MEOS
(MANDELA ETHICS ONLINE SYSTEM)

FACULTY REVIEWER USER GUIDE

Version 3.0
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1.   Emails Generated by MEOS

At various points in the review process, you will receive emails from MEOS. These could include the following:

- An email assigning you to a review.
- A reminder to complete your review.
- A notification that an applicant has submitted a revised application (if you are the designated faculty liaison).

These emails are not from a Mandela University server but are generated external to the University system. They will come from an external email address (donotreply@infonetica.net) and will have the yellow Mandela warning indicated.
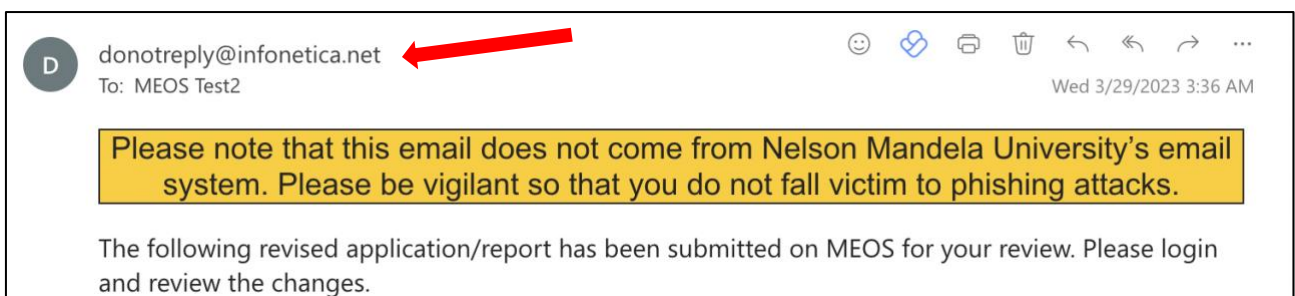
2.   Logging in as a Faculty Reviewer

Navigate to the MEOS reviewer site using the URL – meos-review.mandela.ac.za

Sign in using your Mandela University credentials. These are the same log in details that are used to access your Mandela emails, the staff/student portal, etc.

After signing in, you will be directed to your work area for reviews.

3. Work Area Screen

The Work Area Screen is divided into three sections:

- Top Bar: black bar across top of screen
- General Work Area: 3 tiles – Notifications, Contacts, Reports
- My Reviews Work Area: Tiles pertaining to specific reviews required by you

3.1. Top Bar

There are various features you can access from the Top Bar.

(a)   Personal Details
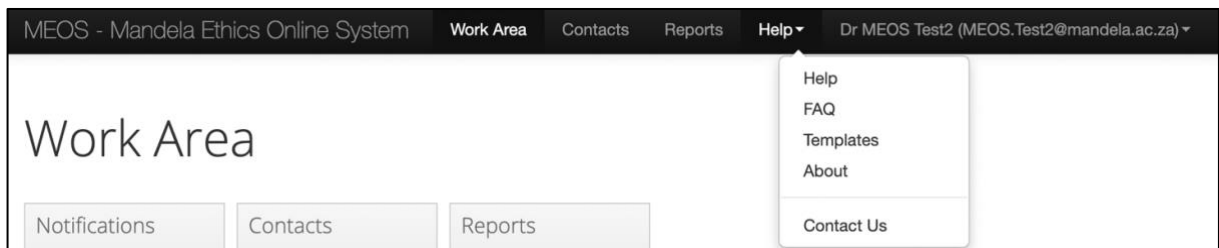
Your personal details are accessed by clicking on the arrow on the right of your email address on the top bar.

To update your personal details, complete the Personal Details form and save using the [Change Details] button.

(b) Help

The Help dropdown has various options.

- Help – not populated
- FAQs – not populated
- Templates – access to review templates if any
- About – not populated
- Contact Us

(c) Reports

The Reports area contains any reports that have been compiled by the faculty administrators which may be of relevance to the reviewers.

(d) Contacts

The faculty administrators may add people external to Nelson Mandela University as a contact, for example, an expert in a specific field. These contacts will appear in this section. Their details can be updated by clicking on the required contact name.

To update a contact, complete/amend the fields and [Update].

(e)   Work Area

This takes you back to the main Work Area screen.

3.2.   General Work Area

The general work area contains three default tiles.
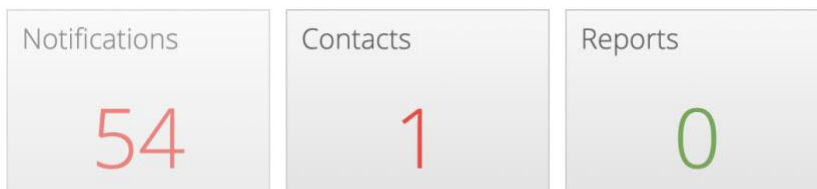
(a)   Notifications

Clicking on the Notifications tile displays all notifications that are relevant to you as a reviewer. Notifications can be searched on message content and/or date. Old notifications can be deleted by clicking on the **X** next to a message.

(b)   Contacts

The Contacts tile brings up any external contacts that have been added to MEOS by the faculty administrators. This may include subject experts, legal experts, etc.

(c)   Reports

The Reports area contains any reports that the faculty administrators have compiled and shared with the faculty ethics committee.

3.3.   My Reviews Work Area

These tiles, as shown below, are specific to you as a faculty reviewer.

