# National Health Research Database

# **User Manual**

How to Submit an Online Research Proposal





Document prepared and published by **Health Systems Trust** 

34 Essex Terrace, Westville, 3630 *Tel:* +27 (0)31 266 9090

**Fax:** +27 (0)31 266 9199 www.hst.org.za



# Welcome

Thank you for taking the time to read through this user manual. We hope this manual will assist you with submitting your research proposals online!

We have taken great care to ensure our system is as intuitive and user friendly as possible. We're providing this manual to assist you with the submission process.

We are continually improving our system and therefore, from time to time, there might be small differences between what you see in this manual and the online system. We apologise for this inconvenience.

We wish you a great success with your research projects.

Sincerely

The NHRD Support Team.



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# Introduction

The National Health Research Database (NHRD) is a searchable, electronic repository of health research studies that have been conducted in South Africa. Its core function is the ability to track research trends in the national health priority research areas.

In addition to the database being a repository of health research, it also has to have a functionality that will allow Provincial Health Research Committees to manage the process of research applications by researchers.

The National Health Research Database is designed with many objectives in mind, one of which is to make it easier for Researchers to submit their research proposals online. The NHRD system will guide you through the 5 steps required to submit a proposal. Once saved, proposals can be worked on at a later stage or submitted for approval immediately. The system will also allow you to submit details of team members involved in your research activities. The "Comments" feature allows researchers and research committees to communicate with each other regarding details of proposals during the approval process.

Our aim is to design and develop an intuitive, easy-to-use system. We believe the system will remove uncertainties and frustrations normally experienced during the submission process.

This manual focusses on the online research proposal submission process. Its purpose is to instruct, guide and support the end-user on how to register, submit details related to researchers and research studies online using the NHRD system.



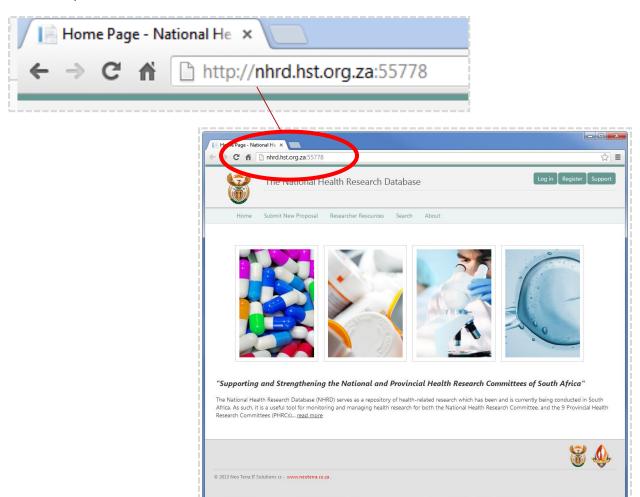
# Module 1 – How to find NHRD

# Lesson 1 - Welcome to the NHRD System

To access the NHRD system you need a standard web browser and access to the internet. The NHRD system works well on most web browsers, but we recommend that you use either Internet Explorer, Google Chrome or Mozilla Firefox.

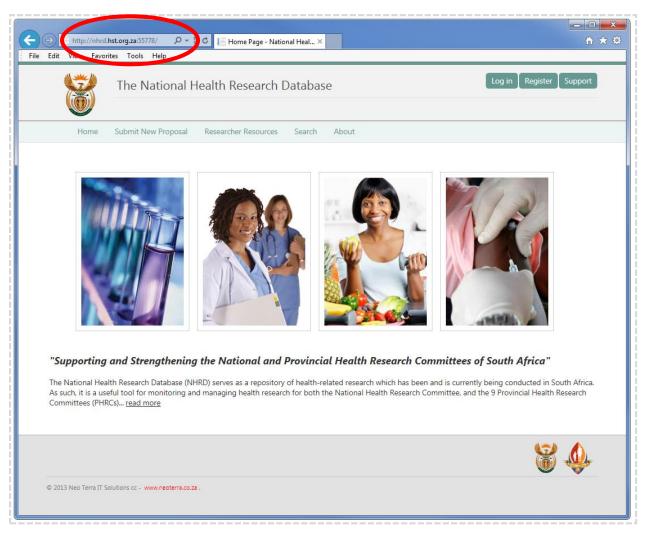
To access the site, please enter the following URL into your web browser address bar.

