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

Research Governance Service (RGS)

Stage I: RGS Administrator Training Manual

Version 1.0

November 2016

Important Disclaimer

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Contents

1.   Introduction

Single ethical review of multi-site human research within WA Health was introduced in 2013, as a forerunner for the introduction the National Mutual Acceptance (NMA) process. This has allowed administrative processes involved in authorising research projects at multiple sites with one ethical review to be established prior to legally joining the National Mutual Acceptance (NMA). The NMA will provide WA Health sites the ability to accept ethical approval from a Human Research Ethics Committee (HREC) sponsored by a public sector Australian institution and Certified by the National Health and Medical Research Council (NHMRC) to act as a Lead HREC.

Members of the NMA are required to have the capability of a web-based research governance platform to submit, track and report on applications. WA Health has been developing the Research Governance Service (RGS) information technology (IT) platform to meet the NMA requirements and sign the Memorandum of Understanding in 2017. This will be achieved by the release of Stage 1 of the RGS in November 2016 and extra capabilities to support the NMA will be released over 2017.

1.1   Research Governance Service (RGS)

RGS is an IT system which supports the research governance framework for conducting WA Health human research projects.

The RGS is a centralised system for investigators, research group members and sponsors to complete, submit, manage and track their ethics and governance documentation through the lifecycle of their human research project. This includes approval/authorisation, monitoring and publication.

In addition, the RGS provides for Ethics, Research Governance and Hospital Administrators, Human Research Ethics Committees (and Subcommittees) to administer and report on all human research conducted within WA Health or accessing WA Health participants, their tissue or data.

1.2   24/7 Access

RGS is a web-based application that can be accessed 24/7 anywhere in the world as long as you have access to the internet and either your primary or alternate email.

1.3   Secure collaborative workspace

Signing in to the RGS requires two factor authentication. Each time a user logs in, they are provided with a security code to gain access. The audit logs retain the traceable activity of all users, so researchers can be assured that the confidentiality and integrity of their research is being protected.

Each research project also has its own security, as access is by invitation only. It is a collaborative workspace that allows easy interaction between the research group members with the ability to create forms, upload documents, post comments, and create and action group and individual tasks. The history and timeline give a clear and concise picture of the project's progress.

For both the ethics and research governance, it means that reviews can be conducted within the RGS, giving greater access sooner. Committees have their own collaborative meeting space to enable discussion prior to meetings.

1.4   Centralised data repository, generate reports on-demand

In Stage 2 there will be a comprehensive list of reports available, with access based on the individual user's security. The investigator speciality list and the recruitment search are just two

of the reports which will be available to the public that the RGS is able to generate in real-time. For RGS users, there is a comprehensive search criteria that can be used to search for both projects and related publications. RGS is also able to produce both state and national reports with the ability to update these as requirements change.

1.5   Using Help Wiki

The Help Wiki has been created to assist users of the RGS. The public pages of the help gives instructions on how to sign up, and the rest of the help is dedicated to providing researchers with information on how to create and manage their projects within the RGS.

The screens in the RGS also have **tooltips**. Click on them to read more information about the section or field to be completed.
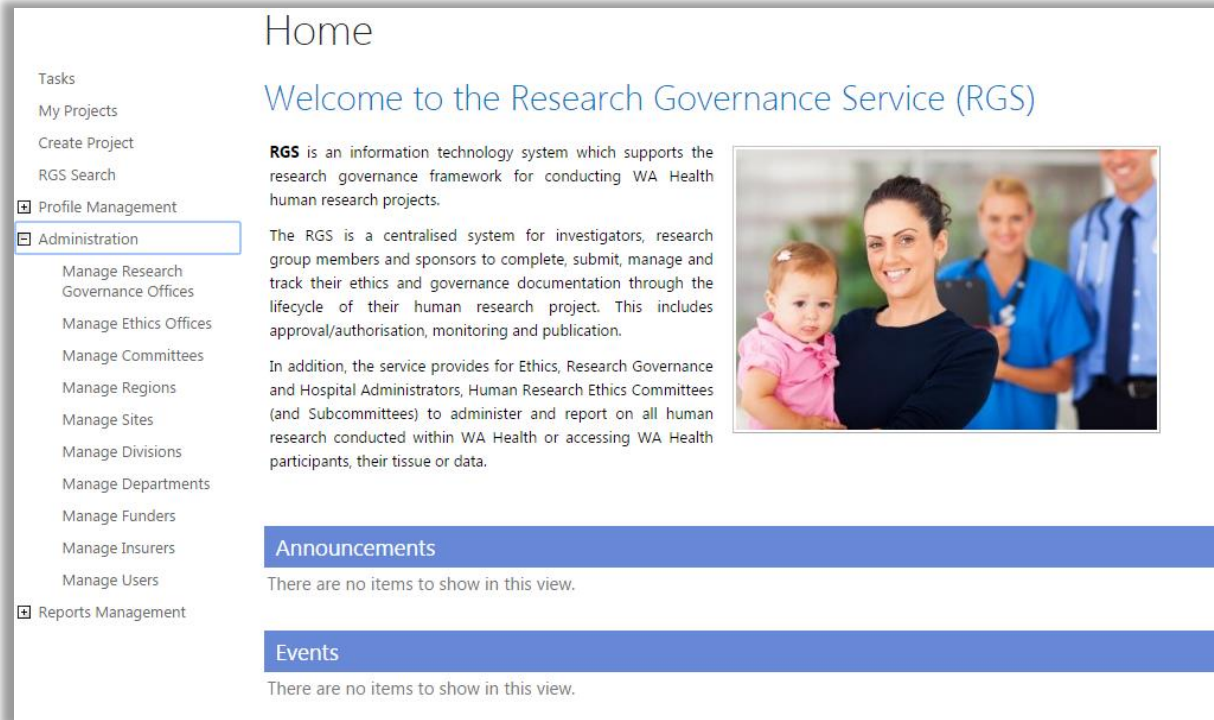
1.6   Technical Assistance

If you require further assistance, contact our RGS Support:

Email: RGS.Support@health.wa.gov.au

2. Administration of RGS

The Administration menu is located on the left-hand side of the RGS screen when you log in. This is only viewable by users with the RGS Administrator (RGS Admin) role. If you require this role, email the RGS Administrator at RGSadmin@health.wa.gov.au for help.

The RGS Admin role involves the:

1. processing of the New User Sign Up Forms by either approving or declining a New User access request
2. the creation and management of organisational structures use in the RGS, which are located in the Administration menu, including:
   - Research Governance Offices
   - Ethics Offices
   - Committees
   - Regions
   - Sites
   - Divisions
   - Departments
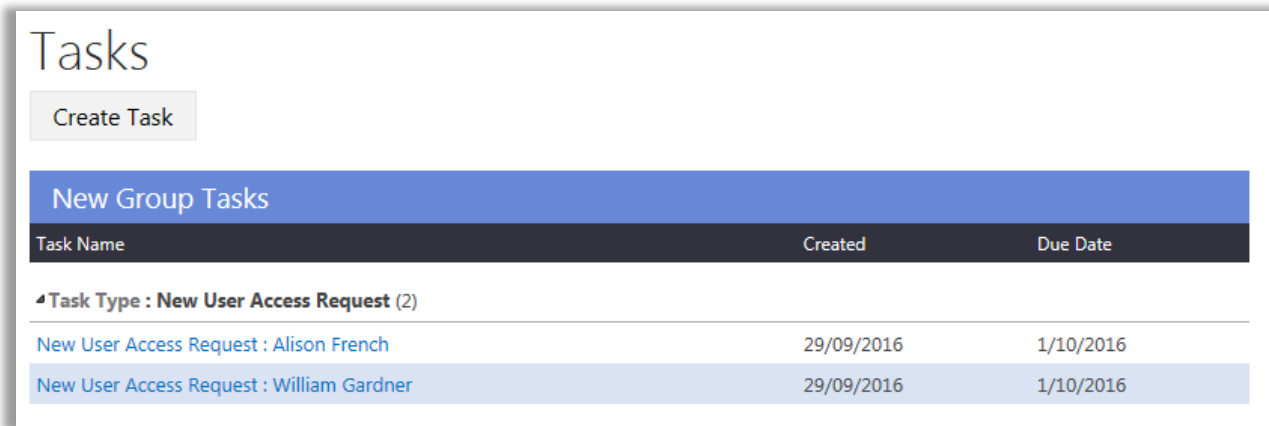   - Funders
   - Insurers
   - Users.

