

Kindly note:

- Internet Explorer is not compatible with MEOS; some functionality may be lost.
- It is suggested that Chrome, Edge, Safari or Opera, amongst others be used.

NELSON MANDELA
UNIVERSITY



**MEOS
(MANDELA ETHICS ONLINE SYSTEM)**

**USING THE DRAFT ACTION
USER GUIDE**

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1. What is the draft action?

The draft action enables two or more users to work on the action memos that are generated by MEOS. For example, an administrator could draft the action memo which the relevant committee chair could view and edit before it is sent to the applicant.

2. When will I see the draft action button?

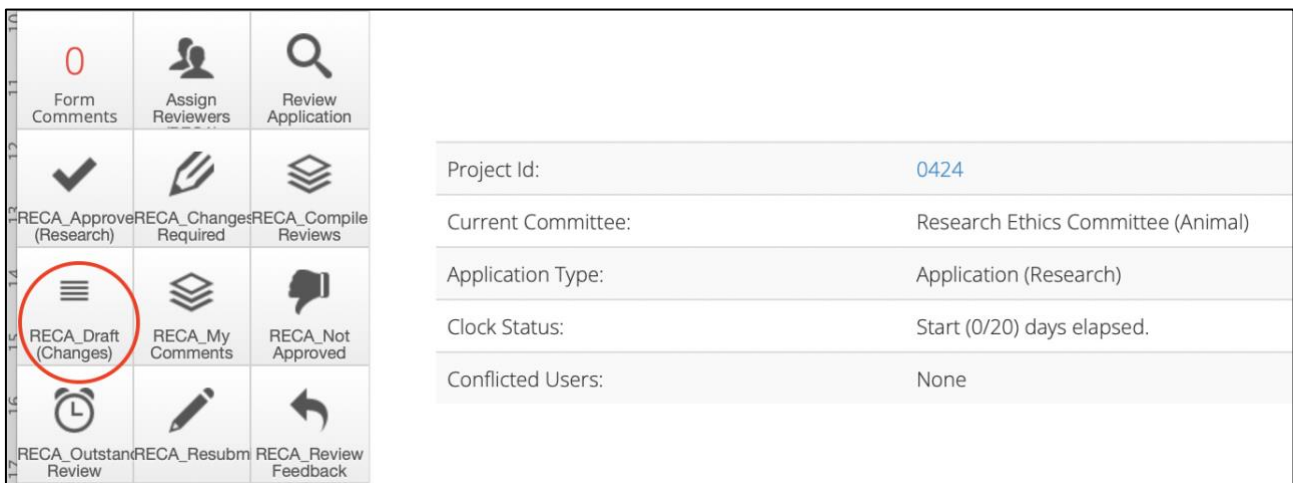
This action is available at the point that feedback would be provided to the applicant after the review process, be this after a meeting or an electronic review.

3. How do I create the draft memo?

Kindly note that this user guide is aimed at all MEOS admin/chairs. The name on the action button may differ depending on the committee to which the application is assigned.

Click on the Draft (Changes) or Draft (Resubmission) action button.

If the application has been approved with modifications, use the Draft (Changes) action; if the application is a resubmission and will serve at the next committee meeting, use the Draft (Resubmission) action.



Form Comments	Assign Reviewers	Review Application	
RECA_Approve (Research)	RECA_Changes Required	RECA Compile Reviews	Project Id: 0424
RECA_Draft (Changes)	RECA_My Comments	RECA_Not Approved	Current Committee: Research Ethics Committee (Animal)
RECA_Outstand Review	RECA_Resubm	RECA_Review Feedback	Application Type: Application (Research)
			Clock Status: Start (0/20) days elapsed.
			Conflicted Users: None

This brings up the action memo with panel comments and form comments from the application pulled into it. This is the exact action memo that would be generated if you clicked the [Changes Required] button. The difference is that with the Draft action, another user can check and make edits before it is sent.

