

QUICK REFERENCE GUIDE

FOR RESEARCH OFFICES

# Creating Home Page Tiles

## Introduction

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. They provide an alternate method to identify application/project is to use the application/project search functions in REGIS.

There are 8 tile options: **Activity, Application, Decision, Document, Forms, Milestone, Review and Task.**

### Add dashboard tile

Found 8 dashboard tiles

<input type="checkbox"/>	Dashboard	Activity
<input type="checkbox"/>	Dashboard	Application
<input type="checkbox"/>	Dashboard	Decision
<input type="checkbox"/>	Dashboard	Document
<input type="checkbox"/>	Dashboard	Forms
<input type="checkbox"/>	Dashboard	Milestone
<input type="checkbox"/>	Dashboard	Review
<input type="checkbox"/>	Dashboard	Task

Each tile can be created multiple times with the title and filter changed to describe the action of the tile. The sorts

of functions that can be accessed under each type of tile are described below.

*Tip: Depending on the size and resolution of your screen, 8-10 tiles will be visible on your REGIS home page. Creating further tiles means you will need to scroll down your page to see them.*

**Activity:** This tile relates to activities in the system i.e. Approval, Meeting, Task, and the type of activity i.e. Application, Form, Review.

**Application:** Initial submission to approval/authorisation is managed in the application.

**Decision:** This tile can be used to filter decision outcomes for applications, projects, documents, forms and milestones. There are no Decision tiles in the suggested home page, this tile will be used at the Research Office's discretion.

**Document:** This tile can search for all related document types.

**Forms:** This tile is used to access forms that are submitted as part of the post approval management of an application i.e. amendments and safety notifications.

**Milestone:** This tile is used for progress reports for Ethics and progress report external HREC, final report external HREC, first patient in and certificate of currency for Governance.

**Review:** This tile is used to identify when a review has been submitted to the Research Office.


**Task:** This tile shows all tasks for the Research Office. Tasks can be system generated i.e. Approver B, or manually created by users.

The next section will describe several tile options, some of which are directly related to the *Setting up a Home Page QRG* and are identified by \*

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.

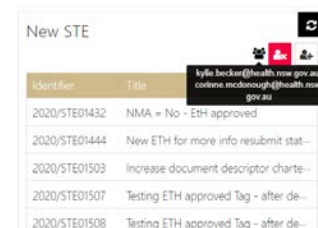
## New functionality

Research Offices now have the option to filter applications, projects and activities assigned to themselves or other team members in their office in the 'Activity' and 'Application' homepage tiles.

 Select the 'Add user(s)' icon on the Activity or Application homepage tile you want to filter and then search for yourself in the 'User' pop-out panel on the right-hand side of the screen.

This will filter applications, projects or activities that have been assigned to yourself in the tile selected.

*Tip: You can add multiple team members using this filter on the homepage tiles. This functionality will eliminate the need for personalised tags which have the potential to cause issues later.*



*Tip: You can see who has been assigned to an application on the summary page under 'Responsible users'.*



## Pre-Approval/Authorisation

### Application Tile

Used during pre-approval application management. The different types of tiles created with the 'Application' tile are described below.

### Edit dashboard tile

Title	Application
Display	Table ▼
Program	Choose... ▼
Submission type	Choose... ▼
Submitted only	No ▼
Status	▼
With tags	▼
Without tags	▼
Classification	▼
Decision status	▼
Sort order	Ascending ▼
Sort by	Date modified ▼
Unassigned only	No ▼

**Title:** Edit this field to describe the action of the tile.

**Display:** Select which template you wish to use; this is based off personal preference.

**Program:** Select Ethics or Site to filter for a specific type of application. Not selecting anything will show both Ethics and Site applications.

**Submission Type:** Use this filter to see either initial applications or resubmitted applications.

**Submitted Only:** Use this to filter out applications that have been submitted once or multiple times. It is recommended to always use 'No' as the response due to further enhancements of the home page negating this filter option.

**Status:** Select one or multiple.

**With Tags:** A Research Office can assign custom tags (already in the system) to an application and this filter will show applications that have those tags.

**Without Tags:** Like 'With Tags', a Research Office can assign custom tags (already in the system) to an application and this filter will show applications that do not have those tags.

