



Here are a few recommendations to help with successful submission of a site-specific application.

Site-Specific Informed Consent Form (ICF)

Use the provincially approved ICF template(s) to create your site-specific consent form(s). Revisions should only include the following:

- Local administrative details (e.g., letterhead, local PI contact etc.)
- Replacing placeholders on the provincial template with site-specific details
- Addition of any institutional requirements listed on the Documented Institutional Ethics Requirements (DIER) Form for your site (if applicable), which is on file with CTO. If you need a copy of this form, or are unsure whether your site has any DIER on file with CTO, please contact streamline@ctontario.ca.

Other tips:

- (1) Specific ICF wording (if required by the institution) is listed in the site's DIER form. Please ensure that all applicable wording is included in the site-specific ICF. If you are assisting another site with their application, you can request a copy of their DIER form from CTO (or we'll let you know if there is no DIER for that site).
- (2) The confidentiality section of the provincially approved ICF describes individuals/organizations that may have access to original medical and study records. This section will include the following statement:
 - **insert research site name**, to oversee the ethical conduct of research at this locationIn this statement, "insert research site name" should be replaced with the **name of the research site** itself (do not insert the name of the local REB or REB of Record here). Some institutions have specific requirements about how their site is named in this section; this will be reflected in that site's DIER form.
- (3) The contacts section of the ICF should include the contact information for the **REB of Record** for questions about participant rights or ethical issues. This information is often included in the approved Provincial ICF template; if not, you can request the contact information from the REB of Record through correspondence. Some institutions have specific requirements about who should be listed in this section; this will be reflected in that site's DIER form.

The Streamlined Research Ethics Review System (SRERS) Administration form contains details about a site's research administration processes, identifies the institution representative(s) and collaborators who must have access to the applications in CTO Stream. Make sure you have the current **SRERS Administration** form and, if applicable, **Documented Institutional Ethics Requirements (DIER)** form before you begin working on the Centre Initial Application.

If you need a copy please contact streamline@ctontario.ca

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Centre Initial Application (CIA) Tip Sheet

Creating Centre Initial Applications (CIA)

We encourage research teams to create the CIA for each participating site as soon as possible. These forms can be created any time after the Provincial Initial Application has been created. Creating these site-specific forms early ensures that each team can start working on their application as soon as possible and may support local research administration/institutional authorization processes.

More information on how to create a CIA can be found in the [Creating Centre Initial Applications](#) Quick Guide.

Accessing the CIA

Members of the research team are usually given access to the CIA by someone who already has access (like a member of the provincial study team or the sponsor). This is done by assigning that new user a Role (entering a person's name/information in the form does not grant them access). Don't forget to assign roles to the collaborators listed on the site-specific **SRERS Administration Form** as well as to the PI, Co-I and any other study staff who need access to your study.

Users with centre roles will be able to see all study-wide materials (like the protocol and Provincial ICF template) and work on forms for their site.

Note: Before you begin working on your CIA, **check the site name** tagged to the application. Do this by clicking on the "Centre" tab which will display the site name that appears on your REB approval letters. You can change the name of your site by clicking "Change Centre" if required.

More information on roles and collaboration can be found in the [Collaboration Features – Roles and Sharing](#) manual.

CIA Content

Institutional Requirements

Some institutions have policies that impact research ethics review and must be addressed within the CIA. These will be documented on the DIER form. If applicable, please ensure that these requirements are reflected within the CIA form.

Institutional Representatives

The name and contact information for the Institutional Representative(s) must be entered into the CIA. These individuals are identified by each institution and documented on the **SRERS Administration Form** which is on file with CTO. If you need a copy of your site SRERS Administration form, please contact streamline@ctontario.ca.

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Centre Initial Application (CIA) Tip Sheet

Department Head/Departmental Approver

The name and contact information for the department head/departmental approver for the Principal Investigator (PI) must be entered into the CIA. Please do not enter the same person as both the PI and the department head/departmental approver. If you're not sure who this individual is, check with the PI or the Institutional Representative for that site.

Requesting Signatures and Submitting the CIA

Once you have completed filling out the CIA, you can request signatures from the PI and other required signatories in the Agreement & Approval section of the form. The signatories must match the individuals entered in section 1 of the application. Signature requests can be sent to multiple individuals in parallel, and each individual will receive an email notification to alert them of the signature request. By default, the application will automatically submit once the last signature has been applied to the form.

More information how to sign an application can be found in the [Signing or Rejecting a Signature Request](#) manual.

REB of Record Study Agreements

The REB of Record Study Agreement formally delegates the ethics review and oversight responsibilities to the REB of Record. The agreement is administered **via email** and must be signed by the site PI/witness, research site (i.e., the legal signing authority) and Host Institution of the REB of Record. A fully-executed agreement is required before the study can begin at the site. Consult the site's **SRERS Administration** form for instructions on how to administer this agreement.

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