CTO STREAM

Meetings

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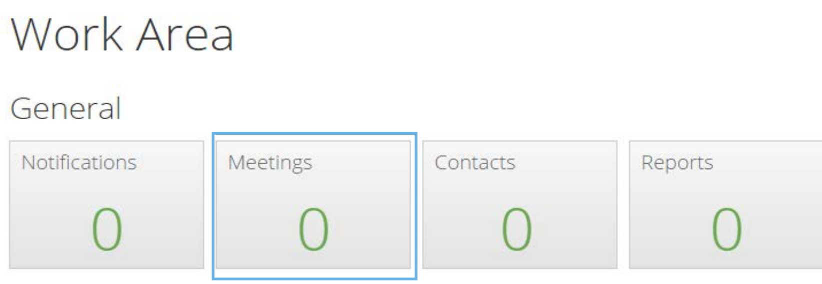
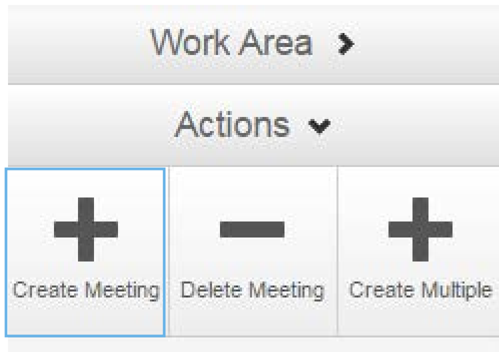
Accessing the Meeting Page

To access the Meetings page you can click on the ‘Meetings’ tile in the Work Area or click on ‘Meetings’ in the Navigation Menu.

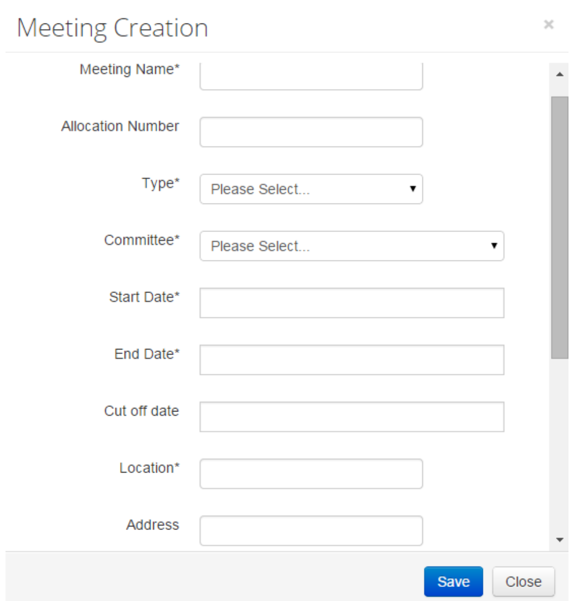


Creating a Meeting

To create a meeting, click on the “Create Meeting” button on the Actions toolbar.



The ‘Meeting Creation’ screen will pop-up. From here you can enter the details for the meeting to be created.

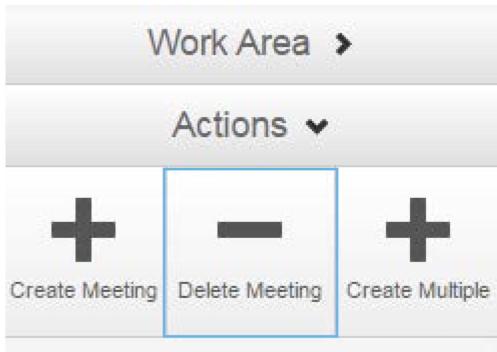


- **Meeting Name*** – We suggest that you create a name that will allow you to identify a particular meeting at a glance (for example, ‘August meeting’)
- **Allocation Number** – This is a numerical field. Content is not required and we recommend it be left blank
- **Type*** – The REB can select the type of meeting from the following options: standard, virtual, discussion or chairs action. In Ontario, almost all meetings would be ‘standard’
- **Committee*** – Please select the appropriate committee from the drop-down list
- **Start Date*** – Please identify the date of the meeting, and use the slider at the bottom to select the start time
- **End Date*** – Please identify the date of the meeting, and use the slider at the bottom to select the estimated end time.
- **Cut off date** – This field indicates the last date that application forms can be assigned to a meeting. The cut-off date will default to the start date and time of the meeting.
- **Location*** – Please enter a location for the meeting
- **Address** – You may choose to enter the address of the location if you’d like.

