NELSON MANDELA

UNIVERSITY

MEOS
(MANDELA ETHICS ONLINE SYSTEM)

USING THE DRAFT ACTION
USER GUIDE

Version 2.0
October 2023

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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.

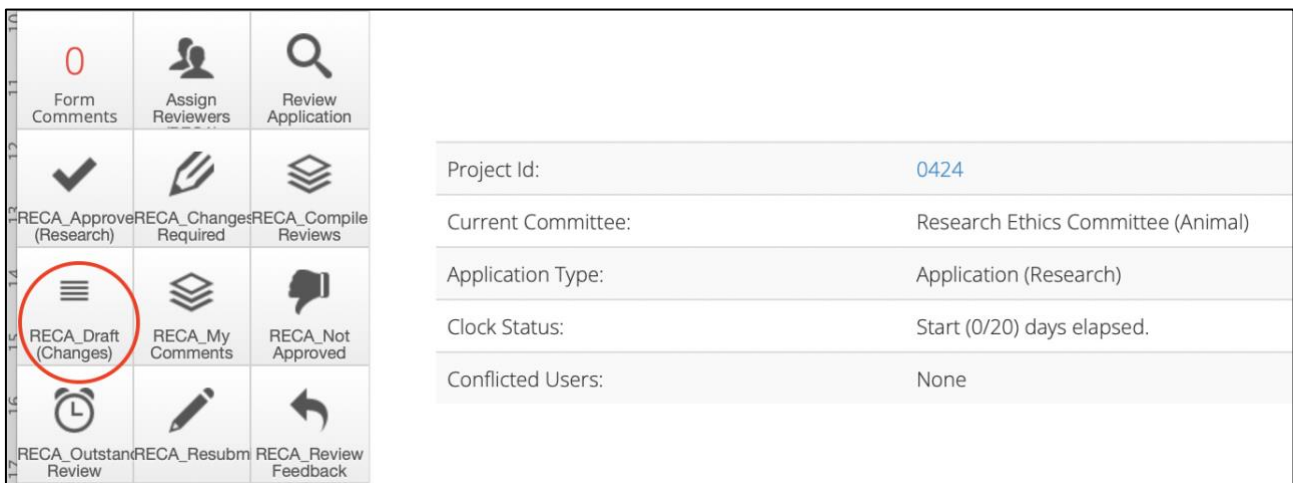# 2.   When will I see the draft action button?

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.

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

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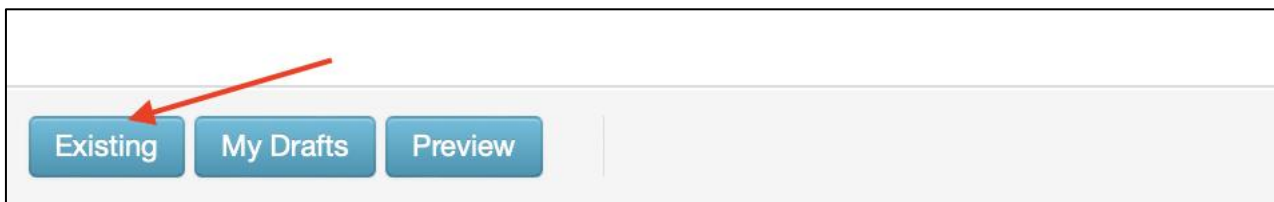
Select the most recent version that you saved and then use the Overwrite action.

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.

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).

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

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

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.