Edit the document as required. Highlighted text has been added for demonstration purposes. Then click on the green [Draft Changes] button and [Yes].

The screenshot shows a web interface titled "RECA_Draft (Changes)". At the top, there is an "Action Date" dropdown menu set to "Now" and a "Timeline Notes" text area. Below this is a rich text editor toolbar with various icons for text formatting. The main content area displays the Nelson Mandela University logo and the text "ACTION MEMO - This text has been added to demonstrate the Draft function", which is highlighted in yellow. Below the text is a form with the following fields:

Project ID:	0424
Title:	RECA Research Test
Degree:	Honours
Risk Level of Study:	Low
PRP:	Dr MEOS Test2
PI:	Ms Michelle Barnett

At the bottom of the interface, there are buttons for "Existing", "My Drafts", and "Preview". On the right side, there is a green button labeled "RECA_Draft (Changes)" with a red arrow pointing to it, and a "Close" button.

The edited memo will appear as an attachment that you can download. This is not necessary unless you wish to email it to someone.

The screenshot shows a preview window titled "Attachment". It displays the same content as the draft editor, including the Nelson Mandela University logo and the highlighted text "ACTION MEMO - This text has been added to demonstrate the Draft function". Below the text is a form with the following fields:

Project ID:	0424
Title:	RECA Research Test
Degree:	Honours
Risk Level of Study:	Low
PRP:	Dr MEOS Test2
PI:	Ms Michelle Barnett
Submission Type:	REC-A: Initial Application (Research)
Meeting Date:	30 November 2023
REC-A Liaison:	

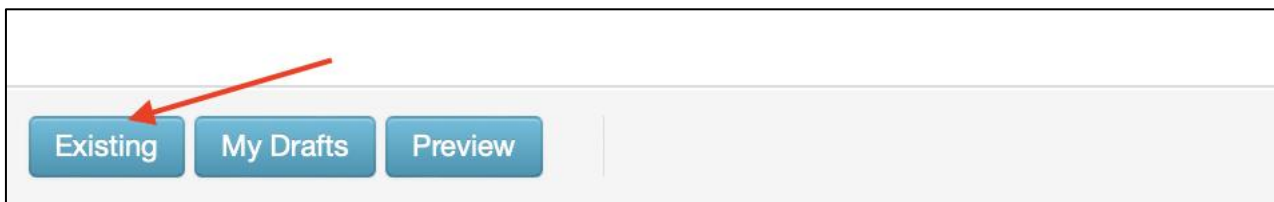
Below the form, there is a section titled "RECA RESOLUTION" with a bullet point: "That the submission for the above protocol be granted ethics approval on condition that the recommendations below be addressed and implemented." At the bottom of the preview window, there are "Download" and "Close" buttons.

4. How does the person who needs to edit my draft know it is available?

Email them! The system does not inform users when drafts are available as it does not know who should have access.

5. How do I edit my edited draft memo ?

Click on the [Draft_Changes] action. This pulls in the original unedited draft consisting of the reviewers' exact comments made on the form. To pull up your edited draft, click on the blue [Existing] button in the bottom left-hand corner.



Select the most recent version that you saved and then use the Overwrite action.



Make the further edits you require. Then click the green [Draft_Changes] button and Yes. This will save the latest most edited version for the other person to see.

6. How do I edit a draft that someone else has created?

For demonstration purposes, the initial draft memo was created by *Michelle Barnett*. The person checking and editing it is *MEOS Test 1*.

As the second user (in this case, MEOS Test 1), log into MEOS and pull up the application and then press the [Draft_Changes] action.

This pulls up an unedited version of the action memo. Scroll down and press the blue [Existing] button.