**Classifications:** On completion of Project Registration (PID), HREA and Site applications have certain categories applied to the application i.e. Study Type, adding a classification will further customise the search.

**Decision Status:** Use this to identify when an application has been approved but the decision notification email has not yet been sent.

**Sort Order:** Select how you want to sort by.

**Sort By:** Select what you want to sort by.

**Unassigned Only:** Use this filter to search for unassigned applications only by selecting 'Yes'.

New STE 👤 📄 📧

Identifier	Title
2020/STE01432	NMA = No - EtH approved
2020/STE01444	New ETH for more info resubmit stat...
2020/STE01503	Increase document descriptor charte...
2020/STE01507	Testing ETH approved Tag - after de...
2020/STE01508	Testing ETH approved Tag - after de...

### New Functionality

Utilise the new 'add user' filtering functionality to further customise your application tiles. In the example on the left, the 'New STE' Application tile only shows applications that have been assigned to the users indicated (hover over the 3 people icon to see the name of the user/s). By assigning applications to yourself, you no longer need to add tags to applications as this functionality replaces that.

**Completed Pending HOD\* (Governance Applications Only)**

This tile can be created to see a site application that has been submitted to the Head/s of Department for their support.

Title	With HOD
Display	Table
Program	Site
Submission type	Choose...
Submitted only	No
Status	Completed pending HOD ✖
With tags	
Without tags	
Classification	
Decision status	
Sort order	Ascending
Sort by	Date modified
Unassigned only	No

**HOD Not Supported (Governance Applications Only)**

This tile can be created to see a site application that is currently with the researcher to action as one or more HODs have indicated that the application is not supported.

Note: If **ALL** HODs have made the decision to support the application, it will then automatically submit to the Research Office and will have the status 'Submitted'.

Title	HOD Not Supported
Display	Table
Program	Site
Submission type	Choose...
Submitted only	No
Status	HOD Not Supported ✖
With tags	
Without tags	
Classification	
Decision status	
Sort order	Ascending
Sort by	Date modified
Unassigned only	No



**New Application\* (Ethics and Governance Applications)**

This tile can be created to see a new application that can be considered for eligibility.

Title	New Application
Display	Table
Program	Choose...
Submission type	Choose...
Submitted only	No
Status	Submitted ✕
With tags	
Without tags	
Classification	
Decision status	
Sort order	Ascending
Sort by	Date modified
Unassigned only	No

**Eligible\* (Ethics and Governance Applications)**

This tile can be created to view applications that have received an eligibility reiew and can progress to the next review process i.e. assigned to a meeting, assigned to a review, RGO review etc.

Title	Eligible
Display	Table
Program	Choose...
Submission type	Choose...
Submitted only	No
Status	Eligible ✕
With tags	
Without tags	
Classification	
Decision status	
Sort order	Ascending
Sort by	Date modified
Unassigned only	No

**Valid\* (Governance Applications Only)**

This tile can be created to view applications that have received an eligibility review and can progress to the next review process i.e. assigned to a meeting, assigned to a review, RGO review etc. **BUT** have not yet received Ethics approval.

Title	Valid
Display	Table
Program	Site
Submission type	Choose...
Submitted only	No
Status	Valid ✕
With tags	
Without tags	
Classification	
Decision status	
Sort order	Ascending
Sort by	Date modified
Unassigned only	No

**Pending CE\* (Governance Applications Only)**

This tile can be created to view applications that have received an RGO recommendation, are pending CE/Delegate review and have not yet received Governance authorisation.

Title	Pending CE
Display	Table
Program	Site
Submission type	Choose...
Submitted only	No
Status	Pending CE ✕
With tags	
Without tags	
Classification	
Decision status	
Sort order	Ascending
Sort by	Date modified
Unassigned only	No

