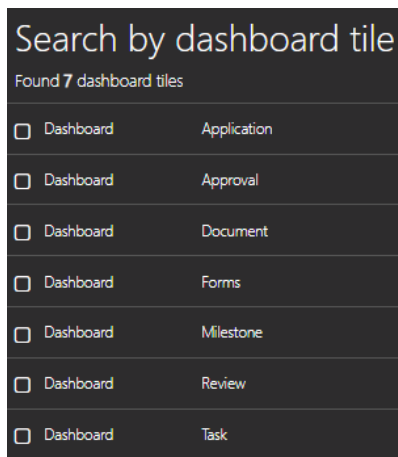




## Guidance for Research Office: Home Page Tiles

**Home Page tiles** allow you to quickly navigate to areas of REGIS you most frequently work in. A homepage tile should identify an incoming action for the research office.

Home page tiles provide a snapshot. An alternate method to identify application/project is to use the application/project search functions in REGIS.



**There are 7 tile options:** Application, Approval, Document, Forms, Milestone, Review and Task.

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.

<b>Application:</b>	Initial submission to approval/authorisation is managed in the Application.
<b>Approval:</b>	This tile can be used to filter approval outcomes for applications, documents, forms and projects. There are no Approval tiles in the suggested homepage. This tile will only be used at the Research Office discretion.
<b>Document:</b>	Document tile can search all Related Document types.
<b>Forms:</b>	This is the best tile to access forms that are submitted as part of the post approval management of and application e.g. amendment forms and safety forms.
<b>Milestone:</b>	There are two standard milestones in REGIS Progress Reports for Ethics and First Patient Recruited (for clinical trials) for Site applications.
<b>Review:</b>	This tile is used to identify when a review has been submitted to the Research Office.
<b>Task:</b>	Shows all tasks for the Research Office. Tasks can be system generated or manually created by users.

**This section describes a number of tile options.** Some are directly related to the Setting up the home page qrg and are indicated with a \*.

When a tile does not specify Ethics or Site in the screenshot either can be selected. Selecting no program will identify Ethics and Site applications.

## Pre-approval/authorisation

### Application Tile

#### Used during pre-approval application management

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

<b>Title:</b>	Edit this field to describe the action of the tile.
<b>Template Type:</b>	Select which template you wish to use. This is based off personal preference.
<b>Program:</b>	Select Ethics/Site to specifically filter a type of application. Selecting no program will show both Ethics/Site.
<b>Submitted only:</b>	Is used to filter out applications that have been submitted one time or multiple times. It is recommended to always use 'No' as the response as further enhancements of the homepage have negated this filter option.
<b>Status:</b>	Select one or more status.
<b>With Tags:</b>	This filter allows further customisation for specific research office processing. A Research Office can assign custom tags to an application and this filter will show applications that also have this tag.
<b>Without Tags:</b>	Similar to "With Tag" this filter allows further customisation for specific research office processing. A Research Office can assign custom tags to an application and this filter will show applications that don't have this tag.
<b>Classifications:</b>	On completion of Project Registration, HREA and Site application certain categories are applied to the application e.g. Study Type, XX and XX. Adding a classification to the filter will further customise the search.
<b>Decision Status:</b>	Used to identify when an application has been approved but the decision notification email has not yet been sent.
<b>Sort by:</b>	Select what you wish to sort by.
<b>Sort order:</b>	Select the order to sort by.

**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: Currently with HOD

Template type: Table

Program: Site

Submitted only: No

Status: Completed pending HOD

With tags:

Without tags:

Classification:

Decision status:

Sort by: Date modified

Sort order: Ascending

**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.

Note:  
 if **ALL** HOD have made the decision to support the application the status will be 'Pending Submission'.  
 If one or more HOD have made a decision of supported with conditions or not supported the status will be 'HOD Not Supported'.

Search by dashboard tile

Title: Back with PI to submit

Template type: Table

Program: Site

Submitted only: No

Status: HOD Not Supported, Pending Submission

With tags:

Without tags:

Classification:

Decision status:

Sort by: Date modified

Sort order: Ascending

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

Search by dashboard tile

Title: Application

Template type: Table

Program: Choose...

Submitted only: No

Status: Submitted

With tags:

Without tags:

Classification:

Decision status:

Sort by: Date modified

Sort order: Ascending

**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:

Sort by: Date modified

Sort order: Ascending

**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

Template type: Table

Program: Site

Submitted only: No

Status: Valid

With tags:

Without tags:

Classification:

Decision status:

Sort by: Date modified

Sort order: Ascending

**Pending CE (governance application only):** this tile can be created to view applications that have received RGO recommendation, Pending and have not yet received governance authorisation.

Search by dashboard tile

Title: Pending CE

Template type: Table

Program: Site

Submitted only: No

Status: Pending CE

With tags:

Without tags:

Classification:

Decision status:

Sort by: Date modified

Sort order: Descending

**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:

Sort by: Date modified

Sort order: Ascending

**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:

Sort by: Date modified

Sort order: Ascending

**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:

Sort by: Date modified

Sort order: Ascending

**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.

**Search by dashboard tile**

Title: Information Provided (RFI In)

Template type: Table

Program: Choose...