- Meeting Reviews – contains all protocols that you need to review for an upcoming ethics meeting.
- Liaison Reviews – contains all protocols to which you have been assigned as the faculty liaison to assist the researcher(s) and ensure that changes are implemented according to the recommendations of the faculty ethics committee.
- Referrals – contains any protocols which you may have been assigned to as an additional reviewer, expert reviewer, etc.

4. How will I know that I have an application to review?

You will be sent an email when you have been assigned to review an ethics submission. This will contain a direct link to the submission.
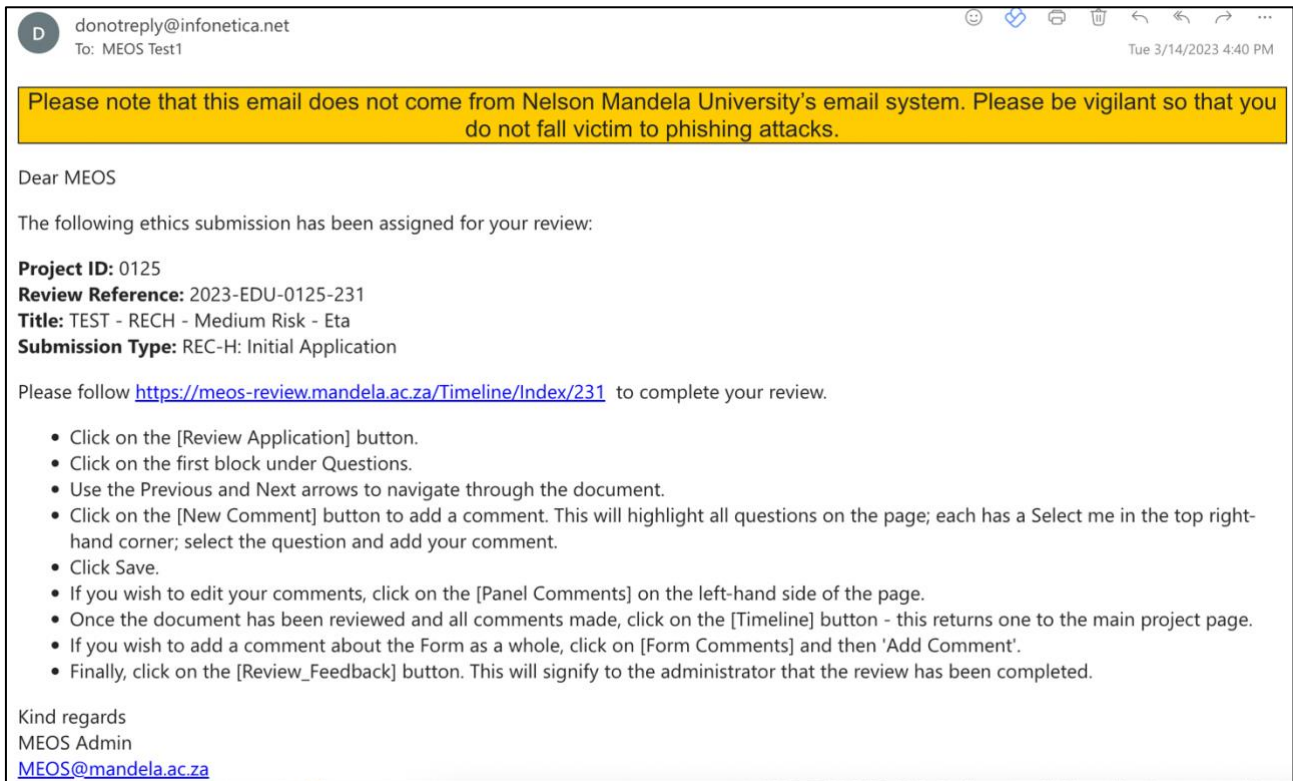
Alternatively, you can log in to MEOS (meos-review.mandela.ac.za) and access it via your work area tiles. The number of reviews to which you have been assigned is indicated on the Meeting Reviews tile.

5.   Actions and Information on an Application Form

Clicking on the Meeting Reviews tile lists the applications to be reviewed. The list can be sorted, if required using the arrows to the left of a column title. Clicking on a submission in the list opens it to the main page of the form.

		Review Reference	Project Id	Review Committee	Application Type	Project Title	Applicant Title	Applicant First Name	Applicant Last Name	Review Status	Assigned Reviewer Full Name	Review Date Received	Review Submission Date
⚑		2023-EDU-0128-238	128	Education	Low/Negligible Risk	Test-RECH-LR-Sigma	Ms	Michelle	Barnett	Assigned to Meeting (Faculty)	Ms MEOS Test1, Dr MEOS Test2	16/03/2023 11:46	16/03/2023 11:46
✓	⚑	2023-EDU-0125-236	125	Education	Medium Risk	TEST - RECH - Medium Risk - Eta	Ms	Michelle	Barnett	Assigned to Meeting (Faculty)	Ms MEOS Test1, Dr MEOS Test2	16/03/2023 09:39	16/03/2023 09:39

The form has three distinct areas:

1. Action panel
2. General information
3. Specific form information

5.1.   The Action Panel

The left-hand Actions panel has the following action buttons:

1 Form Submissions	Form submissions – indicates the number of submission (or versions) of a particular form. When a form is 'sent back' to an applicant for revision, all signatures are invalidated and after revisions are made, the form must be signed and resubmitted again. Each submission of a form is considered to be a separate form version.
0 Project Submissions	Project submissions – indicates the number of submissions made on the project as a whole – includes amendments, extensions, progress reports, etc.

