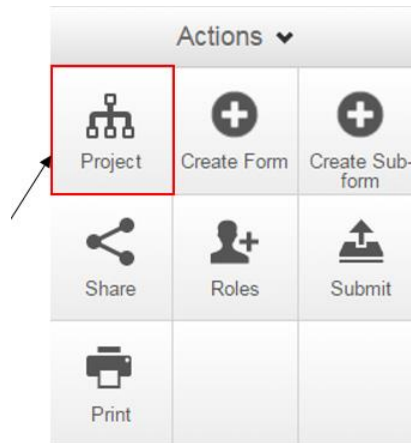


CTO Stream Project Overview

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1. PROJECT OVERVIEW

In order to access the Project Overview, click on the Project tile on the Actions toolbar.



You will be presented with the Project Overview page. The top of the page will indicate the name of the project you are currently viewing. The bottom section of the page is separated by tabs. The default tab selected is **Forms**. Four additional tabs are available – **Submitted Documents**, **Transfers**, **History** and **Project Documents*** (see subsequent sections for more information).

The screenshot shows the 'Project Overview - Research' page. It features a sidebar with 'Home' and 'Notifications' icons. The main content area has a tree view under 'All Forms' showing a hierarchy: Research > Provincial Initial Application - Research - - > Centre Initial Application - Research - - > Centre Reportable Event - Research - . Below the tree are tabs for 'Forms', 'Submitted Documents', 'Transfers', and 'History'. The 'Forms' tab is active, displaying a search bar and a table of forms.

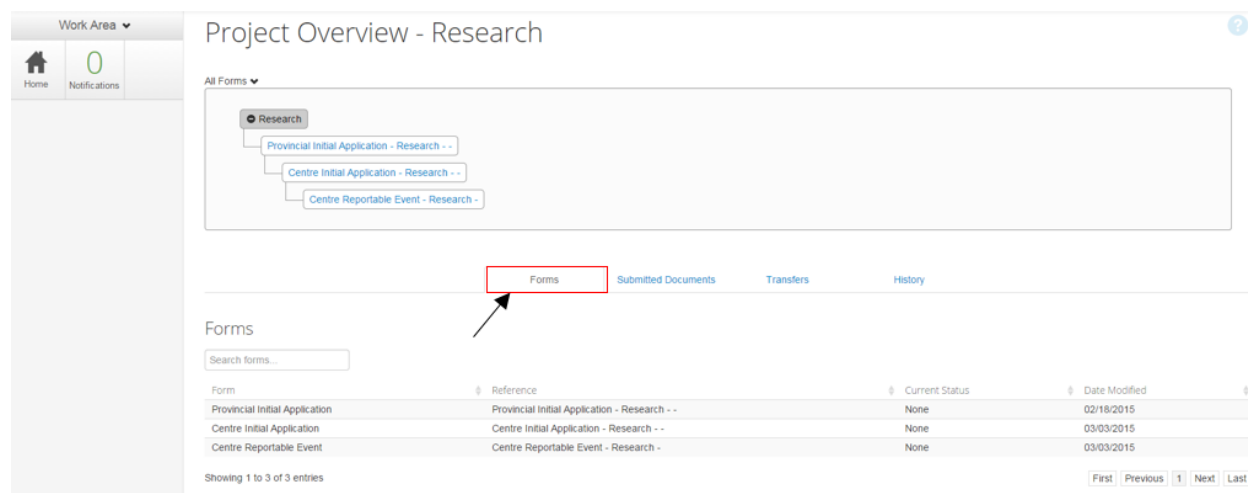
Form	Reference	Current Status	Date Modified
Provincial Initial Application	Provincial Initial Application - Research - -	None	02/18/2015
Centre Initial Application	Centre Initial Application - Research - -	None	03/03/2015
Centre Reportable Event	Centre Reportable Event - Research -	None	03/03/2015

Showing 1 to 3 of 3 entries

*The Project Documents tab will only be available once your Provincial Initial Application form has been approved by the REB.

