

A User Guide for REB of Record Host Institution Representatives

Process for signing CIA as REB of Record Host Institution Representative

Step 1: CTO Assigns the REB Host Institution Representative once a CIA is submitted by the study team

Once CTO assigns the REB Host Institution Representative in CTO Stream, the assigned individual will receive an email from the CTO Stream system with the subject, *"REB Host Institution/ Representative Signature Required – [Study Title]"*. This email will serve as notice that a new site has joined the study and requires approval from the REB host in CTO Stream. This email comes from donotreply@infonetica.net.

The screenshot shows the CTO Stream interface. At the top, there is a navigation bar with 'REVIEW CTO Stream', 'Work Area', 'Meetings', 'Contacts', 'Help', 'Settings', and 'Mr. Scott Tomlinson'. Below this is a 'Work Area' dropdown and an 'Actions' menu. The 'Actions' menu contains several icons: 'Form Submissions' (1), 'Project Submissions' (2), 'Panel Comments' (0), 'Form Comments' (0), 'Amend Centre', 'Assign REB Host Signatory' (highlighted with a blue box and an arrow), 'CTO Panel Change', 'Review Application', 'CIA - CTO Incomplete', 'CIA-CTO Complete', and 'Note to File'. To the right of the 'Assign REB Host Signatory' button, there is a text box that says 'CTO assigns the REB Host once the CIA is submitted'. Further right, the 'Project Title: RCT X vs Y' is displayed, along with 'Form Reference: Centre Initial Application - RCT X vs Y - Hospital A - Doe' and 'Review Reference: 1838-CIA-Apr/2019-21170'. Below this, there is a table with project details:

Project Id:	1838	Applicant Name:	
Current Committee:	DEMO REB	Current Status:	
Application Type:	Centre Initial Application	Meeting:	
Clock Status:	Start (0/100) days elapsed.	Assigned Reviewers:	
Conflicted Users:	None	Centre:	

Note: CTO recommends that REB Hosts create an inbox rule using the above email subject and sender address, to keep all requests in the same folder.

Step 2: REB Host logs into its CTO Stream account

Once the REB Host Institution Representative receives the email notification from CTO Stream notifying them that their signature is required on the CIA, they should log in to their CTO Stream account at <https://review.ctostream.ca>.

The screenshot shows the CTO Stream login page. At the top, there is a navigation bar with 'REVIEW CTO Stream', 'Work Area', 'Contacts', 'Help', and 'Log in'. Below this is the CTO Stream logo, which consists of several curved lines in blue and green. Underneath the logo, it says 'A web-based research ethics review system managed by Clinical Trials Ontario' and 'CLINICAL TRIALS ONTARIO'. The main content area is a 'Log in' form with two input fields: 'Email Address' and 'Password'. A blue arrow points to the 'Email Address' field with the text 'Enter the email address associated with your CTO Stream account'. Another blue arrow points to the 'Password' field with the text 'Enter secure your password'. Below the input fields, there is a blue 'Log in' button and a link for 'Forgotten Password'.

Step 3: REB Host Work Area

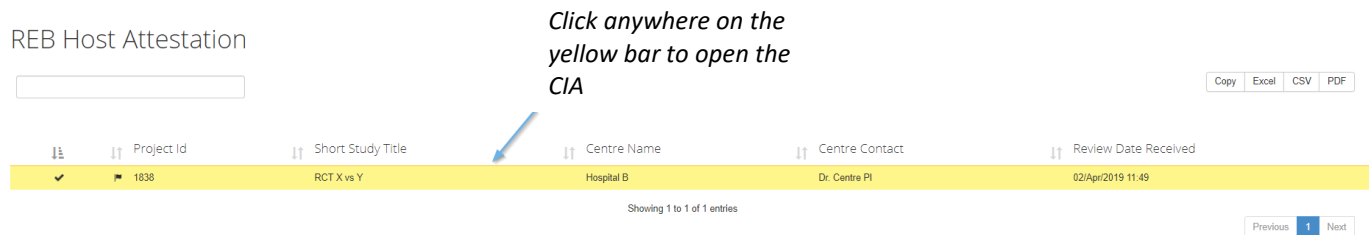
After logging in as REB Host Institution Representative you will be automatically directed to the 'Work Area'. Within the Work Area is an Administrative tile called, "REB Host Attestation" which will display a red number reflecting the number of active signature requests currently awaiting signature in CTO Stream. Click anywhere on this tile to view the CIA applications within.