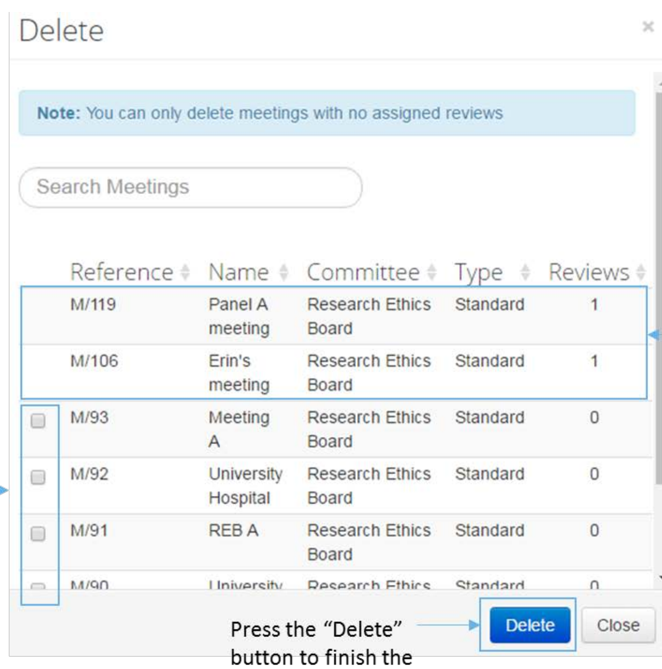
All fields labelled with an asterisk are mandatory. Each meeting will be assigned a unique reference number in CTO Stream.

Deleting a Meeting

To delete a meeting, click on the “Delete Meeting” button.



By clicking on the “Delete Meeting” button, you will be presented with a list of all meetings. You can also use the search bar to search for a particular meeting. Select the meeting(s) you want to delete by clicking the checkbox next to the meetings reference number. Click on the blue “Delete” button to deleted the selected meetings.



A meeting cannot be deleted if applications have been assigned

Click the checkbox next to the meeting(s) you wish to delete

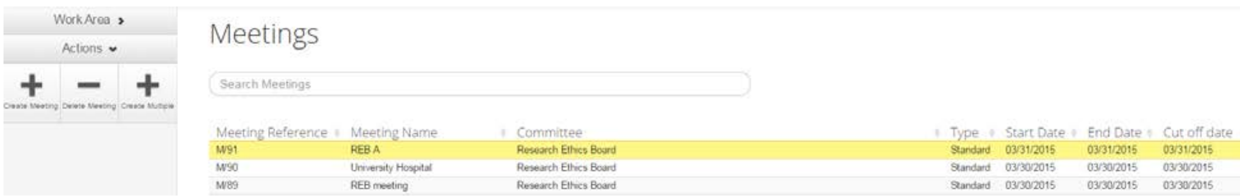
Press the “Delete” button to finish the process

Important notes:

- **A meeting cannot be deleted if an application is assigned to that meeting. All application forms must be removed from the meeting before it can be deleted (please see 'Removing an Application from a Meeting' for more information).**
- **Do not delete a meeting once it has been completed, as any application that was reviewed at that meeting will move back to the 'assign meeting' stage of the work flow. Meetings should only be deleted from CTO Stream if they will not be conducted (e.g., if they were created in error).**

Meetings Overview

Once the meeting is created it will be visible on the 'Meetings' list. All future meetings are highlighted yellow. Past meetings remain in the list, but are not highlighted.

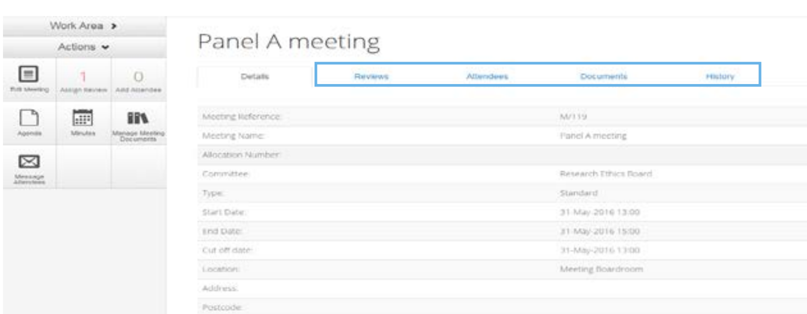


Details Tab:

By clicking on a meeting, you will be presented with a detailed 'Meeting' page. The system will default to the Details tab. The information displayed in the Details tab includes:

