

# CTO **STREAM**



## Getting Started

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## About CTO Stream

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CTO Stream is a web based electronic platform for coordinating research ethics reviews and is built using modern infrastructure which balances a vast set of features with an easy-to-use interface. CTO Stream has been developed to meet the needs of researchers and REBs across the province by enabling research ethics review, document management and communication between multiple institutions and REBs.

CTO Stream is designed for multi-site clinical research. All studies use the same interface and REB application forms, regardless of which REB is providing oversight.

CTO Stream has been developed in partnership with Infonetica Ltd. This relationship ensures that CTO Stream will be continuously monitored and maintained to meet the needs of researchers and REBs.

### Accessing the System

To access CTO Stream, go to <https://review.ctostream.ca>

### Internet Settings and Operating System Requirements

CTO Stream supports the latest versions of the following browsers:

- Microsoft Internet Explorer (version 10 and up)
- Mozilla Firefox
- Google Chrome
- Apple's Safari

CTO Stream uses pop-ups. You will need to configure your browser to ensure CTO Stream pop-ups are allowed.

Users must be operating on Windows 7, Windows 8 or Windows 10. For security reasons, Stream does not support Windows XP or Windows Vista.

### Technical Support

Technical support is provided by Clinical Trials Ontario (CTO).

Email: [streamline@ctontario.ca](mailto:streamline@ctontario.ca)