The screenshot shows a web interface for the 'Work Area'. At the top, there is a navigation bar with 'REVIEW CTO Stream', 'Work Area', 'Contacts', 'Help', and 'Mr. REB Hos'. Below the navigation bar, the main heading is 'Work Area'. Underneath, there is a 'General' section with three tiles: 'Notifications' (10), 'Contacts' (0), and 'Reports' (0). Below the 'General' section is an 'Administrative' section with a dropdown arrow. The 'Administrative' section contains a single tile labeled 'REB Host Attestation' with a red number '1'. A blue arrow points from the text 'The number on the front of the tile represents the number of active signature requests' to the number '1' on the 'REB Host Attestation' tile.

Category	Item	Count
General	Notifications	10
	Contacts	0
	Reports	0
Administrative	REB Host Attestation	1

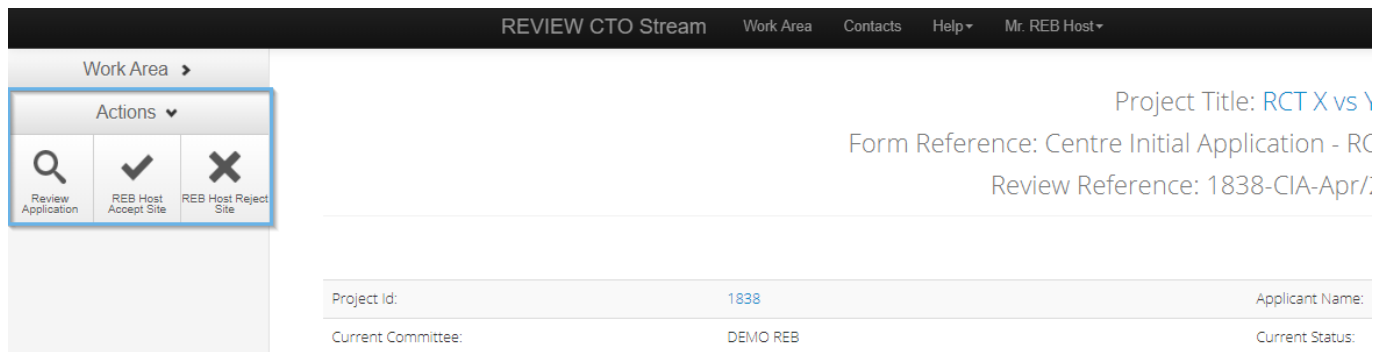
Step 4: REB Host accesses the CIA submission within CTO Stream

Inside the REB Host Attestation tile is a list of all CIA submissions waiting for signature from the REB Host. Click anywhere on the yellow bar containing the CIA you wish to open and sign-off.

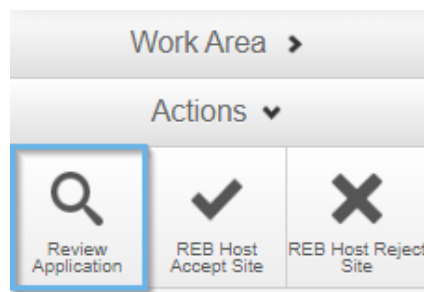


Step 5: REB Host Accepts or Rejects the signature request

Once the CIA submission has been opened, you will be taken to the submission timeline. At the top left-hand side of the screen are three action buttons (Review Application, REB Host Accept Site and REB Host Reject Site) Each action is described below.



Step 5a: Review Application



As the REB Host you can review the contents of the CIA application by pressing the 'Review Application' button. This takes you to the table of contents view for the form and from here you can open any section of the form you wish to view by clicking the corresponding question numbers for that section on the right side of the screen. The Action Menu displays three actions which allow you to view the uploaded documents, print or return to the submission timeline.

Work Area >

Actions ▾

Timeline Print Documents

Print, view documents or return to the submission timeline

Review Reference: 1838-CIA-Apr/2019-21172

Project Id: 1838 Version: 21

Centre Initial Application - RCT X vs Y - Hospital B - PI

- Section
- SECTION 1.0 - GENERAL INFORMATION
 - SECTION 2.0 - CENTRE-SPECIFIC STUDY DESCRIPTION
 - SECTION 3.0 - RECRUITMENT
 - SECTION 4.0 - INFORMED CONSENT INFORMATION
 - SECTION 5.0 - SPECIAL CONSENT CONSIDERATION
 - SECTION 6.0 - PRIVACY & CONFIDENTIALITY
 - SECTION 7.0 - CONFLICT OF INTEREST
 - SECTION 8.0 - REIMBURSEMENT & STUDY RESULTS
 - SECTION 9.0 - TRANSLATIONS
 - SECTION 11.0 - AGREEMENT & APPROVAL

Clicking the question numbers will open that section of the form

Questions
1.0 - 1.9
2.1 - 2.6
3.1 - 3.5
4.1 - 4.16
5.1 - 5.5
6.1 - 6.6
7.1 - 7.9
8.1 - 8.2
9.1 - 9.4
11.0 - 11.5

