can have the new code sent to either your primary or alternate email address. You then need to enter this code and press verify. **Please ensure you enter the latest code sent after you have clicked 'Resend'. A previously sent code will not work and you will be directed back to the Login TO RGS page again.**

You have been successfully logged on, when you see the RGS Home

6. Profile Management

Once you have been given access to the RGS, you should update your profile, as it is important that you ensure your RGS profile details are current. This is because certain fields within the RGS are pre-populated with information from your profile. For example, the CPI, PI and AI profile details are automatically populated each project they are invited to join and the ethics and governance forms.

6.1 Update Details

1. In the menu options found on the left hand side of your screen, click on 'Update Details' under 'Profile Management'.

2. The 'Update Details' screen will launch. All mandatory fields have a red asterisk (*) next to them.

Personal Details

- You can update your **Title, First Name, Surname,** and **Date of Birth**. Your date of birth is only seen by the RGS Administrator and only used for identification purposes if you forget your password. Changes to your First Name, Surname and Date of Birth will require RGS Admin confirmation before they take effect.

- Add a **photo**. This photo will be seen by other RGS users and will be used if you agree to your information being published on the **Investigator Speciality List**, and should be only be a head and shoulder shot of yourself. Click Upload Photo'. The Upload Profile Photo screen appears. Click 'Choose file…' and you can source your photo from your available directories. Once you have selected your photo, click upload. You can crop your photo and then press save. Once you have uploaded a photo you will have the option of removing it.

- Answer the **Good Clinical Practice** question. This is a profile information question for all researchers, and answering 'No' will not restrict your ability to access to the RGS.

- Select your **Area of Research Speciality** by selecting your **Broad Health Condition** first, and then your **Specific Condition**. Your nominated Area of Research Speciality will be published in the **Investigator Speciality List** if you select 'Yes' to the Publish Information question.

- Type in your **Qualifications and expertise**. Your qualifications and expertise will be published in the forms if you are an investigator on a project. Specify the areas that you has been certified, accredited or credentialed and the expiry date(s). There should be a brief outline of your expertise that can be populated into the forms. You have the option of uploading your CV that can be view by the HREC.

- If you have an ORCID ID it can be entered here.

- Answer the **Publish Information** question. If you select 'Yes', your Title, First Name, Surname, Organisation, Phone (Business), and Area of Research Speciality will be displayed on the public webpages in the **Investigator Speciality List**. **Only investigators must select 'Yes'**. This is a national requirement and will allow external stakeholders to contact you to collaborate in future research projects.

Primary Contact Details

Your primary contact details should always be kept update as they are used to populate correspondence (letters) and some of the information populates the business card information other RGS Users can see when they click on your name.

- Select whether you are a WA Health Employee. The answer to this question determines the next series of questions you need to complete. Changing your answer to this question will clear all information in this section including your primary and alternate email addresses.

- If you are an existing RGS user and have now become a WA Health Employee you can now enter your WA Health information into the RGS.
  - Type in your **HE Number**.
  - Complete the mandatory fields regarding your organisation starting with **Jurisdiction**. If you cannot find an **Organisation**, click 'Request for a New Site, Division or Department' in the information icon. Refer to Help Wiki: Request for a new site, division or department for the next steps.

- Edit your **Primary and/or Alternate email** address. Your primary email will be used as your RGS username. If you switch from WA Health Employee to a Non-WA Health Employee or vice versa, you will need to nominate a new primary and alternate email address. Changes to your Primary and/or Alternate email will require RGS Admin confirmation before they take effect.

  Note that you will need to start using this new primary email address next time you sign in to RGS.

- Edit your **Phone (business) and extension (if applicable),** this should be the number you can be reached during normal working hours. This number is part of the basic information available to other RGS users as well as on the Investigator Speciality List. Data input allows for +, brackets, numbers and spaces. Enter the extension number (maximum of six (6) numbers) only where relevant.

- Edit your **mobile number.** Data input allows for + and numbers.

