Australia Online Forms for Research

Software User Manual

Version 1.2

Released 24 May 2010

Contents

1. Introduction 5
2. Getting Started 5
   2.1. Creating an Account 5
   2.2. Logging In 7
   2.3. Logging Out 7
3. Navigating around My Projects 8
   3.1. Project Categories 8
   3.2. Importing the NEAF from www.neaf.gov.au 9
   3.3. The Projects tab 10
   3.4. The Requests for Authorisation tab 10
   3.5. The Transfer Requests tab 10
   3.6. Creating a New Project 11
4. My Project Layout 11
   4.1. The Navigate tab 13
   4.2. The Documents tab 14
   4.3. The Transfer tab 14
   4.4. The Authorisation tab 16
   4.5. The Submission tab 19
   4.6. The SSA tab 20
   4.7. The Manage tab 20
   4.8. The Project Progress tab 21
5. My Contacts 21
   5.1. Adding a Contact 21
   5.2. Editing a Contact 22
6. Managing My Account 24
   6.1. Editing your Account 24
   6.2. Forgotten Password 24
7. Help 24
8. Contact Us 25
9. Helpline 25
10. Other Online Forms Functions 26
   10.1. Icon Descriptions 26

1. Introduction

This is the user manual for AU Online Forms for Research (Online Forms). Online Forms is not just a website that enables users to complete a licensed copy of the NHMRC's National Ethics Application Form electronically; the project information that is entered by researchers is used to populate the various forms needed for the relevant approvals for both ethics and research governance. This is also facilitated by the ability to import and export information in xml format.

The website hosts a licensed copy of the NHMRC's National Ethics Application Form (NEAF), as well as the Site Specific Assessment (SSA) Forms for New South Wales Health, Queensland Health and Victoria Health.

User manual updates are based on system upgrades. Please visit the website https://www.ethicsform.org/au to download the latest version of the user manual.

Further information is available on the website regarding the specific processes and information required to apply to each of the jurisdictions.

2. Getting Started

2.1. System Requirements

For optimum usage, we strongly recommend that the following settings are used whilst using Online Forms. This will ensure all features display correctly.

2.1.1. Operating System –

- Windows 7
- Windows Vista
- Windows XP
- Windows Server 2003
- Windows 2000

2.1.2. Internet Browser –

- Internet Explorer 6 or later (Use IE8 for optimum performance)
- Mozilla Firefox 3.5 or later
- Google Chrome 4.0 or later

2.1.3. Browser plug-ins -

- Adobe PDF Reader (Ensure that you have the latest version)

2.1.4. Screen resolution -

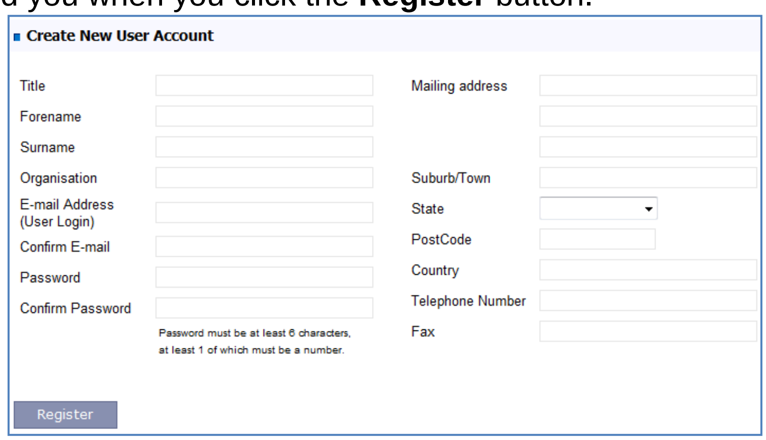
- Our content displays best at a screen resolution of 1280 pixels x 768 pixels.

2.2. Creating an Account

When you access the Online Forms system you will first encounter the 'Login Screen'. To access the forms you must have registered and verified your account. You only need to register once; you can then complete as many applications as you like. To create an account -

2.2.1. Go to https://www.ethicsform.org/au
2.2.2. Go to the **Create Account** tab on the menu bar

2.2.3. Enter your user details and click **Register**. Most fields on this form are required; however, if you are missing any required information the system will remind you when you click the **Register** button.



2.2.4. An activation code will be emailed to you. If you do not receive the automated email after 1 hour please telephone the Helpdesk for assistance.
2.2.5. The email you receive will contain a link. Click on the link to complete the registration process.

NOTE: This is a secure system.
Do not disclose your password to anyone.

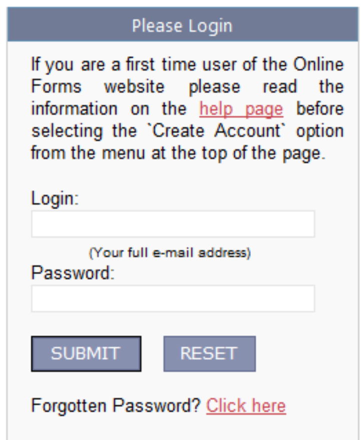
2.3. Logging In

To log into the Online Forms system –

2.3.1. Enter your user login/username and password.

NOTE: Your user login and password are case sensitive - that means you must use capitals on the same letters you did when you registered.

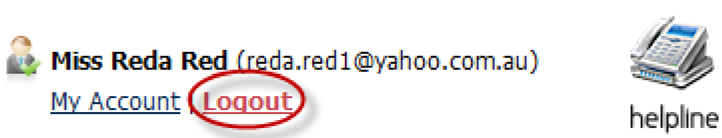
2.3.2. Once you have entered the details, click the **Submit** button and you will be taken to the **My Projects** page. It is from this page you will be able to navigate into the data you maintain for each individual project you have on the system.



2.4. Logging Out

To log out of the Online Forms system –

2.4.1. Click the **Logout** link on the top right of the page below your name and user login.

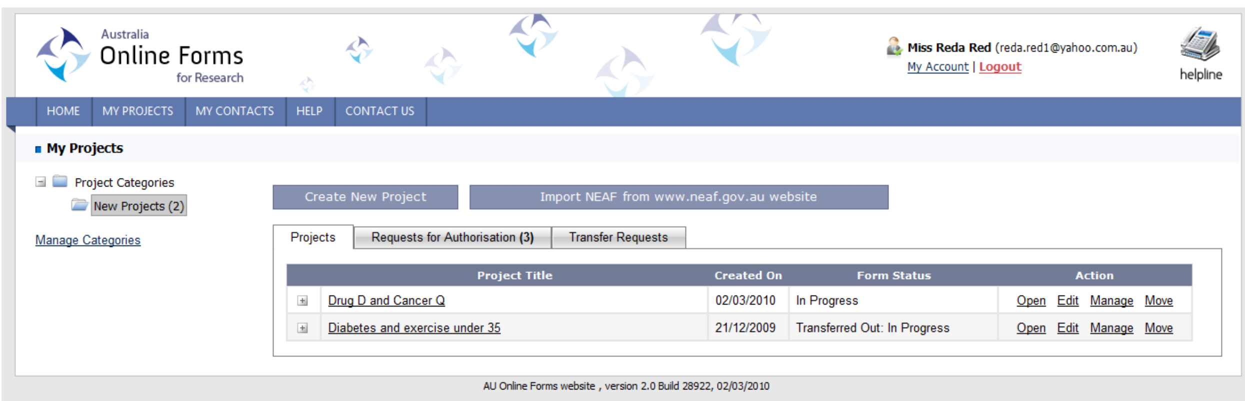


In order to access your work again, you will need to login.
The site will also log you off automatically after a period of inactivity. It is therefore important that you save any unsaved form changes by clicking the **Save Now** link on the form page if you plan to leave your work inactive for any period of time.