Step 5b: REB Host Accept Site

Work Area >

Actions ▾

Review Application **REB Host Accept Site** REB Host Reject Site

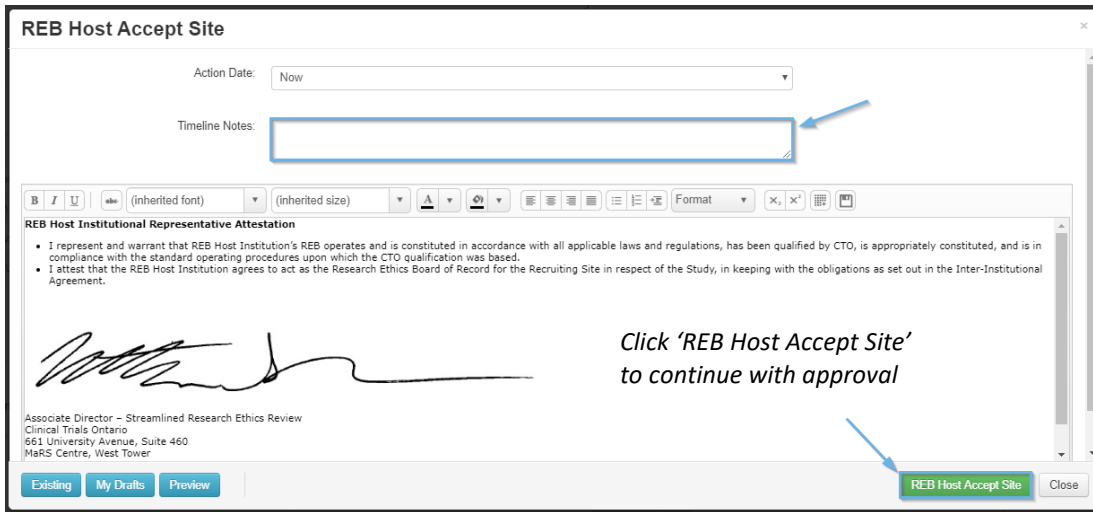
To accept the study on behalf of the REB of Record the you must press the 'REB Host Accept Site' action button. Once the button is pressed a document template will appear in a pop-up window with the attestation language and electronic signature of the REB Host. (Note: this template should not be modified).

The attestation language reads:

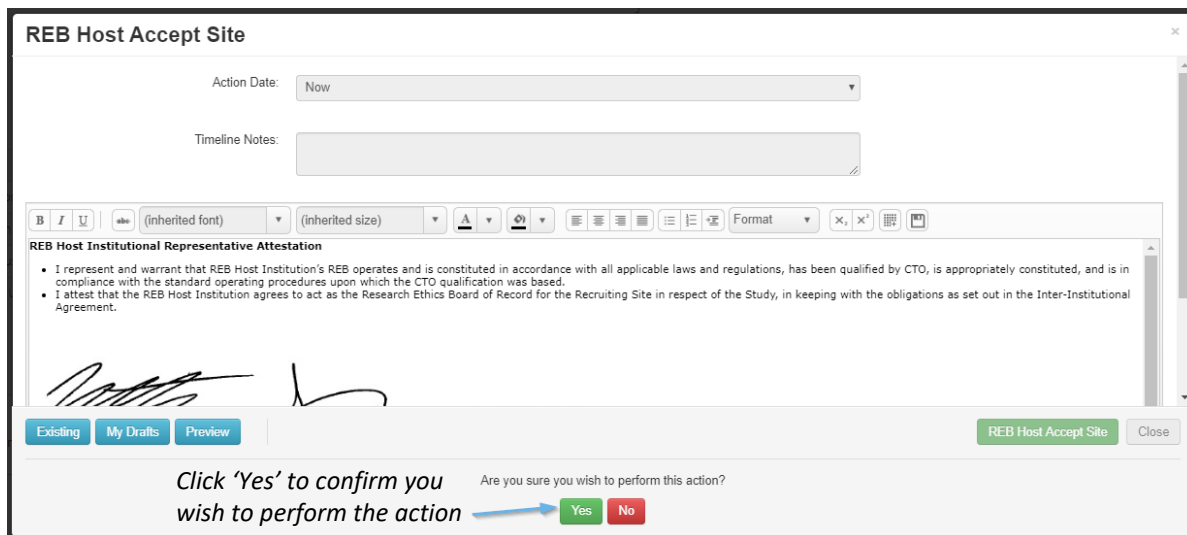
- I. *I represent and warrant that REB Host Institution's REB operates and is constituted in accordance with all applicable laws and regulations, has been qualified by CTO, is appropriately constituted, and is in compliance with the standard operating procedures upon which the CTO qualification was based.*

- II. *I attest that the REB Host Institution agrees to act as the Research Ethics Board of Record for the Recruiting Site in respect of the Study, in keeping with the obligations as set out in the Inter-Institutional Agreement.*

To continue with the site approval, press the green 'REB Host Accept Site' button at the bottom right-hand corner of the pop-up window.