Structures must be created in the following order:

- Region -> Site -> Division -> Department
- Ethics Office -> Committee
- Site -> Research Governance Office.

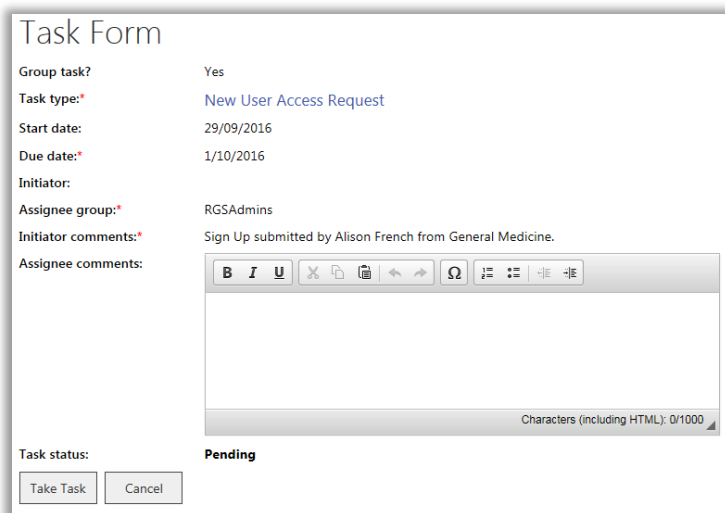# 3. Approve or Decline a New User Sign Up Request

3.1 Approve a New User Access Request

The submission of a New User Sign Up form triggers a New User Access Request task in the Tasks page. The link to Tasks is found in the menu situated on the left-hand side of the screen. The task will appear under New Group Tasks so any RGS Admin can review and action the request.

Tasks

Create Task

New Group Tasks

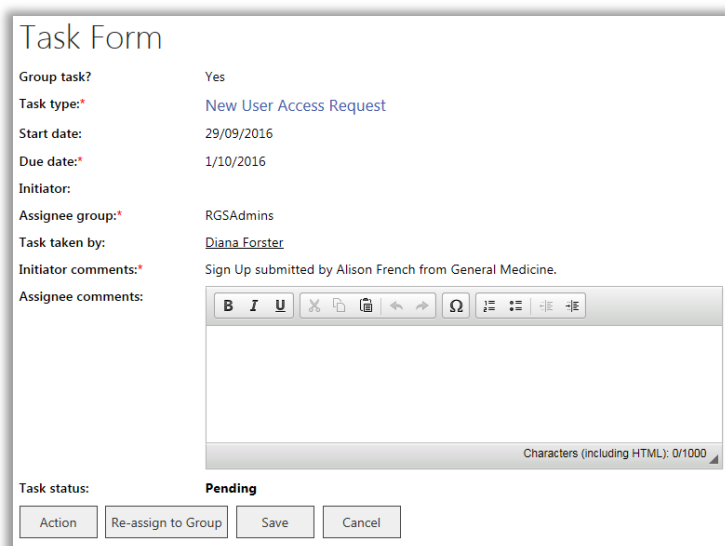| Task Name	Created	Due Date
▲ Task Type : **New User Access Request** (2)		
New User Access Request : Alison French	29/09/2016	1/10/2016
New User Access Request : William Gardner	29/09/2016	1/10/2016

Task Form

Group task?	Yes
Task type:*	New User Access Request
Start date:	29/09/2016
Due date:*	1/10/2016
Initiator:	
Assignee group:*	RGSAdmins
Initiator comments:*	Sign Up submitted by Alison French from General Medicine.
Assignee comments:	

Characters (including HTML): 0/1000

Task status: **Pending**

[Take Task] [Cancel]

Open the New User Access Request that you would like to work on, and click 'Take Task' to start working on it. It will move into My Tasks.

If you wish to cancel the task it will be allocated back to the New Group Tasks for another RGS Admin to action.

Task Form

Group task?	Yes
Task type:*	New User Access Request
Start date:	29/09/2016
Due date:*	1/10/2016
Initiator:	
Assignee group:*	RGSAdmins
Task taken by:	Diana Forster
Initiator comments:*	Sign Up submitted by Alison French from General Medicine.
Assignee comments:	

Characters (including HTML): 0/1000

Task status: **Pending**

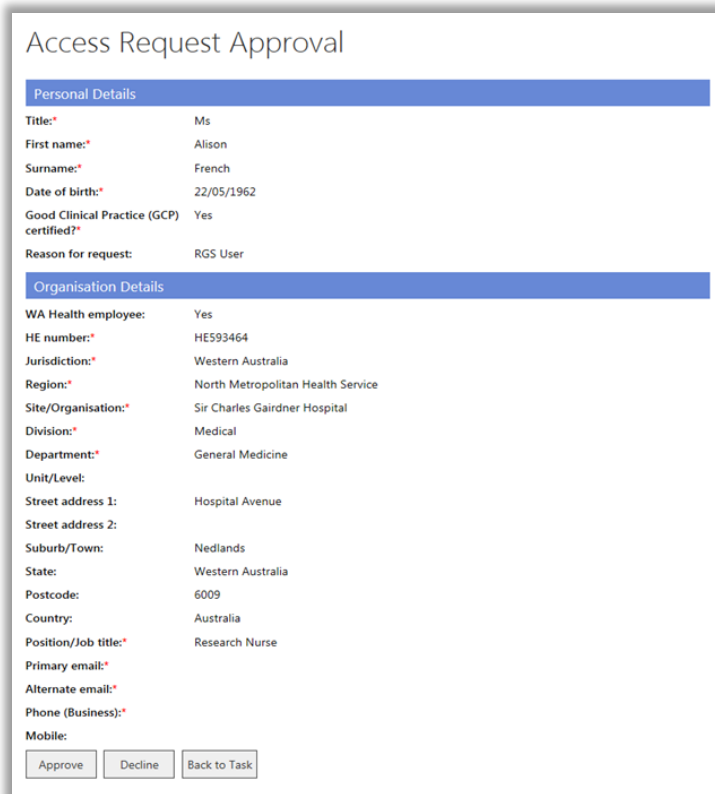[Action] [Re-assign to Group] [Save] [Cancel]

Once you have taken the task you can either click on:

- 'Action' to review the request and decide whether to approve or decline access
- 'Re-assign to the Group' to reallocate the task back to New Group Tasks
- 'Save' to save a comment you have added to the task

- 'Cancel' to cancel the task and leave it in My Tasks to action later.

3.2 WA Health Employee Request for Access

Clicking 'Action' will launch the Access Request Approval page. Review the new user's details.

It is recommended that RGS Admins approve personnel within their jurisdiction (i.e. Health Service) as it is easier for them to establish correct identities. If you have any concerns about the access request you should contact (email/phone) the person to confirm any details.

The RGS Admin should check the following:

• Search the Global Address List to check the person's name, alias, contact details and HE number.
• Confirm they are a WA Health employee (some non-WA Health employees have HE numbers).
• Confirm the reason for requesting access. If they are requesting access for any reason beyond a researcher, this information needs to be confirmed.

Note: this screenshot has had the email and phone number removed but these are mandatory fields in any access request.

Click 'Approve' if you wish to approve the new user's access request. A confirmation that the request has been approved will be shown. An email will also be sent to the requester.

Click 'Back to Task' if you cannot establish someone's identity and don't feel comfortable approving or declining the request. You can add a comment to the task and re-assign it back to the New Group Tasks for another RGS Admin to action. They will be able to review your comment.

3.3   Non-WA Health Employee Request for Access

When assessing the request for a new user not employed by WA Health, you may need to confirm the person's identity from a Local Contact within WA Health.

Access Request Approval

Personal Details

Title:*	Dr
First name:*	William
Surname:*	Gardner
Date of birth:*	11/08/1986
Good Clinical Practice (GCP) certified?*	No
Reason for request:	RGS User

Organisation Details

WA Health employee:	No
Organisation/Company:*	Murdoch University
Unit/Level:	School of Medicine
Street address 1:	91 South Street
Street address 2:	
Suburb/Town:	Hilton
State:	Western Australia
Postcode:	6163
Country:	Australia
Position/Job title:*	Student
Primary email:*	
Alternate email:*	
Phone (Business):*	
Mobile:	

Local Contact within WA Health to confirm New User Details

Title:*	Ms
First name:*	Diana
Surname:*	Forster
Jurisdiction:*	Western Australia
Region:*	Department of Health
Site/Organisation:*	Department of Health
Division:*	Clinical Services & Research
Department:*	Office of the Chief Medical Officer
Position/Job title:*	Senior Policy Officer
Primary email:*	diana.forster@health.wa.gov.au
Phone (Business):*	9222 6413 Ext.
Mobile:	

[Approve] [Decline] [Back to Task]

The RGS Admin should check the following:

- If known to you, check the person's name and contact details.