If you have not logged off the site you may have difficulty navigating away from Online Forms. Please ensure you **log out** before leaving the site.

3. Navigating around My Projects

Once you have logged into the Online Forms system you will be taken to the **My Projects** page. Any Project that you own (old or new, projects that are in-progress, or have been submitted to the reviewing body), are stored on the Online Forms system and can be re-visited at any stage of the application process. You can always return to this page by clicking the **My Projects** link on the Main Menu bar at the top of the page or the **Existing Projects** link in the **My Projects** dropdown menu.



The **My Projects** page is the first page you are directed to after you have logged in. On this page you will also see a number of sections, these include -

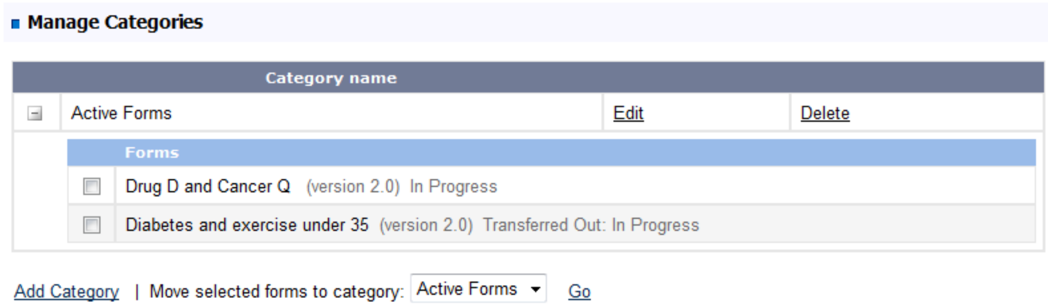
3.1. Project Categories

This section lists all the available categories in which you can store your projects – this is similar to directories in a computer filing system. When your account is created, you will notice a default category to store your projects called **New Projects**.

You can use the **Manage Categories** page to rename or add Project Categories available to you in the **My Projects** page.

3.1.1. To add a new category, click on the **Add Category** link at the bottom of the page. This will add a new category which you can name using the **Edit** link attached to the new entry.

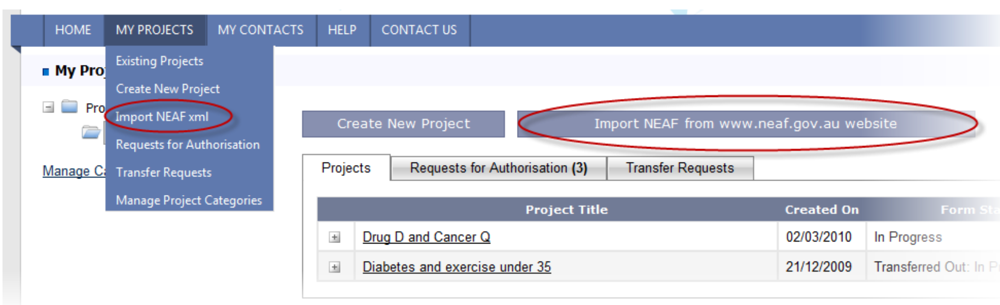
3.1.2. To move a project into a new category, expand the category the project is stored in and tick the project you want to move.



3.1.3. Once this is done, go to the bottom of the page and select the category you need to move the project into from the dropdown list then click **Go** which is next to the dropdown.
3.1.4. You can delete categories by clicking **Delete** but only if you do not have any projects stored in it.

3.2. Importing the NEAF from www.neaf.gov.au

If you are submitting an application to the public health system in New South Wales, Queensland or Victoria and have completed the NEAF from the www.neaf.gov.au website, you can import your ethics proposal.

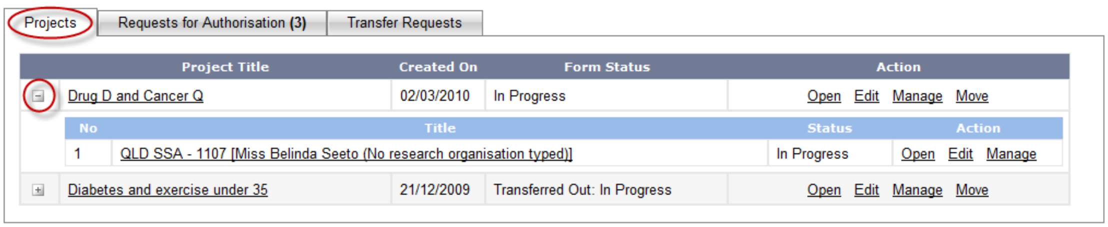


3.2.1. From the **My Projects** page, click the **Import NEAF from www.neaf.gov.au Website** button to create a new project from the XML export of the NHRMC system.
3.2.2. This will take you to the first import page. On this page you will need to select a file from your local file storage area. This file MUST be a valid XML export or the import will not succeed.
NOTE: Save the XML file directly to your local computer, as the ***OPEN*** *button in this instance only allows you to view only.*
3.2.3. Select your file by clicking the **Browse** button and then use the file explorer box to find the target file. Once you have found the file, click on it and then click the **Open** button.
3.2.4. Click the **Upload** button on the Online Forms webpage.
3.2.5. Select the option to import the NEAF XML as a new NEAF and click the **Next Step** button.
3.2.6. Click the **Import Data** button.

3.2.7. You can then view the form or import more forms.

3.3. The Projects tab

The **Projects** tab lists all forms within the selected project category. The table lists the Project Title (this is the short title from the NEAF or full title if there is no short title), the Created On date and the Form Status (i.e. whether the form has been given a submission code, whether it is still being completed and therefore **In Progress**, or whether it has been **transferred**). The Action column contains quick links to Open, Edit, Manage or Move the form to another project category.



Projects | Requests for Authorisation (3) | Transfer Requests

	Project Title	Created On	Form Status	Action
−	Drug D and Cancer Q	02/03/2010	In Progress	Open Edit Manage Move
+	Diabetes and exercise under 35	21/12/2009	Transferred Out: In Progress	Open Edit Manage Move

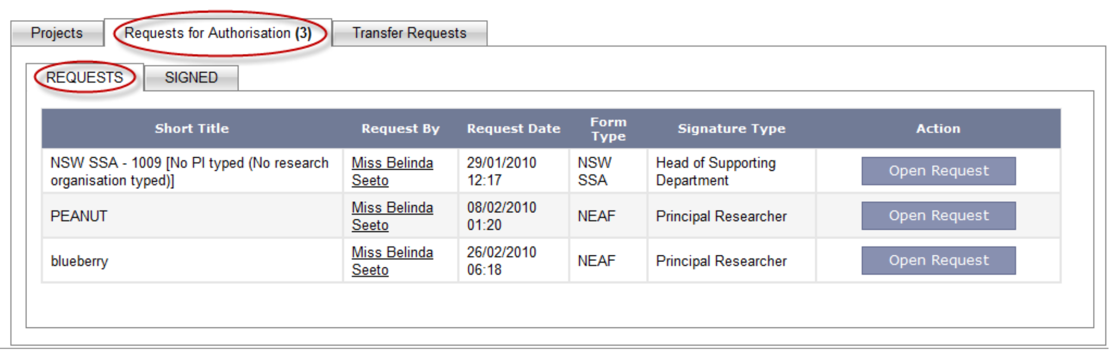
Expanded rows under "Drug D and Cancer Q":

No	Title	Status	Action
1	QLD SSA - 1107 [Miss Belinda Seeto (No research organisation typed)]	In Progress	Open Edit Manage

Selecting the **+** symbol on the left hand side expands the table to display any SSA Forms that have been created for a particular project.