0 Panel Comments	Panel Comments – indicates the number of comments that you have made. Panel comments are specific to the separate questions on the form.
0 Form Comments	Form Comments – indicates the number of general comments made about the form as a whole.
🔍 Review Application	Review Application – opens up the form questions that have been completed by the applicant.
⬙ Fac_My Comments	Fac_My Comments – action to create a document containing YOUR comments for discussion at the FPGSC.
📄 Fac_Review (Approval)	Fac_Review (Approval) – indicates that you have completed your review of the form, that you recommend that the submission be **approved with NO modifications** and alerts the faculty administrator(s) of this.
📄 Fac_Review (Changes)	Fac_Review (Changes) – indicates that you have completed your review of the form, that you recommend that the submission be **approved with modifications** and alerts the faculty administrator(s) of this.
📄 Fac_Review (Resubmission)	Fac_Review (Resubmission) – indicates that you have completed your review of the form, that you recommend that a **resubmission is required** and alerts the faculty administrator(s) of this.

5.2. General Information

Project Title: Test-RECH-LR-Sigma
Form Reference: REC-H: Initial Application
Review Reference: 2023-EDU-0128-238

|			
Project Id:	0128	Applicant Name:	Ms Michelle Barnett
Current Committee:	Education	Current Status:	Assigned to Meeting (Faculty)
Application Type:	Low/Negligible Risk	Meeting:	Education Mar2023 31/03/2023
Clock Status:	Start (14/14) days remaining.	Assigned Reviewers:	Dr MEOS Test2 (Faculty Liaison), Ms MEOS Test1 (Faculty Reviewer)
Conflicted Users:	None	Centre:	Mandela

The following should be noted:

- The Project Title is the short title of the project. In most cases, this will be the approved title of the project, but in some instances, where the title is lengthy, the applicant may opt to define a short project title.
- The Review Reference is made up of the year the specific form being reviewed was submitted, the committee it was first submitted to, the project ID and a form submission number. The form submission number changes with each iteration of the form submitted.
- The Project id is the one constant throughout the life of the project. The project id is hyperlinked and clicking on it brings up a list of any form submitted on the project from extensions to amendments to closures, etc. This enables a reviewer to check on the history of the project.
- Assigned Reviewers indicates any reviewers that have been assigned to the submission. There are four reviewer types:
  - Faculty reviewer – reviews the submission for discussion at the faculty meeting.
  - Faculty liaison - reviews the submission for discussion at the faculty meeting; assigned to liaise with the applicant after the meeting if changes are required.
  - Faculty referral – assigned to assist on a submission if requested, this could be an expert in the field, etc.
  - Faculty chair – assigned to review a submission at the request of the reviewers or the faculty administrator.

5.3. Specific Form Information

(a) The Timeline Tab

The Timeline tab indicates the form timeline both on a graph and as a list of actions. (*Please ignore the Clock Status and Clock Information columns*). The timeline can be moved by placing one's mouse anywhere on the timeline and moving it back or forwards.
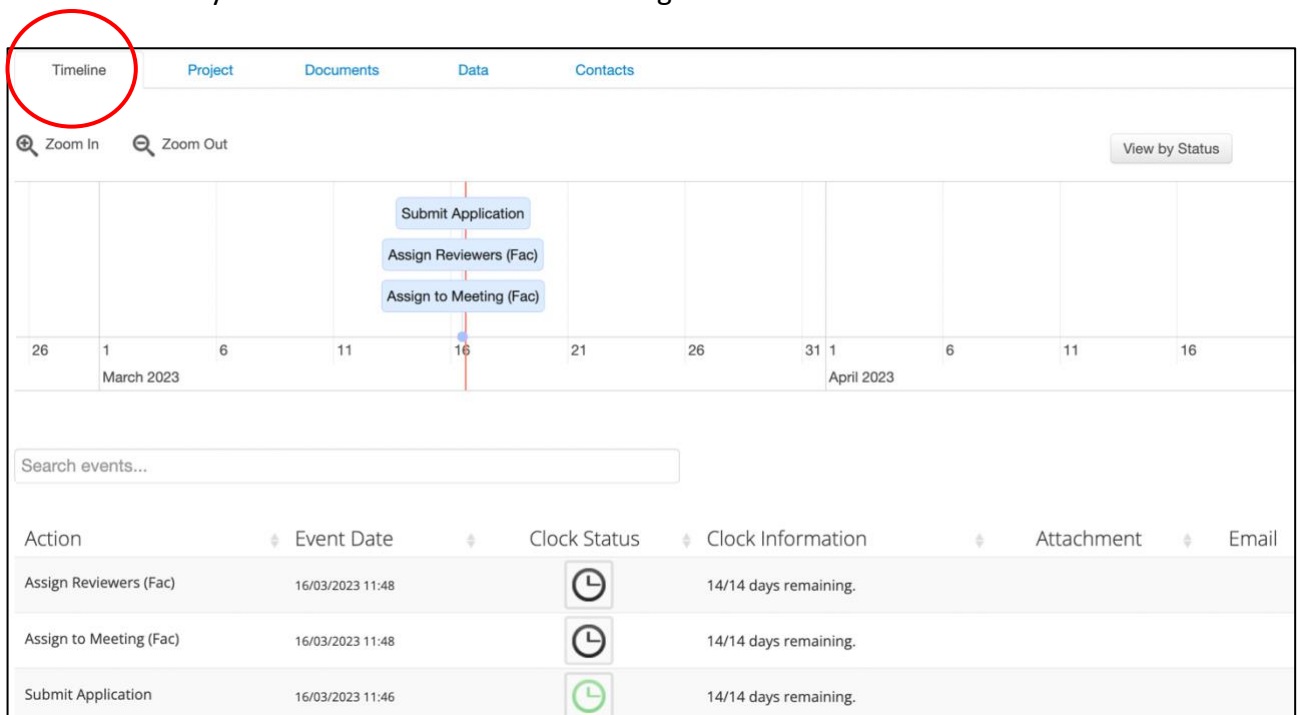
Clicking on either a blue bubble on the timeline or on one of the listed actions, reveals further information about the action that has been performed.

