



QUICK REFERENCE GUIDE

Setting up a Home Page

FOR RESEARCH OFFICES

Setting up a Home Page

The first time you log into REGIS, your home page will be blank. Setting up your home page will significantly help you manage your tasks and workflows in REGIS.

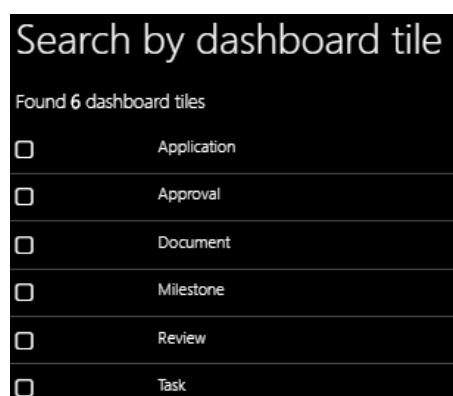
What information is needed?

You should have the following information ready to get started in REGIS:

- your user name and password
- a list of tasks you would like to see on the dashboard.

Home page/dashboard tiles

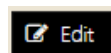
There are 6 tile options:



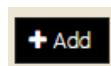
Each tile can be created many times with the Title and Status changed each time to describe the action of the tile.

Create a home page tile

Step 1 Click on the 'Edit' icon at the bottom left of the screen



Then click on the 'Add' icon by the 'Edit' icon.



A black panel will appear on the right-hand side of the screen.

Step 2

On the black panel, select the type of tile you wish appear on your home page by clicking on the check box next to your chosen option. .

Step 3



Click the apply tick at the bottom of the panel.

A tile will appear on the home page.

Step 4

Hover your mouse over the top right-hand side of the tile you wish to edit or filter. The edit and delete icons will appear.



Another black panel will appear on the right-hand side of the screen. You can now create the home page tiles.

Note: if you cannot see the edit and delete icons, check you have clicked on the 'Edit' icon on the bottom left of the screen.

Depending on the type and resolution of your screen, you can fit up to 8 visible tiles (2 rows of 4 tiles). You can add additional tiles, but they are only visible by scrolling down.

The rest of the document describes each of the different tiles and their options in greater detail.

Application tile

Use this tile for actions representing the progress of a new application from submission to approval.

Application filters

Title: describe the action of the tile, e.g. Assigned to meeting.

Template Type: Select either Table or List. 'Table' shows 10 applications, while 'List' shows all applications that meet the criteria. Hover over the Identifier or Title to see the full title and owner of ethics and governance applications.

Program: Select Ethics or Site. To view both types of application, leave this field blank.

Submitted only: Select **Yes** for applications that have been submitted and have since had a status change. Select **No** for the current status of all applications.

Status: A searchable list will appear. Select:

- **In Progress** to see all ethics and governance applications that are being completed or edited
- **Submission Pending** to see a governance application that has been submitted for Head of Department support
- **New Application** to see a new ethics or governance application
- **Eligible** to view ethics and governance applications that are eligible to progress to the next process (assign to meeting, assign to review, Research Governance Officer (RGO) review)
- **Ineligible** to view applications that mean the applicant must resubmit a new version of the ethics or governance application, or associated documents – once the applicant starts working on the

application, the status will change from 'Ineligible' to 'In Progress'

- **Assigned to Meeting** to view ethics applications that have been assigned to a HREC meeting, a specialist subcommittee meeting or other meeting – if you assign an application to a meeting and then to a review, the 'Under Review' status overrides the 'Assigned to meeting' status
- **Under Review** to view ethics applications that have been assigned for review
- **More Information Requested (ethics applications):**
 - *Approval pending further action* to view applications where more information has been requested
 - *Decision pending* to view applications where the committee or RGO has requested changes to submitted documents or the application form – the applicant must submit a new version of the application which REGIS automatically creates, so the status will change to 'In Progress'
 - *Approval pending* to view applications where the committee or RO has requested an item be clarified, confirmed or described but the application form or related documents do not need updating – the applicant must complete the More Information Required form that REGIS generates
- **Information Provided** to view ethics applications when a response to a request for more information has been submitted (this status will only trigger after the 'Approval Pending further action' decision)
- **Approved, Approved with conditions or Not approved** to view ethics applications where the Decision Status is 'Pending email', i.e. an email has not yet been sent to the applicant
- **Authorised, Authorised with conditions or Not authorised** to view governance applications where the Decision Status is 'Pending email', i.e. an email has not yet been sent to the applicant

With tags: A searchable list will appear only if an application has had a tag created.

Without tags: A searchable list will appear.

Classification: A searchable list will appear.

Decision status: A searchable list will appear based on the approval status/progress.

Approval tile

More details to be provided once REGIS has been further enhanced

Document tile

This tile can be used to view any document category in REGIS. The most obvious types of Document tile will be:

- ethics: amendments and safety notifications
- governance: external milestone review (progress report), certificate of currency, CTRA, NCAT approval, safety reporting

Document filters

Title: describe the action of the tile, e.g.

Amendments submitted

Template Type: As for 'Applications tile'

Type: Application (pre-approval) or Project (post-approval)

Only not associated to meeting: select 'yes' for documents that have not been allocated to a meeting

Document type: a searchable list will appear e.g. Amendments, Safety Reports and Certificate of Currency

With tags and without tags: as for 'Applications' tile

Milestone tile

There are two types of milestones in REGIS:

- Ethics Progress Reports
- First Patient In (clinical trials).

Milestone filters

Title: describe the action of the tile, e.g. Milestone

Template Type: As for 'Applications' tile

Program: Select Ethics or Governance

Milestone type: Progress Report or First Patient In (clinical trials)

Status: A drop down list will appear e.g. Achieved, Received.

Review tile

Use this tile to view when a review has been completed (when all the reviewers have submitted their review).

A submitted review may need to be downloaded and attached to a meeting or may require the Research Office to provide a decision e.g. Approved.

Review filters

Title: describe the action of the tile, usually Reviews submitted in last xx days.

Template Type: as for 'Applications' tile

Reviews submitted in last XX days: choose a timeframe.

Task tile

Use this tile to view tasks allocated to you for ethics or site applications.

Tasks can be assigned manually by yourself or other REGIS users. Tasks are also created by the system.

Task filters

Title: describe the action of the tile, e.g. Progress ethics application.

Template Type: As for Applications tile

For further guidance see: **REGIS User Manual – 1.1 Homepage tiles**

For technical assistance, contact
REGIS HELP DESK

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