1.1 Forms

When you click on the [Forms](#) tab, you are presented with a list of all forms currently associated with this project, along with related information. The information provided is separated into four columns:



The screenshot shows the 'Forms' tab selected in the 'Project Overview - Research' interface. The 'Forms' tab is highlighted with a red box and an arrow. Below the tab is a search field and a table with the following data:

Form	Reference	Current Status	Date Modified
Provincial Initial Application	Provincial Initial Application - Research - -	None	02/18/2015
Centre Initial Application	Centre Initial Application - Research - -	None	03/03/2015
Centre Reportable Event	Centre Reportable Event - Research -	None	03/03/2015

Showing 1 to 3 of 3 entries

1. Form – displays the name of the form
2. Reference – displays Form Reference information including the name, type of form and centre name (if applicable)
3. Current Status – displays the current status of the form in the REB review process
4. Date Modified – displays the date of the last change made to the form

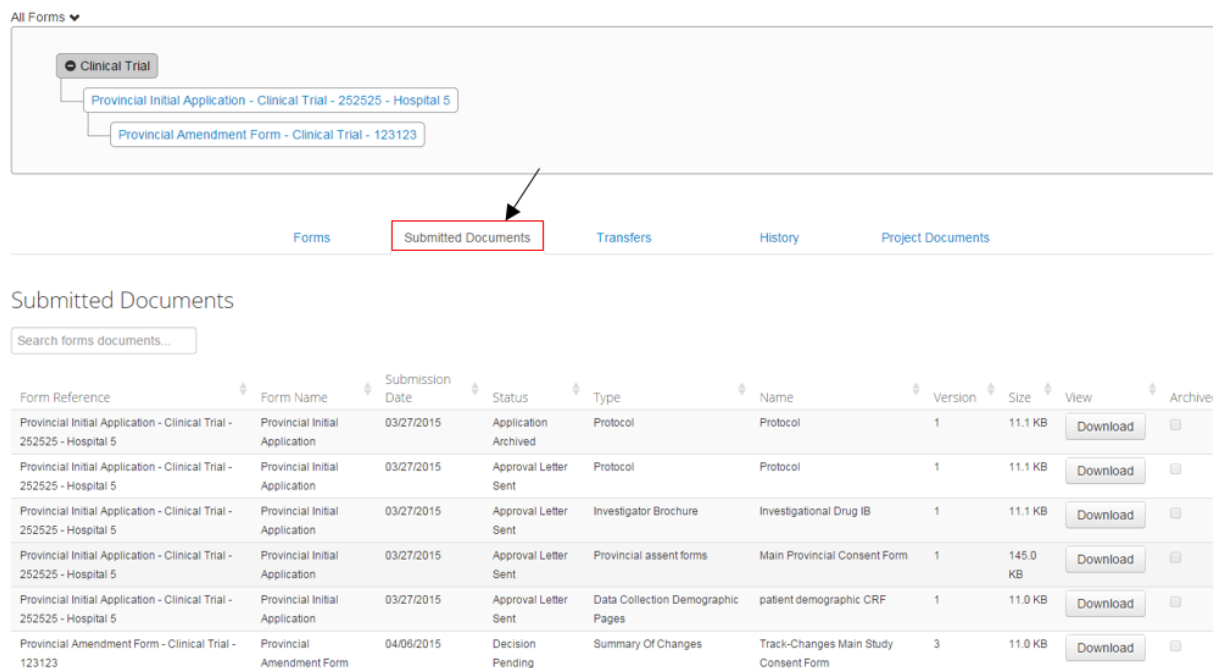
Clicking on any of the forms will link you to the form overview allowing you to view more details or to edit the form if it has not been submitted.

Forms

There is also a search field on this tab allowing you to find a specific form. You can search for a specific form using keywords or any information located in the following criteria: Form Name, Reference, Current Status or Date Modified.