#### http://nhrd.hst.org.za:55778



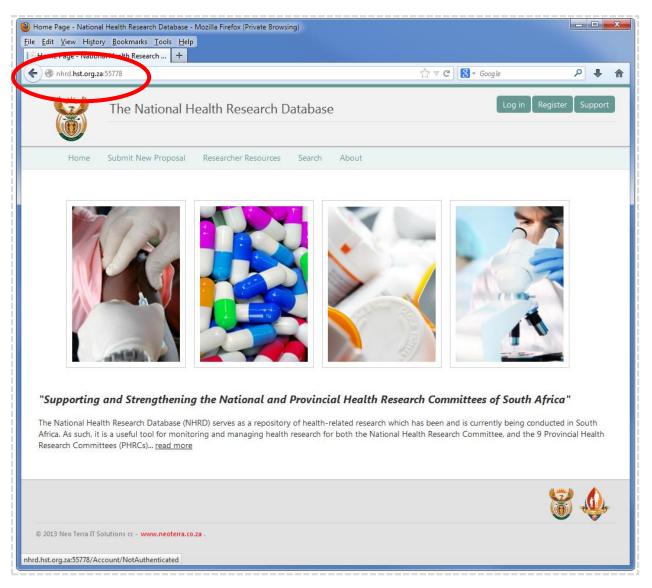


#### Using Internet Explorer:





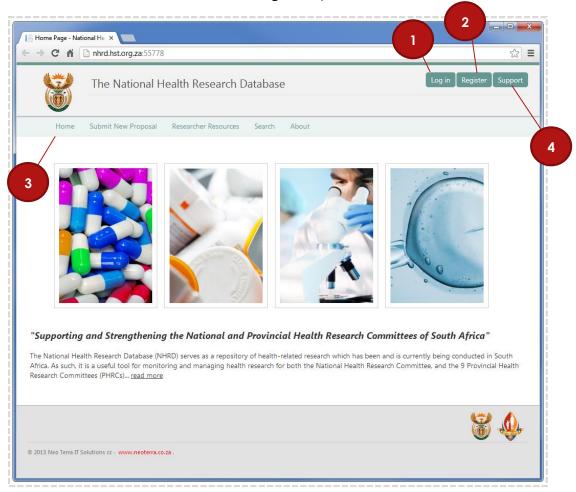
Example would be to layer the pics and give a thorough text. Using Mozilla Firefox:





### Lesson 2 - Basic Navigation

Let's have a look at some of the navigation points on the site.



- Click here to log into the system. You'll have to be registered on the site before you can log in.
- Click here to access the registration page. You'll be asked to provide some details about yourself. You only have to register once. Remember your password.
- This is the main navigation bar. This area will change once you're logged into the system, offering a few more options to registered users.
- Click here to send the NHRD support an email here if you experience a technical problem with the site. Clicking on this link will automatically open your default email client. If you do not have an email client installed, you can manually send an email to <a href="mailto:support@neoterra.co.za">support@neoterra.co.za</a>



# **Module 2 - Registration**

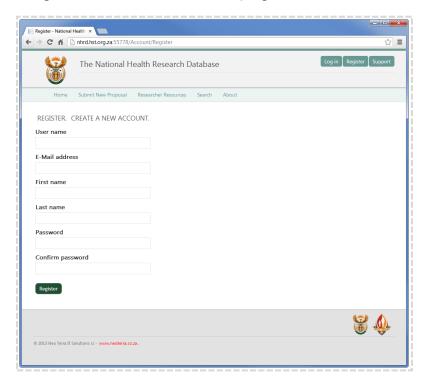
### Lesson 1 - Registering on the site

Before you can continue, you have to register on the website.

To register, click on the Register found in the top-right area of the main page.



This will bring up the registration page. Please provide the required details and click on "Register" at the bottom of the page to continue.





For example, to register you need to fill in all of the required details as seen below.