<p><b>Ineligible (Ethics and Governance Applications)</b></p> <p>This tile can be created to view applications that have received an eligibility review but are not eligible to proceed, the applicant needs to submit a new version of the application and/or associated documents.</p> <p>Once the application owner starts working on the application, the status will change from 'Ineligible' to 'In Progress' and will no longer appear in this tile.</p>	<table border="1"> <tr><td>Title</td><td>Ineligible</td></tr> <tr><td>Display</td><td>Table</td></tr> <tr><td>Program</td><td>Choose...</td></tr> <tr><td>Submission type</td><td>Choose...</td></tr> <tr><td>Submitted only</td><td>No</td></tr> <tr><td>Status</td><td>Ineligible ✕</td></tr> <tr><td>With tags</td><td></td></tr> <tr><td>Without tags</td><td></td></tr> <tr><td>Classification</td><td></td></tr> <tr><td>Decision status</td><td></td></tr> <tr><td>Sort order</td><td>Ascending</td></tr> <tr><td>Sort by</td><td>Date modified</td></tr> <tr><td>Unassigned only</td><td>No</td></tr> </table>	Title	Ineligible	Display	Table	Program	Choose...	Submission type	Choose...	Submitted only	No	Status	Ineligible ✕	With tags		Without tags		Classification		Decision status		Sort order	Ascending	Sort by	Date modified	Unassigned only	No
Title	Ineligible																										
Display	Table																										
Program	Choose...																										
Submission type	Choose...																										
Submitted only	No																										
Status	Ineligible ✕																										
With tags																											
Without tags																											
Classification																											
Decision status																											
Sort order	Ascending																										
Sort by	Date modified																										
Unassigned only	No																										
<p><b>Assigned to Meeting (Ethics Application Only)</b></p> <p>This tile can be created to view applications that have been assigned to a meeting. This could be a Full HREC meeting, Specialist Subcommittee meeting or Other meeting.</p> <p>Note: If you assign an application to a meeting and then to a review, the 'Under Review' status overrides the 'Assigned to Meeting' status, meaning the application will no longer appear in this tile.</p>	<table border="1"> <tr><td>Title</td><td>Assigned to Meeting</td></tr> <tr><td>Display</td><td>Table</td></tr> <tr><td>Program</td><td>Ethics</td></tr> <tr><td>Submission type</td><td>Choose...</td></tr> <tr><td>Submitted only</td><td>No</td></tr> <tr><td>Status</td><td>Assigned to meeting ✕</td></tr> <tr><td>With tags</td><td></td></tr> <tr><td>Without tags</td><td></td></tr> <tr><td>Classification</td><td></td></tr> <tr><td>Decision status</td><td></td></tr> <tr><td>Sort order</td><td>Ascending</td></tr> <tr><td>Sort by</td><td>Date modified</td></tr> <tr><td>Unassigned only</td><td>No</td></tr> </table>	Title	Assigned to Meeting	Display	Table	Program	Ethics	Submission type	Choose...	Submitted only	No	Status	Assigned to meeting ✕	With tags		Without tags		Classification		Decision status		Sort order	Ascending	Sort by	Date modified	Unassigned only	No
Title	Assigned to Meeting																										
Display	Table																										
Program	Ethics																										
Submission type	Choose...																										
Submitted only	No																										
Status	Assigned to meeting ✕																										
With tags																											
Without tags																											
Classification																											
Decision status																											
Sort order	Ascending																										
Sort by	Date modified																										
Unassigned only	No																										

**Assigned to a Review (Ethics Applications Only)**

This tile can be created to view applications that have been assigned to be reviewed.

Title	Assigned to Review
Display	Table ▼
Program	Ethics ▼
Submission type	Choose... ▼
Submitted only	No ▼
Status	Under Review ✕ ▼
With tags	▼
Without tags	▼
Classification	▼
Decision status	▼
Sort order	Ascending ▼
Sort by	Date modified ▼
Unassigned only	No ▼

**Information Provided\* (Ethics and Governance Applications)**

This tile can be created to view when a response to a request for more information has been submitted.

Title	Information Provided
Display	Table
Program	Choose...
Submission type	Choose...
Submitted only	No
Status	Information provided ✕
	Information Provided – Decision Pending ✕
With tags	
Without tags	
Classification	
Decision status	
Sort order	Ascending
Sort by	Date modified
Unassigned only	No



**Approved/Authorised – Pending Decision Email\* (Ethics and Governance Applications)**

This tile can be created to view applications that have a decision of ‘Approved’ or ‘Authorised’ (including with conditions) where the decision notification has not yet been sent.

