How to use REGIS Live Dashboards

What is the REGIS Live dashboard?

The REGIS Live dashboard has been created to support Research Offices to manage and prioritise their active applications in the system.

The REGIS Live Dashboard incorporates a live clock calculation which allows Research Offices to see how long an application has been progressing through the review process and the Metric 3 and Metric 4 total time calculations.

Current Metric Calculations

Included in the CE Service Agreement

Greater than Low Risk

Metric 3 (Total Time) measures from the advertised submission closing date of the first meeting the application is assigned to until the Decision Notification Email is sent.

Metric 4 (Total Time) measures from one of the following start dates until the Decision Notification Email is sent.

Start Dates:

- Date application was first submitted (if ethics is already in place) *

- Date of ethics approval – where Ethics exists in REIGS (if submitted prior to ethics approval)

- Date application is uploaded into REGIS from an approved interjurisdictional HREC

Not yet included in the CE Service Agreement but will be reported.

Low and Negligible Risk

Ethics Total Time measures from the date an application is first submitted until the Decision Notification Email is sent.

Governance Total Time Measurements are the same regardless of ethics pathway.

How to access Dashboards

Navigate to Dashboards from your main menu.

Select REGIS Live Dashboard from the list of available dashboards.

Icons and Filters

1. **Export to:** used to export data from the dashboard. (icon appears in multiple areas)
   NOTE: *clicking on the top right-hand corner icon will export all the dashboard information.*
   Clicking on the icon from any individual panel will export information from that panel.

2. **Multiselect tool on/off:** Switch on (blue) to select multiple sections of data in the table to be filtered or exported. (icon appears in multiple areas)

3. **Clear filter:** This icon becomes available when a bar has been selected in the table select this to clear the drilldown filter applied to that area. (icon appears in multiple areas)

4. **Maximise/Minimise:** Used to maximise/minimise a section of the dashboard. (icon appears in multiple areas)

Filter Definitions

5. **Review Pathway Filter:** Click on the dropdown to filter by one or more of the risk pathways. (*Classification*)

6. **Status Filter:** Click on the dropdown to filter by one of more of the application statuses.

7. **Category of Research:** Click on the dropdown to filter by Category.

8. **First Submitted:** To determine if there is an increased number of certain application with certain status types, example, how many applications are in the status of Completed pending HOD this week?

9. **Study Type Filter:** Click on the dropdown to filter by one or more of the study types. (*Classification*)

10. **Sponsor Type Filter:** Click on the dropdown to filter by one or more of the sponsor types. (*Classification*)

11. **Application Type:** Click on the dropdown to filter by Ethics, Site or both (*application type*)

Table Key

12. **Application by Status Bar Chart:** This is the visual snapshot of the current status of applications.
    The table will show data based off the filters above. Statuses will only appear in the dashboard if an application is in that status.

13. **Application by Status filtered list**: This table shows data based off the filters applied above. You can further filter down the applications that appear in this list by selecting one or more of the status in the bar graph.
    Each column can be reordered, and width adjusted by clicking on the column title.

14. **Ethics 21 days remaining Gauge and List:** see 15

15. **Site 21 days remaining Gauge and List:** The gauge shows a visual count and the list provides details of individual any applications, based off filters above, that have 21 days or less remaining before they exceed the metric (negative values meaning the application has passed the metric value).

16. **Progress Report Guage and Details:** the guage shows a visual count and the list of progress reports (ETH and STE), taking into consideration any filtered parameters.

Icons and Filters Cont'