(b)   The Project Tab

The Project tab provides a brief overview of the project as a whole and all form submissions. On a new project, the following will be displayed.

However, on an older project, there may be a number of submissions displayed. This is very useful when you are reviewing the sub-form of a project, for example, an amendment. You can easily open and check the original approved application or an adverse event report, etc. Clicking on any of the forms displayed will open them.

(c)   The Documents Tab

The documents tab provides access to all documents uploaded with a particular form submission. These can be viewed or downloaded.

Form Documents

Search Document

	Type	Document Name	File Name	Version Date	Version	Size	Download
☑	Submission	Submission	Submission.pdf				Download
☑	Research Proposal	Research Proposal	Research Proposal Test 1.docx			22.2 KB	Download
☑	Recruitment Material/Information	Recruitment Info Written	Recruitment Info Written.docx	07/03/2023		22.9 KB	Download
☑	Institutional Permission Draft Letter	Institutional Permission Draft Letter 1	Institutional Permission Draft Letter 1.docx			22.8 KB	Download
☑	Gatekeeper Draft Letter	Gatekeeper Test Letter 1	Gatekeeper Test Letter 1.docx			22.2 KB	Download
☑	Data Collection Instrument	Data Collection Online Questionnaire	Data Collection Online Questionnaire.docx			11.8 KB	Download
☑	Contract Restriction	Contract Restrictions 1	Contract Restrictions 1.docx			22.1 KB	Download
☑	Consent Form	Consent Form	Consent Form Test 1.docx			21.7 KB	Download

Showing 1 to 8 of 8 entries

View Selected   Download Selected

(d)   The Data Tab

This tab is not currently in use.

(e)   The Contacts Tab

The Contacts Tab lists both form and review contacts added to the form. The screenshot below indicates the PRP and PI. This list could include co-workers, co-supervisiors, etc.

Timeline	Project	Documents	Data	Contacts

Form Contacts

Search Contacts

Full Name	Email	Organisation	Type
Ms Julie Smith	julie@gmaile.com	NMU	PRP
Ms Michelle Barnett	Michelle.Barnett@mandela.ac.za	Nelson Mandela University	Applicant

Showing 1 to 2 of 2 entries   First Previous 1 Next

Review Contacts   + New Review Contact

Note: There are currently no contacts listed.

6.   Reviewing an Application

6.1.   Opening an Application
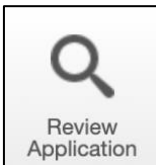
Click on the [Review Application] button in the left-hand action panel of an opened submission to access the sections and questions on a form.

The blue hyperlinked questions provide quick access to the various questions on the form. The questions shown in black cannot be accessed as they are not relevant to the particular submission (for example, in the submission above, there are no co-workers, therefore this question is not required).

The panel on the left-hand side of each page provides the following functionality.

	Takes one to the previous page of the form.
	Takes one to the next page of the form.
	Takes one to the page of the form on which all sections and questions of the form are displayed. This enables one to move between pages of the form easily and quickly.

Timeline	Takes one to the main screen which contains the tabs as well as the action buttons to provide feedback and alert the administrator that the review has been completed.
View as PDF	Enables one to view/download the form as a PDF.
Documents	Displays all documentation uploaded as part of the form.
2 Panel Comments	Shows any comments made on specific questions by faculty administrator, reviewers, etc. Comments that you make will increase this number. Please note that your review comments are not visible to the applicant, nor other reviewers. Any faculty administrator comments made are visible, as these are not regarding issues of an ethical nature but rather poorly completed forms, incomplete documentation, etc.
2 Changes	Shows any changes made by the applicant in response to issues raised. The changes shown are those between the submission being reviewed and the last submission that the applicant made. This will be covered in more detail below.
0 Form Comments	Shows any general comments made on the form as a whole by faculty administrator, reviewers, etc. Comments that you make will increase this number. Please note that your review comments are not visible to the applicant, nor other reviewers. Any faculty administrator comments made are visible, as these are not regarding issues of an ethical nature but rather poorly completed forms, incomplete documentation, etc.
New Comment	Action button to add new comments to a question on the form.

6.2. Reviewer Anonymity

The review comments that you make on the form for feedback and discussion at the faculty ethics meeting are <u>anonymous</u> and <u>independent</u>.

- You cannot see other reviewer comments and they cannot see yours.
- The applicant cannot view any comments made online; they will receive an Action Memo containing the committee feedback after the meeting.

Your comments are visible to the faculty administrator and the faculty ethics chair.

You are able to view any comments that the faculty administrator has made during their initial check of the submission. These comments go directly to the applicant, are visible to all and are not review-related.

6.3. Adding Review Comments (Panel Comments)

To add a comment to a specific question, navigate through the form to that question. Click on the New Comment action button.