Title	Approved/Authorised - Pending Decision Email
Display	Table
Program	Choose...
Submission type	Choose...
Submitted only	No
Status	Approved (Pending Decision Email) ✕
	Approved with conditions (Pending Decision Email) ✕
	Authorised (Pending Decision Email) ✕
	Authorised with Conditions(Pending Decision Email) ✕
With tags	
Without tags	
Classification	
Decision status	
Sort order	Ascending
Sort by	Date modified
Unassigned only	No

**Review Tile**

Used during pre-approval application management.

Title	Review
Display	Table
Reviews submitted in last (days)	0
Sort by	Current due date
Sort order	Ascending

**Title:** Edit this field to describe the action of the tile.

**Display:** Select which template you wish to use; this is based off personal preference.

**Reviews Submitted in Last (Days):** The action will remain in the tile based on the number of days entered here. It is recommended that you keep this number as low as practical.

**Sort Order:** Select how you want to sort by.

**Sort By:** Select what you want to sort by.

<p><b>Review Submitted* (Ethics Applications Only)</b></p> <p>This tile can be created to view when a review has been completed against an application.</p>	Title	Review Submitted
	Display	Table
	Reviews submitted in last (days)	0
	Sort by	Current due date
	Sort order	Ascending

## Pre and Post Approval/Authorisation

### Task Tile

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

Title	Task	<p><b>Title:</b> Edit this field to describe the action of the tile.</p> <p><b>Display:</b> Select which template you wish to use; this is based off personal preference.</p> <p><b>Sort Order:</b> Select how you want to sort by.</p> <p><b>Sort By:</b> Select what you want to sort by.</p>
Display	Table	
Sort by	Current due date	
Sort order	Ascending	

<p><b>My Tasks* (Ethics and Governance Applications)</b></p> <p>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 i.e. Eligibility Approver B and are also created by the system.</p> <p>Tasks may also be used during post-approval.</p>	Title	My Tasks
	Display	Table
	Sort by	Current due date
	Sort order	Ascending

### Activity Tile

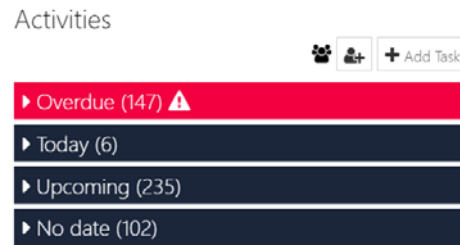
Used during pre-approval application management and post approval project management

Activity *	All	<p><b>Activity:</b> Select the type of activity you wish to filter</p> <p><b>Enable New Task Button:</b> Selecting Yes will allow you to create a new task or edit a task listed in this tile</p> <p><b>Show Only Current User Data:</b> Selecting No will show all user data (seeking further clarification from vendor and will update as appropriate)</p> <p><b>Type:</b> Select where the activity comes from i.e application, project</p>
Enable new task button	No	
Show only current user data	No	
Type	Choose...	

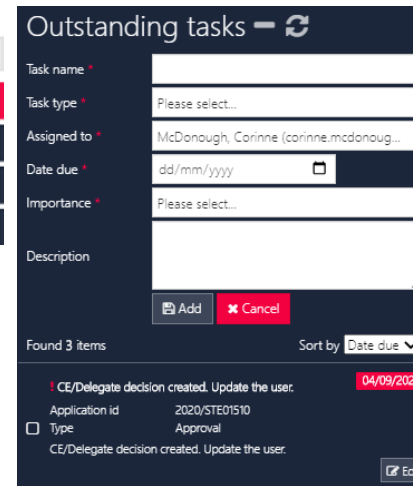
## Activity Tile - New Functionality

1. Clicking on the '+Add Task' button will make the 'Outstanding tasks' window appear on the right-hand side of the screen.
2. You will be able to see outstanding tasks which require actioning from your Research Office, the tasks listed here relate to both Ethics and Governance pre and post approval.
3. Selecting a task takes you directly to the tasks page in the application or project, as appropriate. Selecting 'Edit' against a task will bring the task details up, allowing you to make appropriate changes i.e. Assigned to, Date due and Importance.