RECA_Draft (Changes)

Action Date:

Timeline Notes:

Timeline notes are not shared with Researchers

PROJECT ID: 0424

Title: RECA Research Test

Degree: Honours

Risk Level of Study: Low

PRP: Dr MEOS Test2

PI: Ms Michelle Barnett

Submission Type: REC-A: Initial Application (Research)

Meeting Date: 30 November 2023

REC-A Liaison:

Existing My Drafts Preview RECA_Draft (Changes) Close

Select the edited draft that has been created from the right-hand side and click on it (in this example, the one created by Michelle Barnett).

RECA_Draft (Changes)

Action Date:

Timeline Notes:

Timeline notes are not shared with Researchers

Risk Level of Study: Low

PRP: Dr MEOS Test2

PI: Ms Michelle Barnett

Submission Type: REC-A: Initial Application (Research)

Meeting Date: 30 November 2023

REC-A Liaison:

RECA RESOLUTION

- That the submission for the above protocol be **granted ethics approval** on condition that the recommendations below be addressed and implemented.
- That the REC-A Representative named above be available for consultation with the PRP/PI in order to advise regarding the implementation of the recommendations.
- That, once changes have been made to the satisfaction of the RECA representative, the amended signed electronic form be re-submitted on MEOS for final approval, after which a letter of approval will be issued.

Please note that it is the **responsibility of the PRP/PI to make contact with the designated RECA representative** should they require further assistance when attending to the recommendations made by the RECA. The PRP/PI would be given a period of **three calendar months from the date this action memo** within which to resubmit revisions to the submission for final ethics approval to the designated RECA representative.

In the case of an initial application for ethics approval, should the revised application not be submitted within the said period, the PRP/PI would **need to submit a new application** on MEOS and be subjected to the full review process. In the case of other submissions (amendments, progress reports, etc.), failure to submit the revised submission may lead to suspension of the study.

Existing Documents

Action	Date	User
RECA_Draft (Changes)	07/09/2023 14:56	Ms Michelle Barnett

Existing My Drafts Preview RECA_Draft (Changes) Close

Select Overwrite. This replaces the unedited version with the version created by the first user.

The screenshot shows the 'RECA_Draft (Changes)' window. At the top, there is an 'Action Date' dropdown set to 'Now' and a 'Timeline Notes' text area. Below this is a rich text editor with a toolbar. The main content area is split into two panes. The left pane shows the original document with the following metadata:

Project ID:	0424
Title:	RECA Research Test
Degree:	Honours
Risk Level of Study:	Low
PRP:	Dr MEOS Test2
PI:	Ms Michelle Barnett
Submission Type:	REC-A: Initial Application (Research)
Meeting Date:	30 November 2023

The right pane shows the 'Existing Documents' table:

Action	Date	User
RECA_Draft (Changes)	07/09/2023 14:56	Ms Michelle Barnett

Below the table, the document content is shown with a yellow highlight: 'ACTION MEMO - This text has been added to demonstrate the Draft function'. A red arrow points from the 'Append' button to this highlighted text. Below the document content, the metadata is repeated in a simplified view.

Edit as required and then press the green [Draft Changes] button.

This screenshot shows the same 'RECA_Draft (Changes)' window after editing. The document content now includes the highlighted text from the previous version and a new line: 'Further edits to the document', indicated by a red arrow. At the bottom of the window, there are three buttons: 'Existing' (blue), 'My Drafts' (blue), and 'Preview' (blue). A red arrow points to the 'RECA_Draft (Changes)' button, which is now green, indicating it is the active state.

If the first user logs in and then actions the [Draft] button and then the blue [Existing] button, they will see two versions – the version that they created, and the version edited by the second user.

RECA_Draft (Changes)

Action Date:

Timeline Notes:

Timeline notes are not shared with Researchers

NELSON MANDELA UNIVERSITY

ACTION MEMO

Project ID: 0424

Title: RECA Research Test

Degree: Honours

Risk Level of Study: Low

Dr. MEOS Test?