- If unknown, contact (email/phone) the Local Contact within WA Health and confirm the person's identity, contact information and role in a research project.

- Confirm the reason for requesting access. If they are requesting access for any reason beyond a researcher, this information needs to be confirmed.

Note: this screenshot has had the email and phone number removed but these are mandatory fields in any access request.

Click 'Approve' if you wish to approve the new user's access request. A confirmation that the request has been approved will be shown. An email will also be sent to the requester.

If you have to wait for additional information, click 'Back to Task'. When you go back to the Task Form you can enter comments relevant to your review (e.g. 28/09/2016 sent email to local contact, waiting for confirmation). Click 'Save' and this task will then remain in My Tasks until you are ready to action it again.

3.4   Decline a New User Access Request

In the event that the new user does not pass the identity verification checks, you may decline the user by clicking 'Decline'. This may be due to:

- incorrect details or type of user request
- cannot confirm person's identity
- spam identity*
- no valid reason for accessing RGS i.e. not involved in WA Health research*

The Decline section will appear on the page.

*In addition to declining the request, you have the ability to Black list a new user by selecting yes or no. This would only be selected if the RGS Admin wished to alert other RGS Admins that this person should <u>not</u> be given access to RGS in the future.

Provide the reason for declining this new user access request as this comment will be sent by email to the requester. For example, the user has requested access for a role they are not currently assigned, or that their identity cannot be confirmed.

Click 'Decline' to proceed. Click 'Cancel' to leave the 'Decline' section and discard any changes made.

A confirmation that the request has been declined will be shown. An email will also be sent to the requester.

4. Create and Manage a Research Governance (RG) Office

Before creating a RG Office you must ensure that the sponsoring organisation (i.e. the site that manages/funds the office) has been created in the RGS. This may/or may not be where the RG Office is located.

4.1 Add a Research Governance Office

Click on 'Manage Research Governance Offices' and then click 'Add Office'.

Complete the 'Add New Research Governance Office' section. All mandatory fields have a red asterisk (*) next to them.

If a value is not available in a dropdown menu (e.g. region or site name), you will have to add these fields first through the relevant Administration Menu (e.g. Manage Regions or Manage Sites) before completing the form.

The Unit/Level can be used to show the physical location of the office.

The address and phone number should be the ones that you wish to publish on the RGS Contacts page, which is visible to the public. Click 'Save' to save the changes made or 'Cancel' to discard them.

4.2 Manage Research Governance Officers

Add the Research Governance Officers (RGOs) to the lower part of the 'Add New Research Governance Office' section. RGOs can be added/removed or activated/deactivated as required.

To add an RGO you can either type their name and press the check name icon or you can press the browse icon to show you a list of all RGOs which you can select from. Once you have selected the user's name click 'Add'. Select the user and click 'Remove' to remove.

Click 'Save'. You can then add another RGO if required.

4.3   Associated Sites

Add the Associated Sites to the lower part of the 'Add New Research Governance Office' section. Associated Sites are those aligned with a RG Office, i.e. the RG Office is responsible for conducting a research governance review of research projects involving those sites. These can be added and removed as required.

To add a site, select the jurisdiction, organisation type and region. Available Sites associated with your selection (e.g. Region) will be revealed. Click a site and it will move across to Selected Sites. Click 'Save' to save the changes made or 'Cancel' to discard them.

If a value is not available in a dropdown menu, you will have to add these fields first through the relevant Administration Menu before completing the form.

4.4   Edit a Research Governance Office

To edit a RG Office select the relevant office on Manage Research Governance Offices. Click 'Edit Office'. You can then edit the information. Click 'Save' to save the changes made or 'Cancel' to discard them.

Research Governance Office	Sponsoring Organisation	Jurisdiction	Status	Select
Child and Adolescent Health Service Research Governance Office	Children and Adolescent Health Service Executive	WA	Active	☐
Department of Health Research Governance Office	Department of Health	WA	Active	☐
East Metropolitan Health Service Research Ethics and Governance Unit	Royal Perth Hospital	WA	Active	☐
North Metropolitan Health Service Mental Health Research Ethics and Governance Office	North Metroplitan Health Service Mental Health	WA	Active	☐
RGO LL 04/10/2016	Department of Health	WA	Inactive	☐
RGO PF 1	Aboriginal Health	WA	Inactive	☐
Sir Charles Gairdner Osborne Park Health Care Group Research Governance Office	Sir Charles Gairdner Hospital	WA	Active	☐
South Metropolitan Health Service Research Ethics and Governance Unit	South Metropolitan Health Service Executive	WA	Active	☐
WA Country Health Service Research Governance Office	WA Country Health Service Central Office	WA	Active	☐
Women and Newborn Health Service Research Governance Office	King Edward Memorial Hospital	WA	Active	☑

4.5   Activate/Deactivate a Research Governance Office

To activate or deactivate a RG Office select the relevant office on Manage Research Governance Offices. Depending on the status of the office, click either 'Activate Office' or 'Deactivate Office'. Before deactivating a RG Office ensure there are no outstanding reviews being conducted by any of the RGOs assigned to that office.

5. Create and Manage an Ethics Office

Before creating an Ethics Office you must ensure that the responsible Site/Organisation (i.e. the site that manages/funds the office) has been created in the RGS. This may/or may not be where the Ethics Office is located.

5.1   Add an Ethics Office

Click on 'Manage Ethics Offices' and then click 'Add Office'.

Complete the 'Add New Ethics Office' section. All mandatory fields have a red asterisk (*) next to them.

If a value is not available in a dropdown menu (e.g. region or site name), you will have to add these fields first through the relevant Administration Menu (e.g. Manage Regions or Manage Sites) before completing the form.

The Unit/Level can be used to show the physical location of the office.

The address and phone number should be the ones that you wish to publish on the RGS Contacts page, which is visible to the public.

Click 'Save' to save the changes made or 'Cancel' to discard them.

5.2   Manage Ethics Executive Officers

Add the Ethics Executive Officers (EEOs) to the lower part of the 'Add New Ethics Office' section. EEOs can be added/removed or activated/deactivated as required. To add an EEO you can either type their name and press the check name icon ⚲ or you can press the browse icon ▤ to show you a list of all EEOs which you can select from. Once you have selected the user's name click 'Add'. Select the user and click 'Remove' to remove. Click 'Save'. You can then add another EEO if required.

5.3 Edit an Ethics Office

To edit an Ethics Office select the relevant office on Manage Ethics Offices. Click 'Edit Office'. You can then edit the information. Click 'Save' to save the changes made or 'Cancel' to discard them.