The questions on that page will be highlighted and a [Select Me] will appear in the top-right hand corner of the question block.
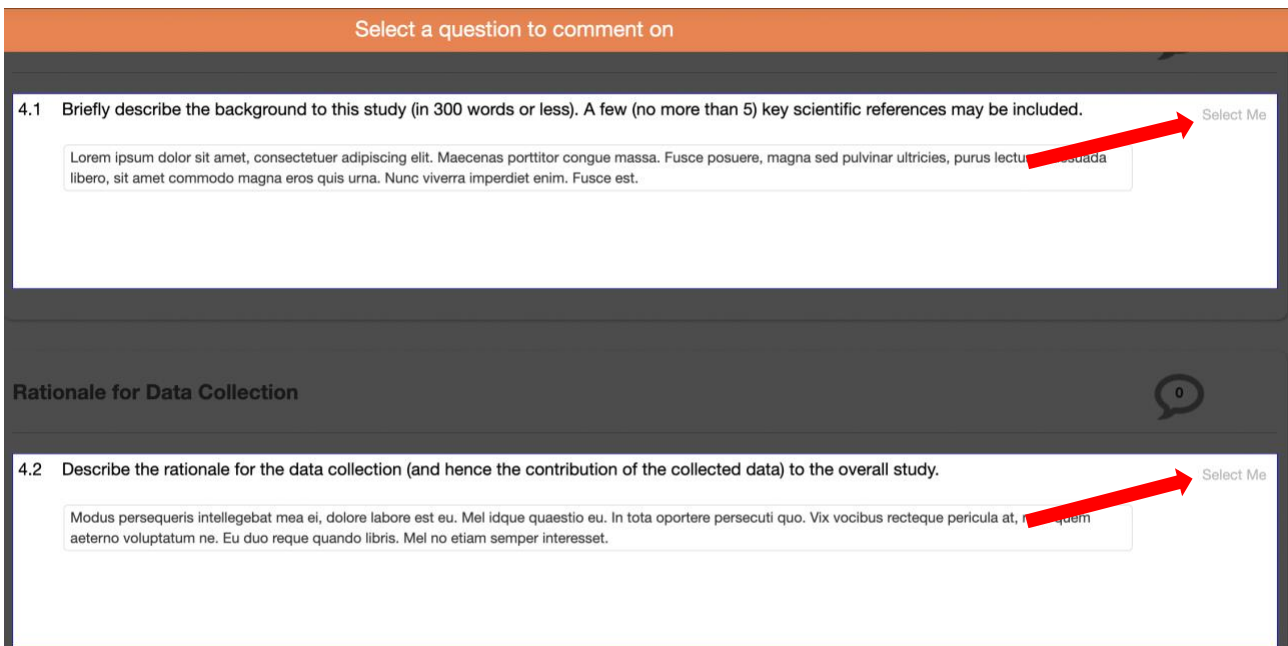
Click on the [Select Me] of the question that you wish to comment on. Add your comment and [Save].

6.4. Reviewing and Editing your Panel Comments

The [Panel Comments] button will increase with each comment made.

Click on the [Panel Comments] button to open all comments made. Any comments made by the ethics administration team during the initial check will appear under the Previous tab. Click on [Edit] to open the comment that you wish to amend.

Update the Comment and [Save]. You can also delete the comment if required.

Please note: Edited/deleted panel comments remain as part of the history of the Project and can be accessed under the History Tab under the Project ID link.

6.5.   Adding General Comments (Form Comments)

General comments are any comments about the application that do not pertain to a specific form question. A form comment should also include your recommendation on approval. Forms comments are independent. Other reviewers cannot view your comments and you cannot view theirs.

Clicking on the [Form Comments] action button opens the Form Comments pop-up.
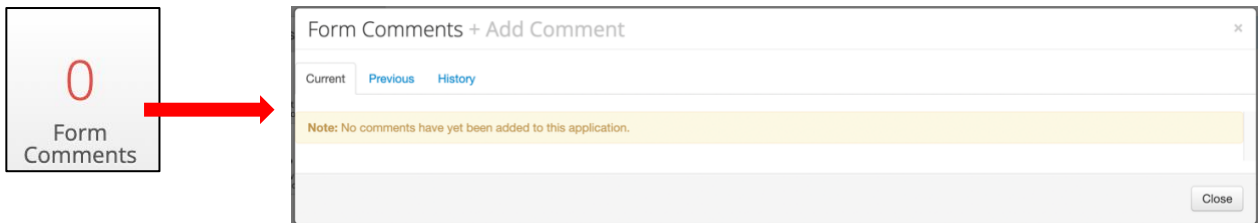
Click on + Add Comment. Add your general comment and [Save].

To edit a form comment, click on the [Form Comments] action button to bring up a list of the forms comments that you have made. Click on the required comment.

Edit your comment and [Save]. The comment can also be deleted if required.

Please note: Edited/deleted form comments remain as part of the history of the Project and can be accessed by under the History Tab under the Project ID link.

6.6.   Submitting your Review

After completing your review, navigate to the main application screen by using the [Timeline] action button.

Click on one of the [Fac_Review] feedback action buttons.
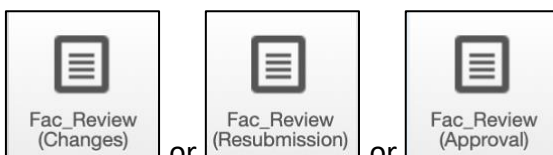
Add a comment to the Timeline Notes. It is suggested that this is your overall recommendation regarding the application.