- **Meeting Reference** – Unique CTO reference number assigned to every meeting
- **Meeting Name** – Name of the meeting entered during the meeting creation
- **Allocation Number** – A numerical field associated with meetings. Content is not required to be entered, and CTO recommends it be left blank
- **Committee** – Name of the REB of Record
- **Type** – Type of meeting selected during the meeting creation
- **Start Date** – Start date and time of the meeting during the meeting creation
- **End Date** – End date and time of the meeting during the meeting creation
- **Cut off date** – The 'cut off date' is entered during meeting creation, and indicates the last date and time in which application forms can be assigned to the meeting
- **Location** – The location entered during meeting creation
- **Address** – The address entered during meeting creation (may be blank)

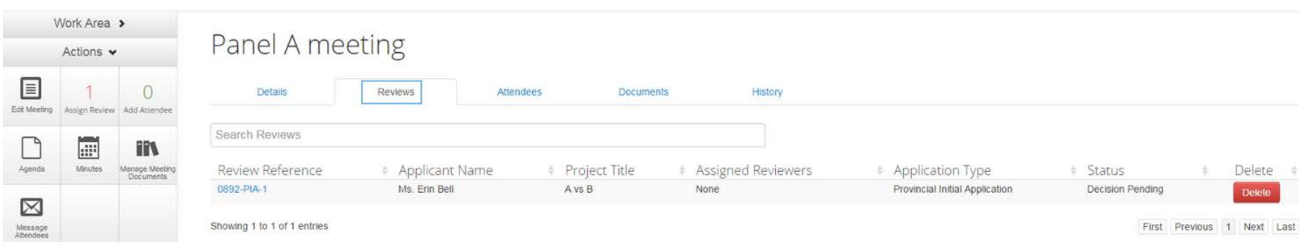
Four additional tabs are available – Reviews, Attendees, Documents and History.



Reviews Tab

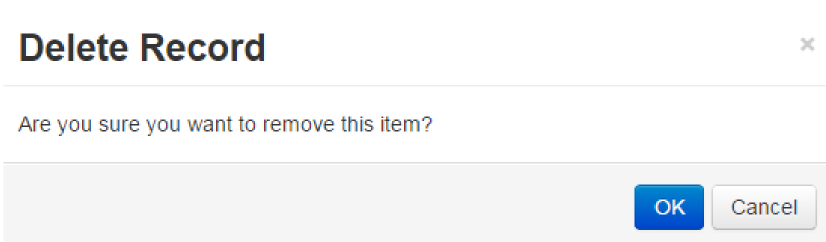
When you click on the Reviews tab, you are presented with a list of all applications currently assigned to that meeting, along with related information. The information provided is separated into seven columns:

- **Review Reference** – The unique identification code assigned by the system once that application is submitted to the REB
- **Applicant Name** – Displays name of the project owner (this is the person who is managing the study overall in CTO Stream)
- **Project Title** – Displays short study title (each study is called a project in CTO Stream)
- **Assigned Reviewers** – Displays names of reviewers assigned to this form
- **Application Type** – Displays the type of application form
- **Status** – Displays current status of the form within the REB review process
- **Delete** – Clicking on the "Delete" button will remove the application from the meeting



Removing an Application from a Meeting

Clicking on the "Delete" button will open a pop-up window where you will be asked to confirm if this application should be removed from the meeting.

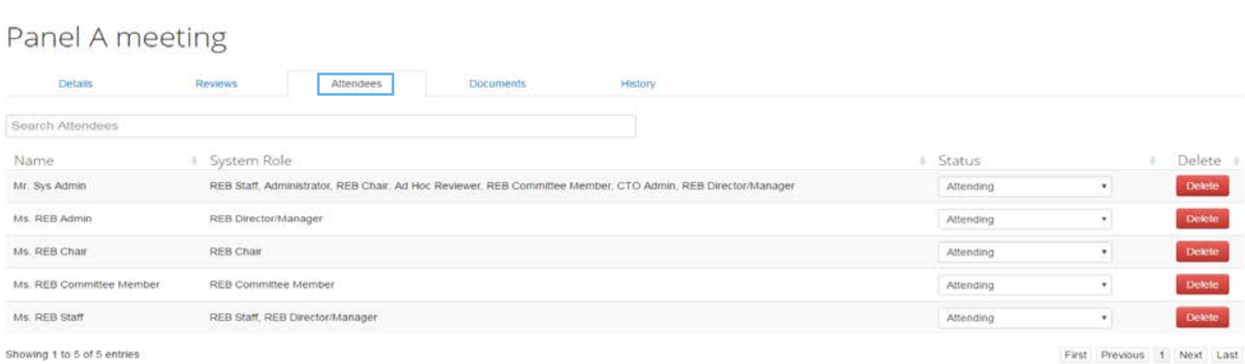


Click the "OK" button to remove the application from the meeting and it will return to the status of "Full Board Review". The application can then be assigned to a different meeting.