Secondary Address

- If you are a WA Health employee you have the option of having a secondary address maintained in RGS.

- Answer the question **Is this a Public Health address?**
  - If yes, then you will need to select the information from the drop down menus for each field starting with **Jurisdiction**.
  - If no, then you will need to enter the information starting with **Organisation**. Enter the full official name of the organisation please don't use acronyms. The address is added through the **Find Address** field. Start typing the address and select it when it appears in the drop down menu. This will populate the address fields. You can enter additional information specifying your location in this organisation in the **Unit/Level** field.

If you are a student

- If you are a student and will be conducting a research project as part of your studies you can enter the **Institution** and the **Course** information in this section.

Training

- You can enter any training details that relate to your resarch work in this section. First enter the relevant information into the **Provider**, **Training details** (the name of the course) and the **Date of attendance**. When you click 'Add' this information will be populated into the grid below.

- You can also upload a copy of your GCP Certificate here. You can only maintain one copy on the RGS. Click 'Choose File', this will allow you to browse your computer to locate the document, once located you select open and you can then 'Upload' it.

Personal Documents

- You can also maintain a copy of your Curriculum Vitae (CV), which will be viewable by Ethics Committees so that you do not have to submit a new one with each application. Click 'Choose File', this will allow you to browse your computer to locate the document, once located you select open and you can then 'Upload' it.
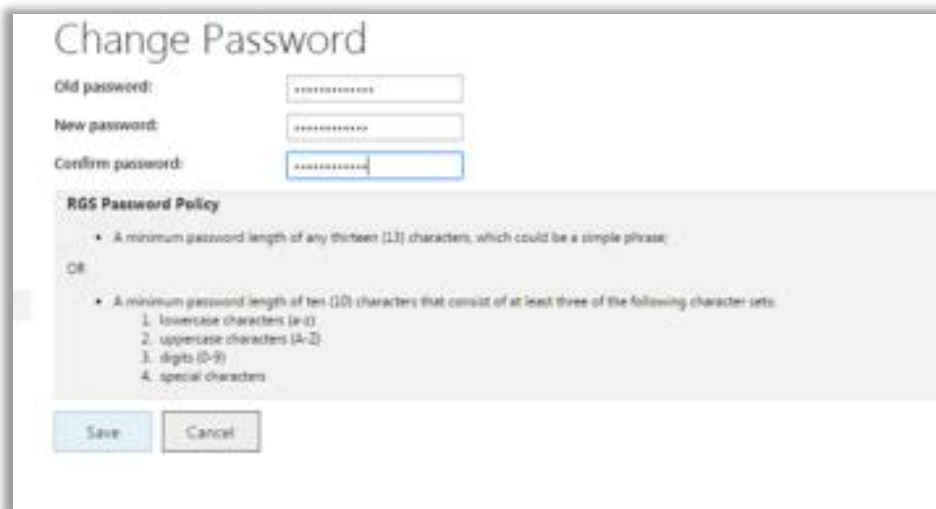

Save

- To confirm the changes made, click 'Save' found at the bottom of the screen. To discard changes made, click 'Cancel'.
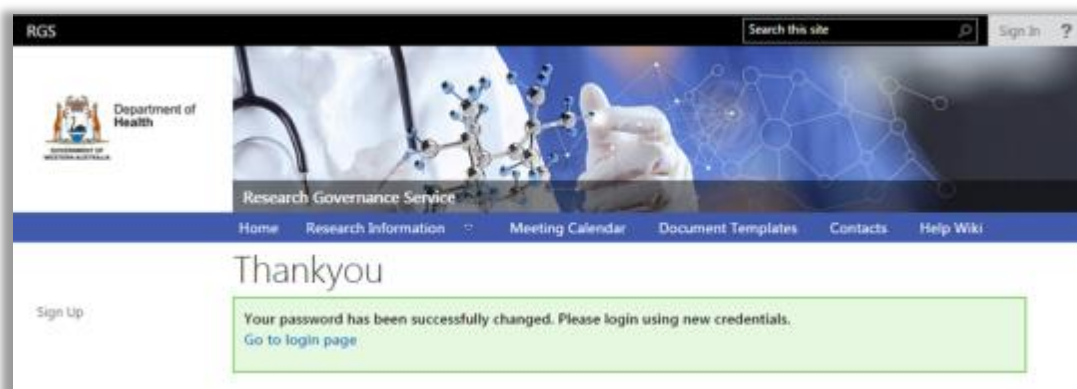
6.2 Change Password