1.2 Submitted Documents

When you click on the [Submitted Documents](#) tab, you are presented with a list of all documents that have ever been submitted to the REB. Information about each document is separated into ten columns:



The screenshot shows a web interface for 'Submitted Documents'. At the top, there's a navigation bar with tabs: 'Forms', 'Submitted Documents' (highlighted with a red box and an arrow), 'Transfers', 'History', and 'Project Documents'. Below the navigation bar is a search bar labeled 'Submitted Documents' with the placeholder text 'Search forms documents...'. The main content is a table with the following columns: Form Reference, Form Name, Submission Date, Status, Type, Name, Version, Size, View, and Archived. The table contains seven rows of data representing different document submissions.

Form Reference	Form Name	Submission Date	Status	Type	Name	Version	Size	View	Archived
Provincial Initial Application - Clinical Trial - 252525 - Hospital 5	Provincial Initial Application	03/27/2015	Application Archived	Protocol	Protocol	1	11.1 KB	Download	<input type="checkbox"/>
Provincial Initial Application - Clinical Trial - 252525 - Hospital 5	Provincial Initial Application	03/27/2015	Approval Letter Sent	Protocol	Protocol	1	11.1 KB	Download	<input type="checkbox"/>
Provincial Initial Application - Clinical Trial - 252525 - Hospital 5	Provincial Initial Application	03/27/2015	Approval Letter Sent	Investigator Brochure	Investigational Drug IB	1	11.1 KB	Download	<input type="checkbox"/>
Provincial Initial Application - Clinical Trial - 252525 - Hospital 5	Provincial Initial Application	03/27/2015	Approval Letter Sent	Provincial assent forms	Main Provincial Consent Form	1	145.0 KB	Download	<input type="checkbox"/>
Provincial Initial Application - Clinical Trial - 252525 - Hospital 5	Provincial Initial Application	03/27/2015	Approval Letter Sent	Data Collection Demographic Pages	patient demographic CRF	1	11.0 KB	Download	<input type="checkbox"/>
Provincial Amendment Form - Clinical Trial - 123123	Provincial Amendment Form	04/06/2015	Decision Pending	Summary Of Changes	Track-Changes Main Study Consent Form	3	11.0 KB	Download	<input type="checkbox"/>

1. Form Reference – displays the information about the application form this document was uploaded into
2. Form Name – displays the name of the form the document was attached to when submitted to the REB
3. Submission Date – date of submission of the listed form, along with attached document
4. Status – displays the status of the application form this document was uploaded into
5. Type – displays the category this document belongs too
6. Name – displays the document name
7. Version – displays the version of the document
8. Size – displays the disk space size of the document
9. View – allows the file to be downloaded to your computer

- 10. Archived – displays if the document has been archived by the REB. The document will show as archived when a newer version of the document has been approved or acknowledged by the REB.

Submitted Documents

Search forms documents...

There is also a search field on this tab, allowing you to find a specific document(s). You can also search submitted documents using keywords or any information located in the following criteria: Form Name, Submission Date, Status, Type, Document Name and Version.

1.3 Transfers

When you click on the [Transfers](#) tab you are presented with a list of all transfers, which have been initiated on the project, along with related information. Information about each transfer is separated into seven columns:

The screenshot shows the 'Project Overview - TEST' interface. At the top, there is a 'Work Area' dropdown and a navigation sidebar with 'Home' and 'Notifications' (3). Below the sidebar, there is a document tree under 'All Forms' containing:

- TEST
 - Provincial Initial Application - TEST -
 - Centre Initial Application - - TEST
 - Provincial Trial Closure Report - TEST - 11/03/2014
 - Provincial Reportable Event - -

Below the document tree, there are four tabs: 'Forms', 'Submitted Documents', 'Transfers' (highlighted with a red box and an arrow), and 'History'.