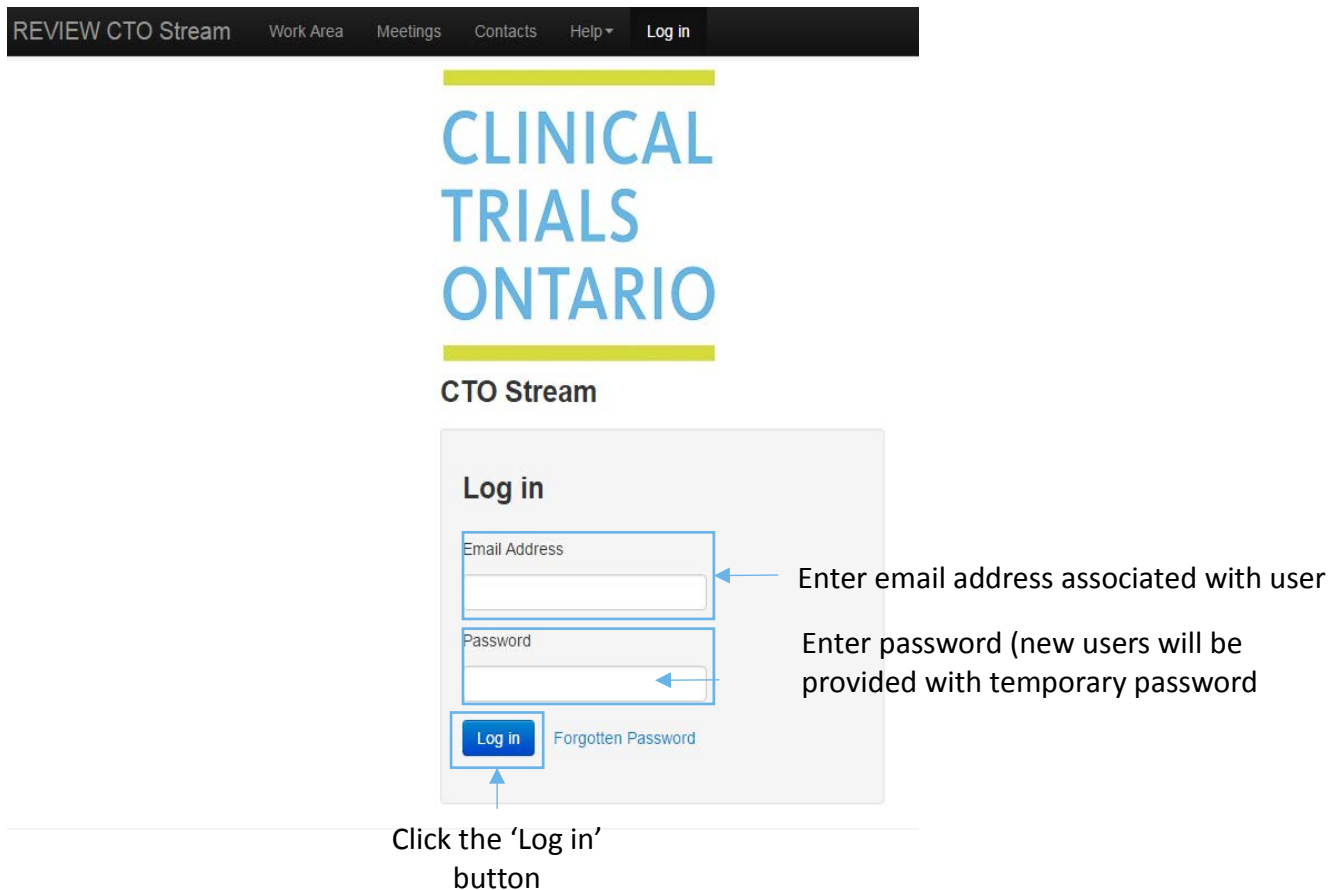
Phone : 1-877-715-2700

## Getting Started

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### Logging In

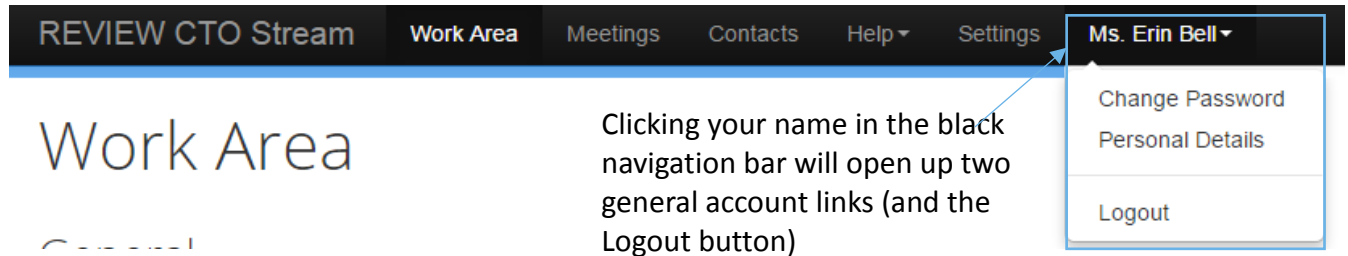
CTO will work with the REB operations personnel for each REB to arrange the creation of user accounts. Once created, you will be sent a temporary password by the CTO Administrator. To login, enter the email address associated with your account and password and click on the “Log in” button.



The screenshot shows the CTO Stream web application interface. At the top is a dark navigation bar with the following items: REVIEW CTO Stream, Work Area, Meetings, Contacts, Help ▾, and Log in. Below this is the main content area with the text "CLINICAL TRIALS ONTARIO" in large blue letters, followed by "CTO Stream" in bold black text. A light gray box contains the login form, titled "Log in". The form has two input fields: "Email Address" and "Password". Below the "Password" field is a blue "Log in" button and a link for "Forgotten Password". Annotations with blue arrows point to the "Email Address" field with the text "Enter email address associated with user", the "Password" field with "Enter password (new users will be provided with temporary password)", and the "Log in" button with "Click the 'Log in' button".

## Account Settings

You can change your account settings from anywhere in CTO Stream through the black navigation bar running across the top of your screen. Clicking on your profile name will bring up two general account links.



The screenshot shows the top navigation bar of the CTO Stream application. The bar is black with white text for the following items: REVIEW CTO Stream, Work Area, Meetings, Contacts, Help, and Settings. On the right side of the bar, the user's name "Ms. Erin Bell" is displayed with a downward arrow. A dropdown menu is open below the name, containing three options: "Change Password", "Personal Details", and "Logout". A blue arrow points from the text below to the "Change Password" option in the dropdown menu.

Clicking your name in the black navigation bar will open up two general account links (and the Logout button)

### Changing Your Password

To change your password, click on the 'Change Password' link (found by clicking on your name in the navigation bar). This will take you to the 'Change Password' page. Enter the required information to change your password. Passwords must contain at least seven characters and include an uppercase letter, lowercase letter and a number.

