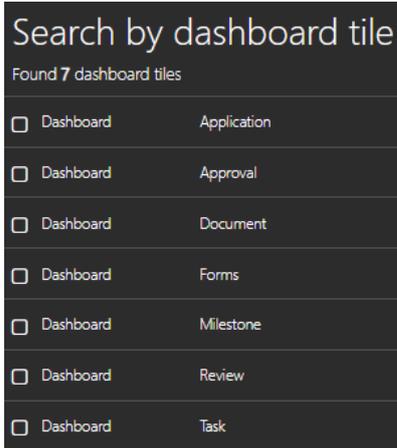




## Guidance for Research Office: Home Page Tiles

Home Page tiles allow you to quickly navigate to areas of REGIS you most frequently work in.

There are 7 tile options:



Each tile can be created multiple times with the Title and filters changed each time to describe the action of the tile. The sorts of functions that can be accessed under each type of tile are described below.

Depending on the size and resolution of your screen, you will be able to comfortably create 8-10 visible home page tiles on your REGIS home page. You can create more home page tiles, but they will not be immediately visible and you will need to scroll down the page.

An alternate method to identify application is to use the application search function in REGIS.

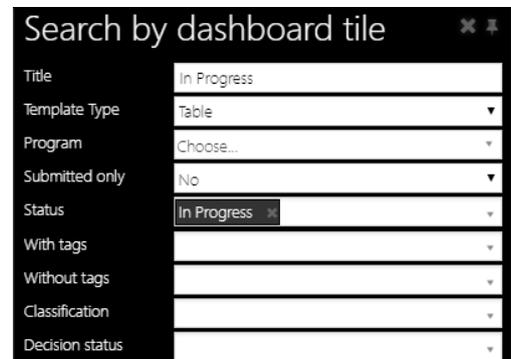
### Pre-approval/authorisation

#### Application Tile

Used during pre-approval application management

The different types of tiles created with the Application tile are described below.

**In Progress (ethics and governance applications):** this tile can be created to see all the applications that are being completed or edited.



**Submitted to HOD (governance applications only):** this tile can be created to see a site application that has been submitted for Head of Department support.

Search by dashboard tile

Title: Sub to HOD

Template type: List

Program: Site

Submitted only: No

Status: Completed pending HOD

With tags:

Without tags:

Classification:

Decision status:

**All HOD decision made (governance applications only):** this tile can be created to see a site application that is currently with the researcher to submit to the research office after of HOD have signed off.

Search by dashboard tile

Title: back with PI to submit

Template type: List

Program: Site

Submitted only: No

Status: HOD Not Supported, Pending Submission

With tags:

Without tags:

Classification:

Decision status:

**New Application (ethics and governance applications):** this tile can be created to see a new application that can be considered for eligibility.

When a 'More Information - Decision pending further information' is selected, the application returns to the research office as 'Submitted'. This will change in the 1.7/1.8 release.

Search by dashboard tile

Title: New Application

Template Type: Table

Program: Choose...

Submitted only: No

Status: Submitted

With tags:

Without tags:

Classification:

Decision status:

**Eligible (ethics and governance applications):** this tile can be created to view applications that have received an eligibility review and can process to the next process (assign to meeting, assign to review, RGO review).

Search by dashboard tile

Title: Eligible

Template Type: Table

Program: Choose...

Submitted only: No

Status: Eligible

With tags:

Without tags:

Classification:

Decision status:

**Valid (governance application only):** this tile can be created to view applications that have received an eligibility review and can process to the next process (assign to meeting, assign to review, RGO review). BUT have not yet received Ethics approval.

Search by dashboard tile

Title: Valid (elig pending eth)

Template type: Table

Program: Site

Submitted only: No

Status: Valid

With tags:

Without tags:

Classification:

Decision status:

**Ineligible (ethics and governance applications):** this tile can be created to view applications that have received an eligibility review but are not eligible to proceed, so the applicant must re-submit a new version of the application and/or associated documents.