REGISTER. CREATE A NEW ACCOUNT.
User name
Fred
E-Mail address
fred.smith@gmail.com
First name
Fred
Last name
Smith
Password
•••••
Confirm password
•••••
Register

Fill in your first and last names, email address, etc.

Choose a unique username. If it is already in use, you will have to choose another.

Click on Register at the bottom of the page to save your details and register on the site.

Remember your password and user name.

Please note that your password must be at least 6 characters long. You can use any combination of letters and numbers, uppercase and lower case.



### Lesson 2 – Log In.

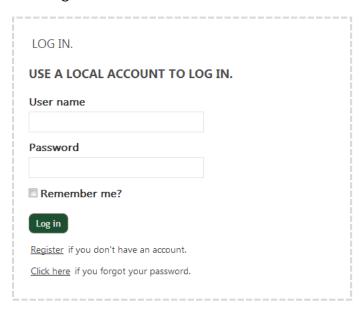
You will only have to register once. Next time you use the NHRD system you can log in using your existing username and password.

Click on "Log in" found in the top-right area of the main page.



This will bring up the "Log In" page. Please type in the username and password that you registered with.

Your log in screen will look like this:

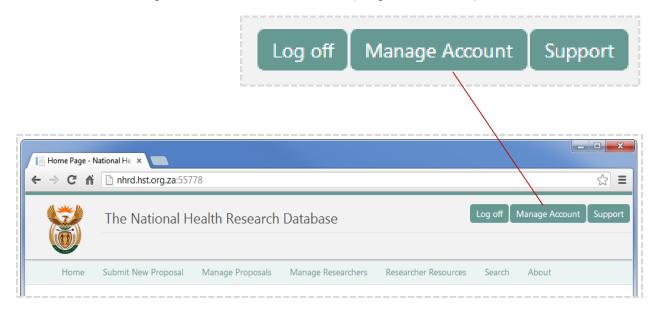


If you have forgotten your password, you can use the "Click here if you forgot your password" feature. This will email you a link that will allowing you to reset your password.

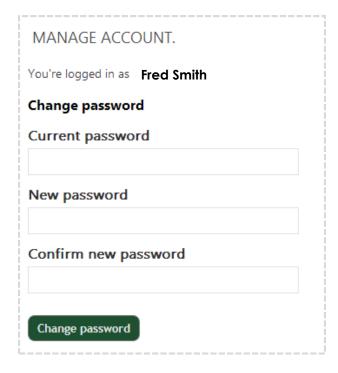


### Lesson 3 – Managing your Account

To change your password, first log into the system using your existing password, then click on the "Manage Account" found in the top-right corner of your screen.



This will allow you to change your old password to a new one.



Type in your old password. Create a new password and then repeat it in the "Confirm new password" box. Click on "Change Password" to continue.

Please note that your password must be at least 6 characters long. You can use any combination of letters and numbers, uppercase and lower case.



## Lesson 4 – Researcher Navigation

Once you have logged into the site, your site will look slightly different from the original home page.

For example, your home screen will look like this.



- Click here to Submit a new proposal. You have to be logged into the system
- 2 Click to view and manage your existing proposals.
- Each proposal can be linked to a list of researchers, investigators, coordinators and other team members that are defined here
- 4 Click to manage your account, change your password etc.



### Summary – Module 2

You have to be registered in order to submit research proposals. Once registered, you will have access to a variety of options that will allow you to:

- Upload details and curriculum vitae of researchers.
- Submit research proposals.
- Receive feedback from research committees regarding proposals.
- Submit research findings.

If your registration has been successful, you will be taken back to the home page.

If not, check any validation errors that may prevent you from registering. See table below for a quick reference.

Possible Cause:	Remedy:
An invalid email address	Please check the format and validity of your email address
Using a user name that already exist	Please choose another suitable user name
Password mismatch	Please make sure that both password fields match.



## Module 3 – Research Staff

### Lesson 1 - Adding your Research Staff

Before you can submit a research proposal you have to add researchers/investigators to your profile.