Attendees Tab

By clicking on the Attendees tab, you will be presented with a list of all attendees currently assigned to that meeting, along with related information. The information provided is separated into four columns:

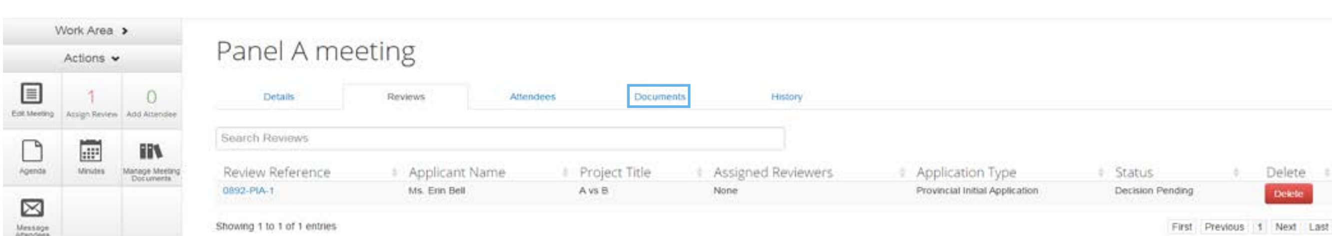
- **Name** – Displays the name of attendee
- **System Role** – Displays the attendee's assigned role(s) in the system
- **Status** – Displays the attendee's status (attending/not attending)
- **Delete** – Enables you to remove the person from the meeting



Documents Tab

By clicking on the Documents tab, you will be presented with a list of all documents that have been uploaded into the meeting (for more information see '[Meeting Documents](#)' for more information). Information about each document is separated into six columns:

- **File Name** – Displays the file name of the document uploaded
- **Date** – Displays the date entered by the user when the document was uploaded
- **Version** – Displays the version entered by the user when the file was uploaded
- **Size** – Displays the disk space size of the document
- **View** – Displays the "Download" button where you can download the document to your computer
- **Delete** – Displays the "Delete" button to delete the document from the meeting



History Tab

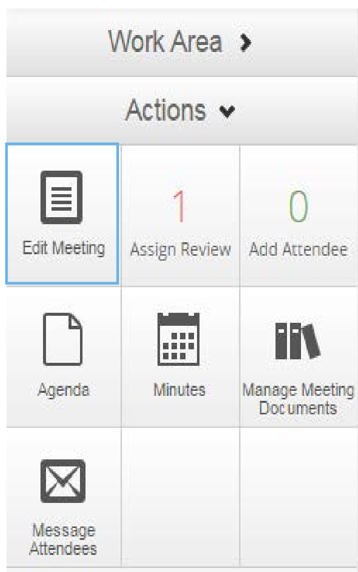
The history tab lists all actions that have occurred for that meeting for audit trail purposes. For example, details related to the addition of attendees, uploading of documents, and adding a study to the meeting can all be found via this tab.

Actions toolbar (Meetings)

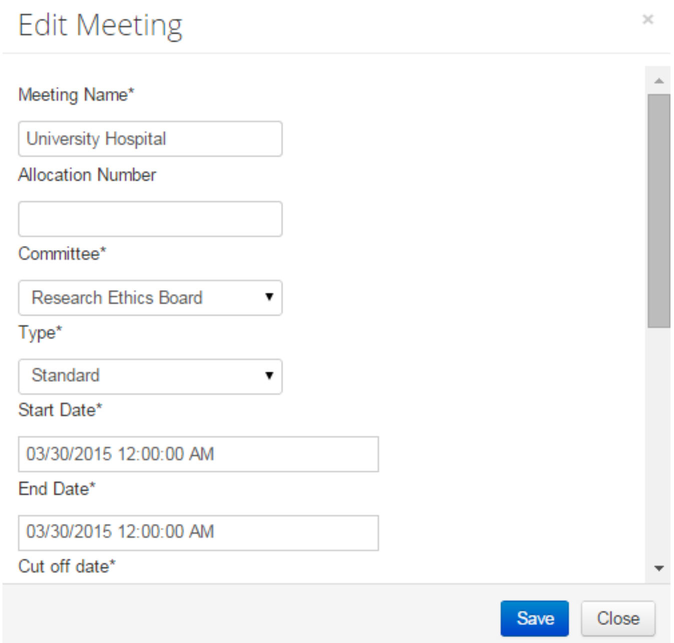
The Actions toolbar contains important information and features, including the ability to assign any application forms to the meeting, developing and reviewing the agenda and minutes, editing the meeting and managing all meeting documents.