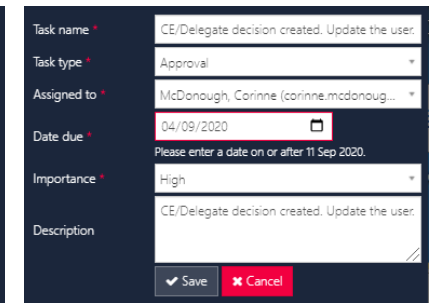
1.



2.



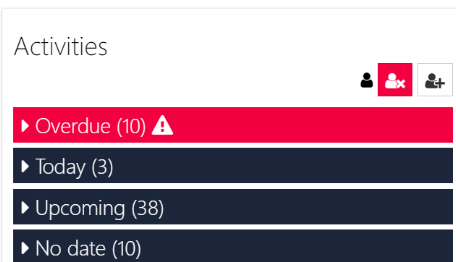
3.



### Activities (Ethics and Governance)

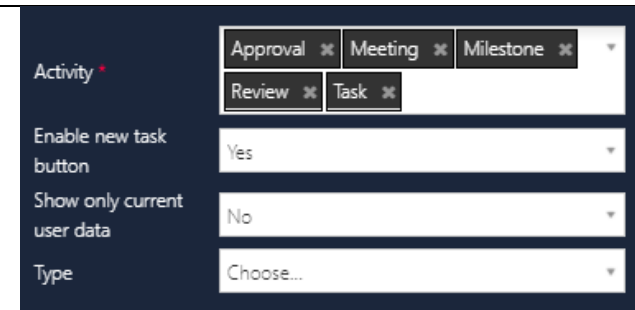
This tile can be created to view any overdue, due, pending activities or activities without dates that are assigned to you or a member of your Research Office.

Activities can be both pre-approval and post-approval.



### New Functionality

Utilise the new 'add user' filtering functionality to further customise your Activity tile. In the example on the left, the Activities tile only shows activities that have been assigned to the user listed (hover over the 3 people icon to see the name of the user/s). By assigning activities to yourself, you no longer need to add tags to activities as this functionality replaces that.



## Decision Tile

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

Title	Decision
Display	Table
Decision type	
Applies to	Choose...
Assigned to	
Outcome	
Sort by	Date modified
Sort order	Ascending

**Title:** Edit this field to describe the action of the tile.

**Display:** Select which template you wish to use; this is based off personal preference.

**Decision Type:** Select one or multiple decision types.

**Applies To:** Select what application, application document, application related form, project, project document, project related form or project milestone that corresponds to the 'Decision Type' selected.

**Assigned To:** Type in the username and a dropdown will appear.

**Outcome:** Select the outcome you want to filter by.

**Sort Order:** Select how you want to sort by.

**Sort By:** Select what you want to sort by.

<p><b>Site Amendment (Governance Project) *</b></p> <p>Create this tile to filter Site Amendments requiring RGO review</p>	<table border="1"> <tr> <td>Title</td> <td>Site Amendment Submitted</td> </tr> <tr> <td>Display</td> <td>Table</td> </tr> <tr> <td rowspan="2">Decision type</td> <td>RGO amendment review ✕</td> </tr> <tr> <td>RGO review of change of personnel ✕</td> </tr> <tr> <td>Applies to</td> <td>Choose...</td> </tr> <tr> <td>Assigned to</td> <td></td> </tr> <tr> <td>Outcome</td> <td>Pending ✕</td> </tr> <tr> <td>Sort by</td> <td>Date modified</td> </tr> <tr> <td>Sort order</td> <td>Ascending</td> </tr> </table>	Title	Site Amendment Submitted	Display	Table	Decision type	RGO amendment review ✕	RGO review of change of personnel ✕	Applies to	Choose...	Assigned to		Outcome	Pending ✕	Sort by	Date modified	Sort order	Ascending
Title	Site Amendment Submitted																	
Display	Table																	
Decision type	RGO amendment review ✕																	
	RGO review of change of personnel ✕																	
Applies to	Choose...																	
Assigned to																		
Outcome	Pending ✕																	
Sort by	Date modified																	
Sort order	Ascending																	

