

Ethics Review Manager

User Guide

Reviewer

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Getting started

Click [here](#) to log into the review side of the system (University MWS login required).

On campus:

Username: your username

Password: your password

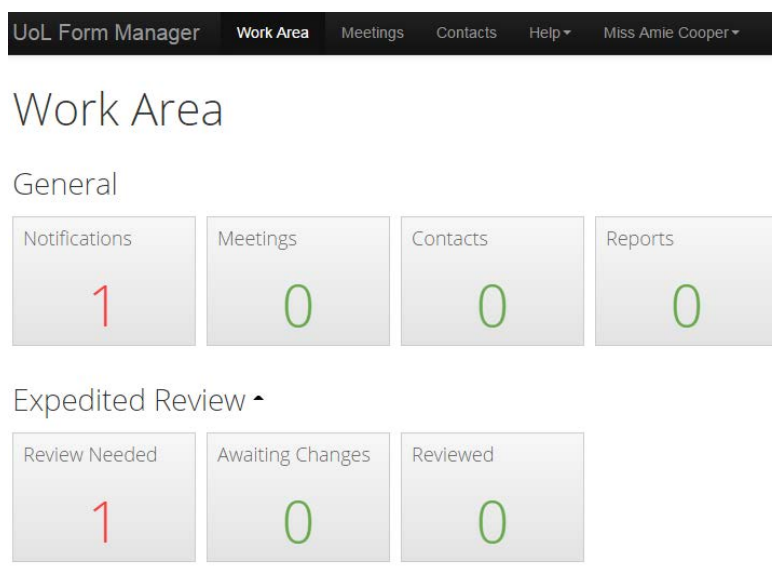
Off campus:

Username: yourusername@liverpool.ac.uk

Password: your password

Interface

After logging in, you arrive at the **Work Area**:



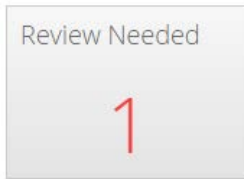
The **Review Needed** | **Awaiting Changes** | **Reviewed** tiles provide an overview of your projects. Tiles can be moved to change the order. Selecting a tile allows you to view associated applications.

Review Needed shows applications that require review.

Awaiting Changes shows applications that you have initially reviewed that are awaiting changes from the applicant.

Reviewed shows previously reviewed applications that are now completed.

Selecting an application to review



Applications requiring review are displayed in the **Review Needed** tile. To review an application, select the **Review Needed** tile, and then select the application you wish to review.

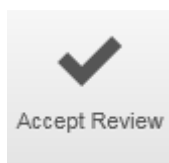
Navigation – Timeline (project main page)

Once you have selected the project, you arrive at the project main page:

The screenshot shows the "UoL Form Manager - Review" interface. At the top, there is a navigation bar with "Work Area", "Meetings", "Contacts", "Help", and "Miss Amie Cooper". Below this is a "Work Area" sidebar with "Actions" and various icons for "Form Submissions", "Project Submissions", "Question Comments", "Overall Recommendation", "View Application", "Accept Review", "Decline Review", and "Review Complete". The main content area displays "Project Title: test application", "Form Reference: Research Ethics Application Form", and "Review Reference: 0704". A "Delete submission" button is visible. Below this is a table with project details:

Project Id:	0704	Applicant Name:	Mr Chris Gore
Current Committee:	Default Committee	Current Status:	Awaiting Reviewers
Application Type:	Expedited Review	Meeting:	Unassigned
Clock Status:	Start (0/15) days elapsed.	Assigned Reviewers:	Miss Amie Cooper (Reviewer)
Conflicted Users:	None		

At the bottom, there are tabs for "Timeline", "Project", "Documents", "Contacts", and "Correspondence". Below the tabs are "Zoom In" and "Zoom Out" icons.



Please **Accept Review** (or **Decline Review**) at this point.

View Application takes you into the application to begin the review.

Accept Review sends an email to the appropriate administrator alerting them that review has been accepted.