Editing a Meeting

To edit a meeting (e.g., to update the start/end times, location, or other meeting information) click on the "Edit Meeting" button on the Actions toolbar:

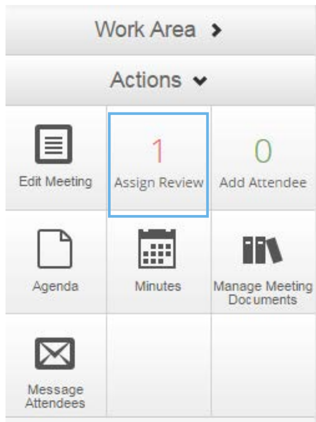


The 'Edit Meeting' dialog box will pop-up allowing you to make any edits to that meeting.

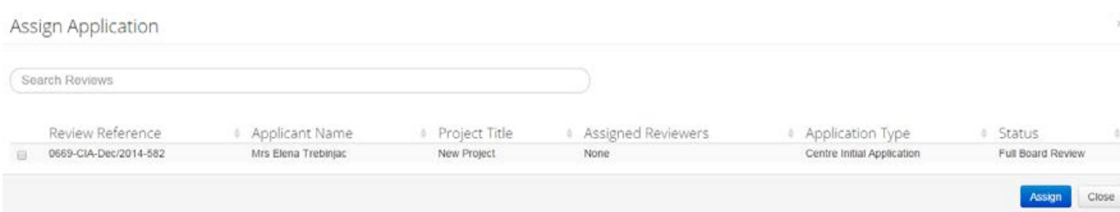

Edit Meeting
×
Meeting Name*
University Hospital
Allocation Number
Committee*
Research Ethics Board
Type*
Standard
Start Date*
03/30/2015 12:00:00 AM
End Date*
03/30/2015 12:00:00 AM
Cut off date*
Save
Close

Assigning Application Forms to a Meeting

The "Assign Review" button will indicate the number of applications currently assigned to be reviewed at this full board meeting.



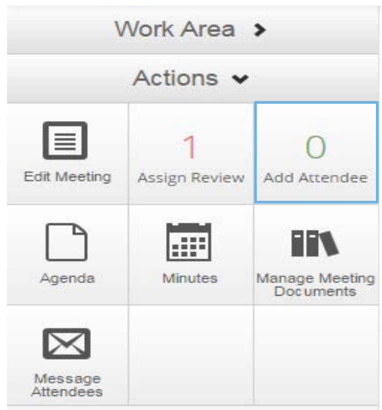
Clicking the "Assign Review" button will bring up a window listing the applications waiting assignment. Using the 'search' feature allows you to search the applications by review reference, applicant name, project title, assigned reviewers, application type and/or status.



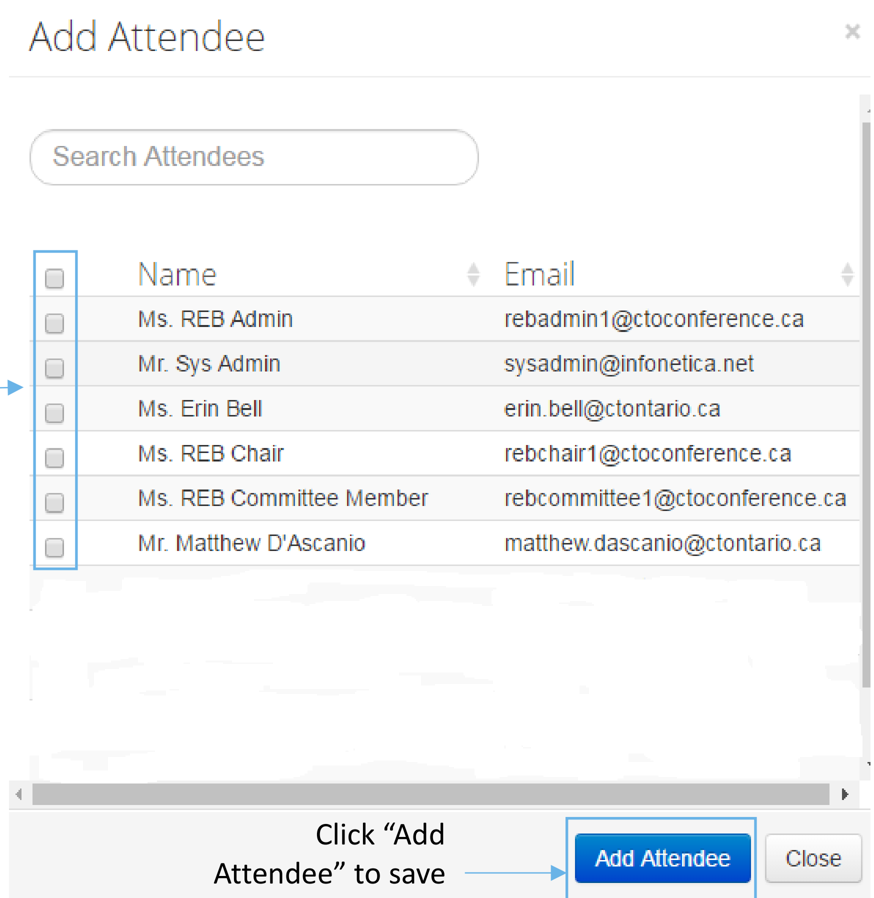
Click the checkbox to the left of the Review Reference number and click the blue "Assign" button to assign an application to the meeting. You can assign more than one application to a meeting by selecting multiple checkboxes and clicking the blue "Assign" button.

