MEOS
(MANDELA ETHICS ONLINE SYSTEM)

REC-A REVIEWER USER GUIDE

Version 2.0
September 2023

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1. Introduction

MEOS, the Mandela Ethics Online System, is a web-based management system that facilitates the ethics review process from approval of original ethics application to closure of the project.

All applications/reports with respect to a research study requiring ethics clearance are created, submitted, reviewed, and approved on MEOS, providing one central storage repository where users can access all approved ethics submissions, approval letters and correspondence relating to an application.
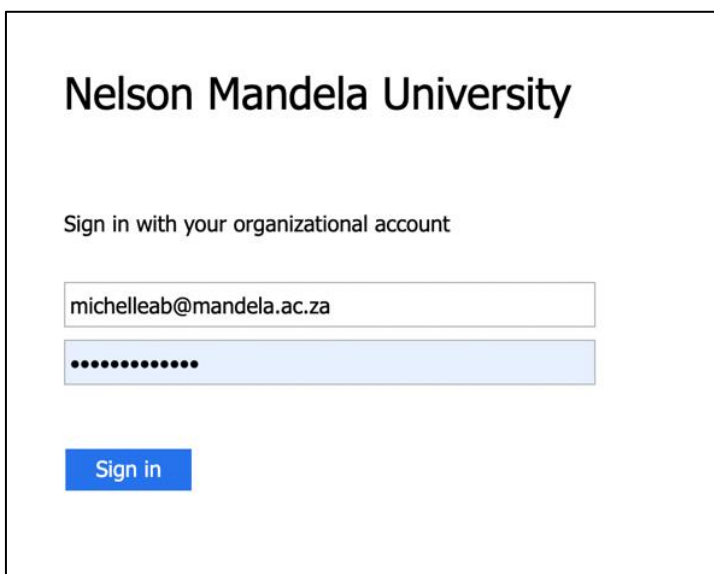
MEOS covers the following ethics submissions:
- Applications for ethics approval
- Amendments
- Extensions
- Progress reports
- Adverse event/violation/deviation reports
- Closure reports

Researchers from other institutions requiring access to Nelson Mandela University students/staff for research purposes cannot apply on MEOS. The process to obtain ethics approval for such research can be found on the RECH website.

2. Logging in as a REC-A 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
- Specific 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.
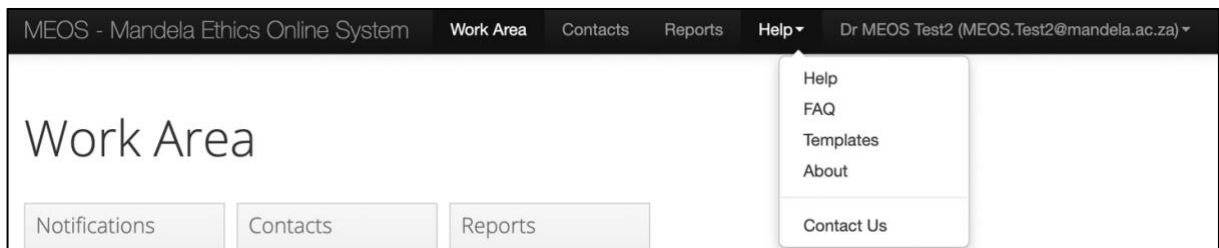
- Help – not populated
- FAQs – not populated
- Templates – access to review templates if any
- About – not populated
- Contact Us

(c)   Reports

The Reports area contains any reports that the REC-A administrators have compiled and shared with the entire REC-A committee.

(d)   Contacts

The REC-A 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 ethics administrators. This may include subject experts, legal experts, etc.

(c) **Reports**

The Reports area contains any reports that the REC-A administrators have compiled and shared with the entire REC-A committee.

3.3. Specific Work Area

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

- Meeting Reviews – contains all protocols for review for an upcoming meeting.
- Electronic Reviews – protocols assigned for electronic review (round-robin).
- Liaison Reviews – contains all protocols to which you have been assigned as the REC-A Representative after a meeting.
- Referrals – contains any protocols which you have been asked to review or comment on by the designated REC-A Representative.

4. Functionality on an Application Explained

You will be sent an email when applications/reports have been assigned to a meeting for review or have been assigned for electronic review (round-robin). Log into MEOS. The number of reviews that need to be completed is indicated on the Meeting Reviews tile or Electronic Reviews tile.

Click on the tile to list the applications to be reviewed. The list can be sorted, if required, by clicking on the arrows to the left of a column title.