1. Changing your password is only required if you need to change your password if your security has been compromised. In the menu options found on the left hand side of your screen, click on 'Change Password' under 'Profile Management'.

2. Enter your current password (old password), and then enter your new password and confirm it by entering it again.

3. A confirmation screen will appear to confirm that the password has been changed.

4. You will receive a confirmation email.

Your RGS Account Password has been changed.

If you did not change your password please contact the RGS Administrator.

Regards,
The RGS Team
RGS.Support@health.wa.gov.au
Department of Health: Research Governance Service
(http://rgs.health.wa.gov.au)

This is an automated email. Please DO NOT REPLY to this email.

6.3   Forgot Password

1. If you forget your password, go to the Login to RGS screen, enter your username and then click 'Forgot password?'

Login To Research Governance Service (RGS)

Username

Note: Your username is your primary email address

Password

Forgot password?

Sign In

2. Enter your Date of Birth and Primary email address which you supplied when you created your RGS account. Make sure 'I am not a robot' is ticked. Type the characters in the picture provided. You may wish to get a new set of characters by clicking 'Get a new code'. The code is not case sensitive. Click 'Send the Request'.

Password Reset Request

Please enter your Date of Birth and the Primary Email address you supplied when creating your RGS Account.

Primary email:

Date of birth:

☑ I am not a robot

Type the characters in the picture below ⓘ

z5BNcq

The picture contains 6 characters. This is NOT case sensitive.

Get a new code

Send Request   Cancel

3. A confirmation screen will appear to confirm that the password has been changed.

4. You will receive a confirmation email with a new temporary password.

5. Once you have logged on using this temporary password, you will be asked to change your password.
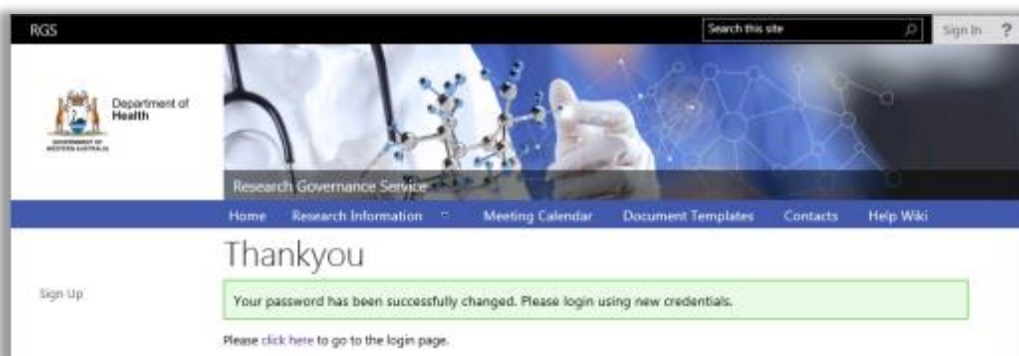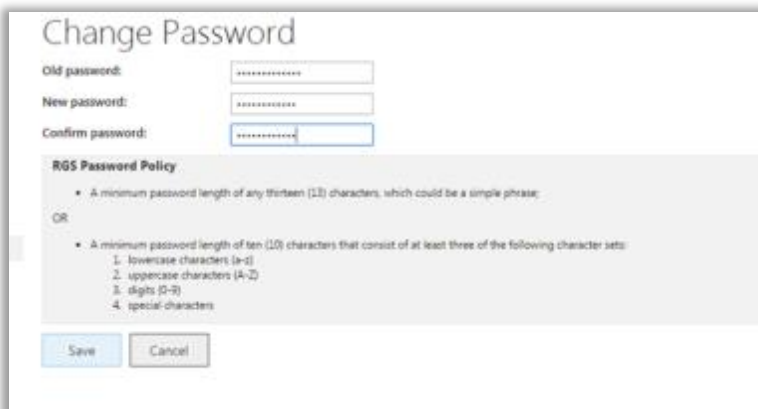
You will be required to log in using your new password.