### Change Password

Old Password\*

New Password\*

Confirm Password\*

[Change Password](#)

### Changing Your Personal Account Information

To update your personal account information, click on the 'Personal Details' link (found by clicking on your name in the navigation bar). This will take you to the 'Change Personal Details' page. From this page you can update the information associated with your account.



Please contact CTO if you need to update the email address associated with your account.

### Change Personal Details

Person Title

First Name\*

Last Name\*

Organisation

Qualifications

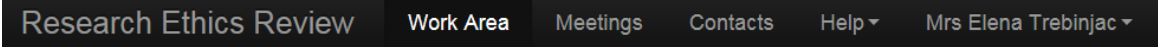
Telephone

Unavailable From  To

[Change Details](#)

## The Navigation Bar

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A screenshot of the navigation bar from the CTO REB system. It is a dark horizontal bar with white text. From left to right, the items are: "Research Ethics Review", "Work Area", "Meetings", "Contacts", "Help" with a downward arrow, and "Mrs Elena Trebinjac" with a downward arrow.

Research Ethics Review   Work Area   Meetings   Contacts   Help ▾   Mrs Elena Trebinjac ▾

The Navigation bar is always visible at the top of the page as you navigate through the system, with links to:

- **Work Area** – Takes you to the [Work Area](#)
- **Meeting** – Takes you to the Meetings page (further information about meetings can be found in the separate *Meetings* manual)
- **Contacts** – Takes you to the [Contacts](#) page
- **Help** – The help bar links to:
  - *Help* – Provides contact information for all IT issues
  - *FAQ* – Links the Frequently Asked Questions
  - *About* – Provides information about Clinical Trials Ontario
  - *Contact Us* – Provides contact information for all IT issues





## The Work Area

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Logging in to CTO Stream takes users to the Work Area. This is the general landing spot for all REB users (their dashboard). It is split into six main sections:

- General
- My Tasks\*
- Administrative\*
- Delegated\*
- Full Board\*
- Summary\*

Some sections (those marked with an asterisk, above) are not visible to all users, but instead are customized based on the role you have been given in CTO Stream.

### The Tile System

Each block on the Work Area is referred to as a 'tile'. A tile is like a folder, and clicking into the tile will take you to a list of study applications within that folder.

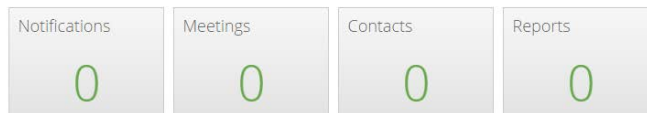
Each tile represents different stages of the REB review process. The numbers on the front of the tile represent the number of applications at that stage of the process.

Your user role determine which tiles you will see in the Work Area. Each user has the ability to re-arrange the order of the tiles in each section.

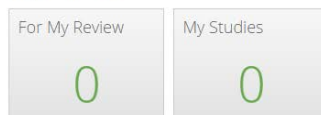
Figure: Example of Work Area as seen by those with the “REB Staff” role.

## Work Area

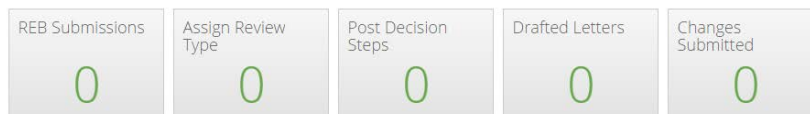
### General



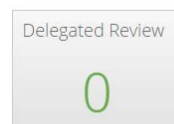
### My Tasks



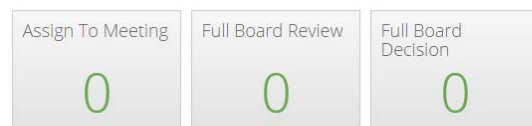
### Administrative



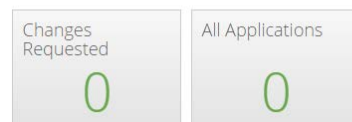
### Delegated



### Full Board



### Summary



## The 'General' section of the Work Area

The General Menu is the main hub for all notifications, meetings, contacts and reports. These 4 tiles are visible to all users.