Once the application owner starts working on the application again, the status will change from 'Ineligible' to 'In Progress' and will no longer be seen under the Ineligible tile.

Search by dashboard tile

Title: Ineligible

Template Type: Table

Program: Choose...

Submitted only: No

Status: Ineligible

With tags:

Without tags:

Classification:

Decision status:

**Assigned to meeting (ethics applications only):** this tile can be created to view applications that have been assigned to a meeting. This could be a Full HREC Meeting, a Specialist Subcommittee Meeting or Other Meeting.

Note: If you assign an application to a meeting and then to a review, the 'Under Review' status overrides the 'Assigned to meeting' status.

Search by dashboard tile

Title: Assigned to Meeting

Template Type: Table

Program: Ethics

Submitted only: No

Status: Assigned to meeting

With tags:

Without tags:

Classification:

Decision status:

**Assigned to a review (ethics applications only):** this tile can be created to view applications that have been assigned to be reviewed.

Search by dashboard tile

Title: Assigned to Review

Template Type: Table

Program: Ethics

Submitted only: No

Status: Under Review

With tags:

Without tags:

Classification:

Decision status:

**More Information Requested (ethics applications only):**

*Approval pending further action* – this tile can be created to view applications where the applicant has received an email requesting further information.

*Decision pending* – this tile can be created to view applications where a Human Research Ethics Committee (HREC) or Research Governance Officer (RGO) has requested changes to submitted documents or the application form – the applicant must submit a new version of the application. REGIS currently creates this new version automatically so the status of this application will change to ‘In Progress’.

*Approval pending* – this tile can be created where the HREC or Research Officer have requested an item be clarified, confirmed or described but do not require the application form or related documents to be updated. – the applicant must complete and submit the More Information Required form that has been created in their application view.

A screenshot of a search filter interface titled "Search by dashboard tile". The form includes the following fields: Title (More Information Requested), Template Type (Table), Program (Choose...), Submitted only (No), Status (Approval pending further action by CPI/PI), With tags, Without tags, Classification, and Decision status.

**Information Provided (ethics and governance applications only):** this tile can be created to view when a response to a request for more information has been submitted.

Ethics note: Currently the ‘Information Provided’ status will only trigger after the ‘Approval pending further action’ decision.

When ‘Decision pending further information’ is selected, the application status changes to ‘Submitted’. The Information Provided status will trigger after the 1.7/1.8 release.

A screenshot of a search filter interface titled "Search by dashboard tile". The form includes the following fields: Title (Response Provided), Template Type (Table), Program (Choose...), Submitted only (No), Status (Information provided), With tags, Without tags, Classification, and Decision status.

**Approval/Authorisation pending email (ethics and site governance applications):** this tile can be set up to view any application that has had a decision of ‘Approved’ or ‘Authorised’ (including with conditions) but the approval email has not yet been sent.

A screenshot of a search filter interface titled "Search by dashboard tile". The form includes the following fields: Title (Approved - pending letter), Template type (List), Program (Ethics), Submitted only (Yes), Status, With tags, Without tags, Classification, and Decision status (Pending email, Pending generation).

A screenshot of a search filter interface titled "Search by dashboard tile". The form includes the following fields: Title (Auth - pending letter), Template type (List), Program (Site), Submitted only (Yes), Status, With tags, Without tags, Classification, and Decision status (Pending email, Pending generation).

## Review Tile

Used during pre-approval application management

**Review submitted (ethics applications only):** this tile can be created to view when a review has been completed against an application. A review is only completed when all the reviewers have submitted their reviews.

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

Reviews may also be used during post approval management.

The screenshot shows a search interface titled "Search by dashboard tile". It includes three input fields: "Title" with the value "Review - submitted - 20days", "Template Type" with a dropdown menu set to "Table", and "Reviews submitted in last (days)" with a text input field containing "20".