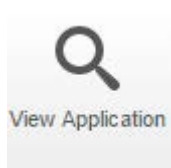
Decline Review sends an email to the appropriate administrator alerting them that review has been declined.

Review Complete should be selected once you have completed your review. This sends an email to the appropriate administrator alerting them that review is complete.

Question Comments shows any comments you have added to a question.

Overall Recommendation shows any overall comments/recommendation you have added relating to the application.

Reviewing an application



After selecting **View Application**, you arrive at the project main page to begin the application review:

The screenshot shows the UoL Form Manager - Application interface. The top navigation bar includes "Home", "Contacts", and "Help". The user is logged in as "Mr Chris Gore". The main area displays the project name "bfvdsb" and a notification count of "93". A table shows the "Form Status" as "Not Submitted" and "Review Reference" as "N/A". Below the table are navigation tabs for "Documents", "Signatures", "Collaborators", "Submissions", "Correspondence", and "History". The main content area is titled "Research Ethics Application Form" and lists sections: "1. Research ethics application (Start here)", "24. Research governance permissions", and "25. Declaration and submission". There are buttons for "Section 1", "Section 24", and "Section 25". The footer includes "© Infonetica Ltd 2016 Version 6.3.0.0" and "Terms and Conditions | Privacy Policy".

Please start with **Section 1. Research ethics application** and begin reviewing the form by selecting the section name ([Section 1](#)).

Note:

Section in blue can be accessed (e.g. [Section 1](#))

Inactive sections are not required and have not been filled in, therefore cannot be accessed

Reviewing an application – adding comments



Reviewer comments can be added against a question by selecting the **New Comment** button from the left side panel.

The screenshot shows the 'UoL Form Manager - Review' interface. The top navigation bar includes 'Work Area', 'Meetings', 'Contacts', 'Help', and 'Miss Amie Cooper'. The left sidebar contains a 'Work Area' dropdown, 'Actions' dropdown, and several icons: 'Previous', 'Next', 'Navigate', 'Timeline', 'Print', 'Documents', 'Question Comments', 'Changes', 'Overall Recommendation', and 'New Comment'. The main content area is titled 'Research Ethics Application Form' and displays 'Project Id: 1930' and 'Version: v2.21'. Below this, 'Section 1: Project details' is shown with a speech bubble icon containing the number '0'. A 'Note to applicant' section provides help and support information, including links to user guides, help, training, and email support.