Submitted only: No

Status: Information provided

With tags:

Without tags:

Classification:

Decision status:

Sort by: Date modified

Sort order: Ascending

**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 Decision Notification email has not yet been sent.

**Search by dashboard tile**

Title: Approved pending email

Template type: Table

Program: Choose...

Submitted only: No

Status:

With tags:

Without tags:

Classification:

Decision status: Pending email, Pending generation

Sort by: Date modified

Sort order: Ascending

## Review Tile

Used during pre-approval application management

<b>Title:</b>	Edit this field to describe the action of the tile.
<b>Template Type:</b>	Select which template you wish to use. This is based off personal preference.
<b>Reviews submitted in last (days)</b>	The action will remain in the tile based on the number of days entered here. It is recommended you keep this number as low as possible.
<b>Sort by:</b>	Select what you wish to sort by.
<b>Sort order:</b>	Select the order to sort by.

**Review submitted\* (ethics applications only):** this tile can be created to view when a review has been completed against an application.

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

**Search by dashboard tile**

Title:

Template type:

Reviews submitted in last (days):

Sort by:

Sort order:

## Pre and Post approval/authorisation

### Task Tile

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

<b>Title:</b>	Edit this field to describe the action of the tile.
<b>Template Type:</b>	Select which template you wish to use. This is based off personal preference.
<b>Sort by:</b>	Select what you wish to sort by.
<b>Sort order:</b>	Select the order to sort by.

**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

**Search by dashboard tile**

Title:

Template type:

Sort by:

Sort order:

### Approval Tile

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

**Search by dashboard tile**

Title:

Template type:

Decision type:

Applies to:

Outcome:

Sort by:

Sort order:

### Document Tile

<b>Title:</b>	Edit this field to describe the action of the tile.
<b>Template Type:</b>	Select which template you wish to use. This is based off personal preference.
<b>Type:</b>	Select Application (submission to approval/authorisation) or Project (post approval/authorisation management of the study) to indicate where the documents should be identified
<b>Only not associated to meetings:</b>	Is used to filter out documents that have or haven't been submitted to a meeting. It is recommended to always use 'No' as the response as further enhancements of the homepage have negated this filter option.
<b>Document Type:</b>	Select one or more document types that should appear here.
<b>With Tags:</b>	This filter allows further customisation for specific research office processing. A Research Office can assign custom tags to a document and this filter will show documents that also have this tag.
<b>Without Tags:</b>	Similar to "With Tag" this filter allows further customisation for specific research office processing. A Research Office can assign custom tags to a document and this filter will show documents that don't have this tag.
<b>Sort by:</b>	Select what you wish to sort by.
<b>Sort order:</b>	Select the order to sort by.

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

**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.

## Post approval/authorisation

### Forms



**Used during post-approval project management.**

<b>Title:</b>	Edit this field to describe the action of the tile.
<b>Template Type:</b>	Select which template you wish to use. This is based off personal preference.
<b>Status:</b>	Select one or more status.
<b>Form mapping:</b>	Select the type of form. Currently this is a single select option.
<b>With Tags:</b>	This filter allows further customisation for specific research office processing. A Research Office can assign custom tags to a form and this filter will show forms that also have this tag.
<b>Without Tags:</b>	Similar to "With Tag" this filter allows further customisation for specific research office processing. A Research Office can assign custom tags to a form and this filter will show forms that don't have this tag.
<b>Assigned to meeting:</b>	Filter to show forms that have or haven't been assigned to a meeting.
<b>Email sent:</b>	Filter to indicate that a decision email (more information, approved, not approved) has been previously sent.
<b>Decision outcome:</b>	Select a decision outcome that has occurred.
<b>Sort by:</b>	Select what you wish to sort by.
<b>Sort order:</b>	Select the order to sort by.

**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.

**Search by dashboard tile**

Title	<input type="text" value="New Amendment"/>
Template type	Table ▼
Status	Submitted ▼
Form mapping	Notification of an amendment to a researc... ▼
With tags	<input type="text"/>
Without tags	<input type="text"/>
Assigned to meeting	Choose... ▼
Email sent	Choose... ▼
Decision outcome	Choose... ▼
Sort by	Date modified ▼
Sort order	Ascending ▼

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

Search by dashboard tile

Title	Amendment Response In
Template type	Table ▼
Status	Submitted ▼
Form mapping	Notification of an amendment to a researc... ▼
With tags	
Without tags	
Assigned to meeting	Choose... ▼
Email sent	Choose... ▼
Decision outcome	More information required ▼
Sort by	Date modified ▼
Sort order	Ascending ▼