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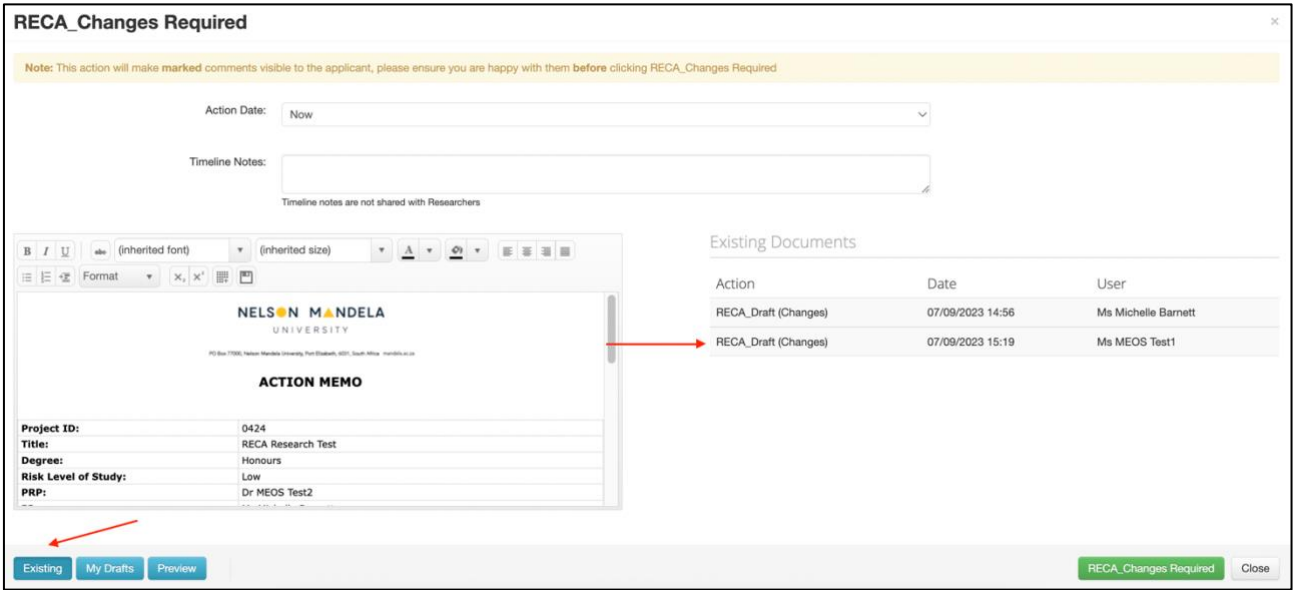
Depending on permissions assigned in MEOS, either one or both users may be able to send the feedback (for example, the chair might edit the draft memo, but the admin may be the one to send it).
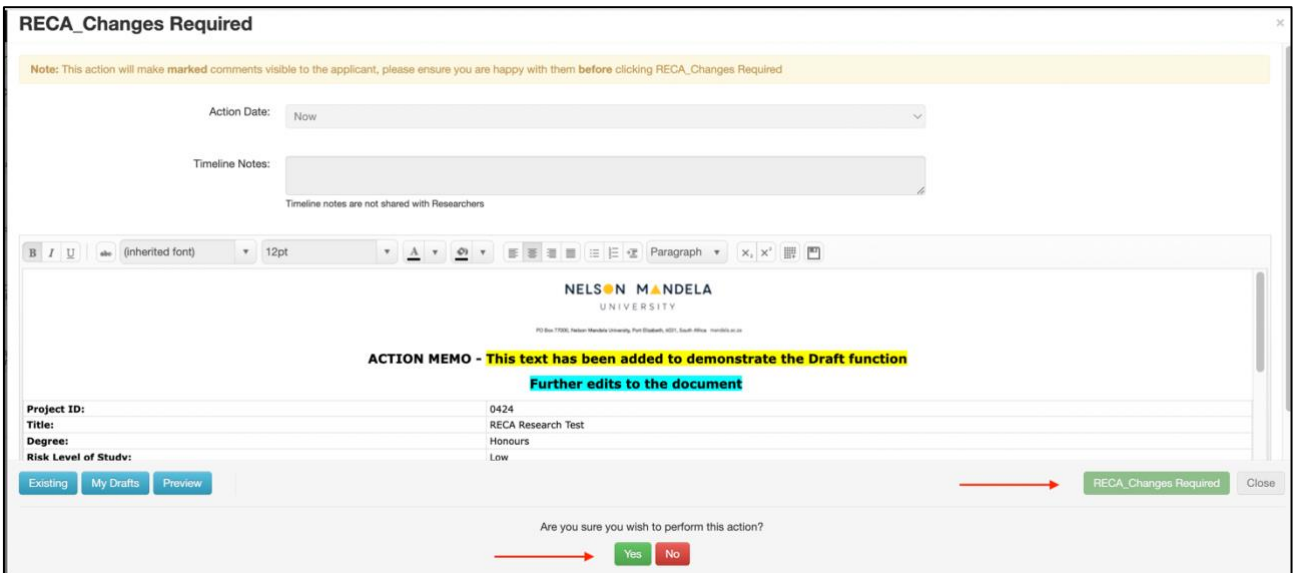
Log in to MEOS and pull up the application.

Click on the [Changes Required] button.

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'.