UoL Form Manager - Review Work Area Meetings Contacts Help Miss Amie Cooper

Work Area ▾

Actions ▾

Previous Next

Navigate Timeline

Print Documents

Question Comments Changes

Overall Recommendation New Comment

Research Ethics Application Form

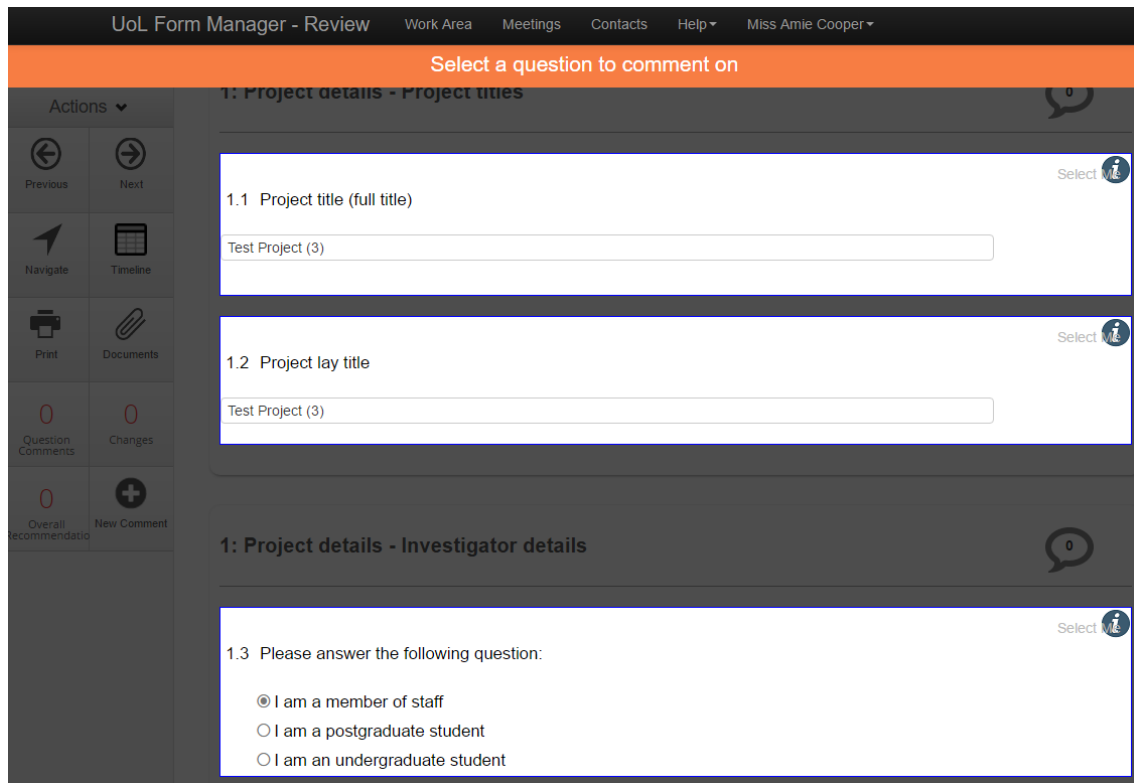
Project Id: 1930 Version: v2.21

Section 1: Project details

Note to applicant: The following help and support is available to assist you in completing your application:

- **User guides:** [Applicant User Guide](#) | [Student Applicant User Guide](#)
- Select the (i) icon next to a question for question-specific help
- Select **Help** from the top of the page for a list of contacts and frequently asked questions
- **Training:** It is a mandatory condition that all Principal Investigators and Supervisors have completed the [Epigeum](#) research ethics training module before submitting an application for research ethics approval
- **Email support** at the bottom of each section: [Ethics System Support](#) for technical issues using the system | [Research ethics query](#) for general queries relating to research ethics

After selecting **New Comment**, select the box which contains the question you would like to comment against:



Selecting the box opens the **Comments** window:

The 'Add Comment' dialog box has a title bar with 'Add Comment' and a close button (X). Below the title bar, there are two columns: 'Question Title' and 'Project lay title'. Under 'Question Title', the text 'Comment' is displayed. To the right of 'Project lay title' is a large text input field. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Save'.

Type your comment into the Comment box and then select **Save** to save the comment.

Referencing the question

Section 1: Research ethics application

1.1 Project title (full title)

my test project

1.2 Project lay title (the lay title should be used on the consent forms and information sheets)

my test project

When adding a comment, it is important to reference the **question number** (e.g. **1.1**) so the comment makes sense when sent to the applicant:

Example:

1.1 Please add a full project title

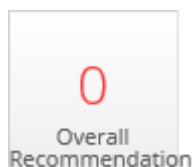
Add Comment ×

Question Title Project title (full title)

Comment 1.1 Please add project title

Cancel Save

Reviewing an application – completing the review



Once you have reviewed all answers in the application and added **Question Comments** (if required), an overall recommendation must be added using the **Overall Recommendation** button. This should take into account the following factors:

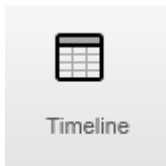
- Is the purpose, design, and methodology of the planned research feasible?
- Are there any potential conflicts of interests?
- Are there satisfactory justifications for research involving vulnerable participants?
- Are there satisfactory safeguards for research discussing sensitive topics?
- Are the reimbursements offered to participants appropriate?
- Is the recruitment of participants appropriate and free from coercion?
- Has the applicant satisfied the obligations of informed consent?
- Has the applicant satisfied the duty of confidentiality?
- Has the applicant adequately considered all likely risks, and ensured that appropriate safeguards are in place?
- Are the arrangements in place for data access, storage, and dissemination appropriate?
- Is the consent sheet appropriate?
- Is the participant information sheet adequate?