Existing Documents

Action	Date	User
RECA_Draft (Changes)	07/09/2023 14:56	Ms Michelle Barnett
RECA_Draft (Changes)	07/09/2023 15:19	Ms MEOS Test1

7. How do I 'use' my draft version to send feedback to the applicant?

For this demonstration, assume that the version edited by MEOS Test 1 is the version that should be sent to the applicant

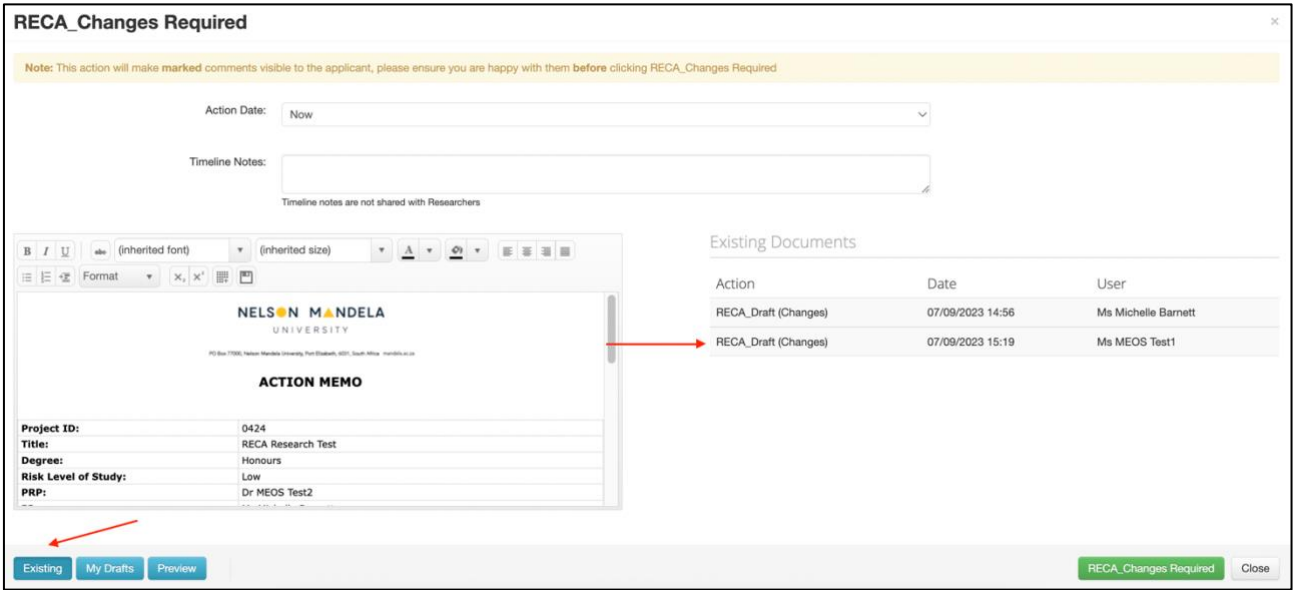
Depending on permissions assigned in MEOS, either one or both users may be able to send the feedback (for example, the chair might edit the draft memo, but the admin may be the one to send it).

Log in to MEOS and pull up the application.