Meeting Start Date	Review Reference	Project Id	Application Type	Project Title	Applicant Title	Applicant First Name	Applicant Last Name	Review Status
25/11/2022 12:00	2022-REC-A-0104-184	104	Application (Research)	RECA RESEARCH Epsilon TEST	Mrs	Michelle	Barnett	Assigned to Meeting (RECA)
25/11/2022 12:00	2022-REC-A-0105-183	105	Application (Research)	RECA Research Zeta TEST	Mrs	Michelle	Barnett	Assigned to Meeting (RECA)

Click on the required submission in the list of applications to open it. This opens to the main page of the submission.

4.1. The Action Panel

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

- 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.
- Project submissions – indicates the number of submissions made on the project as a whole – includes amendments, extensions, progress reports, etc.
- Panel Comments – indicates the number of comments that you have made. Panel comments are specific to the separate questions on the form.
- Form Comments – indicates the number of general comments made about the form as a whole.
- Review Application – opens up the form questions that have been completed by the applicant.
- RECA_Review Feedback – indicates that you have completed your review of the form and alerts the ethics administrators of this.

4.2. The Timeline Tab

Scrolling down the page reveals the Timeline tab. This shows the various statuses of this particular form submission both on a graph and below as separate actions. (*Please ignore the Clock Status and Clock Information columns*).
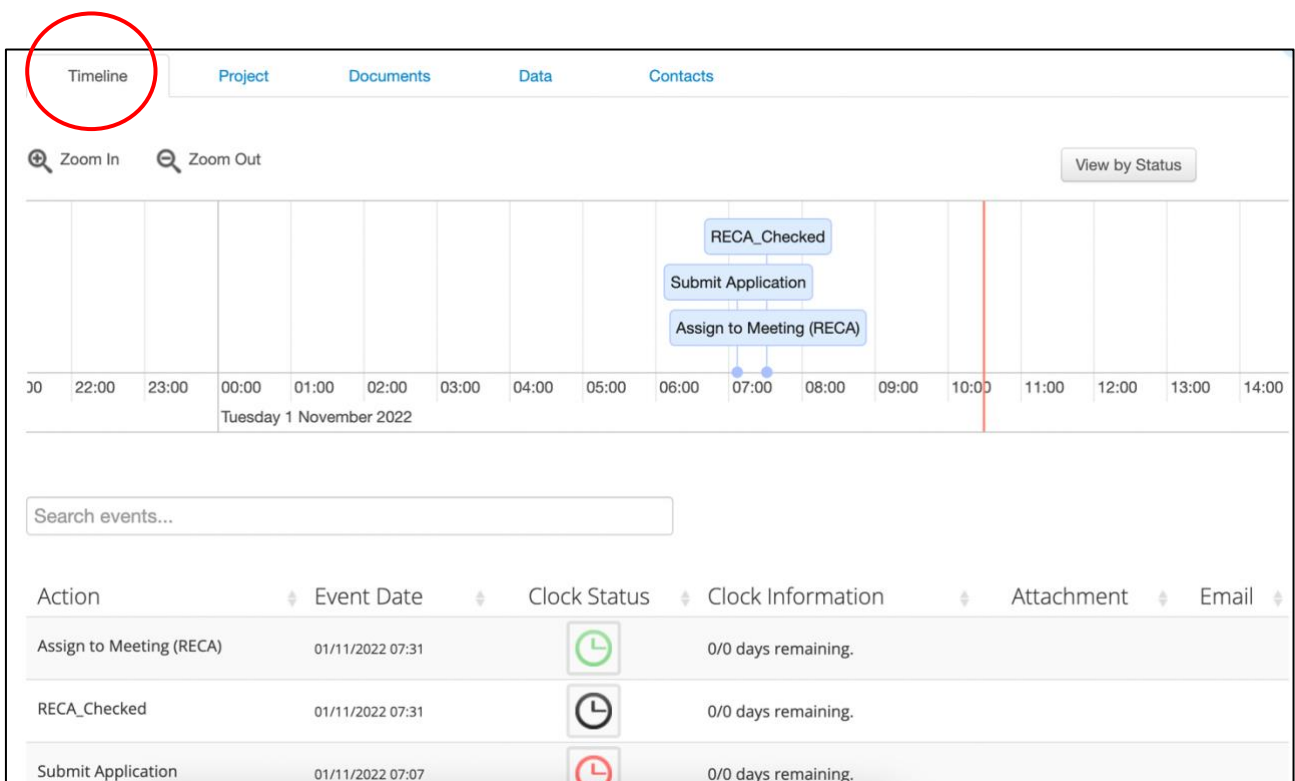
Clicking on either a blue speech bubble or one of the listed actions, reveals further information about the action that has been performed.