Adding Attendees to a Meeting

Attendees can be added to the meeting from the Actions toolbar. The “Add Attendee” button will list how many attendees have currently been invited to the meeting.



Clicking on ‘Add Attendee’ will bring up a list of people who can be invited to the meeting. To invite a person to the meeting click on the checkbox to the left of their name and click the blue “Add Attendee” button. Multiple people can be invited to the meeting using this feature.

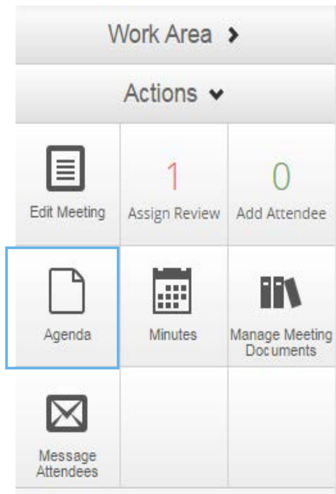


Tick the boxes corresponding to the individuals who are attending the meeting

Click "Add Attendee" to save changes

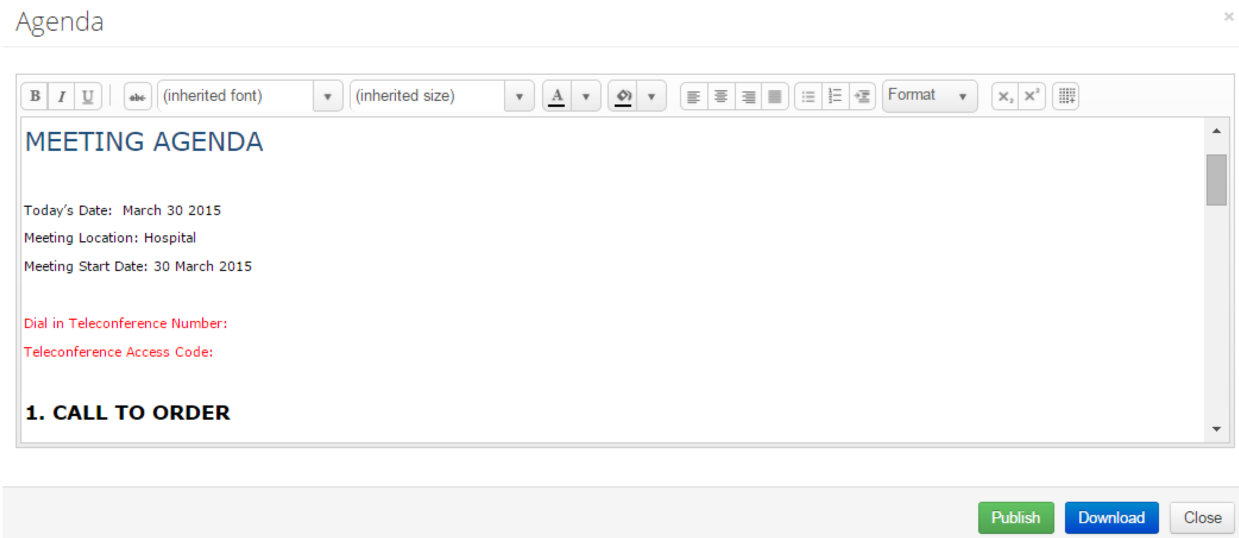
Meeting Agenda and Minutes

To create an agenda click on the “Agenda” button on Actions toolbar.