<p><b>Site RFI Received – Amendment/Safety Report (Governance Project)</b></p> <p>This tile can be created to filter for request for information received for Site Amendments and Safety Reporting.</p>	<p>Title: Site RFI Received - Amendment/Safety Report</p> <p>Display: Table</p> <p>Decision type: RGO review of a More information required form, RGO review of a more information required form - RGO Approval</p> <p>Applies to: Choose...</p> <p>Assigned to:</p> <p>Outcome: Pending</p> <p>Sort by: Date modified</p> <p>Sort order: Ascending</p>
<p><b>Site Annual Report Submitted (Governance Project) *</b></p> <p>This tile can be created to filter progress reports pending RGO review</p>	<p>Title: Site Annual Report Submitted</p> <p>Display: Table</p> <p>Decision type: RGO review of a progress report</p> <p>Applies to: Choose...</p> <p>Assigned to:</p> <p>Outcome: Pending</p> <p>Sort by: Date modified</p> <p>Sort order: Ascending</p>
<p><b>Site Annual Report - RFI Received (Governance Project)</b></p> <p>This tile can be created to filter for requests for information received for Site Annual Reports.</p>	<p>Title: Site Annual Report - RFI Received</p> <p>Display: Table</p> <p>Decision type: RGO review of a more information required form - progress report</p> <p>Applies to: Choose...</p> <p>Assigned to:</p> <p>Outcome: Pending</p> <p>Sort by: Date modified</p> <p>Sort order: Ascending</p>

<p><b>Milestones - CoC - Submitted and Resubmitted (Governance Project)</b></p> <p>This tile can be created to filter for the Governance Milestone Certificate of Currency requiring review by the RGO.</p>	<table border="1"> <tr> <td>Title</td> <td>Milestone - CoC - Submitted and Resubmitted</td> </tr> <tr> <td>Display</td> <td>Table</td> </tr> <tr> <td>Program</td> <td>Site ✕</td> </tr> <tr> <td>Milestone type</td> <td>Certificate of Currency ✕</td> </tr> <tr> <td>Status</td> <td>Received ✕</td> </tr> <tr> <td>Sort by</td> <td>Date modified</td> </tr> <tr> <td>Sort order</td> <td>Ascending</td> </tr> </table>	Title	Milestone - CoC - Submitted and Resubmitted	Display	Table	Program	Site ✕	Milestone type	Certificate of Currency ✕	Status	Received ✕	Sort by	Date modified	Sort order	Ascending		
Title	Milestone - CoC - Submitted and Resubmitted																
Display	Table																
Program	Site ✕																
Milestone type	Certificate of Currency ✕																
Status	Received ✕																
Sort by	Date modified																
Sort order	Ascending																
<p><b>Site SSI Notification and Local Safety Reporting (Governance Project)</b></p> <p>This tile can be created to filter for SSI notifications that have been reviewed by HRECs within REGIS and Local Safety Reporting, requiring RGO review.</p>	<table border="1"> <tr> <td>Title</td> <td>Site SSI Notification and Local Safety Reporting</td> </tr> <tr> <td>Display</td> <td>Table</td> </tr> <tr> <td>Decision type</td> <td>RGO review of a local safety event ✕ RGO review of a safety report ✕</td> </tr> <tr> <td>Applies to</td> <td>Choose...</td> </tr> <tr> <td>Assigned to</td> <td></td> </tr> <tr> <td>Outcome</td> <td>Pending ✕</td> </tr> <tr> <td>Sort by</td> <td>Date modified</td> </tr> <tr> <td>Sort order</td> <td>Ascending</td> </tr> </table>	Title	Site SSI Notification and Local Safety Reporting	Display	Table	Decision type	RGO review of a local safety event ✕ RGO review of a safety report ✕	Applies to	Choose...	Assigned to		Outcome	Pending ✕	Sort by	Date modified	Sort order	Ascending
Title	Site SSI Notification and Local Safety Reporting																
Display	Table																
Decision type	RGO review of a local safety event ✕ RGO review of a safety report ✕																
Applies to	Choose...																
Assigned to																	
Outcome	Pending ✕																
Sort by	Date modified																
Sort order	Ascending																

## Document Tile

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

Title	Document
Display	Table
Related to	Application
Submission type	Choose...
Only not associated to meetings	No
Document type	
With tags	
Without tags	
Sort by	Date modified
Sort order	Ascending

**Title:** Edit this field to describe the action of the tile.

**Display:** Select which template you wish to use; this is based off personal preference.

**Related To:** Select 'Application' (submission to approval/authorisation) or 'Project' (post approval/authorisation).

**Submission Type:** Use this filter to see either initial applications or resubmitted applications.

**Only Not Associated to Meetings:** Use this filter to see only documents not associated with meetings.

**Document Type:** Select one or multiple document types.

**With Tags:** A Research Office can assign custom tags (already in the system) to a document and this filter will show documents that have those tags.