Event Information ✕

Event:	Assign to Meeting (RECA)
Start Date:	Tuesday, November 1, 2022
Recorded Date:	Tuesday, November 1, 2022
Clock Action:	Start
Status Before:	Submission Checked (RECA)
Status After:	Assigned to Meeting (RECA)
Attachment:	
Performed By:	Michelle Barnett
Timeline Notes:	
Action Detail:	

Close

4.3. The Project Tab

Clicking on 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.

Timeline	Project	Documents	Data	Contacts

RECA Research Zeta TEST

REC-A: Initial Application (Research)

However, on an older project, there may be a number of submissions displayed. This is very useful when reviewing a 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. To access these other forms for a project, click on the required form to view it.

Timeline	Project	Documents	Data	Contacts

RECA PRACTICAL Beta TEST

REC-A: Initial Application (Practicals)

REC-A: Adverse Event/Violation/Deviation (Practical)

REC-A: Annual Progress Report (Practical)

REC-A: Documentation Upload/Additional Information

REC-A: Amendment (Practical)

4.4.   The Documents Tab

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

4.5.   The Data Tab

This tab is not currently in use.

4.6.   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, lab technicians, etc.

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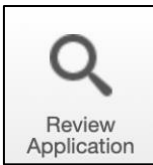
Click on the [Review Application] button in the left-hand action panel of an opened submission to access the sections and questions on a form.

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 supervising vets, 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 the ethics administration team during the initial check before the submission is assigned to the meeting for review. Comments that you make will also increase this number.
2 Changes	Shows any changes made by the applicant in response to issues raised by ethics administration team. This will be covered in more detail below.
0 Form Comments	Shows any comments made on the form as a whole by the ethics administration team during the initial check before the submission is assigned to the meeting for review. Comments that you make will also increase this number.
New Comment	Action button to add new comments to a question on the form.

5.1. Reviewer Anonymity

The review comments that you make on the form for feedback and discussion at the REC-A meeting are anonymous and independent.

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

Your comments are visible to the ethics administration team and the REC-A Chair.

You are able to view comments that the ethics administration team have made during their initial check of the submission. These comments go directly to the applicant, are visible to all and are not review-related.

5.2. Adding your Review Comments (Panel Comments)

To add a comment to a specific question, click on the New Comment action button in the left-hand panel.
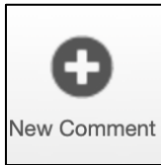
The questions on that page will be highlighted and a [Select Me] will appear in the top-right hand corner of the question block.
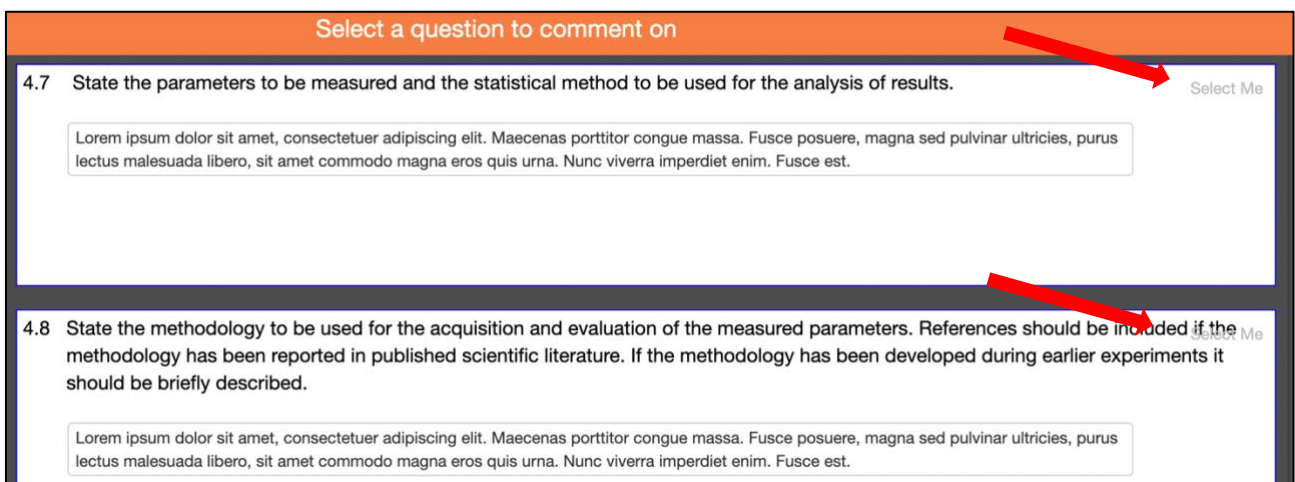
Click on the [Select Me] of the question that you wish to comment on. Add your comment and [Save].