The 'Transfers' tab displays a table with the following data:

Transfer Id	From User	To User	Requested Date	Status	Response Date	Action
41	Mr Matthew Dascario	You	12/03/2014 14:28	Accepted	12/04/2014 9:40 17 AM	Cancel

1. Transfer ID – each transfer request in CTO Stream is given a unique ID for tracking purposes
2. From User – displays the user who initiated the transfer
3. To User – displays the user who will receive the transfer request
4. Requested Date – displays the date the transfer was initiated
5. Status – displays the status of the transfer (Requested, Accepted or Rejected)
6. Response Date – displays the date the “To User” responded to the transfer request
7. Action – allows the transfer request to be canceled by the From User

1.4 History

A complete listing of everything that has occurred in the project is obtained by clicking on the [History](#) tab. You will be presented with a list of all chronological events that have taken place since the projects creation. This list includes major events such as a form being submitted, project transfers and status changes during the REB review process.

The screenshot shows the 'Project Overview - Clinical Trial' interface. The 'History' tab is selected and highlighted with a red box and an arrow. Below the tabs, the 'Project History' section is visible, featuring a search bar and a table of events.

Date	Form Reference	User	Description	Attachment
03/27/2015	Provincial Initial Application - Clinical Trial - 252525 - Hospital 5	Ms. Elena Trebinjac	An applicant has submitted a Provincial Initial Application, please review it as soon as possible.	Download
03/27/2015	Provincial Initial Application - Clinical Trial - 252525 - Hospital 5	Review user	Form status changed from Submitted by Applicant to CTO Mandate Met	Download
03/27/2015	Provincial Initial Application - Clinical Trial - 252525 - Hospital 5	Review user	Notification received: Your Application Has Been Received By CTO	Download
03/27/2015	Provincial Initial Application - Clinical Trial - 252525 - Hospital 5	Review user	Form status changed from CTO Mandate Met to Submission Complete	Download

1. Date – displays the date of the event occurred
2. Form Reference – displays the applicant form in which this event occurred
3. User Name – displays the user name who initiated the action
4. Description – displays information about the event and what actions occurred

5. Attachment – displays a direct link to obtain the any letters associated with the event - by clicking the Download button, a letter will be open in the pdf format and downloaded to your computer.

Project History

There is also a search field on this tab allowing you to query project history. You can search for a specific form using any of the following criteria: Date, Form Reference, User Name and Status Description.

1.5 Project Documents

When you click on the [Project Documents](#) tab, you are presented with a list of the currently approved/acknowledged documents for the project. The tab will automatically update as new documents are approved/acknowledged by the REB. Information about each document is separated into seven columns:

1. Document Name – displays name of the submitted document
2. Document Date – displays the version date of the document
3. Document Version – displays the version number of the submitted document
4. Document Category – displays the documents category (approved or acknowledged)
5. Download Submission Document Button – by clicking on Download button a document will be open in the pdf format and downloaded to your computer
6. Document Type – displays the document type within CTO Stream
7. Centre Organization – displays name of the Centre Organization

Forms Submitted Documents Transfers History **Project Documents**

Document Name	Document Date	Document Version	Document Category	Download Submission	Document Type	Centre Organization
Protocol	03/03/2015	1	Approved	Download	Protocol	
Investigational Drug IB	02/03/2015	1	Acknowledged	Download	Investigator Brochure	
Main Provincial Consent Form	01/03/2015	1	Approved	Download	Provincial assent forms	
patient demographic CRF	01/03/2015	1	Approved	Download	Data Collection Demographic Pages	
Track-Changes Main Study Consent Form	11/03/2015	3	Acknowledged	Download	Summary Of Changes	
Sponsor amendment letter	01/04/2015	4	Acknowledged	Download	Sponsor Correspondence / Newsletter	
Sponsor Cover Letter	01/04/2015	7	Acknowledged	Download	Sponsor Correspondence / Newsletter	
Protocol	06/04/2015	6	Approved	Download	Protocol	
Main Provincial Consent Form 2	04/04/2015	5	Approved	Download	Provincial consent form	
Main Provincial Consent Form	05/04/2015	4	Approved	Download	Consent/Assent Update	
Investigational Drug IB	03/03/2015	3	Acknowledged	Download	Investigator Brochure	