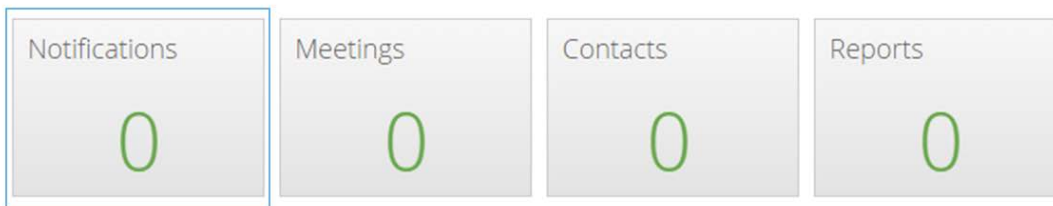
### The 'Notifications' Tile

'Notifications' are messages sent within CTO Stream. These notifications include general updates and important tasks (e.g., those informing users that they need to do something in CTO Stream), and are sent based on roles. Users will also receive an email for important tasks.

Clicking on the 'Notifications' tile in the Work Area will bring you to the Notifications page:

## Work Area

### General



Users can search through notifications by keywords or start and end date. There is also a slider can be used to change the number of notifications that are displayed on-screen. The check box to the left of each message can be used to select one or more messages at one time. You can select all messages at once by clicking on the checkbox at the top left hand of the page. Selected messages can be marked as unread, marked as flagged, or deleted.

**Deleted notifications cannot be recovered.**

## Notifications

Search

Start  End

Display  100 notifications  
 Please note that only the specified number of notifications will show after searching.

<input type="checkbox"/>	<input type="checkbox"/>	Message	Attachments	Reference	Committee	Date	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	New study assigned to Meeting	None	0743-PIA-Mar/2015-613	Research Ethics Board	3:12 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	The Application Has Been Deferred To Next Available Full Board Meeting	None	0743-PIA-Mar/2015-613	Research Ethics Board	3:10 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	The Application Is Complete and Awaiting Review Type Determination	None	0743-PIA-Mar/2015-613	Research Ethics Board	9:46 AM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	An applicant has submitted a Provincial Initial Application, please review it as soon as possible.	None	0743-PIA-Mar/2015-613	Research Ethics Board	03/27/2015	<input checked="" type="checkbox"/>

### The 'Meetings' Tile

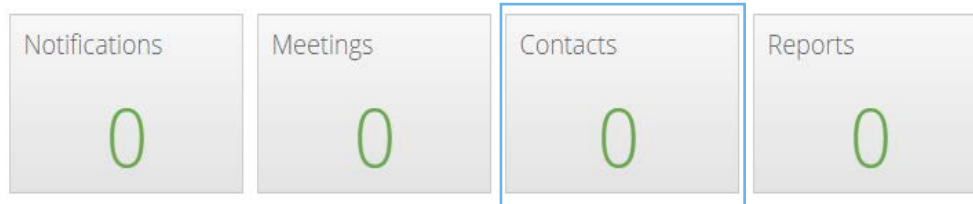
By clicking on the Meetings tile on the General menu, you will be presented with the Meetings page (more information on meetings can be found in the *Meetings* manual).

### The 'Contacts' Tile

Clicking on the 'Contacts' tile in Work Area will bring you to the Contacts page.

## Work Area

### General



The Contacts page lists all contacts that you have saved to your personal address book in CTO Stream, along with related information: Full Name, Email, Organization and Town/City.

## Contacts

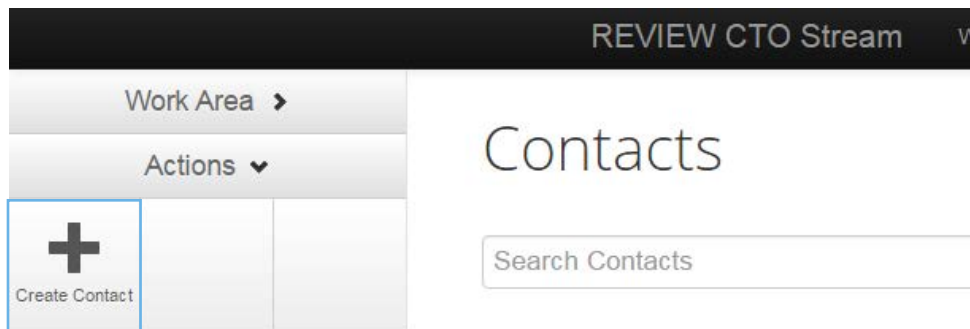
Search Contacts

Full Name	Email	Organisation	Town / City
MRS. Elena Trebinjac	elena.trebinjac@ctontario.ca	CTO	
Ms. Erin Bell	erin.bell@ctontario.ca	CTO	

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

To add a new contact, click on the “Create Contact” button on the Actions toolbar.



