Research Governance Service (RGS)

Stage I: All Users (Getting Started)
Training Manual

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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. Locating the RGS

The RGS is located on its own website at https://rgs.health.wa.gov.au/Pages/Home.aspx

Or alternatively, it is accessible via a link on the Department of Health Research Governance webpage located at http://ww2.health.wa.gov.au/Health-for/Researchers-and-educators/Research-governance

It is recommended you bookmark the webpage on your computer for ease of access.
3. System Requirements and Help

RGS will run using any of these web browsers:

- Internet Explorer 11 or higher
- Google Chrome
- Mozilla Firefox
- Safari

If you are a WA Health employee and your WA Health computing resource (e.g. computer) does not have any of the compatible web browsers, please contact your Service Desk.

Technical Assistance:

If you require technical assistance when using the RGS the following assistance is available depending on your position:

- If you are a WA Health employee contact your Service Desk for help
- If you are not a WA Health employee email RGS.Support@health.wa.gov.au for help.

Business Assistance:

If you require business assistance when using the RGS (e.g. you cannot find listed your department, division, site, region, insurer or funder in a drop down menu) email the RGS Administrator at RGSadmin@health.wa.gov.au for help.

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.

If you are not sure where to start:

- Click on a topic in the left menu of the Help Wiki that may be relevant to you, or use the Quick Start relevant to your role.

Using RGS

Here are some 'Tips and Tricks' that you may find helpful in using and navigating through RGS:

- Find information on the RGS public webpages by using the 'Search this site' box found in the header of every RGS page.
- Find information related to RGS research projects by using the ‘Project Search’ in the left menu once you are logged into the RGS.
- The screens in RGS have tooltips. Click on them to read more information about the section or field to be completed.
- Remember to refresh the page in RGS to view any recent updates. To do this, press F5 or click on the ‘Refresh’ or ‘Reload this page’ button, depending on the browser you are using.
- RGS opens a new tab in your browser when you click on a hyperlink that leads to an external website or document. You may return to your previous screen in RGS by clicking on the original tab.
- RGS uses **pop ups**, so please ensure your browser is allowing them. Refer to your browser's Pop-up Blocker settings for more information.
- RGS uses your **default email client when sending emails**. Please ensure that the MailTo protocol of your computer is set to a valid email client (e.g. Outlook).
- RGS uses your **default printer and PDF program**; please adjust these programs to meet your requirements.

4. **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.

4.1 **Access Roles**

4.1.1 **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.

4.1.2 **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.

4.1.3 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 Head of Research Department (HoD), Head of Supporting Department (HoSD), Business Manager (BM), Divisional Director (DD), Regional Director (RD) or Chief Executive (CE).

4.1.4 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.

4.1.5 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.

4.1.6 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.
4.2 Project Roles within RGS

4.2.1 Coordinating Principal Investigator (CPI)

Within the RGS, there is only one CPI per project and **must be the person communicating with the WA Health 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.

4.2.2 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.

4.2.3 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, Als, 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.
4.2.4 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.

4.2.5 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.

4.2.6 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.

4.2.7 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 not allow for viewing of the site Budget Form.**

4.3 Administrative Roles

4.3.1 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.

4.3.2 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.
4.3.3 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.

4.3.4 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.

4.3.5 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.

4.3.6 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.

4.3.7 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.

4.3.8 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.
4.3.9 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.

4.3.10 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.

4.3.11 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.
5. 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:

- Placing 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.

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

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**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. Numbers (0-9)  
    4. Special characters

**Reason for requesting access to RGS:**

- Choose as many roles as appropriate:
  - RGS User  
  - Research User  
  - Hospital Administrator  
  - Committee Member  
  - Research Governance Officer  
  - Ethics Executive Officer

**Provide us with your details**

- **Title**
- **First name**
- **Surname**
- **Date of birth**

*Your date of birth will be kept confidential and is seen only by the RGS Administrator; it will be used for user identification purposes.*

- **Good Clinical Practice (GCP) certified?**
- **Are you a Public Health employee?**

*I am not a robot

I have read, understood and agree with the **Terms of Use and Privacy Policy**

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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.