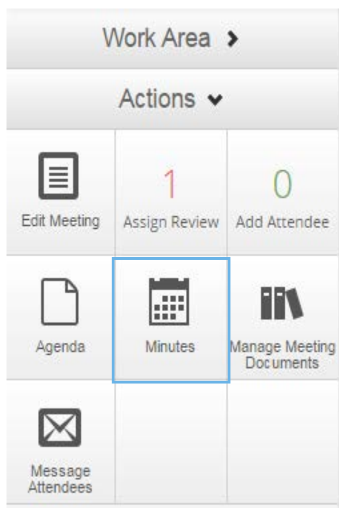


By clicking on the “Agenda” button, you will be presented with the draft meeting agenda. The document can be edited in the system. The agenda will automatically pre-fill with information based on the application forms that have been assigned for review during this meeting. Once the agenda is complete, click the green “Publish” button. The final copy of the agenda will now be available for download under the documents tab in the meeting.

Using the Agenda template in CTO Stream is optional; you can also upload your agenda using the “Manage Meeting Documents” feature. Please see ‘Meeting Documents’ for more information.

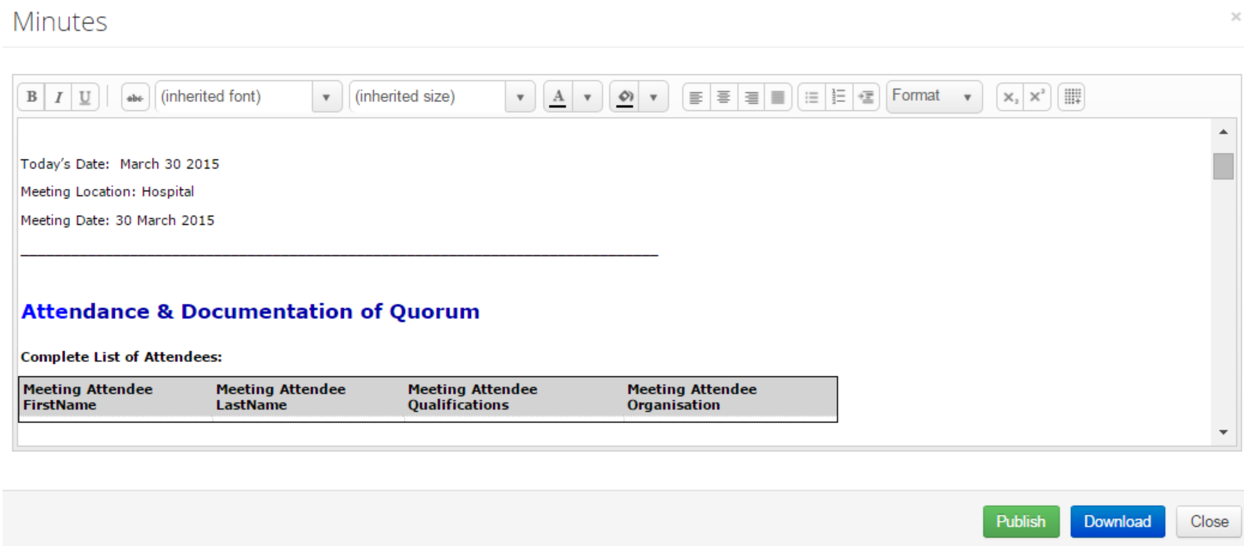


To create meeting minutes, click on the "Minutes" button on the Actions toolbar.



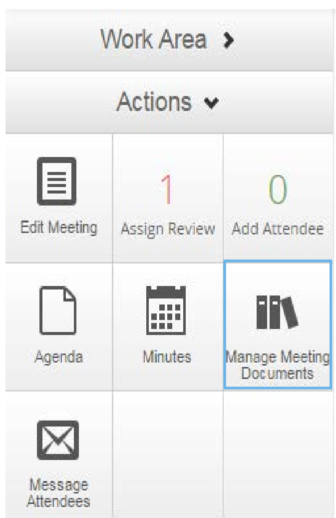
By clicking on the "Minutes" button, you will be presented with the draft meeting minutes. The document can be edited in the system. The minutes will pre-fill with information based on the application forms that have been assigned for review during this meeting and the list of attendees. Once the minutes are complete, click the green "Publish" button. The final copy of the minutes will now be available for download under the documents tab in the meeting.

Using the Minutes template in CTO Stream is optional; you can also upload your redacted minutes using the "Manage Meeting Documents" feature. Please see 'Meeting Documents' for more information.