7.   All About Tasks

The workflow processes in RGS are based on the allocation and actioning of tasks by an individual or group of people.

7.1   Task Sub-menu Categories

Your 'Tasks' are accessed by clicking on link on the left hand menu of the screen. There are three sub-menus: Current, Overdue and Archived.

7.1.1 Current

This section displays active tasks that are not overdue. When you have completed a task the task should move to Archived , click 'Finish Task' to indicate that you have performed the required action. This will exit the task and move it to the Archived view. For Group Tasks, once you 'take' the task, the Finish Task button will be displayed.
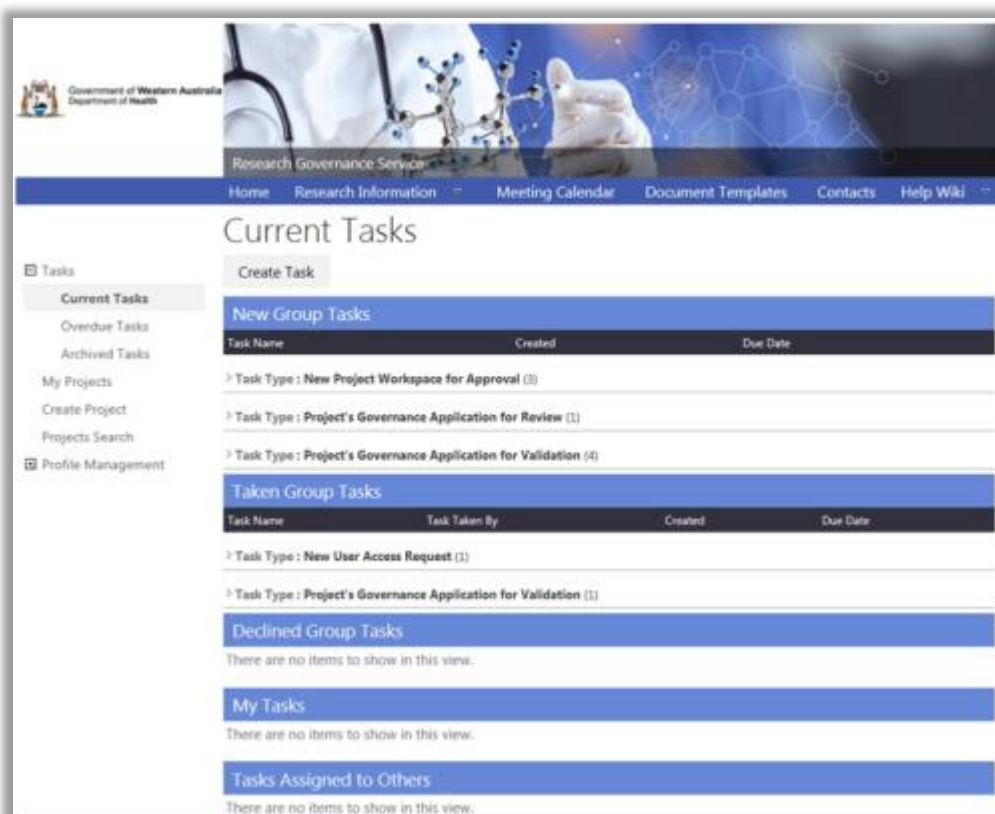
7.1.2 Overdue
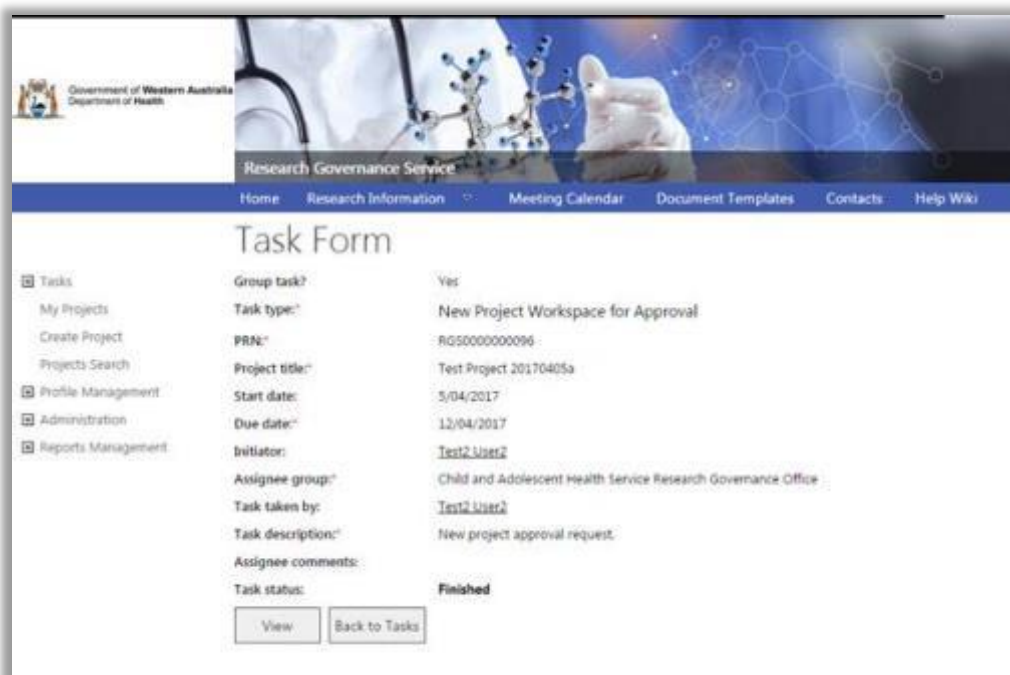
This section displays tasks that are past their due date i.e. they are tasks highlighted in 'red'. When you have completed a task, click 'Finish Task' to indicate that you have performed the required action. This will exit the task and move it to the Archived view.