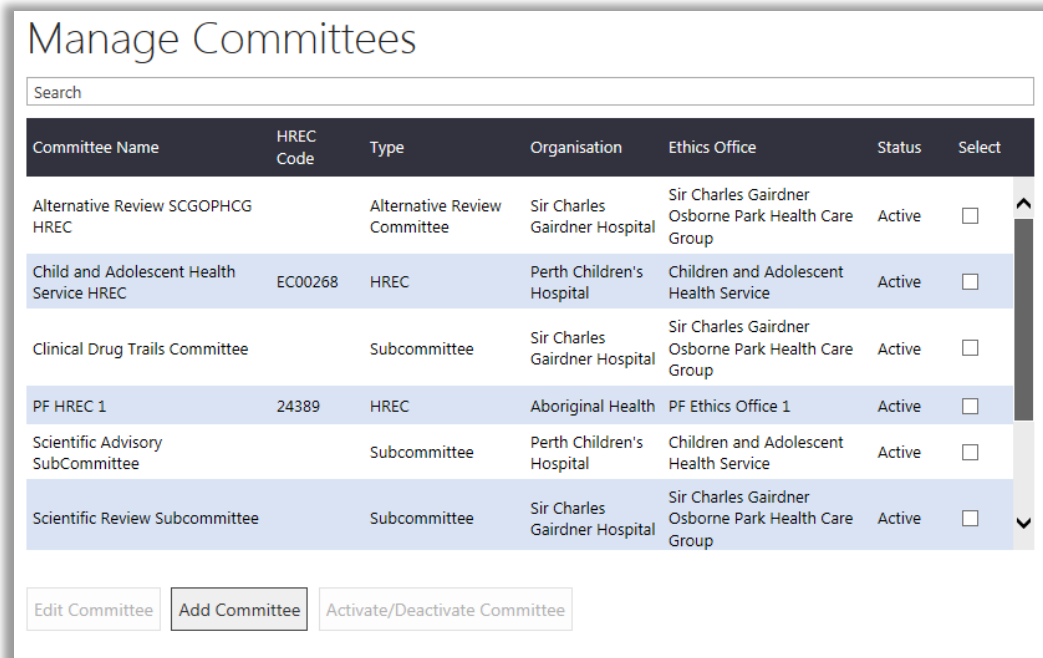
5.4 Activate/Deactivate an Ethics Office

To activate or deactivate an Ethics Office select the relevant office on Manage Ethics Offices. Depending on the status of the office, click either 'Activate Office' or 'Deactivate Office'. Before deactivating an Ethics Office ensure there are no outstanding reviews being conducted by any of the committees aligned to that office.

6. Create and Manage a Committee

Before adding a committee you must ensure the Ethics Office and the Sponsoring Institution (i.e. the site/organisation that sponsors the Human Research Ethics Committee (HREC)) has been created in the RGS.

6.1 Add a Committee
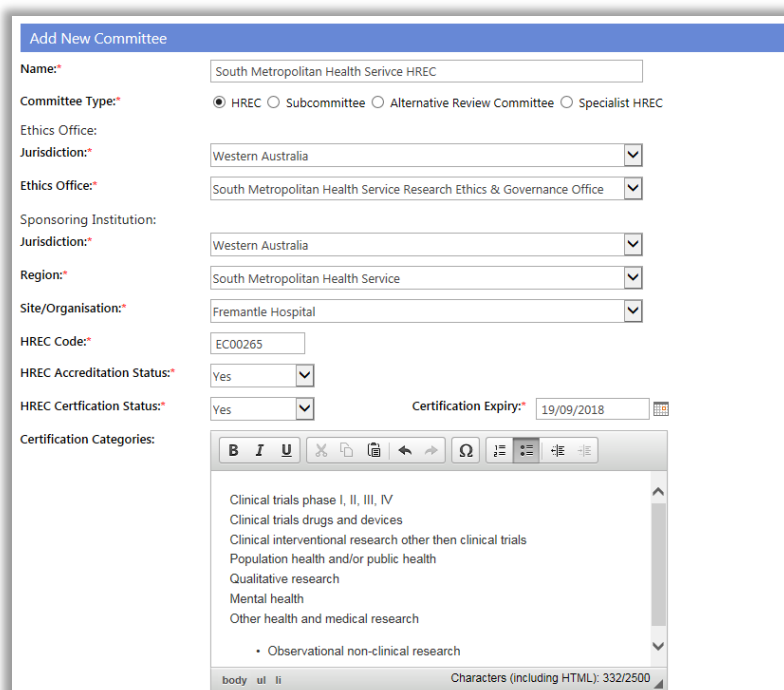
Click on 'Manage Committees' and then click 'Add Committee'.

The HREC must always be created first (as the parent committee) and the Subcommittee and Alternative Review Committee (as child committees) are created next to align with the parent HREC. The Department of Health WA HREC is the only HREC that should be nominated as a Specialist HREC.

Complete the 'Add New Committee' section. All mandatory fields have a red asterisk (*) next to them.

If a value is not available in a dropdown menu (e.g. region or site name), you will have to add these fields first through the relevant Administration Menu (e.g. Manage Regions or Manage Sites) before completing the form.

The name of the committee must be its formal name. For the HREC it must be the name that is registered with the NHMRC. Click 'Save' to save the changes made or 'Cancel' to discard them.

.6.2   Manage Committee Members

Add Committee Members (Members) to the lower part of the 'Add New Committee' section, in the Members tab. Members can be added/removed or activated/deactivated as required.

Click 'Add Member' which launches the Add Committee Member screen.

In the Find Member section you can either type their name and press the check name icon 👤 or you can press the browse icon 📇 to show you a list of all Members you can select from. If a user is not on the list and you know they are an eligible Member you must update their access in Manage Users.

Enter the Member Details, including the position the Member holds on the committee. Click 'Save' to save the changes made or 'Cancel' to discard them.

The committee positions align with the National Statement Section 5. If the position is not listed you can nominate Other Member and add a description against this new position.

The following fields also apply:

- Gender – select male or female.
- External or Internal – nominate if the Member is employed by the Sponsoring Institution (internal) or not (external).
- Member Appointment Date – select the date the Member was first appointed to the committee.
- Appointment Expiry Date – select the date the Member's current appointment is due to expire.

6.3   Associated Sites

Add the Associated Sites to the lower part of the 'Add New Committee' section, in the Associated Sites tab. Associated Sites are those aligned with a HREC, as agreed with their Sponsoring Institution and documented in the HRECs Terms of Reference. These will be populated into the Contacts page. Subcommittees and Alternate Review Committees do not have associated sites.

To add a site, select the jurisdiction, organisation type and region. Available Sites associated with your selection (e.g. Region) will be revealed. Click a site and it will move across to Selected Sites. Click 'Save' to save the changes made or 'Cancel' to discard them.

6.4   Add Contact Details

Add the committee contact details to the lower part of the 'Add New Committee' section, in the Contact Details tab. The contact details will be populated in to the letter templates.

Tick the 'Same address as Ethics Office' if you wish to use the same address. Add the Unit/Level if necessary. Click 'Save' to save the changes made or 'Cancel' to discard them.

Un-tick the 'Same address as Ethics Office', if you wish to enter a different address for the Ethics Office. Add the Unit/Level if necessary. All mandatory fields have a red asterisk (*) next to them. Click 'Save' to save the changes made or 'Cancel' to discard them.

If a value is not available in a dropdown menu (e.g. region or site name), you will have to add these fields first through the relevant Administration Menu (e.g. Manage Regions or Manage Sites) before completing the form.

6.5   Edit a Committee

To edit a committee select the relevant committee on Manage Committees. Click 'Edit Committee'. You can then edit the information. Click 'Save' to save the changes made or 'Cancel' to discard them.


6.6   Activate/Deactivate a Committee

To activate or deactivate a committee select the relevant committee on Manage Committees. Depending on the status of the committee, click either 'Activate Committee' or 'Deactivate Committee'. Before deactivating a committee ensure there are no outstanding reviews being conducted by the committee or its subcommittees.

7. Create and Manage a Region

The regions within RGS are aligned to jurisdictions. Within WA Health, regions align with Health Service Providers (HSPs) and the Department of Health, except for the WA Country Health Service (WACHS) which is divided into its 7 regions and Central Office.

7.1   Create a New Region
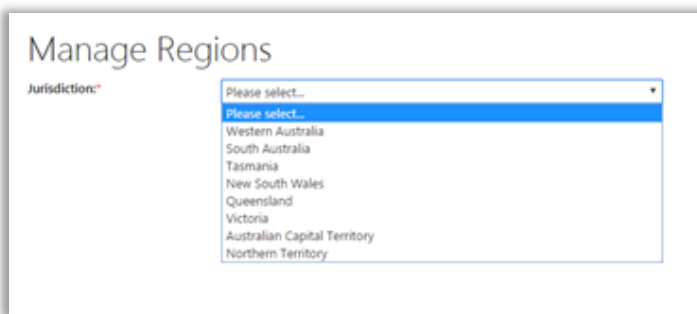
To create a new region, click on 'Manage Regions' found in the menu under 'Administration', situated on the left-hand side of the screen. The 'Manage Regions' screen will launch. Select Western Australia (WA) from the top of the list of jurisdictions. This will produce a list of WA Health regions.

Non-WA Health sites do not fall within regions, these are managed under Sites.

The screen will show all regions within WA. Click 'Add Region' on the Manage Regions page.

Enter a name for the new region in the 'Add New Region' section. Click 'Save' to save the changes made or 'Cancel' to discard them.

Once a region has been created it can be inactivated, but will be listed forever.