Once the above factors have been considered, you should clearly outline whether the application is:

Approved

Further modification/clarification needed before approval can be granted

Rejected



Once you have added your recommendation, select the **Timeline** button to return to the project main page and mark the application as **Review Complete**:

UoL Form Manager - Review Work Area Meetings Contacts Help ▾ Miss Amie Cooper ▾

Work Area ▸

Actions ▾

- Form Submissions: 0
- Project Submissions: 0
- Question Comments: 0
- Overall Recommendation: 0
- View Application: [Magnifying Glass Icon]
- Accept Review: [Checkmark Icon]
- Decline Review: [X Icon]
- Review Complete: [Thumbs Up Icon]

Please Note: This is a beta Submission

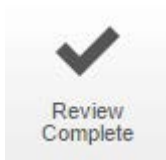
Project Title: test application
Form Reference: Research Ethics Application Form
Review Reference: 0704

Delete submission

Project Id:	0704	Applicant Name:	Mr Chris Gore
Current Committee:	Default Committee	Current Status:	Awaiting Reviewers
Application Type:	Expedited Review	Meeting:	Unassigned
Clock Status:	Start (0/15) days elapsed.	Assigned Reviewers:	Miss Amie Cooper (Reviewer)
Conflicted Users:	None		

Timeline Project Documents Contacts Correspondence

Zoom In Zoom Out

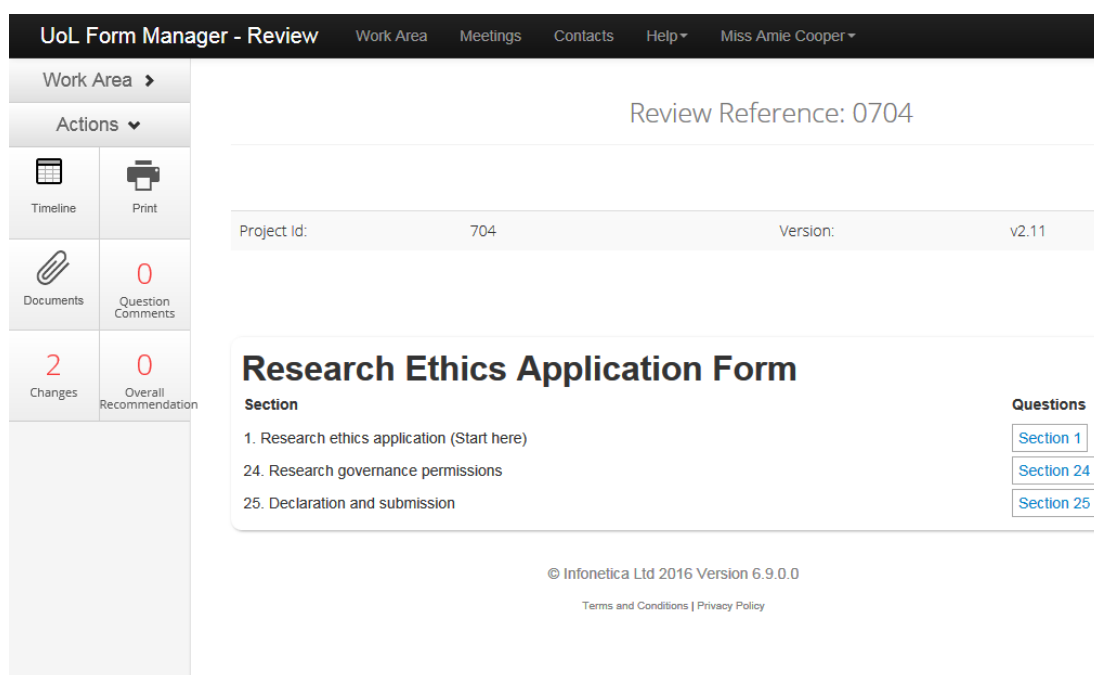


Selecting **Review Complete** sends an email to the appropriate administrator indicating you have completed the review.