This will open the ‘Create Contact’ pop-up window. Once the information for the contact has been entered, press the blue “Create” button to save to your contacts list.

Create Contacts

Title\*

First Name\*

Last Name\*

Organisation

Email\*

Telephone

Mobile

Fax

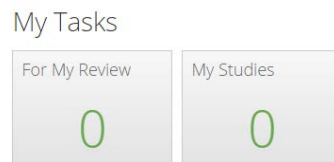
Create Close

### The Reports Tile

This is where REB users will be able to run reports created by CTO.

### The 'My Tasks' section of the Work Area

There are up to two different tiles in the 'My Tasks' section, depending on your role.



### The 'For My review' Tile

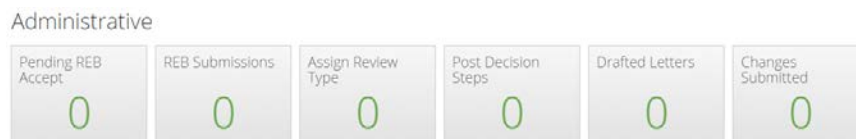
Contains applications for which you have been assigned as a reviewer. This tile is visible to everyone.

### The 'My Studies' Tile

Contains the applications for which you have been assigned as a staff member. This tile is visible to those with the "REB Chair" or "REB staff" role(s).

### The 'Administrative' section of the Work Area

There are up to six tiles in the 'Administrative' section of the Work Area, depending on your role (those with only the "REB member" or "REB Chair" role will not see this section at all).



### The 'Pending REB Accept' Tile

Contains Provincial Initial Applications (PIA) for which CTO has asked your REB to act as the REB of Record and are awaiting your REB to accept/decline. This tile is visible only to those with the REB Director/Manager role.

### The 'REB Submissions' Tile

Contains all new submissions (e.g., those that have been received by the REB and not yet assigned a review type), regardless of form type. This tile is visible to all with the REB staff or REB Director/Manager role(s).

### The 'Assign Review Type' Tile

Contains all applications that have been accepted as complete and are awaiting a decision on the level of review (e.g., full board, delegated, or administrative review). This tile is visible to those with the REB staff or REB Director/Manager role(s).

### The 'Post Decision Steps' Tile

Contains all applications on which a decision has been made, but the documents haven't be categorized or archived, and/or is waiting for the letter to be drafted/sent. Studies undergoing administrative review will also appear in this tile. This tile is visible to those with the REB staff role.

### The 'Drafted Letters' Tile

Contains all applications for which a letter has been drafted. This tile is visible to those with the REB staff role.

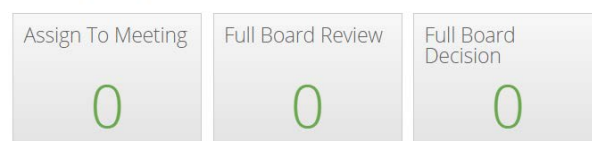
### The 'Changes Submitted' Tile

Contains any applications that have been re-submitted following a request for modifications. This tile is visible to those with the REB staff or REB Director/Manager role(s).

### The 'Full Board' Section of the Work Area

There are up to three tiles in the 'Full Board' section of the Work Area, depending on your role (those with only the "REB Director/Manager" role will not see this section at all).

#### Full Board



### The 'Assign to Meeting' Tile

Contains applications that will undergo a full review but have not yet been assigned to a meeting. This tile is visible to those with the REB Staff role.

### The 'Full Board Review' Tile

Contains applications that have been assigned to an REB meeting and are undergoing the review process. Any applications in this tile are visible to those with the REB staff role, and are also visible to the REB members/REB Chair.