7.2 Update an Existing Region

To update an existing region on the 'Manage Regions' screen, select the jurisdiction. Select the region in the grid that requires updating.

You may search for a region by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match.

Click 'Edit Region'

Edit the region name and click 'Save' to save the changes made. Click 'Cancel' to discard them.

7.3   Activate an Inactive Region

To activate an inactive region select on the 'Manage Regions' screen, select the jurisdiction.

Select the inactive region in the grid to be activated.

You may search for a region by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match. Click 'Activate Region'.

The region's status will now show as 'Active'.

7.4   Deactivate an Active Region

To deactivate a region, you must first ensure that all sites have either been moved or deactivated.

To deactivate an active region on the 'Manage Regions' screen, select the jurisdiction. Select the region to be deactivated.

You may search for a region by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match.

Click 'Deactivate Region'. RGS will show a warning that deactivating a region will automatically deactivate the sites associated to the region. To confirm the deactivation, click 'OK', and the region's status will show as 'Inactive'. To keep the region's status as active, click 'Cancel'.

If you deactivate a region in error you can reactivate it. However it will not automatically reactivate the sites under the region and each one of these will have to be made active again along with the divisions and departments.
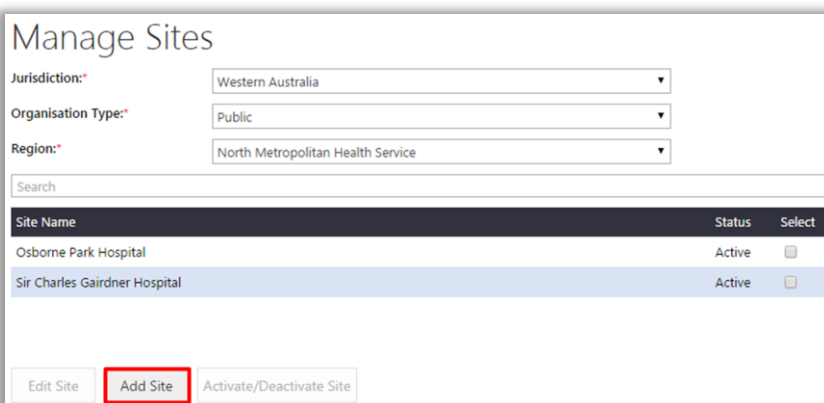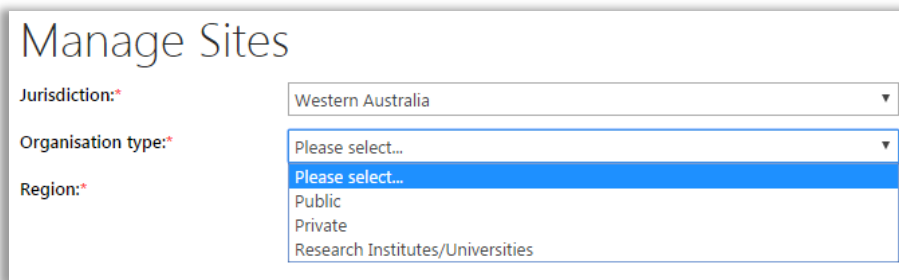
8. Create and Manage a Site

8.1 Create a New Site

To create a new site, click on 'Manage Sites' found in the menu under 'Administration', situated on the left-hand side of the screen.
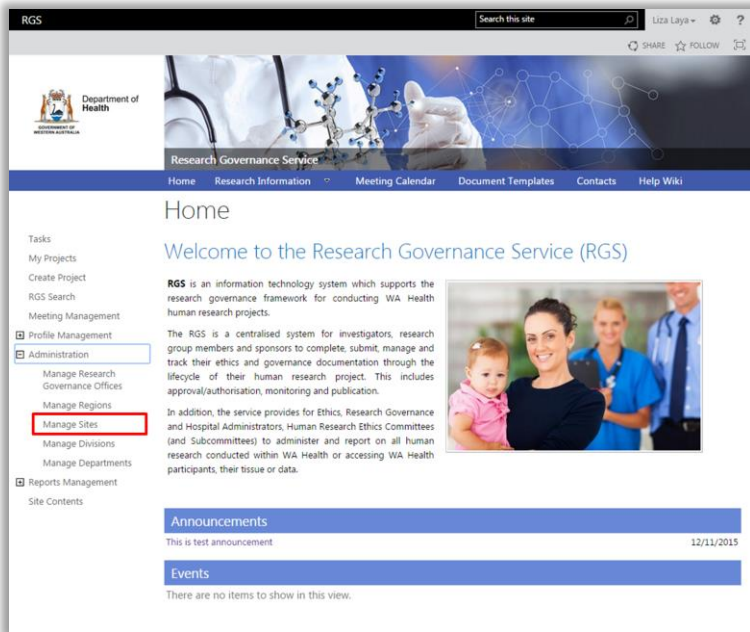
The 'Manage Sites' screen will launch. Select the jurisdiction, organisation type and region, and click 'Add Site'. Sites in RGS are divided into Public, Private and Research institutes / universities. Private and Research institutes / universities are not bound to a region, so if selected, the region field disappears. Region is mandatory only for sites with 'Public' as their organisation type.

> User tip: A public site is any site that is part of WA Health.

Complete the fields in the 'Add New Site' section. All mandatory fields have a red asterisk (*) next to them.

- Enter the **name of the site** to be added under the previously selected jurisdiction, organisation type and region. Region applies only to sites with 'Public' as their organisation type. When adding non-Public sites, ensure the full official title of the site is entered.

- Complete the **address**. Use the **Find Address** to select the physical location of the site and RGS will automatically populate the rest of the fields for you.

- The Unit/Level address field may be used for a site's **PO Box address**. Ensure that you enter the full address, including suburb/town, state and postcode in the Unit/Level address field.

- Provide the **Phone (Business), and the extension number** if applicable. This should be the main contact number for this site. For phone (business), data input allows for +, brackets, numbers and spaces. Enter the extension number only when it applies, and it allows a maximum of six (6) numbers.

Click 'Save' to save the changes made, or 'Cancel' to discard them.

The new site will be shown, with status as 'Active'.

8.2   Update an Existing Site

To update an existing site on the 'Manage Sites' screen, select the jurisdiction, organisation type and region. Select the site in the 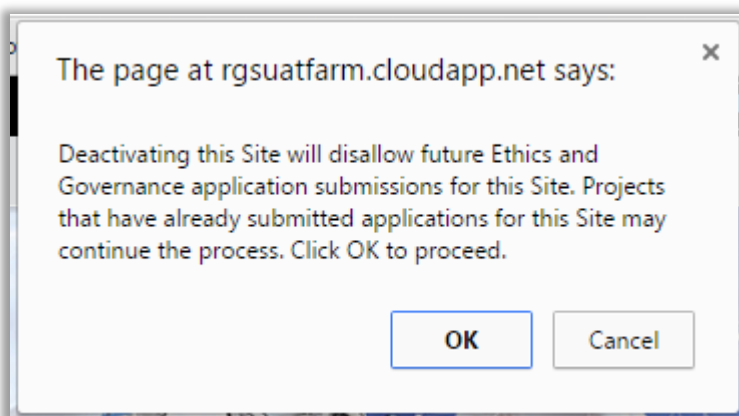grid that requires updating. You may search for a site by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match.

Site Name	Status	Select
hospital		
Osborne Park Hospital	Active	☐
Sir Charles Gairdner Hospital	Active	☐

Edit Site

Name:*	Joondalup Community Mental Health
Site Address:	
	Find Address:
	Enter a location
	Address suggestion will be visible when you start typing your address.
Unit/Level:	
Street address 1:	Regents Park Road
Street address 2:	
Suburb/Town:	Joondalup
State:	Western Australia
Postcode:	6027
Country:	Australia
Phone (Business):*	0894009599 Ext.

Save   Cancel

Click 'Edit Site'. Edit the site's details in the 'Edit Site' section. All mandatory fields have a red asterisk (*) next to them. Click 'Save' to save the changes made. Click 'Cancel' to discard them.

8.3   Activate an Inactive Site

Manage Sites

Jurisdiction:*	Western Australia
Organisation Type:*	Public
Region:*	North Metropolitan Health Service

Search

Site Name	Status	Select
Joondalup Community Mental Health	Inactive	☑
Osborne Park Hospital	Active	☐
Sir Charles Gairdner Hospital	Active	☐

Edit Site   Add Site   Activate Site

To activate an inactive site on the 'Manage Sites' screen, select the jurisdiction, organisation type and region. Select the inactive site in the grid to be activated.