- Approved with modifications
- Approved with no modifications
- Resubmission (major modifications requiring the submission to serve at a subsequent faculty meeting)

Click the green [Fac_Review] button and then [Yes]. The Timeline comment will be visible to all on the Timeline as outlined in the The Timeline Tab section above.

6.7. Amending your Submitted Review Comments

Reviews can be amended after the [Fac_Review] feedback button has been actioned. The submission remains under the Meeting Reviews tile in your Work Area until the faculty meeting/

To amend your review, open the required form and click on [Review Application].

To edit Panel comments and Form comments, access the full list directly by clicking on the relevant buttons in the left-hand panel.

Alternatively, navigate through the form using the [Previous] and [Next] buttons to the relevant question. A number is indicated in the speech bubble next to any questions that have been commented on. Please note that the number indicates the comments made by ALL committee members who have already reviewed the submission. You will, however, only be able to view your comments.

Click on the speech bubble to open up the specific comment for editing or deletion.
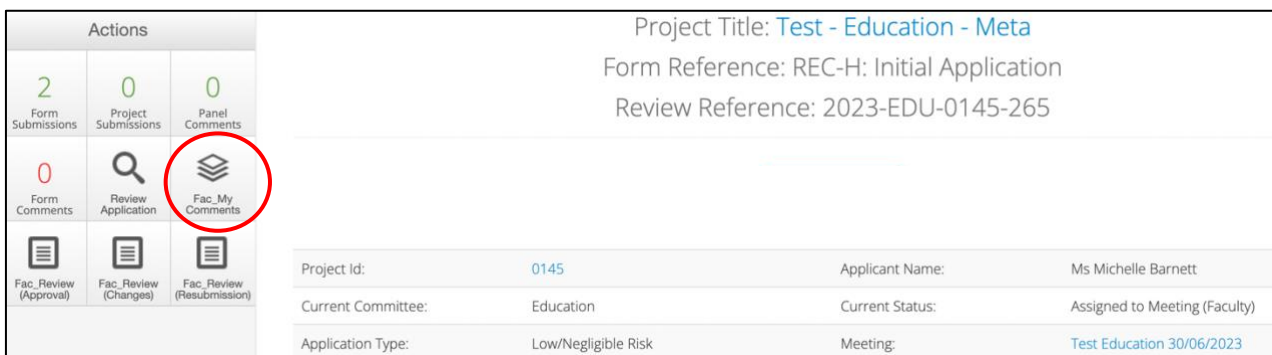
Alternatively, Click on the [New Comment] action button in the left-hand button to add further comments as outlined in the Adding Review Comments (Panel Comments) section.

7. Compiling YOUR Comments for Discussion

An action has been included that enables you to download a document of <u>your comments</u> that can be used for discussion purposes at a review meeting.

Kindly note: Only your comments will be downloaded and not those of other reviewers on the same submission. It is not necessary to send your comments to the faculty administrator to compile as they administrator has the ability to download a document containing all comments on the application.

Click the [Fac_My Comments] action button on the main screen of the application.

This opens a pop-up which pulls in all of your comments on the submission.

You can edit the information on the pop-up as required using the edit tools in the centre of the pop-up.

Click on the green [Fac_My Comments] and [Yes]. An attachment will pop up which can be downloaded.

8. Attending to Revisions as the Faculty Liaison (Post-meeting)

8.1. How will I know if I am the Faculty Liaison on a Submission?

(a)   By Email (assigning you as a reviewer)

If you are assigned as the faculty liaison <u>after</u> the faculty meeting has taken place, you will receive an email indicating to this effect. Clicking on the link in the email will take you directly to the form.

If the status of the form is indicated as "Changes Required (Faculty)", there will be no actions available to you other than [Review Application]. In this status, the application has been unlocked and the applicant is able to edit it before having it signed and resubmitted for your review and approval.

If the status of the form is "Superseded", this means that the applicant has already made revisions and resubmitted. In this case, click on Work Area in the black top-bar and then on the Liaison Reviews tile to access the most recent submission of the form.

(b)   By Email (copied in on Action Memo sent to the applicant)

You will be copied in on the Action Memo email that the applicant/PRP is sent. This Action Memo can also be accessed from the Timeline tab. Click on the Attachment icon in the list of Actions.
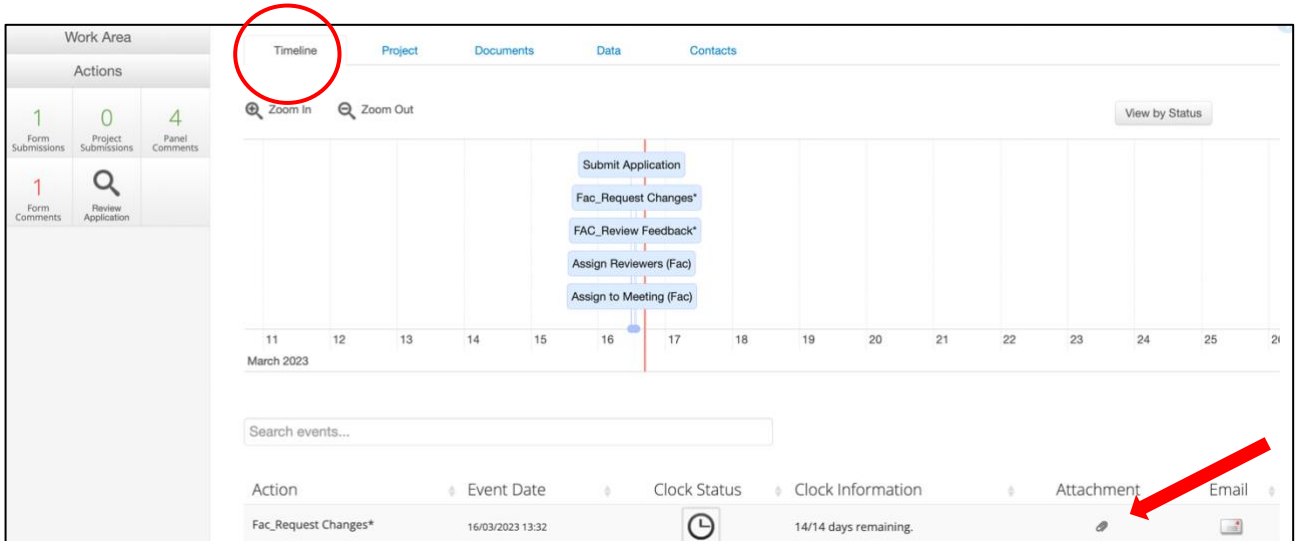
(c)   Liaison Review Tile

