

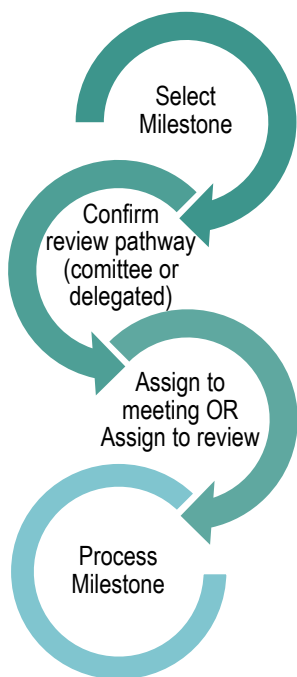



Processing a Progress Report
 FOR RESEARCH OFFICES

QUICK REFERENCE GUIDE

Processing a Progress Report (Milestone)

The following diagram is an overview of the progress report (milestone) process in REGIS.



Accessing the Progress Report

Note: This QRG assumes you have already set up your homepage tiles. See [QRG – Research Offices – Setting up a Homepage](#) and [REGIS User Manual guide – Homepage tiles](#)

Step 1
Select the progress report from the homepage tile that you want to process.

Step 2
You will be taken to the Milestone section of the Ethics Project (post-approval).

Information: Milestone Details and Milestone Dates give an overview of the progress report.


Note: Forecast & invoice currently not required for REGIS.

Detail: Includes name of the milestone (progress report). Click 'Edit' to manually add more detail.

Justification: Will be blank. Click 'Edit' to manually add more detail.

Addition fields: Will list additional fields assigned to milestone.

Documents: Includes the progress report form and any other supporting documents submitted.

 Click the download icon to access the form and supporting documents.

Click 'Edit' and the '+Add document' to add any external documents required.

Actions: Currently not required for REGIS.

Ratings: Currently not required for REGIS.

History: See a detailed history of the milestone.

Milestone review: Click 'Edit' and the Hamburger to manually '+Add new review'. A milestone review is a separate functionality to the Review function accessed through the start icon.

The progress report can be:

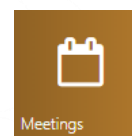
- ❖ Assigned to an existing meeting
- ❖ Processed through the ETH Project

Assigning a progress report to an existing meeting

For full committee review or executive committee review

For instructions on how to create a meeting please see: [QRG - Research Offices - Creating and Preparing HREC Meetings](#)

Step 1



Navigate to the 'Meetings' tile and select the 'Meetings' icon to search, schedule or check meetings.

Step 2. Search for the existing meeting

Filter the search by adding a Title, Meeting status or add further filters by dragging and dropping any of the 7 filters available on the left-hand side of the screen.

Select the meeting by clicking the 'Edit meeting' icon



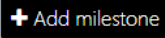
Step 3

Milestones

Click on the Milestones heading of the bottom of the Meeting page.

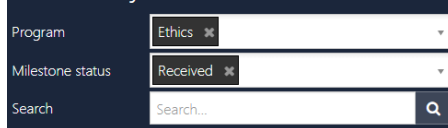
Milestones in meetings relate to progress and final reports.

Step 4

Select the '+ Add milestone' and a pop out panel will appear. 

Step 5

Search by milestone



Use the Search function in the pop out panel to find the forms. Filter by Program, Milestone status or text search. Select the progress report and click the tick icon to add the milestone.

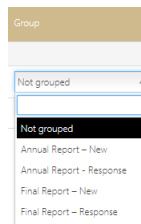
Step 6

The system will automatically include all documents submitted with the milestone to be viewed by the meeting attendees in the external portal.

New functionality:

You can group documents together by selecting the drop-down menu under 'Group' and using the filter options.

You can also change the display order of documents by using the 'up' and 'down' arrows.



Adding notes and recording the decision

Step 1

Add any notes or comments from the meeting in 'Meeting details', located at the top of the screen and click save when you are finished.

Notes can be edited after the meeting; this information can feed through to the draft minutes created in REGIS.

Step 2 Record a decision.



The 'gavel' icon records the decision:

Decision Type:

- ❖ Progress Report with status change (Completed, Terminated/Abandoned)
- ❖ Annual Progress Report
- ❖ First Patient in Report

Decision:

- ❖ Decision pending – More Information required
- ❖ Noted
- ❖ Rejected

Step 3

Click 'Save' in the wizard.

Step 4

Click page save to save all of the decisions and outcomes and then click edit.

Step 5

Click on the email icon, edit template as required and send email. This will mark the annual report/milestone as achieved.

Remember to share the milestone report/system generated email from the project related documents. See below section How to Share.

Step 6

For all 'Decision Pending' or 'Rejected' progress reports you will need to process the milestone from the project.

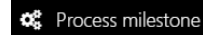
Processing the progress report from the ETH Project

Select the milestone to be processed.

See Accessing the Progress Report for the menu details.

Step 1

Select 'Information', 'Edit' and 'Process milestone'



Complete the progress report in the 'Process milestone wizard'.

Step 2. Process Milestone

Date received - is the date the milestone was initially submitted. This should not be changed.

Milestone status - select the status from the dropdown menu.:

Achieved – milestone report noted and accepted by the HREC.


Revision – further information is required. Complete the additional information required.

Select the date the milestone should be returned.

Click the toggle to update the milestone due date.

Not Achieved – selected when a milestone is not submitting even after multiple requests. Complete the additional information required.

Effective Date – the date the decision was made

Click on the red next arrow to proceed through sections 2-4. 

Step 3. Attach minutes

Functionality currently not used.

Step 4. Rate milestone

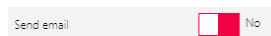
Functionality currently not used.

For technical assistance, contact
REGIS HELP DESK

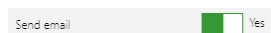
support.f1solutions.com.au
1300 073 447

Step 5. Send milestone email

If you do not wish to send an email then click the 'send email' toggle to 'No'.



If sending an email, edit as required and then ensure toggle is selected 'Yes' and click the green tick to finish and send.



Remember to share the milestone report and the system generated email from the project related documents. See below section How to Share

Change the Status of the Project.

When a milestone has a status of Completed, Closed (post analysis), Terminated/Abandoned it is noted the RO should change the status of the Ethics Project.

Step 1.

Ensure that you are in the Ethics 'Project'. Select the Management tile and then Status



Step 2.

Select Edit and '+ Add status'

Completed - When the last participant has met the last study analysis endpoint. When reached at a single site study, this is likely the time point when data analysis can begin. When reached at the last site in a multi-site study, this is likely the time point when data analysis can begin. Participants may still be undergoing follow-up visits.

Closed (post analysis) - The study has finished normally, participants are no longer being treated or examined, but the documents are not yet archived.

Abandoned - The application has been approved/authorised, but it has been determined that the project will never commence.

Terminated After study start but before study close, discontinuation of a research project by the investigator or sponsor, where activity will not resume. Possible reasons include: Ethical, safety, financial or other grounds. Will never progress to "Complete" or "Closed (post analysis)"

Select Ok and then Save.



How to share with governance?


When the milestone is "achieved" share the milestone form and system generated email with related entities.

Navigate to 'Related documents' and using the aggregate view, identify the 'Milestone Report' and 'System Generated Email'



Use aggregate view to easily identify the documents.

Select the appropriate documents and make them visible in related entity by clicking . It is now visible when the icon changes to .

Once actioned it automatically saves and you can click  to close and finish.

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