**Without Tags:** Like 'With Tags', a Research Office can assign custom tags (already in the system) to a document and this filter will show documents that do not have those tags.

**Sort By:** Select what you want to sort by.

**Sort Order:** Select how you want to sort by.

### Documents (Ethics and Governance Applications)

This tile can be used to filter out specific documents that appear in the 'Related Documents' section of applications and projects.

Title	Document
Display	Table
Related to	Application
Submission type	Choose...
Only not associated to meetings	No
Document type	
With tags	
Without tags	
Sort by	Date modified
Sort order	Ascending

## Forms Tile

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

Title	Forms
Display	Table
Status	
Form name	Choose...
With tags	
Without tags	
Assigned to meeting	Choose...
Email sent	Choose...
Decision outcome	Choose...
Sort by	Date modified
Sort order	Ascending

**Title:** Edit this field to describe the action of the tile.

**Display:** Select which template you wish to use; this is based off personal preference.

**Status:** Select one or multiple.

**Form Name:** Select the type of form.

**With Tags:** A Research Office can assign custom tags (already in the system) to a form and this filter will show forms that have those tags.

**Without Tags:** Like 'With Tags', a Research Office can assign custom tags (already in the system) to a form and this filter will show forms that do not have those tags.

**Assigned to Meetings:** Use this filter to see only documents associated with meetings.

**Email Sent:** Use this filter to where an email has been sent from i.e. meeting, decision screen.

**Decision Outcome:** Select decision outcome.

**Sort By:** Select what you want to sort by.

**Sort Order:** Select how you want to sort by.

*Tip: When using the form tile to look for Requests for Information Provided, you will be taken directly to 'Related Forms'. If you want to be taken to 'Decisions', create a Request for Information Provided Decisions tile.*

### New Amendment (Ethics Project Only)

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

Ethics amendments; General Amendment, Request for Extension of HREC Approval, Addition of a New Site and Change in PI/CPI.

Title	New Amendment
Display	Table
Status	Submitted
Form name	Notification of an amendment to a researc...
With tags	
Without tags	
Assigned to meeting	Choose...
Email sent	Choose...
Decision outcome	Choose...
Sort by	Date modified
Sort order	Ascending



**Amendment RFI Received (Ethics Project Only) \***

This tile can be created to view information provided for an amendment.

Title	Amendment RFI Received
Display	Table
Status	Information Provided
Form name	Notification of an amendment to a researc...
With tags	
Without tags	
Assigned to meeting	Choose...
Email sent	Choose...
Decision outcome	Choose...
Sort by	Date modified
Sort order	Ascending

**Safety Reporting to HREC (Ethics Project Only)**

This tile can be created to view any SSIs.

Title	Safety Reporting to HREC
Display	Table
Status	Submitted
Form name	Significant Safety Issue Notification
With tags	
Without tags	
Assigned to meeting	Choose...
Email sent	Choose...
Decision outcome	Choose...
Sort by	Date modified
Sort order	Ascending

## Milestone Tile

Used during post-approval management.

Title	Milestone
Display	Table
Program	
Milestone type	
Status	
Sort by	Date modified
Sort order	Ascending

**Title:** Edit this field to describe the action of the tile.

**Display:** Select which template you wish to use; this is based off personal preference.

**Program:** Select if it is Ethics or Governance.

**Milestone Type:** Select one or multiple.

**Status:** Select one or multiple.

**Sort By:** Select what you want to sort by.

**Sort Order:** Select how you want to sort by.

**Annual Progress Report (Ethics Projects Only)**  
 This tile can be created to view submitted Annual Progress Reports.

Title	Annual Progress Report
Display	Table
Program	Ethics
Milestone type	Progress Report
Status	Received
Sort by	Date modified
Sort order	Ascending

**First Patient In – Clinical Trials (Governance Projects Only)**  
 This tile can be created to view submitted First Patient In reports.