3.4. The Requests for Authorisation tab

The **Requests for Authorisation** tab displays information related to any outstanding requests for electronic authorisation (i.e. electronic signatures).



Projects | Requests for Authorisation (3) | Transfer Requests

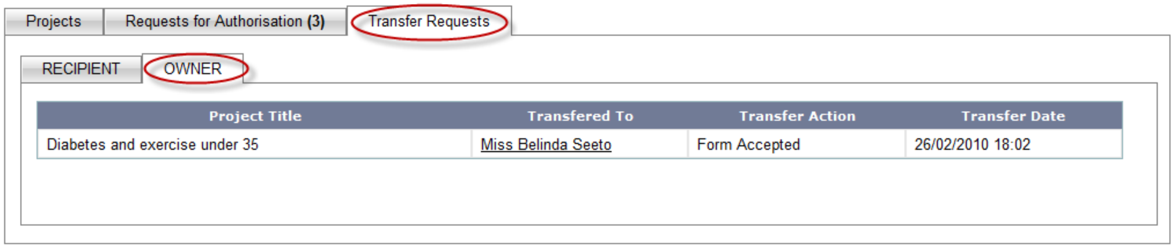
REQUESTS | SIGNED

Short Title	Request By	Request Date	Form Type	Signature Type	Action
NSW SSA - 1009 [No PI typed (No research organisation typed)]	Miss Belinda Seeto	29/01/2010 12:17	NSW SSA	Head of Supporting Department	Open Request
PEANUT	Miss Belinda Seeto	08/02/2010 01:20	NEAF	Principal Researcher	Open Request
blueberry	Miss Belinda Seeto	26/02/2010 06:18	NEAF	Principal Researcher	Open Request

It also keeps a record of projects where electronic authorisation has been granted. The **Signed** tab lists all forms signed by you, or forms that you have requested others to sign.

3.5. The Transfer Requests tab

The **Transfer Requests** tab displays transfer form requests requiring action by the user (i.e. a form has been transferred to them and they will need to either accept or reject the transfer). This table also keeps a history of all transfer requests made as the owner of a form.



The Transferred To column displays the name of the user to whom the form has been transferred. The Transfer Action column indicates the current status of the transfer request and the Transfer Date displays the date and time of the transfer request.

3.6. **Creating a New** Project

To create a new project –

3.6.1. Select the **Create New Project** in the dropdown list of My Projects or if you are already on the **My Projects** page click the **Create New Project** button at the top of the page.

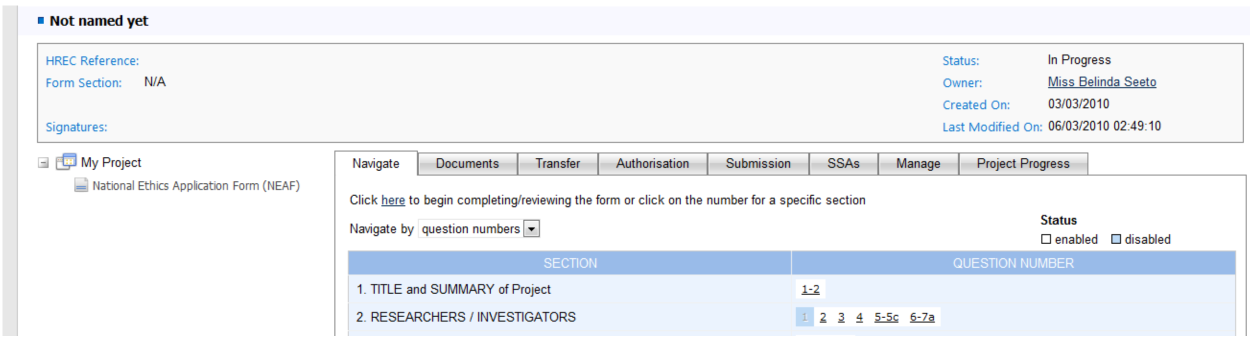
3.6.2. A new project is generated in the system and the user is taken to the project page of project ‘Not Named Yet’.

3.6.3. In the My Project screen the user can access the Navigate, Documents, Transfer, Authorisation, SSAs, Manage or Project Progress tabs for the NEAF (similar tabs are also available for the SSA forms). These tabs allow the user to more easily navigate between the various form functions.

4. My Project Layout

Once you have created a new project, you are directed to My Project. What is the difference between My Projects and My Project? My Projects is like a filing cabinet and My Project (without the ‘s’) is the project folder holding project information for a single project which includes the NEAF and the associated site specific application forms.

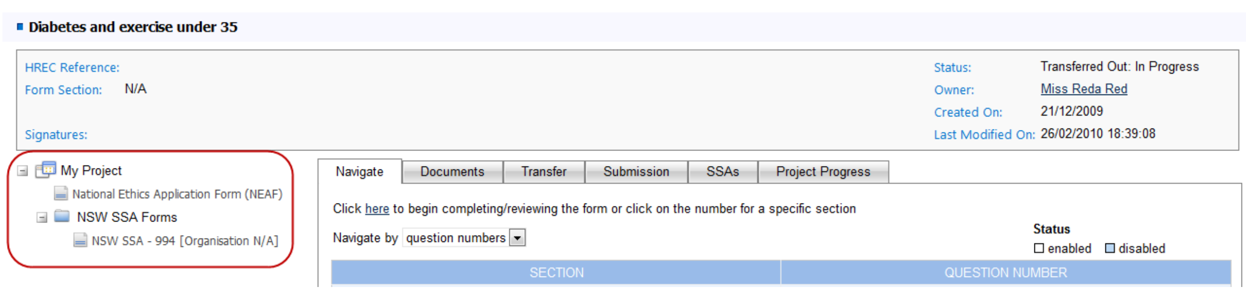
NOTE: An SSA form must be linked to the NEAF that will be/has been sent to the HREC. An SSA Form cannot be created without a NEAF.