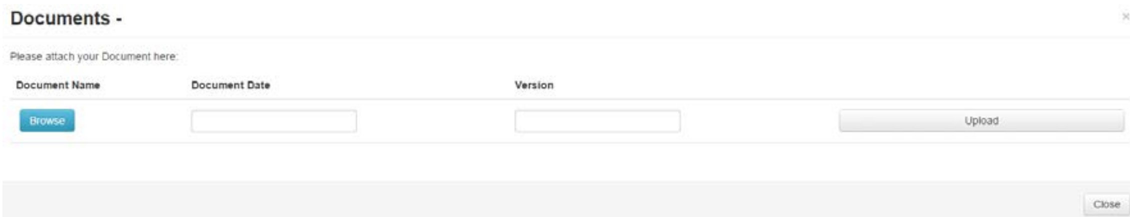


Meeting Documents

Clicking on “Manage Meeting Documents” button will bring up a window where you can manage and upload all documents associated with this meeting.



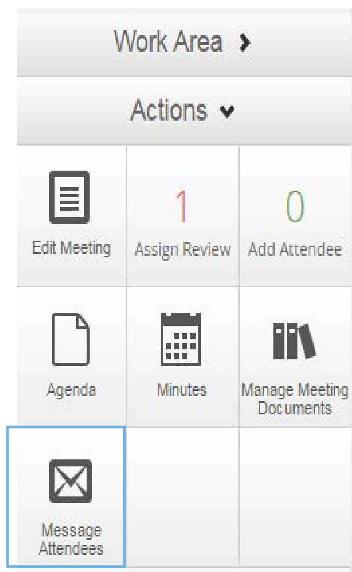
The upload option will enable you to locate a local file and upload it to the system.



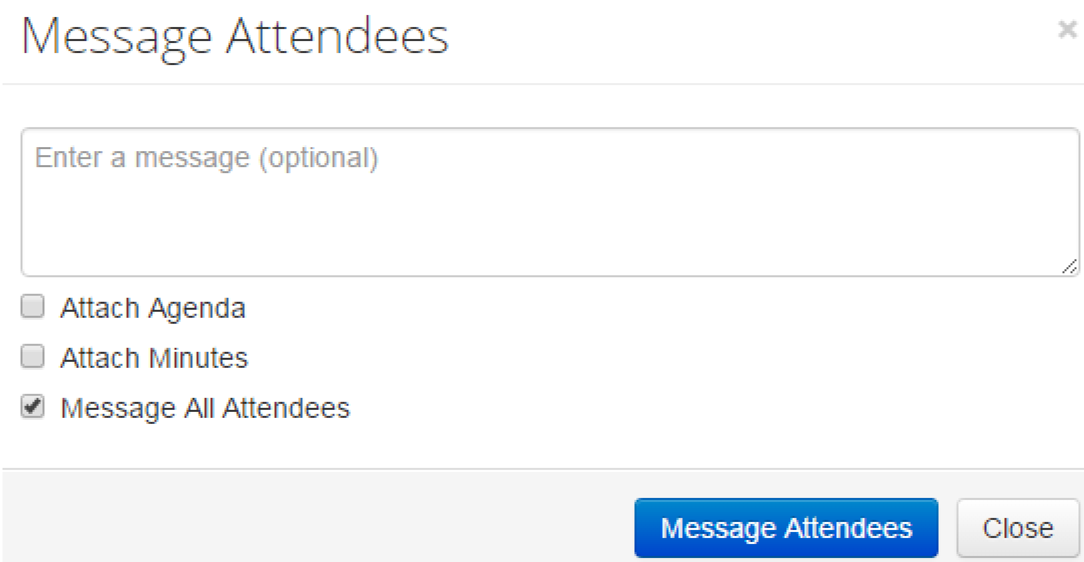
Any document uploaded will be available under the Documents tab for that meeting.

Messaging Attendees

The “Message Attendees” button allows you to send an in-system notification to anyone who has been added as an attendee. The recipients will also receive an email alert to let them know that a message is waiting for them in CTO Stream.



Clicking on the “Message Attendees” button will open a dialog box.



- An optional message can be entered. The message will be included with the in-system notification, but will not be contained within the email alert.
- You have the option to attach the published agenda to the message by ticking the ‘attach agenda’ box. This will attach the published agenda to the in-system notification, but will not to the email alert
- You have the option to attach the published minutes to the message by ticking the ‘attach minutes’ box. This will attach the published minutes to the in-system notification, but will not to the email alert

The default setting is to message all meeting attendees. If you do not wish to message all attendees, untick the ‘Message All Attendees’ checkbox. This will open a pull down menu which can be used to select which attendees should receive the message

Untick “Message All Attendees” to open a drop-down window from which you can select message recipients