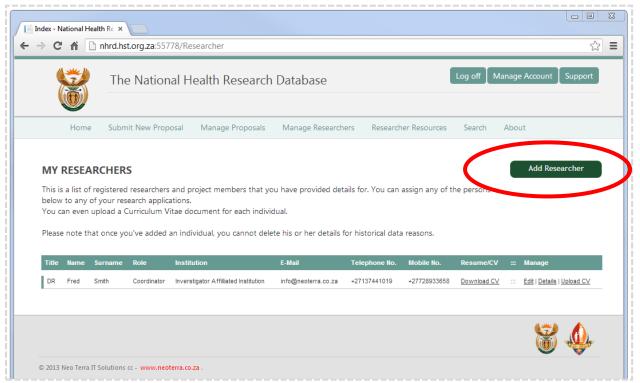
Click on Manage Researchers to continue.



The "MY RESEARCHERS" page is where you will add and manage all your research proposal team members, or any other individuals you would like to "link" to any given research proposal. We will look at how you "link" researchers at a later stage.

The first time you load this page, you will notice that you do not have any persons registered. The next step would be to click on the "Add Researcher" button.

See example below:



# How to Submit an Online Research Proposal



This will load the "Investigator Details Submission Capture" Page. You can use this page to capture details about yourself and/or researchers and investigators that will be involved with your research study. This information is required by most Research Committees.

Please complete this form, as you will not be able to submit a research proposal unless at least one researcher has been defined.

Once you have completed this form, click on "Save" to continue.

Your list of "My Researchers" will now show the newly added individual.



You now have a few more options available to you. Each individual/researcher can be modified by clicking on "Edit". To view each researcher's details, click on "Details".



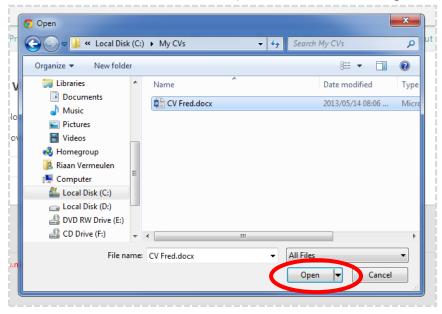
### Lesson 2 - How to upload a Curriculum Vitae

Most Research Committees require that applicants submit a Curriculum Vitae / Résumé for each member involved with a research study. You can do this by clicking on the "Upload CV" link.

Follow these steps to upload a Curriculum Vitae / Résumé for a researcher.



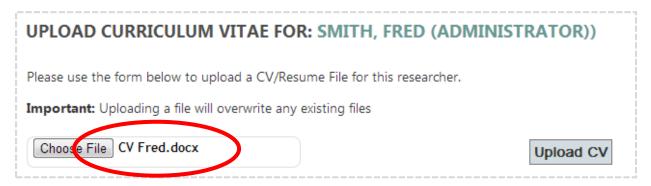
Click on "Choose File". This will open the browser dialogue.



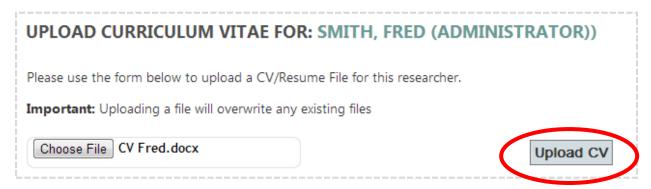
Using the browser, go to the file you would like to upload, select it using the mouse and then click on "Open"



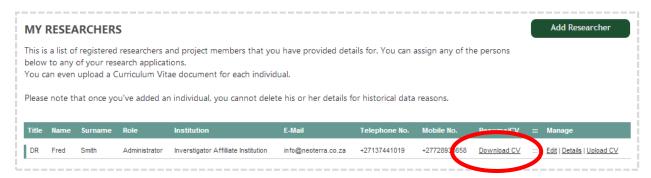
You will now see your file next to the "Choose File" button.



Next, click on "Upload CV" button to upload the file and store it in the NHRD database.



You will see that there is now a downloadable file, linked to the individual's record. Research Committees now have access to the CV.



# How to Submit an Online Research Proposal



# Summary – Module 3

Repeat the steps in this module to add as many researchers as you like. Later you will learn how to link researchers to research proposals.

You only have to do this once. Researcher details, including their CV's are saved and linked to your profile.