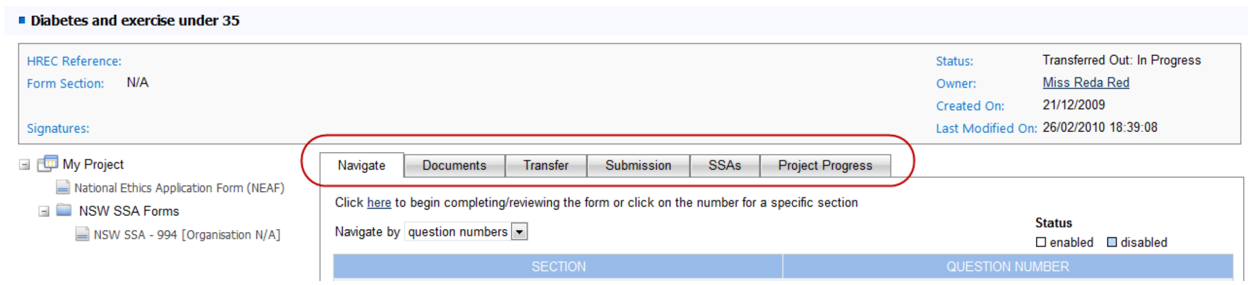
Below the main Online Forms menu bar are the following sections:

The Project Information Bar: (Also referred to as the project header) This bar displays the basic information about the project. The project’s short title appears above the bar, and all other information appears in the bar i.e. the current form section that is selected (if any), the status of the form, owner of the project, when it was first created and last modified and electronic signature notification.

Project List: Underneath the Project Information Bar, on the left, you will find the Project List. In this list you will find the NEAF and folders for any sites specific forms. It is from this list that you can select individual forms by clicking on the appropriate form name. The selected form’s name will always appear above the Project Information Bar.

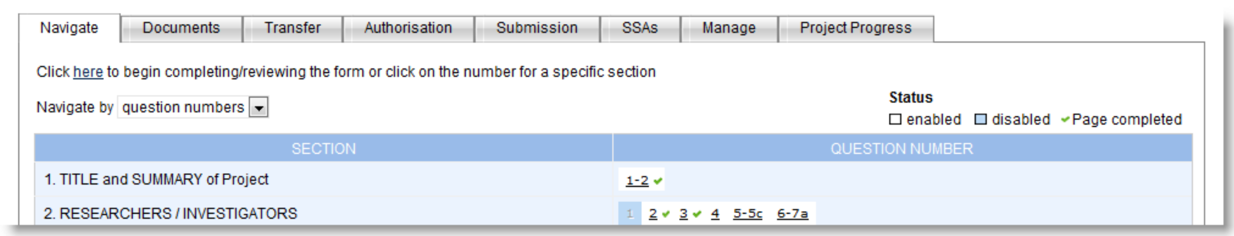


Form Action Tabs: The form action tabs can be seen to the right of the Project List. The tabs correspond to the currently selected form from the Project List. The available tabs will be different depending on which form you have selected and what permissions you have as the owner, the electronic authoriser or the recipient of a transferred form. Each tab plays an important role in the completion of your application:



4.1. The Navigate tab

This tab is available on all forms. It allows you to navigate to the form either by question number or page number. Inactive questions are shaded blue and cannot be clicked on. Active questions have a white background and clicking on them will take you directly to those questions in the form. Questions are activated and deactivated depending upon your answers to the questions in the form. The Navigate tab also displays a green tick beside the completed pages.



4.1.1. The **Click here** link takes you directly to the first question on the form.
4.1.2. Once in the form, to navigate between pages on the forms, click on the **Previous** or **Next** buttons located at the top and bottom right hand side of the forms.
4.1.3. Alternatively, click on the **Navigate** button on the top and bottom left hand side of the form 

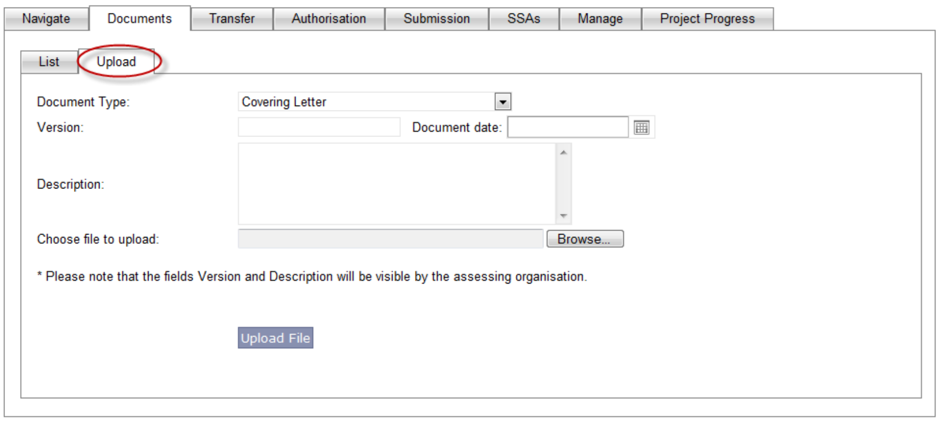
to return to the **Navigate** tab.

*NOTE: The forms do not need to be completed in one session, as the system will save your progress every time you finish a page. If you are typing large quantities of text into the forms, you can click the **Save Now** button regularly to avoid losing data should your internet connection time out. Alternatively, text can be cut and pasted from your word processor.*

4.2. The Documents tab

This tab allows you to attach any electronic documents to your forms. The **List** tab displays any electronic documents already uploaded. The **Upload** tab allows you to upload any new electronic documents.

To upload a document –



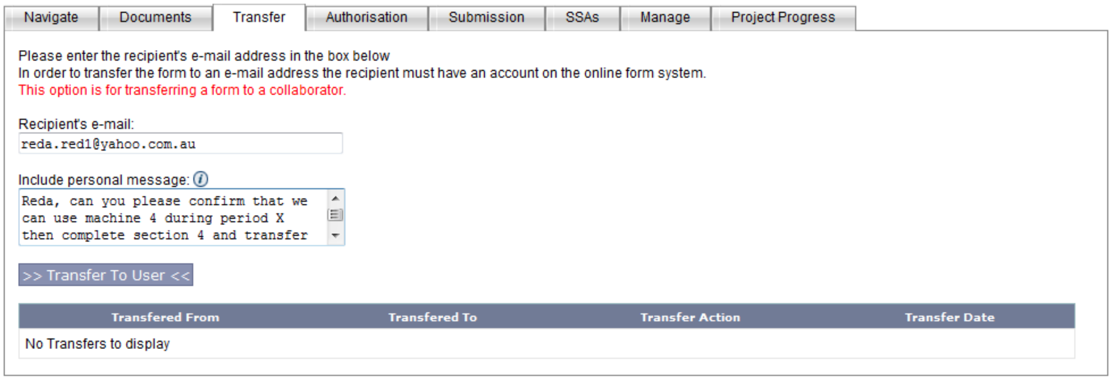
4.2.1. Click on the **Upload** tab, select the document type from the dropdown list
4.2.2. Enter the version number and document date of the document. This will help you keep track of the latest version of the document.
4.2.3. Enter the description. This is useful for identifying documents of the same document type e.g. Investigator CV – J Bloggs; Investigator CV – C Brown.
4.2.4. Select your file by clicking the **Browse** button and then using the file explorer box to find the target file. Once you have found the file, click on it and then click the **Open** button.
4.2.5. Click the **Upload File** button on the Online Forms system.

NOTE: Any electronic documents uploaded against a NEAF will be automatically uploaded against any accompanying SSA Forms. These documents cannot be deleted from the accompanying SSA Forms, and can only be deleted from the NEAF by the owner. Also, the document cannot be deleted if the document has already been uploaded by the HREC Coordinator or Research Governance Officer onto their Research Ethics Database system.