5.3.   Reviewing and Editing your Review 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], or [Delete] the comment if required.

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

5.4. Adding your 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.
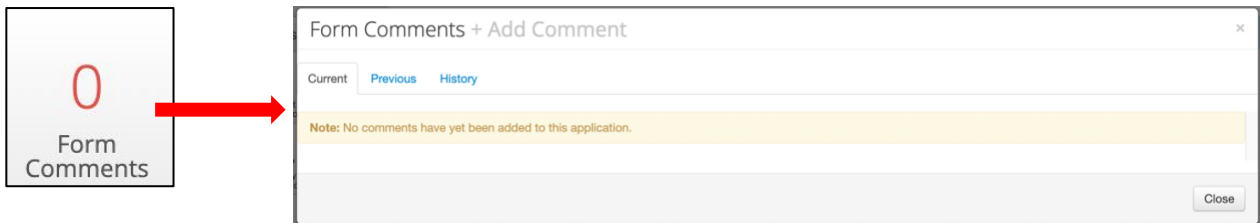
Click on + Add Comment. Add your general comment and [Save].

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 and [Save] or [Delete].

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

5.5. Submitting your Review

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

Click on one of the Feedback action buttons.

- **Feedback - Changes Req'd**: indicates that the submission is approved with modifications

- **Feedback - No Changes**: indicates that the submission is approved with NO modifications

- **Feedback - Resubmission**: indicates that you suggest a resubmission for this submission that should serve at a meeting after revisions have been made

Add an optional comment to the Timeline Notes, click the green [Feedback] button and then [Yes]. This comment will be visible to all on the Timeline as outlined in the The Timeline Tab section above.

Feedback - Changes Req'd

Action Date: Now

Timeline Notes: Minor changes

Timeline notes are not shared with Researchers

[Feedback - Changes Req'd]

Are you sure you wish to perform this action?

[Yes] [No]

5.6. Amending a Review after Submitting Feedback

Reviews can be amended after the [RECA_Review Feedback] button has been actioned. The submission will remain under the Meeting Reviews tile in your Work Area until the RECA Meeting.

To amend your review, open the required form and click on [Review Application]. Click on the first hyperlinked question to access the questions and navigate through the form using the [Previous] and [Next] buttons.

A number will appear 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.

Animal Types   💬 1

4.1   To which category of animals do the animals to be used in this study belong (*select all that apply*)?

- ☐ Domestic animals
- ☑ Farm or agricultural animals
- ☐ Feral animals
- ☐ Laboratory animals
- ☐ Higher invertebrates
- ☐ Lower invertebrates (including insects)
- ☐ Marine animals or aquaculture
- ☐ Non-human primates
- ☐ Wildlife animals
- ☐ Zoo Animals
- ☐ Other

Click on the speech bubble to open up the comment for editing or deletion.

Comments

Current	Previous	History

Title	Comment	Added	Modified	
4.2 Details of Animals	Modus persequeris intellegebat mea ei, dolore labore est eu. Mel idque quaestio eu. In tota oportere persecuti quo. Vix vocibus recteque pericula at, nam quem aeterno voluptatum ne. Eu duo reque quando libris. Mel no etiam semper interesset.	01/11/2022 17:13	You	[Edit]

Alternatively, Click on the [New Comment] action button in the left-hand button to add further comments as outlined in the Adding your Review Comments (Panel Comments) section.

Panels comments and Form comments can also be directly accessed by using the relevant buttons in the left-hand panel.

6	0	2
Panel Comments	Changes	Form Comments

6.   Attending to Revisions as the RECA Liaison

6.1.   How will I know if I am the RECA Liaison on a Submission?

An email as shown below will be sent to you if you have been assigned as the RECA Liaison on a submission that requires revision by the applicant, either for approval or for resubmission to a subsequent RECA committee meeting.

Dear

You have been assigned to the following submission, either as the REC-A liaison or in a referral capacity (at the request of the REC-A Liaison/Chair, etc.).

2022-REC-A-0104-184 : RECA RESEARCH Epsilon TEST

This submission can be accessed as follows:

- REC-A Liaison: Log on to MEOS (meos-review.mandela.ac.za) and access it via the Work Area tile called [Changes to review].

- REC-A Referreal: Log on to MEOS (meos-review.mandela.ac.za) and access it via the Work Area tile called [Referrals].

You will also be sent a copy of the Action Memo that the applicant receives.