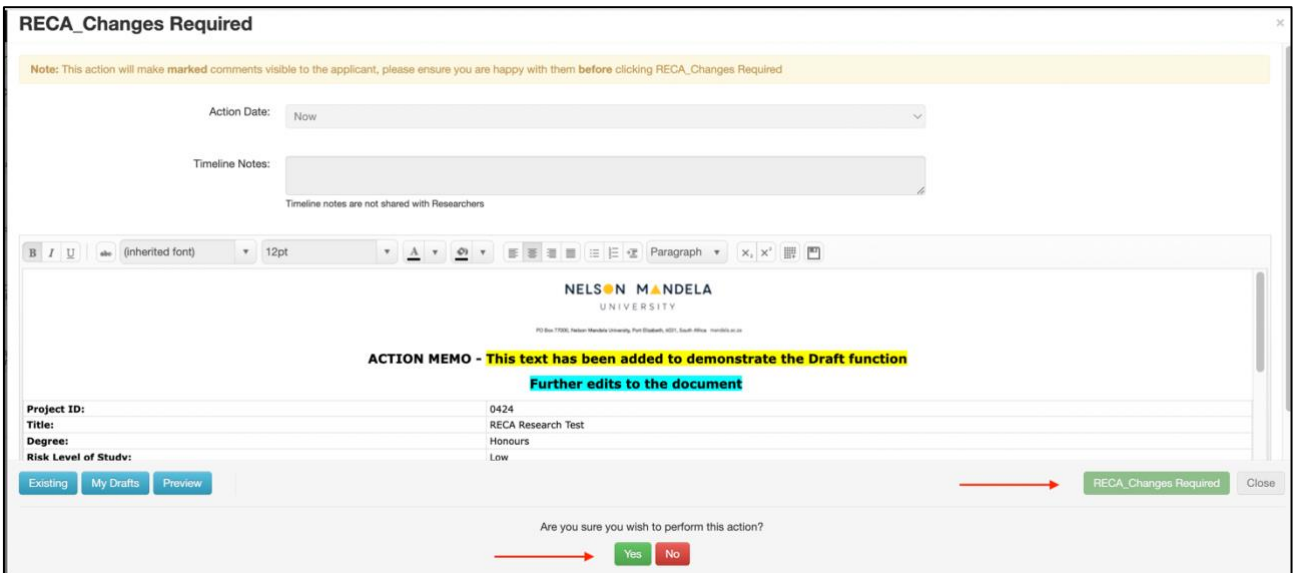
Click on the [Changes Required] button.

1 Form Submissions	0 Project Submissions	0 Panel Comments	<p>Project Title</p> <p>Form Reference: RE</p> <p>Review Refer</p>
0 Form Comments	Assign Reviewers	Review Application	
RECA Approve (Research)	RECA Changes Required	RECA Compile Reviews	
RECA Draft (Changes)	RECA Not Approved	RECA Outstanding Review	
RECA Resubmit			
<p>Project Id: 0424</p> <p>Current Committee: Research Ethics Committee (Animal)</p> <p>Application Type: Application (Research)</p> <p>Clock Status: Start (0/20) days elapsed.</p>			

Click on [Existing], the final edited version and then Overwrite.



Check the document before sending out. Make final edits if required. Then press the green [Changes Required] button and [Yes].



This sends an email with the action memo as an attachment to the PI/PRP and assigned liaison, as well as unlocking the application for revisions.

8. How do I find a copy of the action memo that was sent to the PI/PRP?

A record of both email and action memo is saved on the Timeline of the application. The status of the application changes to 'Changes Required'.

The screenshot displays an application management interface. At the top, a summary table provides key details:

Current Committee:	Research Ethics Committee (Animal)	Current Status:	Changes Required (RECA)
Application Type:	Application (Research)	Meeting:	BETA TEST MEETING - RECA, 30/11/2023
Clock Status:	Start (0/20) days elapsed.	Assigned Reviewers:	None
Conflicted Users:	None	Centre:	Mandela

Below the summary is a navigation bar with tabs: Timeline, Project, Documents, Data, Contacts, and Time KPIs. The 'Timeline' tab is active, showing a horizontal timeline from Wednesday 6 September 2023 to Friday 8 September 2023. Three events are marked on the timeline:

- RECA_Changes Required
- Submit Application
- Assign to Meeting (RECA)

A search bar labeled 'Search events...' is located below the timeline. At the bottom, a table lists actions:

Action	Event Date	Clock Status	Clock Information	Attachment	Email
RECA_Changes Required	07/09/2023 15:32		0/20 days elapsed.		

Red arrows in the original image point from the 'Attachment' and 'Email' columns of the bottom table to the corresponding icons.