4.3. The Transfer tab

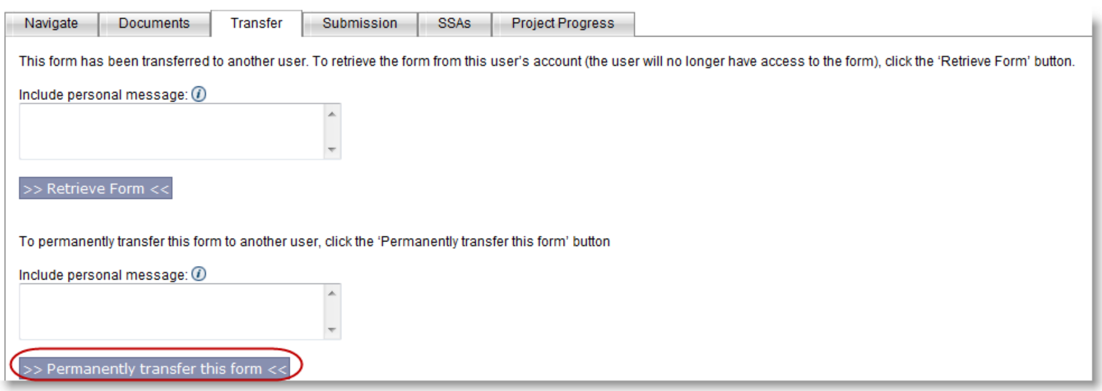
This tab allows you to transfer either the NEAF and/or accompanying SSA forms to another Online Forms user.

NOTE: The recipient of a transferred form must have an account with the Online Forms website.



To transfer a NEAF -

4.3.1. Enter the email address that the other Online Forms user is registered with, in order for the system to locate the other user. Include a personal message to the recipient if necessary and click the **Transfer to User** button.
4.3.2. Automated emails are generated advising the recipient and owner of the actions taken at various stages of the transfer.
4.3.3. The transfer actions are listed in the transfer history.
4.3.4. The owner has the power to retrieve the transferred NEAF by selecting the **Retrieve Form** button.
4.3.5. The owner can also transfer a NEAF permanently once the recipient has accepted the form by clicking the **Permanently transfer this form** link.



NOTE: Once the form has been permanently accepted by the recipient you will no longer be the owner of the form and the person to whom the form was transferred will have full access to all management functions, such as being able to transfer the form to other users or to generate a submission code.

To transfer an SSA form -

4.3.6. Enter the email address that the other Online Forms user is registered with, in order for the system to locate the other user. Click the **Transfer to User** button.

4.3.7. Automated emails are generated advising the recipient and owner of the actions taken at various stages of the transfer.

4.3.8. When an SSA form is transferred by the original owner the form is transferred with full access to all management functions. The recipient is usually the Principal Investigator for the site. The transfer to persons thereafter will be the standard transfer with limited access.

4.3.9. The Principal Investigator can transfer the SSA form to the original owner by clicking on the **Return Ownership** button.

NOTE: If only the SSA form is transferred, the recipient can still view the NEAF but as a read-only version. If the user wishes to transfer the NEAF and all accompanying SSA Forms, they must do so from the Transfer tab on the NEAF. If the user wishes to transfer only an SSA form, they must do so from the relevant SSA form.

4.4. The Authorisation tab

The username and password authentication process for electronic signatures follows the FDA guidelines on electronic signatures (CFR 21 Part 11). Electronic authorisation gives applicants the option of obtaining electronic signatures rather than 'ink' signatures for the Chief Investigator, Principal Investigators, Associate Investigators, Heads of Department, Heads of Supporting Departments and Authority for Data Provision on forms generated on the Online Forms system. This avoids the need to take or post paper copies of forms to the various individuals who need to authorise the application forms. More than one electronic authorisation may be requested at the one time, though the persons authorising the form must have an Online Forms account.

Electronic authorisation is an option that may be used where convenient, but ink signatures may still be used where preferred. There is no need to obtain both ink signatures and electronic authorisation. <u>Prior to submission, please confirm with your HREC/RGO that electronic authorisation is accepted by their organisation.</u>

Where applicants are using electronic authorisations as an alternative to ink signatures, they must obtain the relevant authorisation before generating a submission code. This is a different order to the process used for ink signatures. Applicants need to obtain their electronic authorisations first so that all the authorisations are included in the form which is then saved and printed.

NOTE:

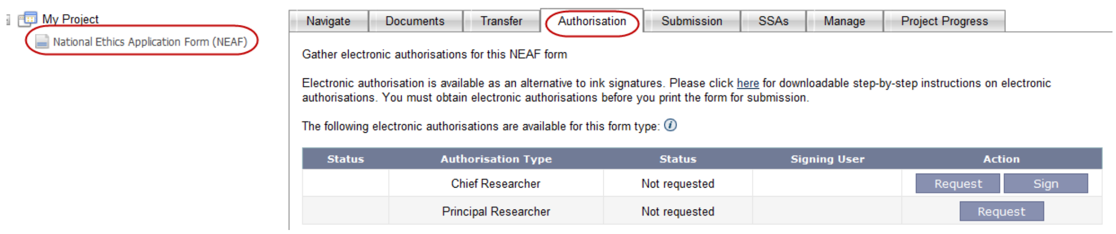
- *Authorisation applies to the ENTIRE form. If one authoriser requires changes to data that has been authorised by others, all the authorisations will need to be requested again before the form can be submitted.*
- *The applicant cannot authorise their own SSA form if they are the Head of Department, Head of Supporting Departments or Authority for Data Provision.*

- *A Chief Investigator who is also the owner of the form can include their electronic authorisation on a form by clicking the **Sign** button.*
- *Similarly an authoriser, who also needs to enter information into a transferred application, can have a form transferred to them and then select the **Sign** button. This avoids the need for a separate process for completing and authorising information.*

To request an electronic signature from another user–

4.4.1. As the applicant requesting an electronic signature of an authoriser, select the relevant form that requires authorisation from the **My Projects** page, e.g. the NEAF.

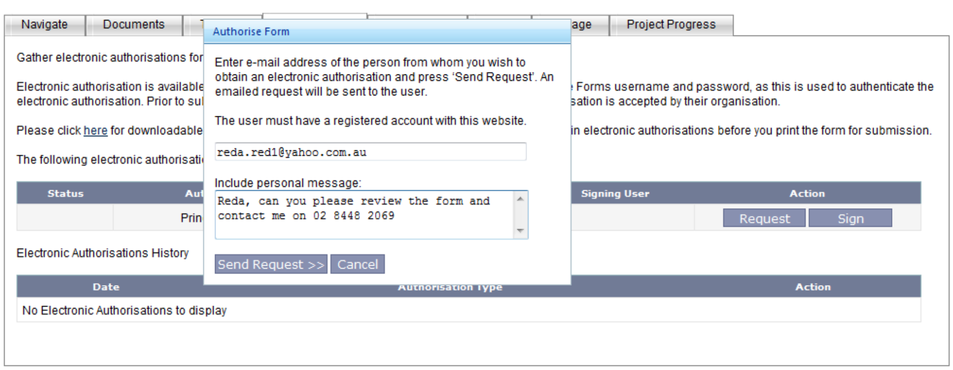
4.4.2. Select the **Authorisation** tab



4.4.3. The tab will indicate all the electronic authorisations that are available for that particular form. Select the relevant type of authoriser (E.g. Principal Researcher) and click the **Request** button.