Title	First Patient In - Clinical Trials
Display	Table
Program	Site
Milestone type	First Patient In
Status	Received
Sort by	Date modified
Sort order	Ascending

**Certificat of Currency (Governance Projects Only)**

This tile can be created to view submitted Certificates of Currency.

Title	Certificate of Currency
Display	Table
Program	Site ✕
Milestone type	Certificate of Currency ✕
Status	Received ✕
Sort by	Date modified
Sort order	Ascending

## Classifications

Used in Application Tile.

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

**Identifying New Clinical Trial**

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.

Title	New Clinical Trials
Display	Table
Program	Ethics
Submission type	Choose...
Submitted only	No
Status	Submitted ✕
With tags	
Without tags	
Classification	Study type - Clinical trial ✕
Decision status	
Sort order	Ascending
Sort by	Date modified
Unassigned only	No

## Customised Display

### Graph Bar/Graph Pie/List

Can be used for application, decision, documents, milestone and review tiles.

A Research Office can use a graph to have a customized overview of applications, decisions, documents, milestones and reviews in REGIS.

When 'Graph' is chosen as the 'Display' type the below additional filters appear.

Display	Graph
Graph type	Pie
Group by	Status

**Display:** Select which template you wish to use; this is based off personal preference.

**Graph Type:** Select the type of graph, this is based off personal preference.

**Group By:** Application Tile: Select 'Status', Decision Tile: Select 'Decision Type', Document Tile: Select 'Document Type', Milestone Tile: Select 'Status' and Review Tile: Select 'Task Type'.

#### Overview of Applications (Ethics and Governance Applications)

This tile can be used to see an overall view of application status' in the system, this example provides and overview of both Ethics and Governance but can be filtered to only Ethics or Governance by using the 'Program' filter.

Note: Hover your arrow over a colour to see the number of applications with that status.

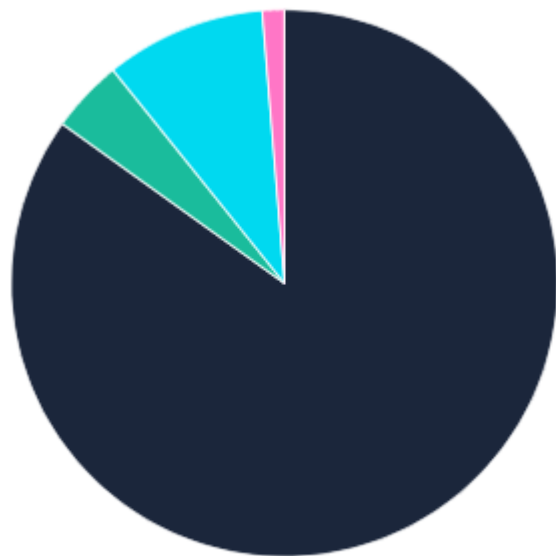
### Overview of Applications

Approved	Authorised	Ineligible
Not approved	Submitted	

Title	Overview of Applications
Display	Graph
Graph type	Pie
Group by	Status
Program	Choose...
Submission type	Choose...
Submitted only	No
Status	Approved ✕ Authorised ✕ Eligible ✕ Ineligible ✕ Not approved ✕ Not Authorised ✕ Submitted ✕
With tags	
Without tags	
Classification	
Decision status	
Sort order	Ascending
Sort by	Date modified
Unassigned only	No

**Graph Pie example**

Milestone



■ Pending ■ Received ■ Achieved ■ Revision

**List example**

Document

2020/ETH00837 - 2020/ETH00837: 24/06/2021 -
2020/ETH00837 - 2020/ETH00837: 24/06/2021 -
2020/STE01405 - Annual/Final Progress Report
2020/STE01405 - Annual/Final Progress Report
2020/ETH00852 - Appointment date change for
2020/ETH00839 - Appointment date change for
2020/STE01434 - 2020/STE01434: 26/07/2020 -
2020/STE01416 - Appointment date change for
2020/STE01416 - 2020/STE01416: 28/07/2020 -
2020/STE01416 - 2020/STE01416: 28/07/2020 -
2020/STE01416 - 2020/STE01416: 28/07/2020 -

**Graph Bar example**

Decision