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

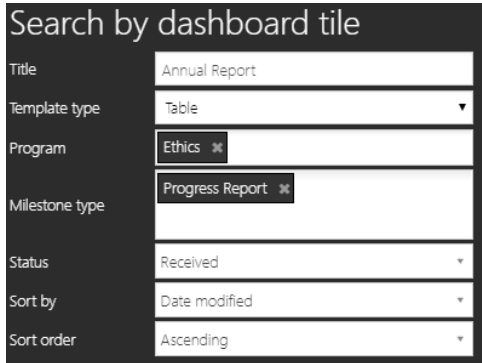
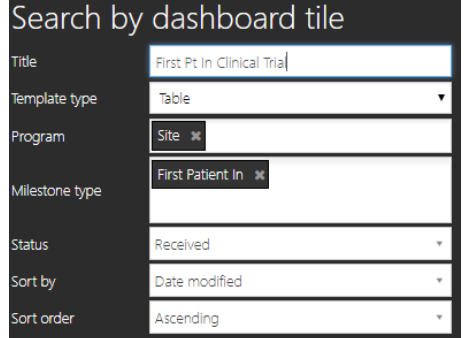
Search by dashboard tile

Title	Safety Reporting to HREC
Template type	Table ▼
Status	Submitted ▼
Form mapping	Significant Safety Issue Notification ▼
With tags	
Without tags	
Assigned to meeting	Choose... ▼
Email sent	Choose... ▼
Decision outcome	Not Actioned ▼
Sort by	Date modified ▼
Sort order	Ascending ▼

## Milestone Tile

Used during post-approval project management.

<b>Title:</b>	Edit this field to describe the action of the tile.
<b>Template Type:</b>	Select which template you wish to use. This is based off personal preference.
<b>Program:</b>	Select Ethics/Site to specifically filter a type of application. Selecting no program will show both Ethics/Site.
<b>Milestone type:</b>	Select one or more type.
<b>Status:</b>	Select a status.
<b>Sort by:</b>	Select what you wish to sort by.
<b>Sort order:</b>	Select the order to sort by.

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

## Customised Filtering

### With/Without Tags

#### Used in Applications, Documents and Forms Tiles

A Research Office can use Tags to further customise actions in REGIS.

#### With Tag

##### Recommended & currently with CE (site applications only)

Indicating a site application that has been recommended by the RGO and is currently with the CE/Delegate.

A site application can have the decision of 'RGO Recommendation' created whilst in the status of 'Valid' or 'Information Provided'.

The RGO manually adds the Tag of 'CE' to the application when the RGO Recommendation decision is made.

#### Search by dashboard tile

Title	Recommended with CE
Template type	Table ▼
Program	Site ▼
Submitted only	No ▼
Status	Information provided ✕ Valid ✕
With tags	CE ✕
Without tags	
Classification	
Decision status	
Sort by	Date modified ▼
Sort order	Ascending ▼

#### Without Tag

##### Valid (site applications only), Information Provided

In conjunction to the above example of 'With Tag CE' you can select to filter applications 'Without Tags'

By updating the Valid and Information Provided application tiles filtering 'Without Tag CE' this will ensure when an application has the tag will no longer appear in these tiles. Only applications that required the attention of the research office will appear in these tiles.

#### Search by dashboard tile

Title	Valid
Template type	Table ▼
Program	Site ▼
Submitted only	No ▼
Status	Valid ✕
With tags	
Without tags	CE ✕
Classification	
Decision status	
Sort by	Date modified ▼
Sort order	Ascending ▼

	<div style="background-color: #333; color: white; padding: 5px;"> <h3 style="margin: 0;">Search by dashboard tile</h3> <p>Title: Information Provided (RFI in)</p> <p>Template type: Table ▼</p> <p>Program: Site ▼</p> <p>Submitted only: No ▼</p> <p>Status: Information provided ✕</p> <p>With tags:</p> <p>Without tags: CE ✕</p> <p>Classification:</p> <p>Decision status:</p> <p>Sort by: Date modified ▼</p> <p>Sort order: Ascending ▼</p> </div>
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## Classifications

### Used in Application Tile

A Research Office can use classifications to further customise actions in REGIS.

<p><b>Identifying New Clinical Trial</b></p> <p>For a research office that has a pre HREC meeting (scientific sub-committee). To easily identify clinical trials on a submission closing date an additional Application tile can be created.</p> <p>The same filters used for the New Application tile are used with the addition of the Classification 'Study type – Clinical trial'.</p> <p>Classifications is a multi-select filter, meaning more than one filter can be selected.</p>	<div style="background-color: #333; color: white; padding: 5px;"> <h3 style="margin: 0;">Search by dashboard tile</h3> <p>Title: New Clinical Trials</p> <p>Template type: Table ▼</p> <p>Program: Ethics ▼</p> <p>Submitted only: No ▼</p> <p>Status: Submitted ✕</p> <p>With tags:</p> <p>Without tags:</p> <p>Classification: Study type - Clinical trial ✕</p> <p>Decision status:</p> <p>Sort by: Date modified ▼</p> <p>Sort order: Ascending ▼</p> </div>
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