4.4.4. Enter the email address of the authoriser and include a personal message if necessary, and click the **Send Request** button.
NOTE: the authoriser's email address must be their AU Online Forms username. Applicants should check this with authorisers before attempting to request electronic authorisation.

4.4.5. An Authorisation History at the bottom of the page keeps a record of all authorisation requests.



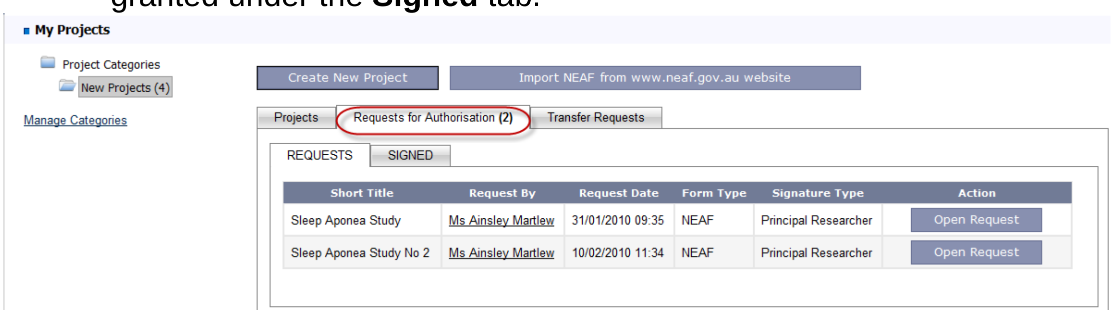
4.4.6. Automated emails are generated advising the recipient and owner of the actions taken at various stages of the authorisation.

4.4.7. The owner has the power to recall the electronic authorisation request that has not been approved by selecting the **Recall** button.

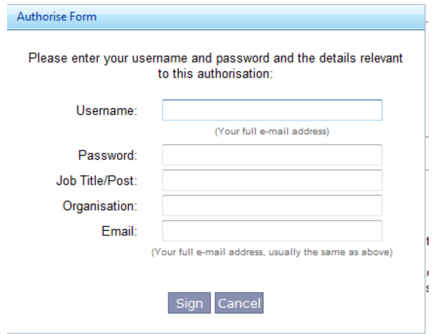
4.4.8. The owner also has the power to revoke an electronic authorisation that has already been approved by selecting the **Revoke** button.
4.4.9. If any data in the form is modified after electronic authorisation has been granted, the authorisation becomes invalid and the applicant must again request electronic authorisation.

To action an electronic authorisation –

4.4.10. As the authoriser of an electronic authorisation request, you will receive an email requesting you to authorise a form, with a link to log in. *NOTE: If you are requested to sign electronically, you should only sign for the section that you are responsible for. If you receive a request for electronic authorisation with an incorrect research personnel title (authorisation type), reject the form and immediately notify the owner of the request*.
4.4.11. When you (the authoriser) log into the Online Forms system the main **My Projects** page, the **Requests for Authorisation** section will now display any outstanding requests for authorisation under the **Requests** tab and a history of all electronic authorisations previously granted/not granted under the **Signed** tab.



4.4.12. In the **Requests** tab, click the **Open Request** of the form you wish to authorise.
4.4.13. The **Authorisation** tab is now visible, click the **Review Requested Form** button to check the data in the form in read-only format. Navigate through the form by clicking the **Next** and **Previous** arrow buttons.
4.4.14. Alternatively, click the **Reject Request** button to reject the form prior to review if for some reason you cannot sign the form.
4.4.15. After reviewing the form, click the **Navigate** icon and then the **Authorisation** tab.
4.4.16. Click the **Authorise Form** button to generate an electronic signature.



4.4.17. Enter your username and password (this acts as an extra layer of security to ensure that only the registered authoriser can electronically authorise an application) as well as your Job Title/Post, Position and Email (these details will appear on the declarations page on the form), then click the **Sign** button.

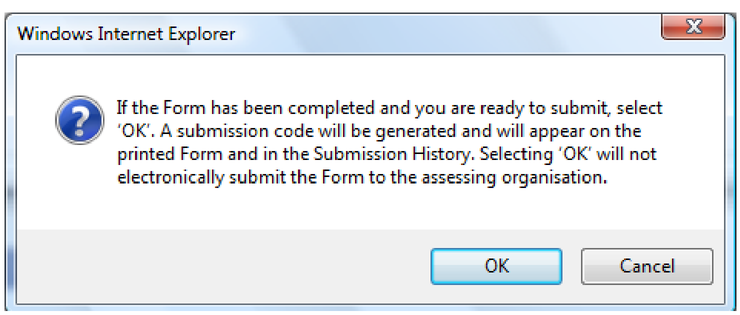
4.4.18. Your electronic authorisation will appear in the form as long as it is valid.

4.4.19. Alternatively, select the **Reject Request** button to reject the form. The applicant will receive a confirmation email and should liaise directly with the authoriser to resolve any issues.

4.5. The Submission tab

The **Submission** tab replaces the **Lock for Submission** button on the old Online Forms website. To generate a Submission Code –

4.5.1. Select the **Generate submission code** button on the **Submission** tab. A new window will appear with the following message –



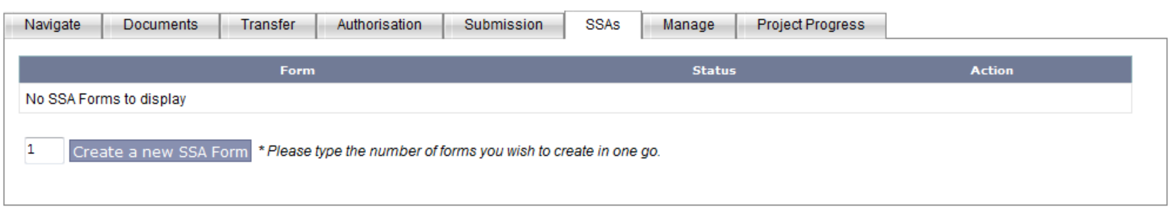
4.5.2. Selecting **OK** generates the Submission Code which then appears on the **Submission** tab (the most recent Submission Code will also appear against the project on the **My Projects** main page). The date and time that the Submission Code was generated is also displayed.

4.5.3. You will then be able to generate a PDF of the form (which will contain the Submission Code in the bottom right hand corner) or save the form as an XML file.

4.5.4. You may be asked to make changes to a form that has already been submitted to an HREC or RGO. If you make changes to a form with a submission code, edit the form as required and save the changes.
4.5.5. Request electronic authorisations, where required. Remember to confirm with the HREC that electronic authorisation is allowed.
4.5.6. Go to the **Submission** tab and select the **Generate submission code** button to generate a new submission code.
4.5.7. Print a hard copy for submission and notify the HREC Coordinator and Research Governance Office of the new submission code.

4.6. The SSA tab

This tab only appears in the NEAF action tabs. Selecting this tab allows you to create a new Site Specific Assessment (SSA) for your project.