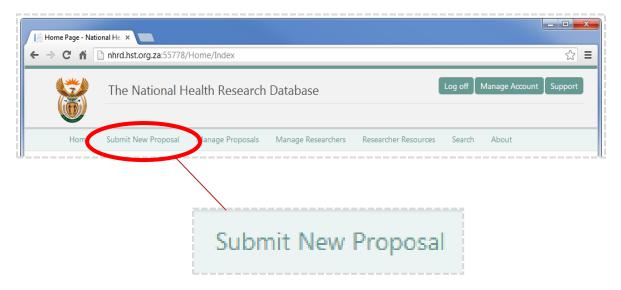


# Module 4 – Apply for Research

### Lesson 1 - How to submit a research proposal.

Now that you have registered and added researchers to you profile, you are ready to submit your research proposal.

To start click on the "Submit New Proposal" menu item in you main navigation bar.



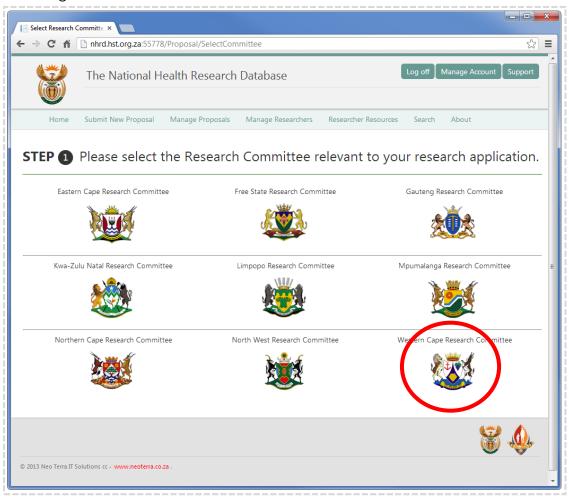
# To submit a Research Proposal follow these 5 steps.

#### Step 1 – Choosing a Research Committee

Choosing a Research Committee relevant to your research proposal is essential. This decision will be based on the location of your study. Each province has a Provincial Research Committee that will be responsible for the processing of your application. You can only choose one Research Committee per application. Therefore, if you are planning to conduct research in more than one province, you will have to apply independently to the relevant you will have to apply to the Provincial Health Research Committee. Select the relevant Research Committee by left-clicking on the committee Image (Coat of Arms).



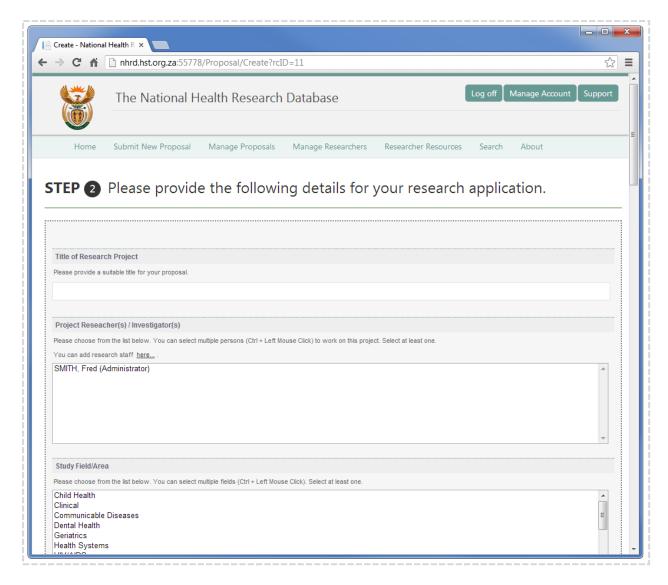
For example: If you want to apply to the Western Cape Research Committee, click on the Image as shown below.



#### Step 2 – Complete the Application Form

The details and information required by Research Committees are combined into a single page. Please note that some attributes are mandatory, and must be completed before the form can be saved or submitted.





Remember: it is important to understand the "Project Researcher(s) / Investigator(s)" section. Here you will need to select from your list of researches that you have supplied in **Module 3**. If you do not have any data in this section, you will first have to go back to Module 3 and add your team members. A **link** is also provided on this page.