You may search for a site by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match. Click 'Activate Site'.

The site's status will now show as 'Active'. Reactivating a site will not reactivate the divisions and department that were previously active in the site.

8.4   Deactivate an Active Site

To deactivate an active site on the 'Manage Sites' screen, select the jurisdiction, organisation type and region. Select the site to be deactivated. You may search for a site by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match. Click 'Deactivate Site'.

RGS will show a warning that deactivating a site will automatically deactivate the divisions and departments associated to the site.

To confirm the deactivation, click 'OK', and the site's status will show as 'Inactive'. To keep the site's status as active, click 'Cancel'.

If you deactivate a site in error you can reactivate it. However it will not automatically reactivate the divisions under the site and each one of these will have to be made active again along with the departments.
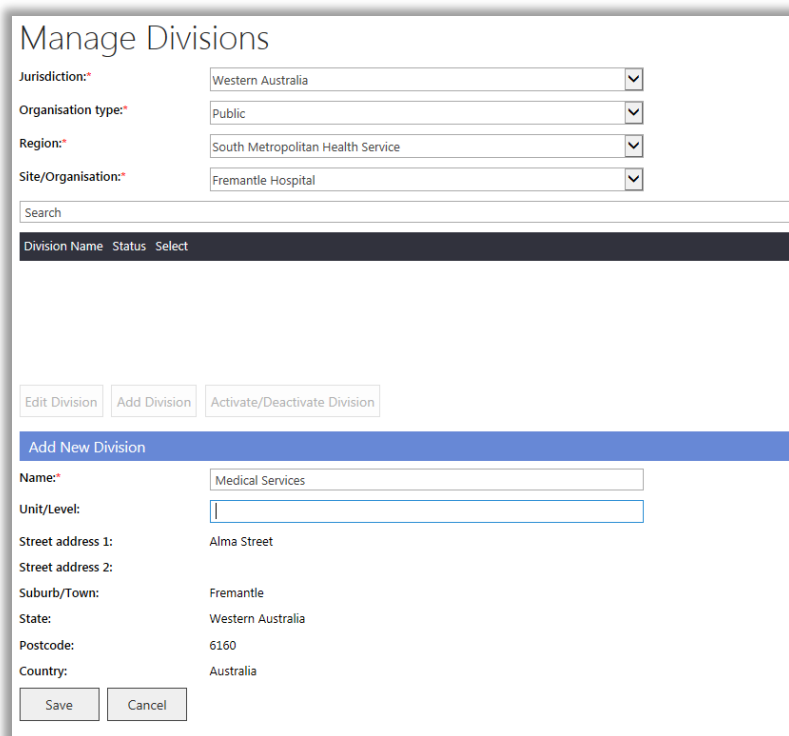
9. Create and Manage a Division

9.1 Create a New Division

To create a new division, click on 'Manage Divisions' found in the menu under 'Administration', situated on the left-hand side of the screen.
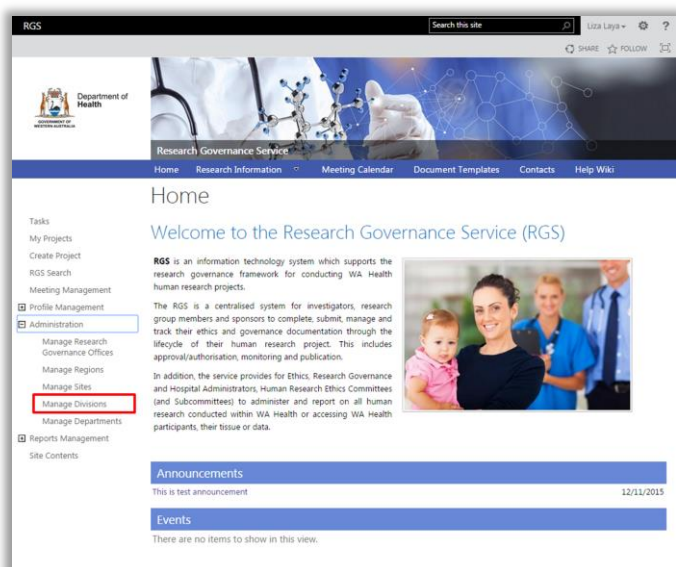
The 'Manage Divisions' screen will launch. Select the jurisdiction, organisation type, region and site, and click 'Add Division'. Private and Research institutes / universities are not bound to a region, so if selected, the region field disappears. Region is mandatory only for sites with 'Public' as their organisation type.

Complete the fields in the 'Add New Division' section. All mandatory fields have a red asterisk (*) next to them.

Enter the full official **name of the division** to be added under the previously selected jurisdiction, organisation type, region and site/organisation.

The Unit/Level address field may be used to enter the location of the division.

The address is automatically provided based on where the organisation is located. If you wish to update this, you must make the changes in the 'Manage Sites' screen.

Click 'Save' to save the changes made, or 'Cancel' to discard them.

> User tip: If the Site/organisation doesn't have divisions or departments you will need to repeat the site/organisation's name. This is necessary to enable the site/organisation's divisions and departments to be selected in the RGS forms as either internal or external service providers.

The new division will be shown, with status as 'Active'.

9.2 Update an Existing Division

To update an existing division on the 'Manage Division' screen, select the jurisdiction, organisation type, region and site. Select the division in the grid that requires updating. You may search for a division by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match.

Click 'Edit Division'. Edit the division's details in the 'Edit Division' section. All mandatory fields have a red asterisk (*) next to them. Click 'Save' to save the changes made. Click 'Cancel' to discard them.

9.3   Activate an Inactive Division

To activate an inactive division on the 'Manage Divisions' screen, select the jurisdiction, organisation type, region and site. Select the inactive division in the grid to be activated.

You may search for a division by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match. Click 'Activate Division'.

The division's status will now show as 'Active'. Reactivating a division will not reactivate the departments that were previously active in the division.

9.3   Deactivate an Active Division

To deactivate an active division on the 'Manage Divisions' screen, select the jurisdiction, organisation type, region and site. Select the division to be deactivated. You may search for a division by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match. Click 'Deactivate Division'.

RGS will show a warning that deactivating a division will automatically deactivate the departments associated to the division.

To confirm the deactivation, click 'OK', and the division's status will show as 'Inactive'. To keep the division's status as active, click 'Cancel'.

If you deactivate a division in error you can reactivate it. However it will not automatically reactivate the departments under the division and each one of these will have to be made active again.

10. Create and Manage a Department

10.1 Create a New Department

To create a new department, click on 'Manage Departments' found in the menu under 'Administration', situated on the left-hand side of the screen.

The 'Manage Departments' screen will launch. Select the jurisdiction, organisation type, region, site and division, and click 'Add Department'. Private and Research institutes / universities are not bound to a region, so if selected, the region field disappears. Region is mandatory only for sites with 'Public' as their organisation type.

Complete the fields in the 'Add New Department' section. All mandatory fields have a red asterisk (*) next to them.

Enter the full official **name of the department** to be added under the previously selected jurisdiction, organisation type, region, site/organisation and division.

The Unit/Level address field may be used to enter the location of the department.

Click 'Save' to save the changes made, or 'Cancel' to discard them.

> User tip: If the Site/organisation doesn't have divisions or departments you will need to repeat the site/organisation's name. This is necessary to enable the site/organisation's divisions and departments to be selected in the RGS forms as either internal or external service providers.

The new department will be shown, with status as 'Active'.

10.2 Update an Existing Department

To update an existing department on the 'Manage Department' screen, select the jurisdiction, organisation type, region, site and division. Select the department in the grid that requires updating. You may search for a department by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match.

Click 'Edit Department.'

Edit the department's details in the 'Edit Department' section. All mandatory fields have a red asterisk (*) next to them. Click 'Save' to save the changes made. Click 'Cancel' to discard them.

10.3   Activate an Inactive Department

To activate an inactive department on the 'Manage Departments' screen, select the jurisdiction, organisation type, region, site and division. Select the inactive department in the grid to be activated.

You may search for a department by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match. Click 'Activate Department'.

The department's status will now show as 'Active'. Reactivating a department will align it with the division it is associated with.