## Pre and Post approval/authorisation

### Task Tile

Used during pre-approval application management and post approval project management

**Task (ethics and governance applications):** this tile can be created to view any task that has been assigned to you or your team. Tasks can be assigned manually by yourself or other REGIS users. Tasks are also created by the system.

Tasks may also be used during post-approval

The screenshot shows a search interface titled "Search by dashboard tile". It includes two input fields: "Title" with the value "Task" and "Template Type" with a dropdown menu set to "Table".

## Approval Tile

**Approval (ethics/governance applications):** This tile can be used to filter approval outcomes for applications, documents, forms and projects.

There is no separation between Ethics and Governance applications.

The screenshot shows a search interface titled "Search by dashboard tile". It includes five input fields: "Title" with the value "Approval", "Template type" with a dropdown menu set to "Table", "Approval type" with a dropdown menu set to "Choose...", "Applies to" with a dropdown menu set to "Choose...", and "Outcome" with a dropdown menu set to "Choose...".

## Document Tile

**Documents (ethics and governance applications):** This tile can be used to filter out specific documents that appear in related documents section.

The screenshot shows a search interface titled "Search by dashboard tile". It includes seven input fields: "Title" with the value "Document", "Template type" with a dropdown menu set to "List", "Type" with a dropdown menu set to "Application", "Only not associated to meetings" with a dropdown menu set to "No", "Document type" with a text input field, "With tags" with a text input field, and "Without tags" with a text input field.

### Documents for Noting (governance applications only)

Documents for noting include an external milestone review (progress report), certificate of currency, CTRA, NCAT approval, and report on safety.

The screenshot shows a configuration window titled "Search by dashboard tile" with the following settings:

- Title: Documents for Noting
- Template Type: Table
- Type: Project
- Only not associated to meetings: No
- Document type: Certificate of Currency, External Milestone Review Report, Other project-related documentation specif...
- With tags: [empty]
- Without tags: [empty]

## Post approval/authorisation

### Forms

Used during post-approval project management.

### New Amendments Submitted (ethics applications only):

This tile can be created to view any new amendment request submitted.

General Amendments, Change in CPI/PI, HREC extension and Addition of site.

The screenshot shows a configuration window titled "Search by dashboard tile" with the following settings:

- Title: New Amendments
- Template type: Table
- Status: Submitted
- Form mapping: Notification of an amendment to a researc...
- With tags: [empty]
- Without tags: [empty]
- Assigned to Meeting: Choose...
- Email Sent: Choose...
- Decision Outcome: Not Actioned

**Amendment Responses (ethics applications only):** This tile can be created to view any responses to a request for information for an amendment.

The screenshot shows a configuration window titled "Search by dashboard tile" with the following settings:

- Title: Amendment Responses
- Template type: Table
- Status: Submitted
- Form mapping: Notification of an amendment to a researc...
- With tags: [empty]
- Without tags: [empty]
- Assigned to Meeting: Choose...
- Email Sent: Choose...
- Decision Outcome: More information required

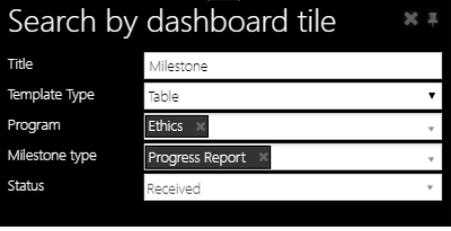
**Safety Reporting to HREC (ethics applications only):** This tile can be created to view any new SSIs.

The screenshot shows a configuration window titled "Search by dashboard tile" with the following settings:

- Title: Safety Reporting to HREC
- Template type: Table
- Status: Submitted
- Form mapping: Significant Safety Issue Notification
- With tags: [empty]
- Without tags: [empty]
- Assigned to Meeting: Choose...
- Email Sent: Choose...
- Decision Outcome: Not Actioned

## Milestone Tile

Used during post-approval project management.

<b>Annual Report/Progress Report (ethics applications only)</b>	
<b>Clinical Trial First Patient In (governance applications only)</b>	