Reviewing changes

If changes to the application were requested, the system will send you an email indicating that the changes have been made and the resubmitted application is ready for further review.

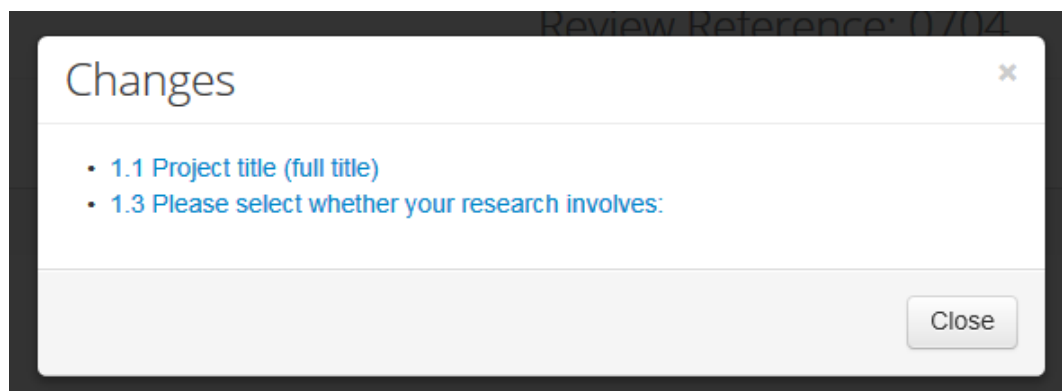
To view the changes, select **View Application** to take you back into the project, then select **Changes** from the left side panel:



The screenshot shows the 'UoL Form Manager - Review' interface. The top navigation bar includes 'Work Area', 'Meetings', 'Contacts', 'Help', and 'Miss Amie Cooper'. The left sidebar contains a 'Work Area' dropdown, 'Actions' (Timeline, Print), 'Documents', 'Question Comments', 'Changes' (with a red '2'), and 'Overall Recommendation' (with a red '0'). The main content area displays 'Review Reference: 0704' and 'Project Id: 704' with 'Version: v2.11'. Below this is the 'Research Ethics Application Form' with sections: '1. Research ethics application (Start here)', '24. Research governance permissions', and '25. Declaration and submission'. A 'Questions' sidebar on the right lists 'Section 1', 'Section 24', and 'Section 25'. The footer includes '© Infonetica Ltd 2016 Version 6.9.0.0' and 'Terms and Conditions | Privacy Policy'.

Selecting **Changes** opens a window that lists any questions in which changes have been made.

Selecting a change will take you directly to the question in the form:



The screenshot shows a 'Changes' window with a close button (X) in the top right corner. The window contains a list of changes:

- 1.1 Project title (full title)
- 1.3 Please select whether your research involves:

A 'Close' button is located at the bottom right of the window.

After selecting a question that has changed, you have the option of viewing the previous answer for comparison. Selecting the **View Previous** button toggles between the updated and previous answer, and also allows you to view any comments you left against the question (if applicable):

Note: The applicant has changed an answer within this panel since the last submission. [View Previous](#)

Section 1: Research ethics application 0

Project title (full title)

Project lay title (the lay title should be used on the consent forms and information sheets)

my research project

At this point you can add further comments if required by selecting the **New Comment** button. You must add an **Overall Recommendation** indicating whether you're happy with the changes, and provide an updated recommendation to **Approve**, **Request Further Modifications** or **Reject**.

Once you have added your recommendation, select the **Timeline** button to return to the project main page and mark the application as **Review Complete**. Selecting **Review Complete** sends an email to the appropriate administrator indicating you have completed the review.

Contacts

For systems support, please contact:

Ethics System Support

Email: ethicssy@liverpool.ac.uk

Telephone: 794-8776

For ethics support, please contact:

Research Ethics and Integrity

Email: ethics@liverpool.ac.uk

Telephone: Mathew Billington – 794-8290 | Mantalena Sotiriadou – 795-8355