10.4   Deactivate an Active Department

To deactivate an active department on the 'Manage Departments' screen, select the jurisdiction, organisation type, region, site and division. Select the department to be deactivated. You may search for a department by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match. Click 'Deactivate Department'.

RGS will show a warning to ask you whether you wish to deactivate the department.

To confirm the deactivation, click 'OK', and the department's status will show as 'Inactive'. To keep the department's status as active, click 'Cancel'.

If you deactivate a department in error you can reactivate it.

11.   Create and Manage a Funder

11.1   Create a New Funder

Funders are sites/organisations who will fund a research project with either monetary or in-kind support. To create a new funder, click on 'Manage Funders' found in the menu under 'Administration', situated on the left-hand side of the screen.
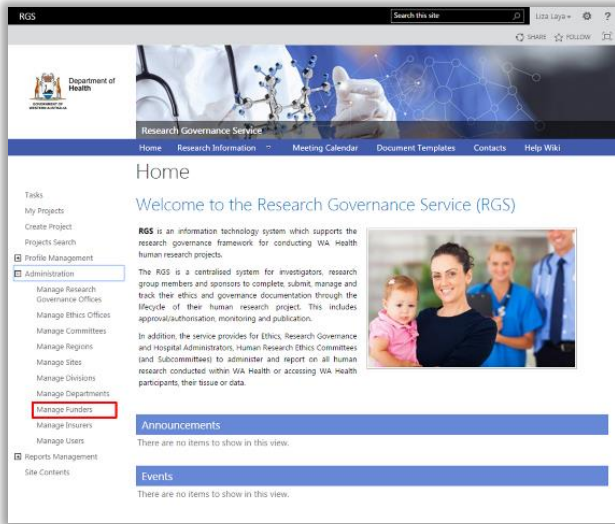
The 'Manage Funders' screen will launch. Click 'Add Funder'.

Complete the fields in the 'Add New Funder' section. All mandatory fields have a red asterisk (*) next to them.

Enter the full official **name of the funder.**

Select the 'Funder organisation type' from the menu.

Complete the **address**. Use the **Find Address** to select the location of the funder and RGS will automatically populate the rest of the fields for you.

Click 'Save' to save the changes made, or 'Cancel' to discard them.

If a WA Health site is providing either monetary or in-kind support funding, it should be added as a 'Government – State (WA)' Funder Organisation Type, so they can be selected in Project Details. A 'Self-funded' funder will be listed under the 'Other' Funder Organisation Type.

11.2 Update an Existing Funder

To update an existing funder on the 'Manage Funders' screen, select the funder in the grid that requires updating. You may search for a funder by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match.

Click 'Edit Funder'. Edit the funder's details in the 'Edit Funder' section. All mandatory fields have a red asterisk (*) next to them. Click 'Save' to save the changes made. Click 'Cancel' to discard them.

11.3 Activate an Inactive Funder

To activate an inactive funder on the 'Manage Funders' screen, select the inactive funder in the grid to be activated.

You may search for a funder by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match. Click 'Activate Funder'.

The funder's status will now show as 'Active'.

11.4 Deactivate an Active Funder

To deactivate an active funder on the 'Manage Funders' screen, select the funder to be deactivated. You may search for a funder by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match. Click 'Deactivate Funder'.
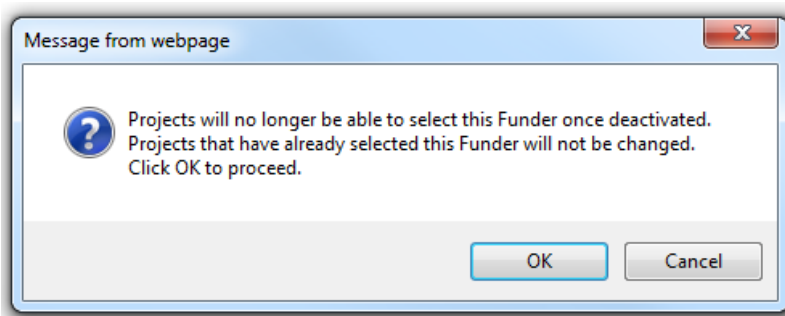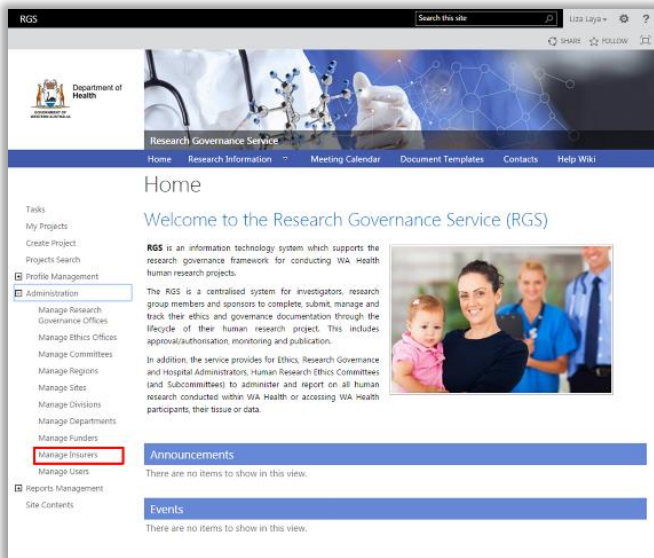

'Deactivate Funder' should not be used unless permission is given from the Data Custodian of the RGS. Projects will no longer be able to select the funder once deactivated. Projects that have already selected the funder will not be changed.

12. Create and Manage an Insurer

12.1 Create a New Insurer

To create a new insurer, click on 'Manage Insurers' found in the menu under 'Administration', situated on the left-hand side of the screen.

The 'Manage Insurers' screen will launch. Click 'Add Insurer'.

Complete the fields in the 'Add New Insurer' section. All mandatory fields have a red asterisk (*) next to them.

Enter the full official **name of the insurer.**

Enter whether the insurer is Australian Prudential Regulation Authority (APRA) approved. A list of approved insurers is available at:

http://www.apra.gov.au/GI/Pages/general-insurers.aspx

Complete the **address**. Use the **Find Address** to select the location of the insurer and RGS will automatically populate the rest of the fields for you.

Click 'Save' to save the changes made, or 'Cancel' to discard them.

12.2 Update an Existing Insurer

To update an existing insurer on the 'Manage Insurers ' screen, select the insurer in the grid that requires updating. You may search for an insurer by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match.

Click 'Edit Insurer'. Edit the insurer's details in the 'Edit Insurer' section. All mandatory fields have a red asterisk (*) next to them. Click 'Save' to save the changes made. Click 'Cancel' to discard them.

## 12.3 Activate an Inactive Insurer

To activate an inactive insurer on the 'Manage Insurers' screen, select the inactive insurer in the grid to be activated.

You may search for an insurer by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match. Click 'Activate Insurer'.

The insurer's status will now show as 'Active'.

12.4 Deactivate an Active Insurer

To deactivate an active insurer on the 'Manage Insurers' screen, select the insurer to be deactivated. You may search for an insurer by entering a word or phrase in the Search field. RGS will check the word or phrase against all column fields in the grid, and will return all records that match. Click 'Deactivate Insurer '.
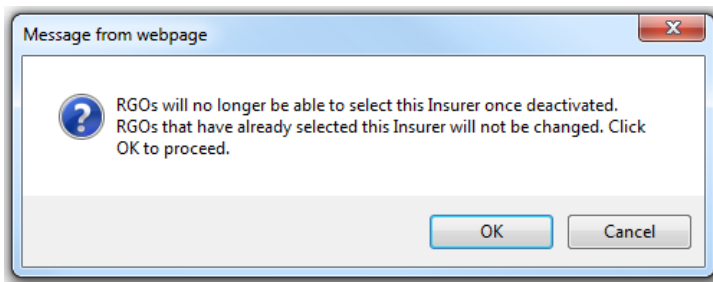

'Deactivate Insurer' should not be used unless permission is given from the Data Custodian of the RGS. RGOs will no longer be able to select the insurer once deactivated. RGOs that have already selected the insurer will not be changed.