7.1.3 Archived

This section displays tasks that you have completed. Click 'View' if you wish to return to the page where the task action was performed. The 'Back to Tasks' button will exit the task and return you to the Current Tasks screen. Archived tasks are deleted six months after they have been finished.

7.2 Task Categories

You can see all tasks assigned to you or your group, and tasks you have opened as lists in the Tasks page. The Tasks list is broken down into the following categories:

7.2.1 New Group Tasks

These are tasks for the group(s) that you belong to that have not yet been assigned or taken by anyone from that group.

7.2.2 Taken Group Tasks

These are tasks that have been taken by others within your group.

7.2.3 Declined Group Tasks

These are tasks that someone in your group has declined on behalf of the group.

7.2.4 My Tasks

This is a list of tasks assigned only to you or that you have taken from the group tasks.

7.2.5 Tasks Assigned to Others

This is a list of tasks you have assigned to others.

7.3 Create a New Task

Click on 'Current Tasks' on the menu situated on the left-hand side of the screen. The 'Current Tasks' page will launch. Click 'Create Task' to create a new task.
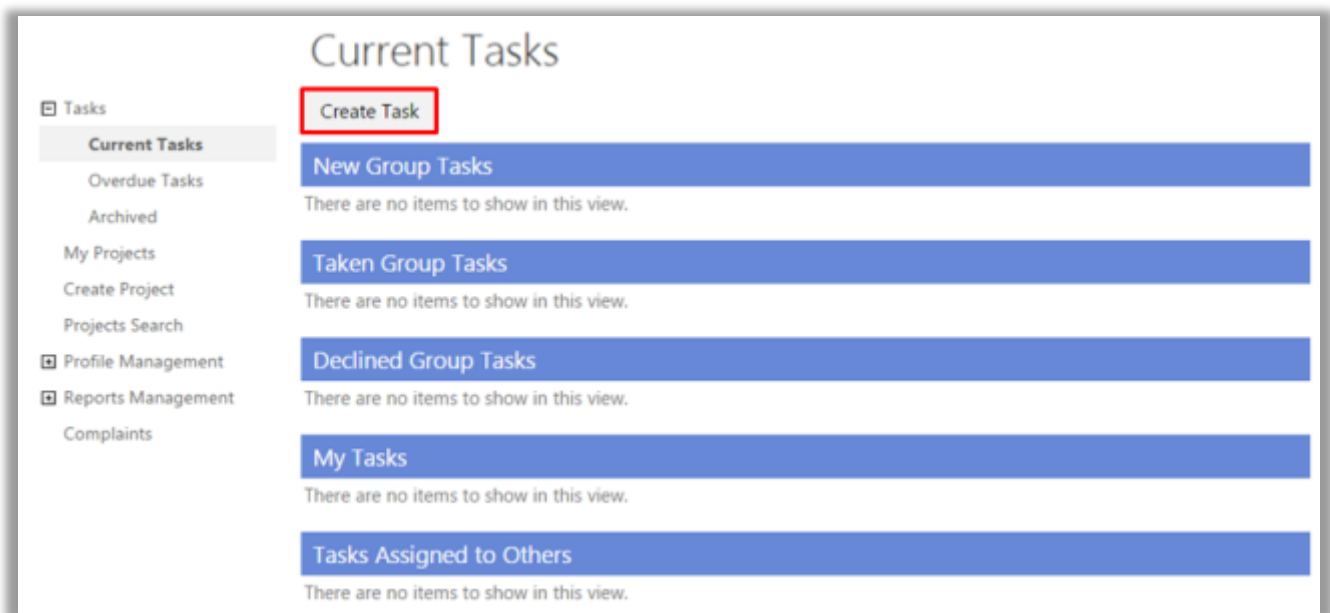
2. Complete the Task Form. All mandatory fields have a red asterisk (*) next to them.

- Select the **task type**. **Project tasks** are those to be assigned only to members of the project, select the PRN. **General tasks** may be assigned to any individual user within RGS. This is mandatory, and a value must be selected in order to save the task.

- **Start and due dates** are useful if starting the task may be delayed, or if you would like to specific a deadline for that task.

- **Assignee** is the individual RGS user who needs to take action. This is mandatory, and a value must be selected in order to save the task.

- **Task description** provides an explanation of the task required. This is mandatory, and must not be empty to save the task.

3. Click 'Save' to create the task and assign it to the assignee. Click 'Cancel' to discard any changes made, and you will be directed back to the Tasks page. The task you created will be shown under Tasks Assigned to Others until it is completed.

4. The assignee will receive a task and an email notification with a link to the Task.

5. The assignee can click 'Action' on the task if it is a Project General Task and it will take the assignee to the project workspace. The assignee can enter a response, in 'Assignee comments' back to the Initiator through the Task Form and then click 'Archive Task'. Alternatively you can decline the task by clicking 'Decline Task'.