Many of the input fields, such as the Study Field/Area referred to as "Burden of Disease", allow you to select more than one value. To select multiple values, hold the Ctrl key and left-click the mouse on the values relevant to your application.

See example below: Here you can select your Study Fields / Areas using this method.

# How to Submit an Online Research Proposal



```
Study Field/Area

Please choose from the list below. You can select multiple fields (Ctrl + Left Mouse Click). Select at least one.

Mental Health
Non - Communicable Diseases
Nutrition
Public Health
Quality of Care
Sexually Transmitted Diseases (Other than HIV/AIDS)
Tuberculosis (TB)
Women's Health
```

Ensure to **not** let go of the Ctrl key while selecting values. Selecting values without holding the Ctrl key will result in single values being selected.

Most of the attributes in this form are mandatory. There are also certain constraints and quality checks that will be done on supplied information. If you have not supplied a value for a required field, or have supplied invalid information, a validation error message will warn you.

This is an example of a typical error message you will get.



Please take note of the warning messages and apply the necessary steps to rectify the problem. You will **not** be able to submit until all validation messages have been cleared.

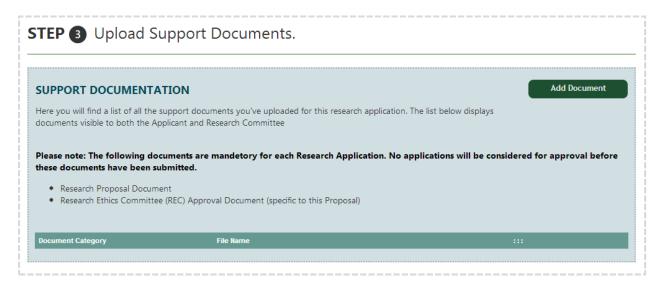


#### Step 3 – Upload Support Documentation

Depending on the type of research, you are required to upload certain documentation. For example, the following is mandatory:

- 1. National Clinical Trials Registration documentation if you are planning to perform clinical trial
- 2. Ethics Committee Approval Documentation
- 3. Research Proposal Document

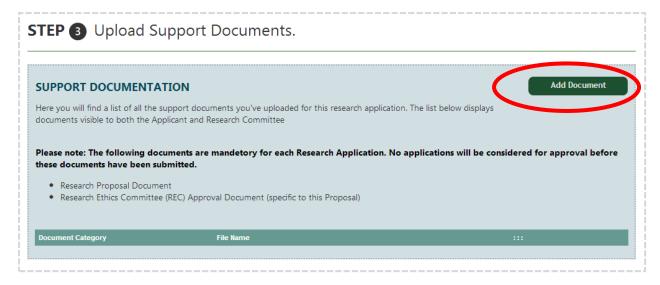
#### For example:



Remember: you will not be able to submit a research proposal until the supporting documentation requirements have been met. You can download templates of the support docs form the "Resources for Researchers" section.

To upload a document, click on the "Add Document" button.





This will load the "UPLOAD SUPPORT DOCUMENT" form.



First select the Document Category / Description

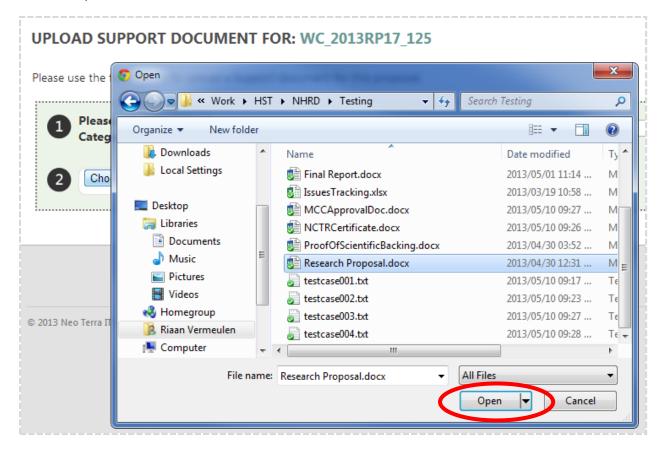


Then click on 'Choose File'.



Browse to the specific file using the 'Open File Dialogue' form.

Select the file using the mouse and then click on "Open" to proceed.