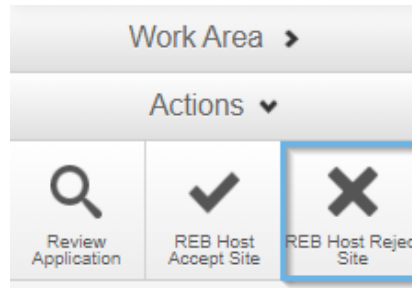


Next click 'Yes' to confirm that you wish to perform this action. You also have the option to create a "Timeline Note" that will be displayed along with your decision on the submission timeline for the CIA.



Once the action has been confirmed an email notification will be delivered to CTO Staff informing them that the new recruiting site has been accepted. CTO will then proceed with screening the CIA through to the REB of Record. The CIA will no longer appear in REB Host Attestation tile of the Work Area.

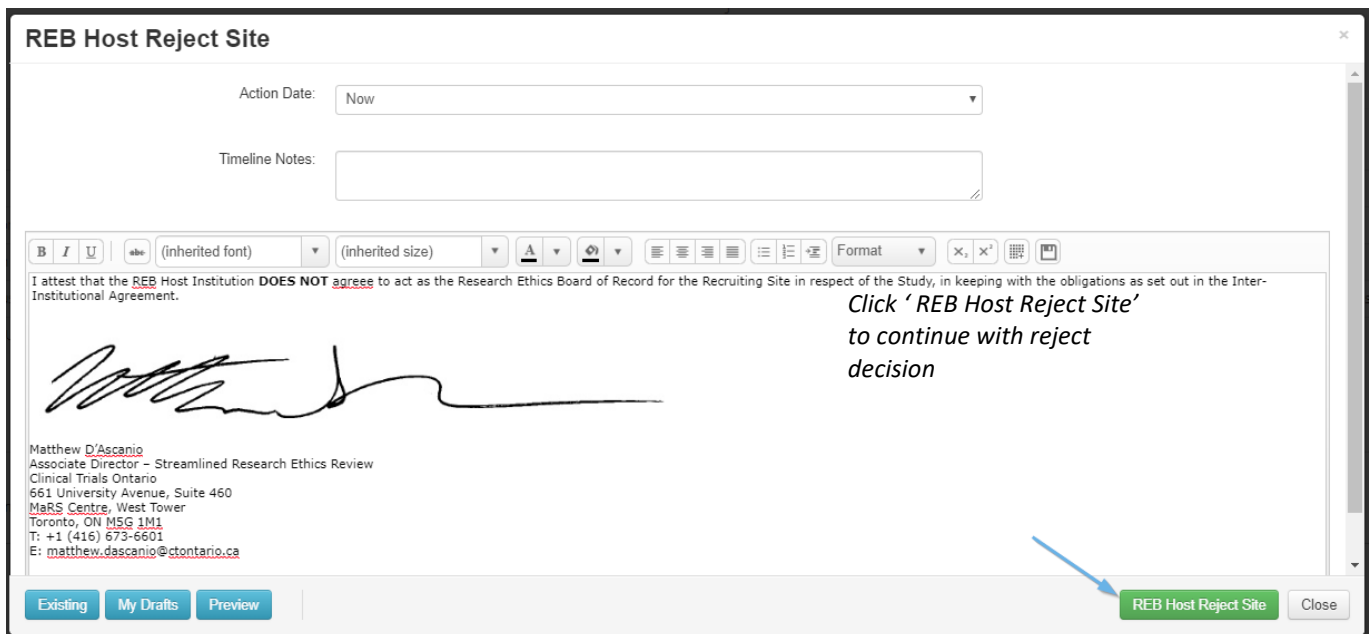
Step 5c: REB Host Reject Site



Pressing 'REB Host Reject Site' will decline the recruiting site on behalf of the REB of Record Host Institution. Once the button is pressed, a document template will appear in a pop-up window with an attestation saying,

*"I attest that the REB Host Institution **DOES NOT** agree to act as the Research Ethics Board of Record for the Recruiting Site in respect of the Study, in keeping with the obligations as set out in the Inter-Institutional Agreement."* (Note: this template should not be modified).

To continue with declining the recruiting site, press 'REB Host Reject Site' in the bottom right-hand corner of the pop-up window. Similar to the Accept decision, you will need to confirm you wish to perform this action.



Once the you decline the recruiting site on behalf of the REB of Record Host Institution, a notification will be sent to CTO Staff and the research team to inform them of the decision and the application will automatically be withdrawn.