4.6.1. Enter the number of forms you wish to create, and then click the **Create a new SSA Form** button.
4.6.2. Access the form via the link on the **SSAs** tab or expand the SSA Forms folder in the projects list on the left hand side.
4.6.3. You are then prompted to choose the relevant State in which the research is being conducted (in order to determine which SSA Form to display) under the **Location** tab
4.6.4. Once you have chosen the relevant location, the folder structure on the left hand side is updated and the new SSA Submenu tabs Navigate, Documents, Transfer, Authorisation, Submission, Manage and Project Progress become available.

NOTE: An SSA form must be linked to the NEAF that will be/has been sent to the HREC.

4.7. The Manage tab

The **Manage** tab allows you to duplicate or delete the application.

The **Duplicate Application** button duplicates most of the data from the original form(s) and can be edited and assigned its own submission code. *NOTE: Electronic documents uploaded against the form will not be duplicated and must be uploaded manually.*

The **Delete Application** button deletes a form, leaving no record of the form. Applications should not be deleted unless the form has been generated by accident. It is recommended that you have a record of all your projects, so unsuccessful / unfinished forms could be moved to a new folder category. This function will not appear if the project has a submission code.

4.8. The Project Progress tab

This tab allows you to be able to monitor the progress of your application when various actions have been performed where an organisation processing your application has a direct link into the Online Forms system. The following Research Ethics Database (AU RED) actions may appear (depending upon the progress of the application in AU RED):

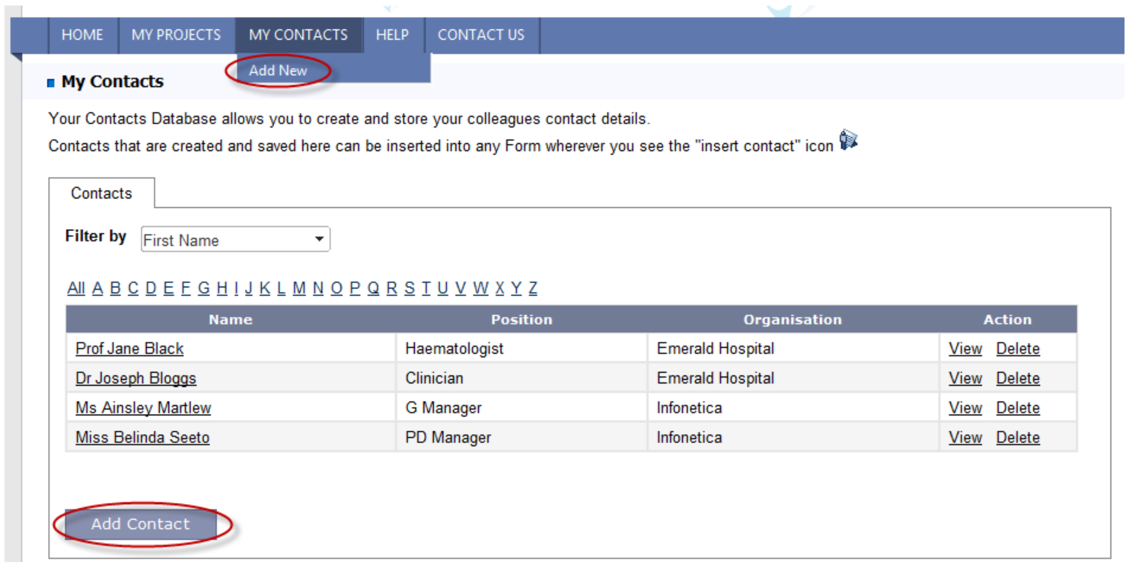
- "Application Checked In"
- "Application Decision Given"
- "Application Marked Valid"
- "Application Marked Invalid”
- "Application Clock Started"
- "Application Clock Restarted”
- "Clock Stopped”
- "Application Assigned To Meeting”
- "Removed From Meeting"

5. My Contacts

The **My Contacts** link on the main menu bar takes you to your personal contact database. This is designed to help you if you are filling out many forms and often refer to a contact multiple times. Once a contact is in your contact database you can quickly fill in contact details in a form by clicking on the **Add Contact Details** icon whenever it is available. You will find this icon on most questions that ask for contact information.

5.1. Adding a Contact

5.1.1. You can add contacts from the **My Contacts** page by clicking on the **Add New** link and filling in the appropriate details.



5.1.2. If you have entered a contact into a form and wish to update the details into the Contact list, click the **Save Contact Details** icon. This gives you the option to either **Add a new contact from the Form** or **Update an existing contact** (which overwrites ALL existing details, including **Summary of qualifications and relevant expertise** AND **General competing interests**).

5.1.3. Before deciding whether to select Update existing contact or Add new contact, view exact first name and surname matches by clicking the + button to expand the contact details to ensure you are updating the correct contact.

5.2. Importing Contacts from Outlook

You can upload the entire MS-Outlook contact list or save selected Outlook contacts.

5.2.1. From the **My Contacts** page, click on the **Import Contacts from Outlook** link.

5.2.2. Before you are able to import the contact list, you must generate the Outlook.csv file.

5.2.2.1. Go to Contacts in your MS-Outlook

5.2.2.2. Select File ->Import and Export from the Main Menu bar. A new window will appear

5.2.2.3. Select Export to a File from that window. Click Next.

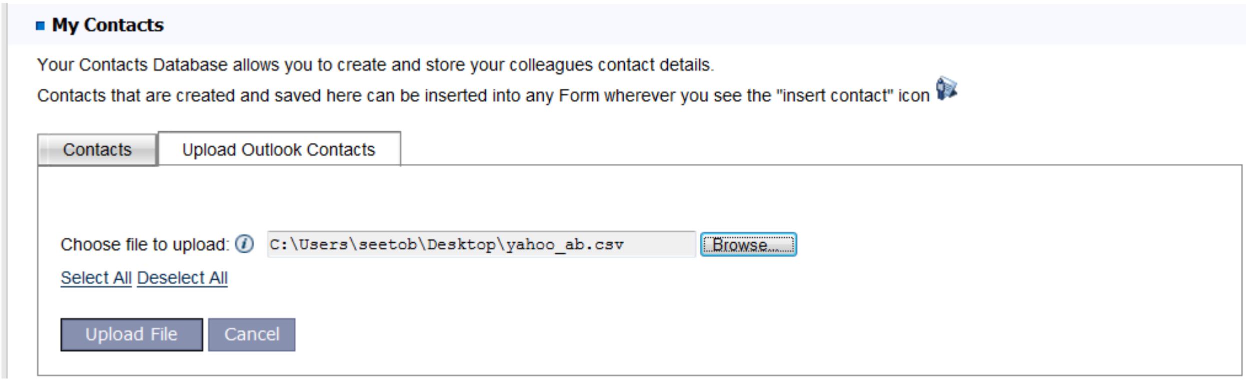
5.2.2.4. Select Comma Separated Values (DOS). Click Next.