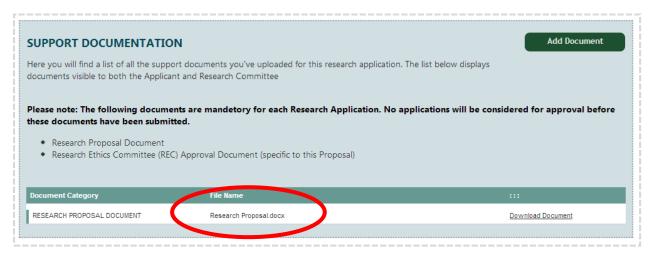




Finally, you will need to click on "Upload Support Document" to save your document and link it to your proposal.



After you have uploaded the document, it will appear in your Support Document list. See example below.



Ensure to repeat this step until you have uploaded all the documents required for your research proposal.



#### Step 4 – Review Submitted Information

This step requires you to review your data before proceeding. This will allow you to ensure that your data is complete and accurate.

By default, your application details are hidden. Click on "Show" to view your details.



#### Step 5 – Submit your data

If you are satisfied that your research application is complete and that you have supplied all of the necessary support documentation, you can submit your proposal.



Alternatively you can choose to save your application for now and come back to it at a later stage. This may be required if you are still waiting for some information or support documentation. Remember that Research Committees will not be aware of your application until you have submitted it.



### Summary - Module 4

Before you can submit a research proposal online, you must be registered on the system.

Also, before you proceed you must capture the details of at least one researcher/investigator in the "My Researchers" section.

You also need electronic copies of certain documents. The documents you will always require include:

- Research Proposal Document
- Ethics Approval Document

If you are planning to perform a Clinical Trial, you will also need to submit your

- National Clinical Trials Register Number
- All documentation related to the Clinical Trials approval and registration.

The process of submitting a proposal online consists out of 5 steps. These steps are:

- 1. Select the Research Committee relevant to your application.
- 2. Complete the Research Proposal online form.
- 3. Upload all of your electronic documents as required.
- 4. Review your application
- 5. Submit and Save your application

You will now be provided with a unique reference number that is dependent on the Province you applied to, the year and the number sequence of your application. This is your unique number that serves as a reference for all communication. It also allows you to track the application process.



# Module 5 – Manage Research Proposals

By now you should be able to:

- Register members of your research team
- Upload a Curriculum Vitae
- Submit an online Research Proposal
- Upload Supporting Documents for Research Proposals

The NHRD Website has a feature that allows you to view all of the research proposals you have submitted or saved before. The "MY RESEARCH PROPOSALS: page will show you:

- A list of reference numbers for each proposal
- If a proposal has or has not been submitted
- The status of your application (Pending, Approved, Declined, Refer to applicant for Changes)
- Title of your research studies
- The status of the project (On-going / Finished)
- The estimated completion date

This is also where you will be able to upload additional Support Documents, and view or add comments to your proposals.

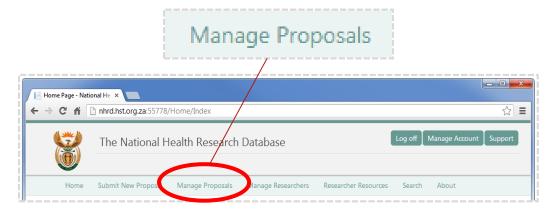
The Comments feature is the primary way for Research Committees to send you information related to your proposal. You can also add your own comments relevant to the study. Research Committees will be able to view and reply to your comments using the same functionality.



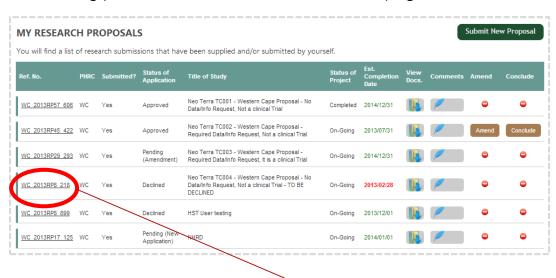
### Lesson 1 – Managing Existing Proposals

Below is an example of how you can view and manage existing proposals. To access this page, click on the "Manage Proposals" menu item in your main navigation bar.