Project ID:	0104
Title:	RECA RESEARCH Epsilon TEST
Degree:	Masters
Risk Level of Study:	Medium
PRP:	Mrs Michelle Barnett
PI:	Mr Thomas Smith
Submission Type:	REC-A: Initial Application (Research)
Meeting Date:	25 November 2022
REC-A Representative:	Ms MEOS Test1

Title	Comment
4.1 Animal Type(s)	Are you sure that this the correct category?
4.4 Holding Density	The holding density should be recalculated. It is not correct.
4.4 Holding Density	Modus persequeris intellegebat mea ei, dolore labore est eu. Mel idque quaestio eu. In tota oportere persecuti quo. Vix vocibus recteque pericula at, nam quem aeterno voluptatum ne. Eu duo reque quando libris. Mel no etiam semper interesset.
4.7 Parameters and Analysis	Modus persequeris intellegebat mea ei, dolore labore est eu. Mel idque quaestio eu. In tota oportere persecuti quo. Vix vocibus recteque pericula at, nam quem aeterno voluptatum ne. Eu duo reque quando libris. Mel no etiam semper interesset.
4.8 Methodology	Modus persequeris intellegebat mea ei, dolore labore est eu. Mel idque quaestio eu. In tota oportere persecuti quo. Vix vocibus recteque pericula at, nam quem aeterno voluptatum ne. Eu duo reque quando libris. Mel no etiam semper interesset.
4.11 Euthanasia	Modus persequeris intellegebat mea ei, dolore labore est eu. Mel idque quaestio eu. In tota oportere persecuti quo. Vix

6.2. How will I know if an Applicant has made Revisions on a Submission?

You will receive an email indicating that the applicant has submitted the revisions for your review.

MEOS: Revised submission for review

D donotreply@infonetica.net
To: MEOS Test1

Sat 11/12/2022 3:19 AM

The following revised application/report has been submitted on MEOS for your review. Please login and review the changes.

Project Title: RECA RESEARCH Epsilon TEST
Submission Type: REC-A: Initial Application (Research)

The submission can be accessed by logging into MEOS via [meos-review.mandela.ac.za]meos-review.mandela.ac.za or using the direct link: https://meos-review.mandela.ac.za/Timeline/Index/185

6.3. How do I Access all Submissions on which I am RECA Liaison?

Log on to your MEOS review work area (meos-review.mandela.ac.za). The number on the [Liaison Reviews] tile indicates the number of submissions that you are assigned to as liaison.

My Reviews (RECA) ▲

Meeting Reviews	Liaison Reviews	Referrals
1	2	0

Clicking on the tile displays the list of submissions.

The <u>Review Status</u> 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 (RECA)* – <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 (RECA)* – **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 (RECA)* – <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 (RECA)* – **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.

Click on an application which has been revised and then [Review Application] to open the form and review the changes made.

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

After opening the form, the number of changes made by the applicant is indicated on the [Changes] tile. (Please note: The Panel Comments and Form Comments buttons will only show your review comments made during the initial review of the form for the RECA committee meeting).

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

Click on a hyperlink. This takes you directly to the question with a [View Changes] button.

Click on [View Changes] to view the changes made. Deletions are indicated in red. Additions are indicated in green. The [View Changes] button will change to a [View Latest] button.

Clicking on the [View Latest] button shows the revised version only.

6.5. 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 your Review Comments (Panel Comments)** section above.

When all comments have been added, click on the [Timeline] action button.
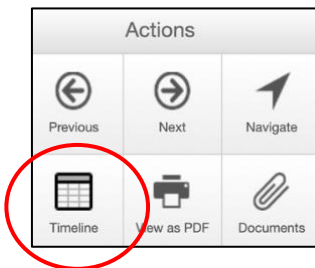
Click on the [RECA_Request More Changes] button.

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.

Please ignore the banner in yellow. This is a standard banner. Your comments <u>will not</u> 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, for example: Changes to Q4 required.

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

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

Project Title: RECA RESEARCH Epsilon TEST
Form Reference: REC-A: Initial Application (Research)
Review Reference: 2022-REC-A-0104-185

Project Id:	0104	Applicant Name:	Mrs Michelle Barnett
Current Committee:	Research Ethics Committee (Animal)	Current Status:	Changes Required (RECA)
Application Type:	Application (Research)	Meeting:	Unassigned

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 [RECA_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.

7. Approving Revisions

When you are satisfied with the changes, 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 [RECA_Liaison Approve] action.

Add a comment to the mandatory timeline notes box and click [RECA_Liaison Approve] and [Yes].

This action sends an email to the ethics administration team informing them that you have approved the submission and the approval letter can be issued.

After you have approved the submission, it will no longer be found in your Work Area.