Using the dashboard to identify priorities

General Workflow and Priorities

1. Select any dashboard filters (5-11).
2. The **Application by Status filtered list** table (13) will show all applications (not yet approved/authorised). To further filter the list, select one or more (2) application statuses on the **Application by Status Bar Chart (12)**.
3. Maximise (4) the list.
4. **The Application by Status list** will show the following information. **Columns**:
   Application Identifier – with hyperlink to easily navigate from the dashboard to the application.
   Application Title – application title
   Status – current application status
   Ethics Pathway – Greater than low risk or Low and negligible risk
   First Submitted – the date the application was first submitted.
   Organisation – The Principal Organsiation**. For ETH this is the HREC for STE this is the Site.
   Total Ethics days – Ethics total days elapsed since the Metric start criteria (including RO time, researchers time, until Approved).
   Total Site days – Site total days elapsed since the Metric start criteria (including RO time, researchers time, HOD time, CE time until Authorized).
   Total days E – Ethics total Research Office days only (previous metric 3).
   Total days G – Governance total Research Office days only (previous metric 4).
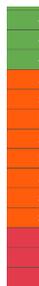   **Days Remaining –** this is a **Calculated Field** to show how many days until the application exceeds the metric requirements.
   Metric Benchmark Ethics (90 days) – Total Ethics days OR Metric Benchmark Site (60 days) – Total Site days. Colour codes to easily identify days remaining before benchmark exceeded:
   - **Ethics**
   46-90 days remaining
   21-45 days remaining
   0-20 days remining
   - **Sites**
   0-20 days Red
   21-45 days Orange
   46-60 days Green
   - days benchmark exceeded
5. Reorder any of the colums by clicking on the column heading.
6. Remember to use the **clear filters (3)** icon before starting a new search.

Identifying applications for urgent action.

1. The **Ethics/Site 21 days remaining Gauge and List (14 & 15)** by default, will show a list of applications that have less than or equal to 21 days remaining against the benchmark. Negative values indicate the application has passed the benchmark.
1. The number under the gauge indicates the number of applications. If the number in the gauge is greater than the rows visible in the list use the maximise (4) icon for the table to expand.
2. Identify the applications for action. For example, a study with the status of assigned to a meeting may not be able to be processed any faster but an application with the status of Information Provided or Approved Pending email can be progressed. Click on the application ID for a new tab to open.

Supporting HODs for timely sign off.

A HOD decision is created in the system by the application being submitted for the first time or the Research Office creating a new HOD decision. The system sends an automatic email to the named HOD with an access link, active for 14 days, that allows the decision to be made without having to log into REGIS.

1. In the **Application by Status Bar Chart (12)** click on the 02 Completed Pending HOD bar.
2. This will update the display in the **Application by Status filter list (13).**
3. Click on the days remaining column on the **Application by Status filter list (13)** so the green number are at the top.
4. Any application showing 53-46 days remaining has a week (7 days) or less to access the decision through the email link.
5. Click on the application ID hyperlink for a new tab to open.
6. Navigate to Management → Decisions and click on view icon. Any User with a blank decision may require active follow up.
7. To send a follow up email to the HOD, navigate to Management → Contacts. Locate the HOD in the list and select the send email icon. Craft email including Subject and Body and hit send.
8. Remember to use the **clear filters (3)** icon before starting a new dashboard search.

Progress Reports (16)

1. **Progress Report Due Date filter –** is defaulted to current quarter. You can change the date parameter by clicking

on the Set Filter to make a different selection.

2. **Progress Report Details Table**
   Table showing a list of Progress report matching the selected Due Date filter parameter.
3. **Progress report Gauge –** an indicator for total number of Progress report based on the due date filter.

Using the dashboard to Quality Check (QC) your data

Identifying application with a missing Ethics Pathway Classification.

1. Using the Review Pathway Filter (5) select the blank option.
2. The **Application by Status Bar Chart (12)** will show the number of applications, by status, that have not yet been approved/authorised and that does not have the Ethics pathway classification.

3. All of the applications will be listed on the **Application by Status filter list (13).** To further filter the list, select one or multiple (2) application statuses on the **Application by Status Bar Chart (12)**.
4. Click on the Application ID hyperlink for a new tab to open.
5. Navigate to Management → Classifications.
6. Click Edit on the right hand side menu and then +Add Classification.
7. Add the appropriate Ethics Pathway classification.

Note: if the researcher has incorrectly selected the Ethics pathway in the application form and the Research Office manually changes the Ethics Pathway classification. The ethics classification will revert to what is in the application form if a new version is submitted (ineligible or request for information). It is best practice to request that the field on the form is updated by the researcher when sending the outgoing communication. If a manual change is required, this best done just before approving the application.

REMEMBER: changes made to classifications will not be represented in the dashboard until the next day.