13. Manage Users

13.1 Update an Existing User

To update an existing user's access, click on 'Manage Users' found in the menu under 'Administration', situated on the left-hand side of the screen.
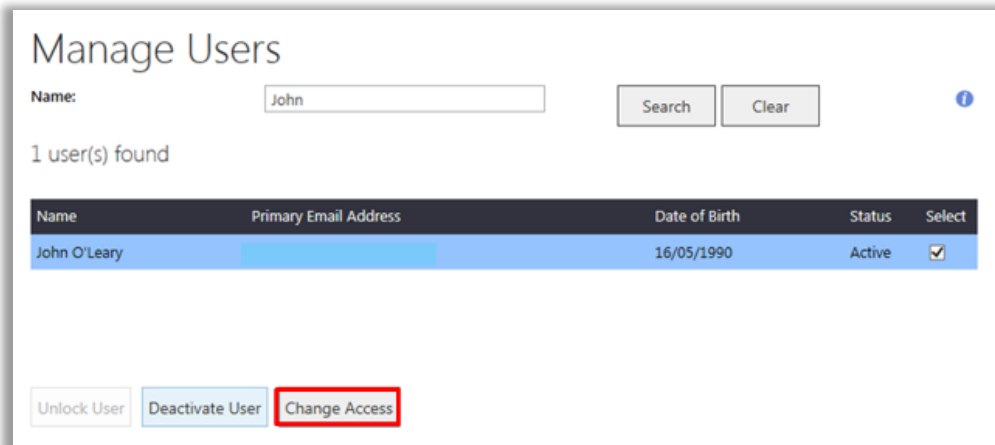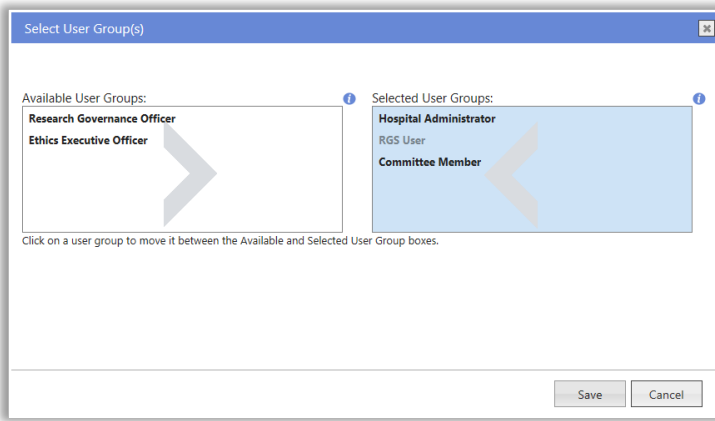

The 'Manage Users' screen will launch.

You may search for a user by entering a name in the Search field. RGS will check the name against all column fields in the grid, and will return all records that match.
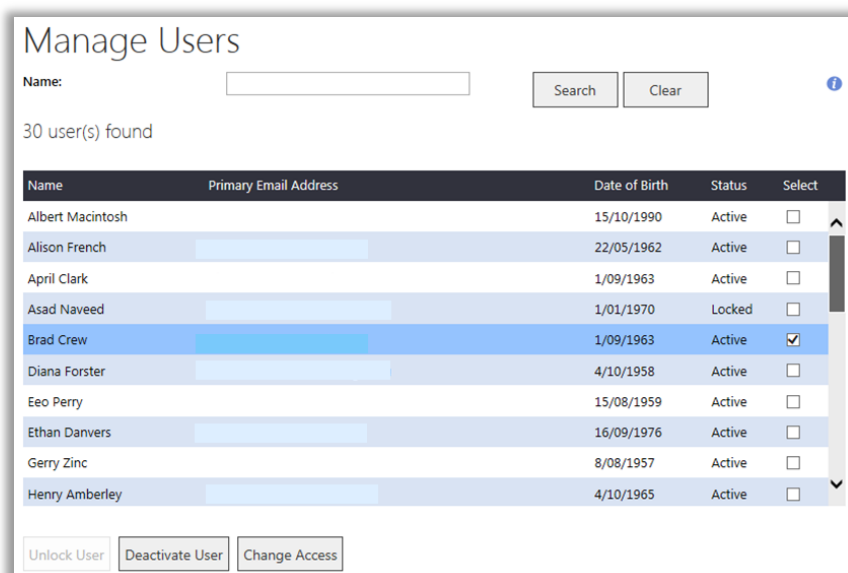
Select the user in the grid that requires updating and click 'Change Access'.

Note: you will be able to see the user's Primary Email Address they have just be hidden for this example.

Edit the user's access by clicking on the specific role to transfer it from 'Available User Groups' to 'Selected User Groups', and vice versa.

The RGS User role is the default access and cannot be changed.

Click 'Save' to save the changes made, or 'Cancel' to discard them.

13.2   Activate an Inactive User

To activate an inactive user on the 'Manage Users' screen, select the inactive user in the grid to be activated.

You may search for a user by entering a name in the Search field. RGS will check the name against all column fields in the grid, and will return all records that match. Click 'Activate User'.

The user's status will now show as 'Active'.

13.3   Deactivate an Active User

To deactivate an active user on the 'Manage Users' screen, select the user to be deactivated. You may search for a user by entering a name in the Search field. RGS will check the name against all column fields in the grid, and will return all records that match. Click 'Deactivate User'.
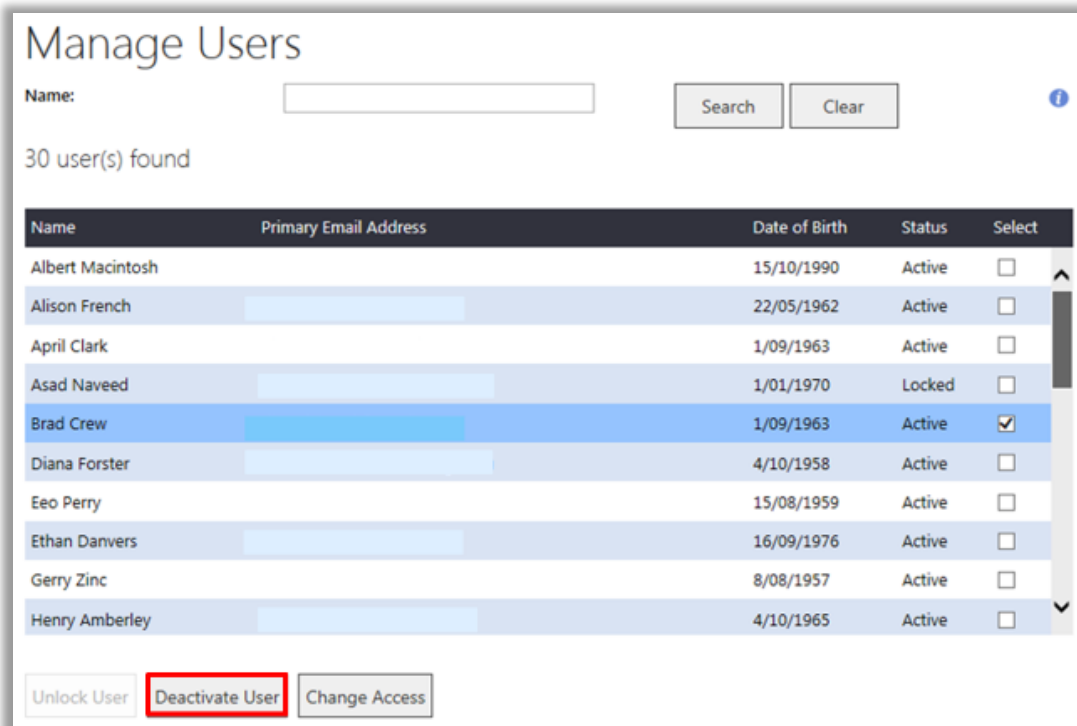
14.   Approve Changes to the CPI

14.1   Approve a request to change the CPI

Any CPI Approval / Removal task received will appear in the Tasks page. The link to the Tasks is found on the menu situated on the left-hand side of the screen.

Open the CPI Approval / Removal task that you would like to work on, and click 'Take Task' to start working on it.

Click on 'Action' to review the request.

The 'Change CPI Approval ' page will launch. Review the CPI changes. If needed, contact the CPI who lodged the request to validate the change. Click 'Approve' if you wish to confirm the CPI changes.

A confirmation that the request has been approved will be shown. An email will also be sent to the requester.

14.2 Decline a request to change the CPI

In the event that the CPI changes are invalid, you may decline the change by clicking 'Decline'.

A confirmation that the request has been declined will be shown. An email will also be sent to the requester.

15. Logging Out

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