



### Add a Document in the Monitoring Tab

### Add a Document in a Form

### Edit the Document Details

### Submit a Document

There are two ways to add a document when the project is in the monitoring phase. The first is through the Monitoring tab and the second while you are in the amendment forms. Any Project Member (PM) can add a document.

For further guidance on monitoring forms and documents see [WA Health Research Authorisation and Monitoring Forms Guidelines](#).

#### Add a document in the Monitoring tab

In the Monitoring tab click 'Add' under the Documents section. The first question on the Add Project Document screen asked if this is a new version of an existing document. The answer to this question is 'No', unless the document has been previously submitted and you have been notified that Additional Information is Required (AIR) see [Re-submitting a document](#).

The screen will expand and you can then enter the details of the document you are submitting.

Select the 'Document category'; the 'Document type' will change depending on the Document category you select. These Document types are the same as those available in the Applications tab (formerly the Forms & Documents tab). If the 'Document types' are not applicable to your document, select 'Other'. All the fields on the screen need to be completed, including the version number and version date. The version number and date do not have to appear in the 'Document name' as they are shown separately. The 'Document name' will populate through to the approval letter, so ensure it is correct as it cannot be changed by administrators. Upload the softcopy of the document or detail where the hard copy will be maintained (the HREC or RG Office). Once all the information has been completed click 'Add'.

#### Add a document in an Amendment Form

In both the Amendment Form and the Governance Only Amendment Form there is the ability to add a document while editing the form.


When you answer 'Yes' to Section 2 of the form you have a list of any previously added documents in the Monitoring tab, that are not associated with a form. In addition to these previously added documents, you have the ability to add a document while in the form.

Click the 'Add' button and the Add Project Document screen will appear. This is the same screen as described in the Add a document in the Monitoring tab previously.

Once the document has been added, select all documents you want to include with this form by clicking the box under the Select column.

If you need to edit the document details you will need to do this under the Documents section of the Monitoring tab.

#### Edit the document details

If you have made a mistake you can edit the document information prior to submitting it, this can't be changed after submission. Click the edit icon  to launch the Edit Project Document screen where you can make any corrections to the document details or upload another version of the document. Click 'Save' to save any changes.


To delete a document click on the remove icon. 

#### Submitting a document

All documents have to be submitted with a form. See the User Guide for the relevant form for information on the submission process.

#### Re-submitting a document

If a document has been reviewed and given the status of AIR then the new version of the document should be associated with the initial form when it is resubmitted.

To upload a new version of a previously submitted document click on the question mark icon  under the HREC or RG Office that AIRed the document.

When the screen opens click on the 'Create New Version' button. The Add Project Document screen will appear. The details of the previous document will appear but without a version number or date and no attachment. The 'Document name' can be edited and new version number and date added. The new document is then uploaded (or the location of the new hardcopy added). Once this has been completed, click 'Add'. The new document can now be submitted to the HREC or RG Office that AIRed it by selecting the 'Submit' button at the bottom of the Monitoring tab.