If you have been assigned as the faculty liaison, the Liaison Review tile in your MEOS work area will indicate the number of submissions to which you have been assigned as liaison.

8.2.   Explanation of Form Statuses

Click on the Liaison Reviews tile to open the list of submissions to which you have been assigned as liaison. The current status of the form is indicated.

The <u>Review Status</u> of the form indicates if the applicant needs to make revisions and submit to you for approval, or if the revisions have been made and you need to review the changes. There are 4 possible review statuses.

- *Changes Required (Faculty)* – <u>no action</u> is required by you as the liaison. The applicant needs to make revisions based on the Action Memo emailed. The Action Memo will also be copied to you.

- *Changes Submitted (Faculty)* – **ACTION** is required by you. The applicant has made revisions; the form has been re-signed and submitted. You need to review the revisions and either request further revision or approve the revisions.

- *Resubmission Required (Faculty)* – <u>no action</u> is required by you as the liaison. The applicant needs to make revisions based on the Action Memo emailed. The Action Memo will also be copied to you.

- *Resubmission by Applicant (Faculty)* – **ACTION** is required by you. The applicant has made revisions; the form has been re-signed and submitted. You need to review the revisions and either request further revision or approve the revisions.

8.3. How will I know when an Applicant has made Revisions on a Submission?

You will receive an email indicating that the applicant has submitted the revisions for your review. Click on the direct link or access the submission via your MEOS work area and the .

Click on [Review Application] to open the form to review the changes.

8.4.   How do I Review Changes Made on a Form?

After opening the form using the Review Application button, the number of changes made by the applicant is indicated on the [Changes] tile.

Clicking on [Changes] opens up a list of all questions that have been changed by the applicant since the last form submission.

Click on the question that you wish to view. This takes you directly to the question. Click on the [View Changes] button.

Deletions are indicated in red. Additions are indicated in green. To revert to the revised submission, click the [View Latest] button.


Alternatively, you can navigate through the form, page by page, using the Previous and Next buttons. Any changes made are indicated by the blue 'View Changes' strip.

8.5. How do I Request Further Changes to a Form?

If you are not satisfied with the revisions made, add a comment to the relevant question(s) using the process outlined in the Adding Review Comments (Panel Comments) section above.

After you have added further comments, click on the [Timeline] action button in the left-hand panel to return to the main screen of the form.
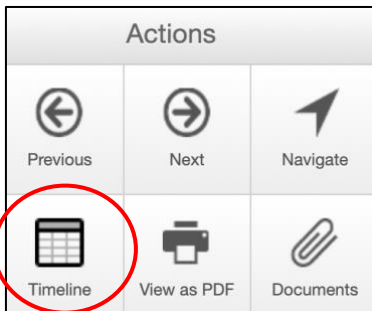
Click on the [Fac_Request More Changes] button.
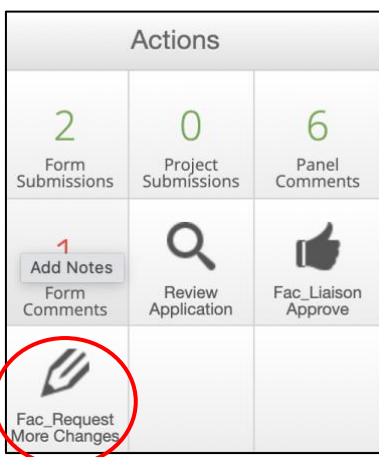
An Action Memo will be generated for the applicant. The comments that you have made on the latest submission will be pulled into the Action Memo. They can be edited to ensure that they are clear for the applicant. You can add additional feedback if required.

Please ignore the banner in yellow. This is a standard banner. Your comments will not be visible to the applicant on the form, and you are unable to mark them as visible. Your comments will be sent on the Action Memo as below.

Edit the Action Memo using the editing tool in the centre of the screen.

Add a mandatory timeline note. This can be specific or generic, for example: Changes required.

When you are satisfied with the Action Memo, click the green [Fac_Request More Changes] button and then [Yes].

After sending the Action Memo, the status of the form will be updated from Changes Submitted (Faculty) to Changes Required (Faculty).


By sending the Action Memo, all signatures are invalidated, and the form is opened for the applicant to make further revisions and resubmit for your approval.

> **IMPORTANT**:
> It is not mandatory to make comments on the form to request further changes. You may prefer to have a meeting or a telephone discussion with the applicant. You may have used email to convey the further changes required. However, you **MUST** re-open the form for the applicant using the [Fac_Request More Changes] action button, even if there are no comments on the Action Memo. If this is not done, the applicant is unable to make the revisions for your approval.