5.1 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.
- You must nominate a **Primary** and **Alternate** email address, which are different. The RGS requires a two-step authentication, involving password entry and an additional access code which is sent to your nominated primary or alternate email. An alternate email allows you to access the system when you cannot access your primary email e.g. at home.
6. **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. 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.
- 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 when logging in to RGS.
- 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.

- **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.
  - 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.
  - 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.
7. **Sign up as a RGS User (Non WA Health Employees)**

You have answered ‘No’ to: *Are you a Public 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 your **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 when logging in to RGS.
- 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.
- **Mobile number** is an optional field. Data input allows for + and numbers.

7.1 **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.
• 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. If you cannot find their 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.
• 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. Data input allows for +, brackets, numbers and spaces. 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. For mobile, data input allows for + and numbers.
• 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.
8. Signing In

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.

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.
Upon confirmation of a valid username and password, an email will be sent to your primary email address, containing your Unique Security Code.

Your Unique Security Code for accessing RGS is: 368317

Please note that the above code is only valid for 20 minutes. A new code will be sent to you the next time you attempt to login.

If you did not request for this code, please contact the RGS Administrators using the email address provided below.

Regards,
The RGS Team
RGSadmin@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.

Enter this numeric code in the screen, without spaces or special characters, and click 'Verify'. You will be sent a new code each time you log in to the RGS.

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

9. 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 into the ethics and governance forms.
9.1 Update Details

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

- **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 have been certified, accredited or credentialled and the expiry date(s).

- 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

- Select whether you are a Public Health Employee, in the RGS this is defined as an employee of WA Health. The answer to this question determines the next series of questions you need to complete.

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

- Edit your Phone (business) and extension (if applicable), this should be the number you can be reached during normal working hours. 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 research 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'.
9.2 Change Password

Changing your password is a simple process and 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’.

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

A confirmation screen will appear to confirm that the password has been changed.
You will receive a confirmation email.

Dear Mrs Katherine Coltrona,

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

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

9.3 Forgot Password

If you forget your password, go to the Login to RGS screen, enter your username and then click ‘Forgot password?’

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

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

Get a new code

Send Request Cancel
A confirmation screen will appear to confirm that the password has been changed.

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

Dear Mrs Katherine Coltrana,

Your temporary RGS Account Password is: [redacted]

Once you Login to RGS, you will be prompted to change this password.

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.

Once you have logged on using this temporary password, you will be asked to change your password.
10. All About Tasks

The workflow processes in RGS are based on the allocation and actioning of tasks by an individual or group of people. The Tasks list is broken down into the following categories:

**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.

**Taken Group Tasks**
These are tasks that have been taken by others within your group.

**Declined Group Tasks**
These are tasks that someone in your group has declined on behalf of the group.

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

10.1 Create a New Task

You can see all tasks assigned to you or your group, and tasks you have opened as lists in the Tasks page. Click on 'Tasks' on the menu situated on the left-hand side of the screen.
The 'Tasks' page will launch. Click 'Create Task' to create a new task.

Complete the Task Form. All mandatory fields have a red asterisk (*) next to them.

- **Group task?** Tick on 'Group task?' if the task will be assigned to a group within RGS (e.g. RGS Administrators, Hospital Administrators, etc.). Otherwise, if the task will be assigned to an individual RGS user, then 'Group task?' must remain un-ticked.

- **Task type.** Select the task type. Project tasks are those to be assigned only to members of the project. General tasks may be assigned to any group or 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 specify a deadline for that task.

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

- **Explain the task required in the Initiator comments.** This is mandatory, and must not be empty to save the task.

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.
10.2 Update an Existing Task
To update an existing task, click on the task's name.

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.

You may update these fields, and click 'Save' to save the changes. Click 'Cancel' to discard any changes made, and you will be directed back to the Tasks page.

10.2 Take a Task
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.

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

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.

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.

10.3 Finish a Task

To finish a task, click 'Finish' on the Task Form view.

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