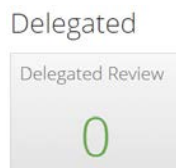
### The 'Full Board Decision' Tile

Contains applications that have undergone review by the full board, but for which the REB's decision (e.g., approved, modifications requested) has not yet been recorded in the system. This tile is visible to those with the REB Staff role.

**REB members will not be able to see an application that is undergoing full board review until it is in the 'Full Board Review' tile (e.g., after the REB operations personnel have assigned the application to a full board meeting). Once the REB operations personnel indicate that the meeting is complete, the application will move into the 'Full Board Decision' tile and the REB members will no longer have visibility to the application through the tile system.**

### The 'Delegated' section of the Work Area

There is one tile in the 'Delegated' section of the work area, and it is visible only to those with the REB Staff role. Those with only an REB member, REB Chair, or REB Director/Manager role will not see this section at all.



### The 'Delegated Review' Tile

Contains applications that are undergoing delegated review.

**NOTE: REB members/Chairs who have been assigned as a reviewer will be able to see applications undergoing delegated review in their "For My Review" tile. If no one has been assigned as a reviewer, only the REB staff will be able to see the application.**



### The 'Summary' section of the Work Area

There are up to two tiles in the 'summary' section of the Work Area, depending on your role (those with only an REB member role will not see this section at all).



### The 'Changes Requested' Tile

Contains all applications that are awaiting the research team to submit their changes (e.g., applications that have been reviewed by the REB, resulting in a request for changes, and have not yet been re-submitted). This tile is visible to those with a REB staff or REB Director/Manager role(s).

### The 'All Applications' Tile

Contains every application that has ever been submitted to your REB. This tile is visible to those with REB staff, REB Director/Manager or REB Chair role(s).

## Appendix A: The Tile System

Tile Group	Tile Name	Tile Contents	Visibility
General	Notifications	Automatic notifications sent within CTO Stream	All
	Meetings	Details on all past and upcoming REB meetings	All
	Contacts	Each user's personal contact book	All
	Reports	This is where REB users will be able to run reports created by CTO.	All
My Tasks	For My Review	Applications for which you have been assigned as a reviewer.	All
	My Studies	Applications for which you have been assigned as staff.	REB Staff, REB Chair
Administrative	Pending REB Accept	Provincial Initial Applications (PIA) for which CTO has asked your REB to act as the REB of Record and are awaiting your REB to accept/decline	REB Director/Manager
	REB Submissions	Contains all new submissions (e.g., those that have been received by the REB and not yet assigned a review type), regardless of form type.	REB Staff, REB Director/Manager
	Assign Review Type	Contains all applications that have been accepted as complete and are awaiting a decision on the level of review (e.g., full board, delegated, or administrative review).	REB Staff, REB Director/Manager
	Post Decision Steps	Contains all applications on which a decision has been made, but the documents haven't be categorized or archived, and/or is waiting for the letter to be drafted/sent.	REB Staff

		Studies undergoing administrative review will also appear in this tile.	
	Drafted Letters	Contains all applications for which a letter has been drafted.	REB Staff
	Changes Submitted	Contains any applications that have been re-submitted following a request for modifications.	REB Staff, REB Director/Manager
Full Board	Assign to Meeting	Contains applications that will undergo a full review but have not yet been assigned to a meeting.	REB Staff
	Full Board Review	Contains applications that have been assigned to an REB meeting and are undergoing the review process.	All
	Full Board Decision	Contains applications that have undergone review by the full board, but for which the REB's decision (e.g., approved, modifications requested) has not yet been recorded in the system.	REB Staff
Delegated	Delegated Review	Contains applications that are undergoing delegated review.	REB Staff
Summary	Changes Requested	Contains all applications that are awaiting the research team to submit their changes (e.g., applications that have been reviewed by the REB, resulting in a request for changes, and have not yet been re-submitted).	REB Staff, REB Director/Manager
	All Applications	Contains every application that has ever been submitted to your REB.	REB Staff, REB Chair, REB Director/Manager

\*All – encompasses the REB Director/Manager, REB Staff, REB Chair, and REB Committee roles.