9.   Approving Revisions

When you are satisfied with the changes made by the applicant, navigate to the main screen of the form by clicking on the submission under the [Liaison Reviews] tile or navigating to it from the form itself using the [Timeline] action. Click on the [Fac_Liaison Approve] action.
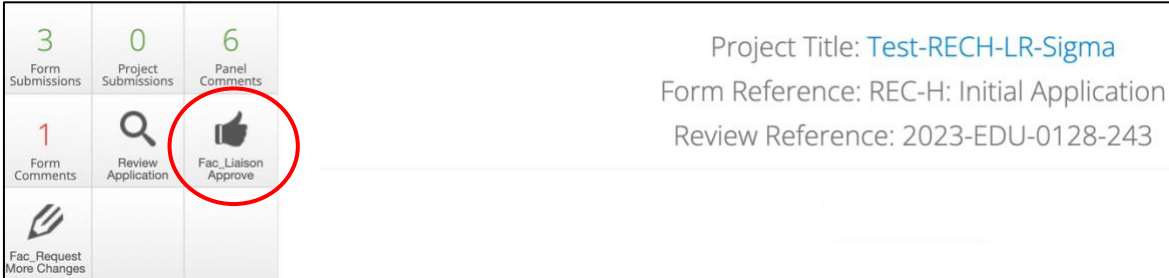
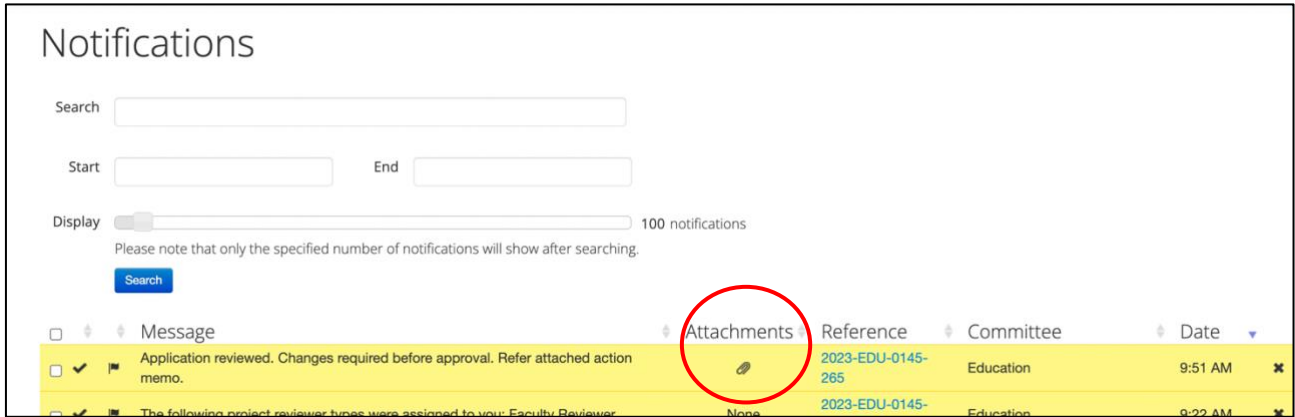Add a comment to the mandatory timeline notes box and click [Fac_Liaison Approve] and [Yes].
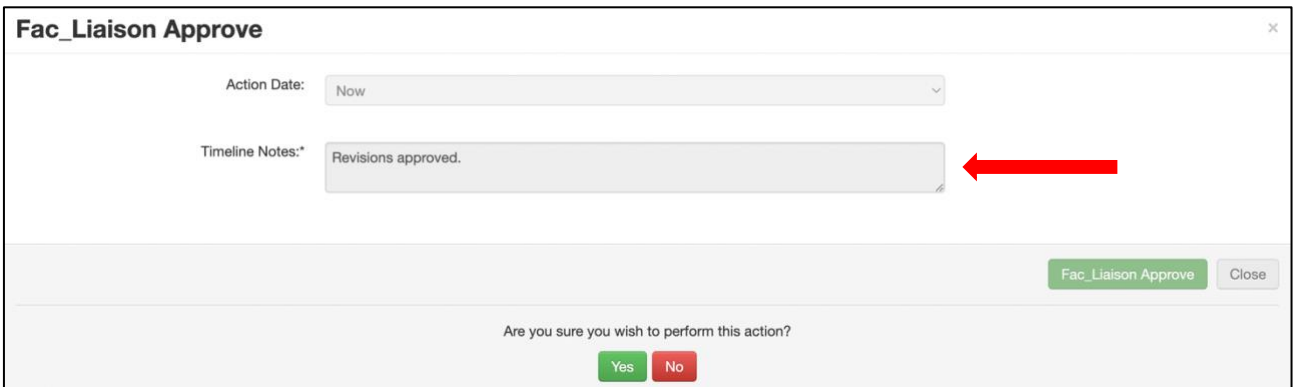
This action sends an email to the faculty administrators, informing them that you have approved the revisions and that the application can be progressed. For low-risk application, a letter of approval will be issued. Medium and high-risk applications will be referred to REC-H for review.

After you have approved the submission, it will no longer be located in your Work Area. The faculty administrator is sent an email indicating that the changes have been approved.

10. Frequently Asked Questions

10.1. I am the faculty liaison on a submission, but I have 'lost' the action memo.

Click on the Notifications Tile in your Work Area. The action memo will be attached to the relevant notification.