For example:



This will bring you to the "MY RESEARCH PROPOSALS" page.

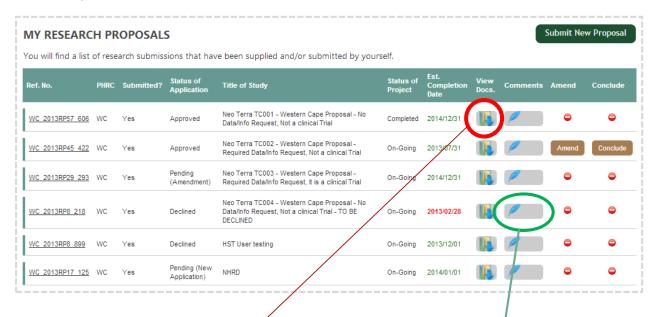


To view the Details of each proposal you can click on the Unique Reference Number found in the first column



Use your "MY RESEARCH PROPOSALS" page to add/view Support Documents and Comments.

#### For example:





Click on this icon to view all support documentation for this Research Proposal. You can add new documents at any time.



Click on this icon to view Comments related to your Proposal. This is a very important tool to communicate and record issues related to your study.



### Lesson 2 – Different Statuses

The status of your application can be one of 5 statuses:

#### Pending (New Application)

This is the status for all new applications **not yet** processed by the Research Committees. Your application could take up to 6 weeks to be approved.

#### For example:



Until it has been approved or reverted back for changes, you will NOT be able to make any amendments. You will also NOT be able to conclude this study at this time.

#### **Approved**

This means that your application has been reviewed and approved by the relevant Research Committee. You will now be able to proceed with your study as per your research proposal.



# How to Submit an Online Research Proposal

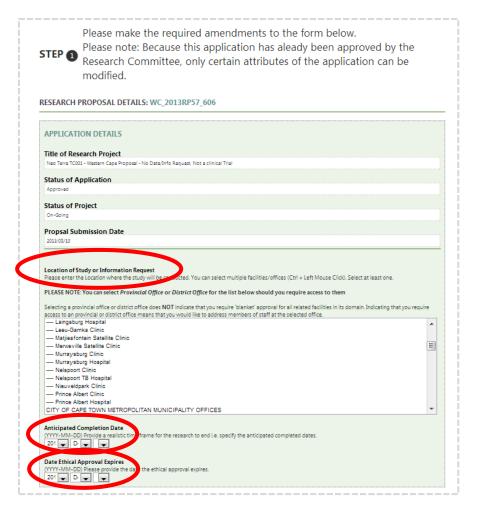


After it has been approved, you will be allowed to make some amendments to your study.

#### Click on Amend to:

- Modify the Location of Study
   You may have to add new facilities or locations to your study
- Edit the Anticipated/Estimated Completion Date
  We understand that factors outside of your control may have resulted in the
  delays. Use this feature to apply for an extension. You application will be
  reviewed by your Research Committee.
- Change the Date Ethical Approval Expires.
   If you are going to require more time to complete your research, you will have to ensure your ethics approval covers your new time frame. Once you have been given an extension you can modify your original date here.





#### Pending (Amendment)

If you have made an amendment after your original proposal was approved, your application will be designated this status. Your application will be flagged for a second approval by the Research Committee. Once approved, you can continue with your research.





#### Revert to Applicant for Changes

This means there is an element of your proposal that will have to be modified BEFORE the research committee can approve your application. Please check the Comments section of your application for details. Make the required changes and resubmit your application.

#### Declined

Unfortunately your application did not meet the requirements set by the Research Committee. You may NOT proceed with your research.





### Summary – Module 5

The "MY RESEARCH PROPOSALS" page will show you:

- A list of reference numbers for each proposal
- If a proposal has or has not been submitted
- The status of your application (Pending, Approved, Declined, Refer to applicant for Changes)
- Title of your research studies
- The status of the project (On-going / Finished)
- The estimated completion date

This is also where you will be able to upload additional Support Documents, and view or add comments to your proposals. From here you can also Edit, or Amend proposals.

# How to Submit an Online Research Proposal



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# How to Submit an Online Research Proposal



Student Notes