6. The initiator will receive the response to the task in an email. The task will be in the Assignee's Archived Tasks

7.4   Update an Existing Task

1. To update an existing task, click on the task's name.
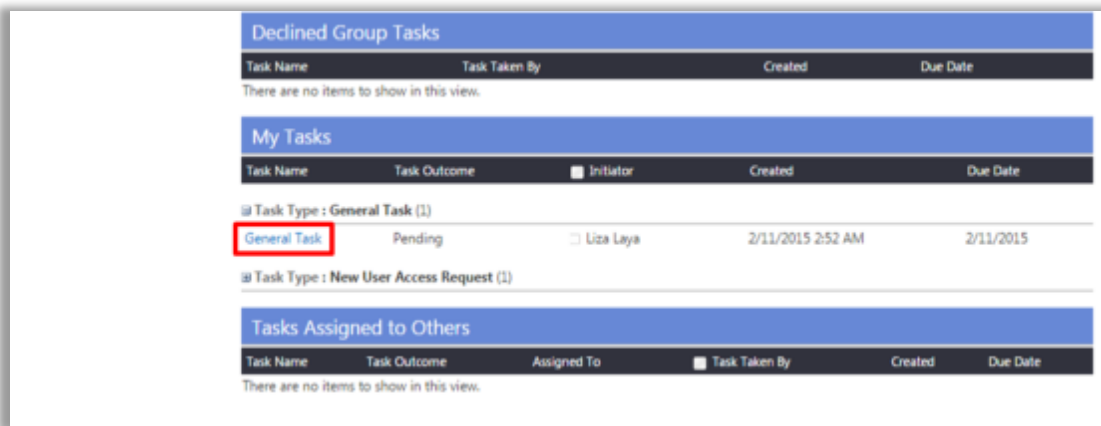
2. Specific fields for the task depending on the task type will be shown in the Task Form. All mandatory fields have a red asterisk (*) next to them.

3. You may update these fields, and click 'Save' to save the changes. Click 'Cancel' to discard any changes made or to return to back to the Tasks page.

7.5   Take a Task

1. To start working on a task currently assigned to a group you belong to, click 'Take Task' on the Task Form view. The task will now be assigned to you, with your name in the 'Task taken by' field.
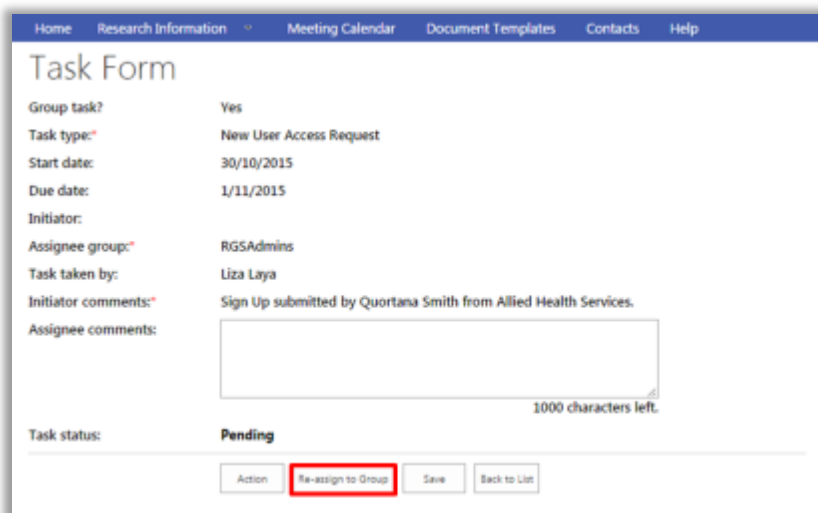

2. If you leave the Task Form view and have been directed back to the Tasks page, the task will appear under 'My Tasks' section.

7.6   Reassign a Task Back to the Group

1. You may be unable to action a task and therefore wish to reassign a task back to its previously assigned group. To do this, click 'Re-assign to Group' on the Task Form view.

2. If you leave the Task Form view and have been directed back to the Tasks page, the task will appear under 'New Group Tasks' section.

7.7   Finish a Task

Some tasks generated within RGS 'archive' automatically after the assignee has taken appropriate action. An example of this type of task is the New User Access Request.

To finish a task, click 'Archive Task' on the Task Form view. Make sure you have actioned the task (e.g. signed the SSA Form) before clicking finish. If you click 'Archive Task' before actioning the task (by mistake), you can still access the task (and therefore the project) in Archived Tasks.

Please click "Action" to take you to the relevant screen to undertake a task. Do not click "Archive Task" unless you have actually carried out the task e.g. authorised a form.

8.   Logging Out

When logging out of RGS, you should close the tab or browser to complete the sign out.