5.2.2.5. Select the Contacts folder. Click Next.

5.2.2.6. Select the location where you wish to save the exported file. Click Next, then click Finish.

5.2.3. Browse for the exported file with contacts.

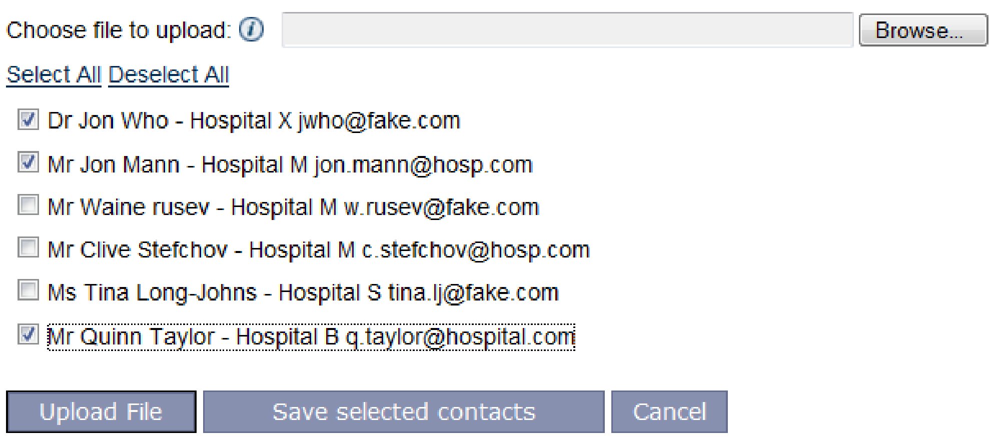
5.2.4. Click Upload File



5.2.5. To upload the entire list click, click Upload File

5.2.6. To upload selected contacts, use the Deselect All link to uncheck the boxes and then check the boxes to mark the contacts to save.

5.2.7. Click Save selected contacts



5.3. Editing a Contact

5.3.1. To find the contact person in **My Contacts** use the **Filter By** dropdown field to filter by First Name, Last Name or Organisation; the contacts are sorted alphabetically.

5.3.2. To edit a contact in your contact list, simply click the **View** link and then the **Edit Details** button.

5.3.3. Once you have finished editing the details - click the **Update** button to save the changes.

5.4. Deleting a Contact

5.4.1. To delete a contact in your contact list, simply click the **Delete** link.

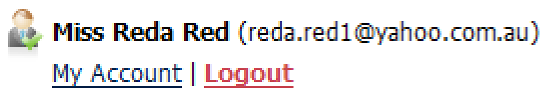
5.4.2. You will be asked to confirm the deletion before the contact is actually deleted from the database. Select **OK** to continue.

6. Managing My Account

6.1. Editing your Account

To edit your account details –

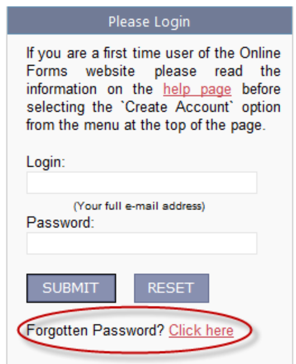
6.1.1. After you have logged in, click the **My Account** link at the top right hand side of the screen



6.1.2. Change your details and click the **Save** button. Changing your E-mail address will change your user login. Please notify your colleagues/research personnel/Research Office of any changes to your details especially your new email address as this may prevent you from receiving transfer requests/authorisations requests/notifications.

6.2. Forgotten Password

If you have forgotten your password you can get a reminder by using the **Forgotten Password** link that can be found at the bottom of the login box.



6.2.1. Enter your user login/username and click on the **Submit** button. Your user login is your full email address.

6.2.2. A Lost Password Reminder email will be sent to you with your password.

NOTE: If for some reason you have forgotten all your account details, please contact the Helpdesk who will assist you in reactivating your account.

7. Help

The Help link on the main menu bar lists tools to help you get around the Online Forms system –

- Welcome page outlines the purpose of the Online Forms system

- Guidance page includes State specific guidance for researchers
- User Manual page includes detailed step-by-step instructions for the Online Forms system
- How To? page includes a list of electronic tutorials on key functions of the Online Forms system
- Updates page includes a list of major changes to the Online Forms system. Remember to check for updates periodically.
- FAQs page will include frequently asked questions and answers. This page is currently unavailable.

8. Contact Us

The Contact Us link on the main menu bar will provide a list of all the suitable contacts for the various forms controlled by the system. This page will assist you in contacting the correct organisation. Please remember that the Helpline is only responsible for technical queries and general help. More specific queries and procedural questions should be addressed to the appropriate organisation in this list.

9. Helpline

If you are having trouble with any aspects of the system and this manual does not help clear up the issue please contact the Helpdesk. The contact information can be found by clicking on the Helpline link on the right hand side of the main menu bar.

Please indicate to the Helpdesk that you have an issue with the Online Forms system and they will then assist you with any problems you may have.

10. Other Online Forms Functions

10.1. Icon Descriptions

There are various icons used in the Online Forms system –

Navigate	**Navigate** icon in My Project takes you back to the Navigate page of a specific form.
Print Draft	**Print Draft** icon in My Project generates a pdf of the form with a DRAFT watermark. Do not use this copy for your submission.
Export	**Export** icon in My Project generates a copy of the form in XML file format.
Incomplete Complete	The **Incomplete Page** features can help you identify which pages in the project are complete and which need further information and are therefore incomplete. Each page of the form is marked as Incomplete by default. When the page is complete the user clicks the **incomplete** icon. The icon changes to a **Complete** icon. To change back to **incomplete** just click the icon again. The form is not affected if you choose not to use this feature. If we go back to the **Navigate** page you will see that a green tick means that the user has confirmed that the page is complete.
Save	**Save** icon in My Project saves changes.
Undo	**Undo** icon in My Project undoes any typing changes that you make. The system automatically saves when you go to the next or previous page.
Previous Next	**Next** and **Previous** Page icon in My Project allows you to move between pages of the form.
Page: 1 of 62 1 2 3 4 6 7 8 9 10 11 12 ...	The **Page Index** allows you to click on a chosen page rather than having to go back to the Navigate page or to click the Previous and Next button numerous times to get to the required page. Clicking the ... allows the user to display pages before or after the page numbers displayed. This feature only appears on the electronic form.
ABC	**Spell Checker** icon in the forms identifies any “bad” words in the text box and provides suggestions where applicable.
Σ	**Insert Symbols and Special Characters** icon in the forms allows the user to insert symbols that are not on your keyboard.
	Text History icon in the forms provides you with a history of all text changes. Text history is only available on certain fields within the NEAF and some SSA forms. When you click onto the icon, a window

	will appear listing text history, the name of the person who made the text change and the date and time of the text history, sorted chronologically. • New text is highlighted in BLUE • Old text is in black and is not highlighted • Deleted text is in ~~RED~~ and has a red strikethrough line. *NOTE: When you generate a pdf of the form, there is an option to include the last three saved text changes.*
	**Add Contact Details**  icon allows you to add an existing from your **Contacts** database
	**Save Contact Details** icon. This gives you the option to either **Add a new contact from the Form** or **Update an existing contact** (which overwrites ALL existing details, including Summary of qualifications and relevant expertise AND General competing interests).
	**Guidance** icon in the NEAF is guidance that has been issued by the NHMRC.
	**Information** icon is information related to various functions on the Online Forms system.
	**Helpline** icon in the top right corner provides you with information on who you can contact for technical assistance and State specific guidance. This page has a print button for your convenience.