

CTO **STREAM**

A graphic consisting of several overlapping, curved lines in shades of blue and green, flowing from the left towards the right, partially encircling the text 'CTO STREAM'.

Creating a Sub-Form

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Form Hierarchy

What is a Sub-form?

In CTO Stream there are two classes of forms: “Parent forms” and “Sub-forms”. There is a relationship between the two different types such that sub-forms are essentially branches of the parent form. The easiest way to see the relationship between the two different types of forms is by looking at the Project Tree.



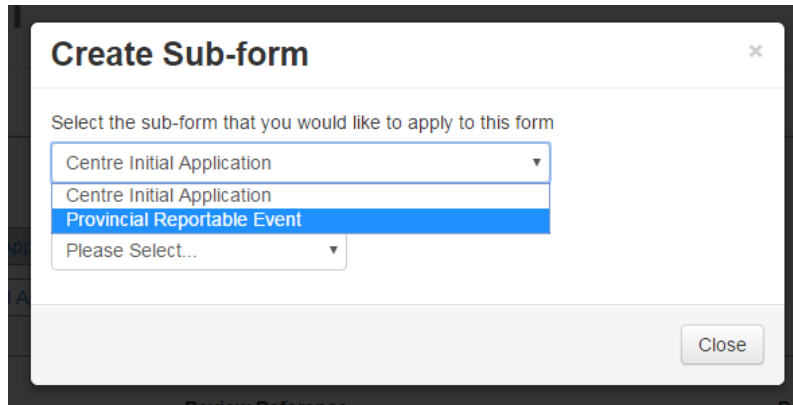
PIA Sub-forms

The following are considered to be sub-forms of the PIA:

- Centre Initial Application (CIA)
- Provincial Continuing Review (PCR)
- Provincial Amendment (PAM)
- Provincial Reportable Event (PRE)
- Provincial Study Closure (PSC)

The types of sub-forms that are available to create is dependent on the status of the parent form (the PIA). For example, the CIA and PRE can be created prior to REB approval of the PIA (they can also be created later, of course). This means that users trying to create a sub-form before the PIA is approved will only see these two options. Once the PIA is approved, all the other sub-forms will appear.

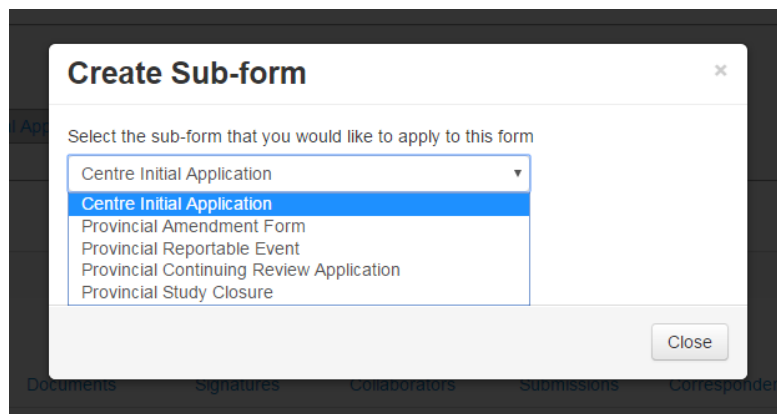
Example 1: Sub-forms available before the PIA is approved



The screenshot shows a 'Create Sub-form' dialog box with the following content:

- Title: **Create Sub-form**
- Instruction: Select the sub-form that you would like to apply to this form
- Dropdown menu options:
 - Centre Initial Application
 - Centre Initial Application
 - Provincial Reportable Event** (highlighted)
 - Please Select...
- Close button

Example 2: Sub-forms available after the PIA is approved



The screenshot shows a 'Create Sub-form' dialog box with the following content:

- Title: **Create Sub-form**
- Instruction: Select the sub-form that you would like to apply to this form
- Dropdown menu options:
 - Centre Initial Application
 - Centre Initial Application** (highlighted)
 - Provincial Amendment Form
 - Provincial Reportable Event
 - Provincial Continuing Review Application
 - Provincial Study Closure
- Close button

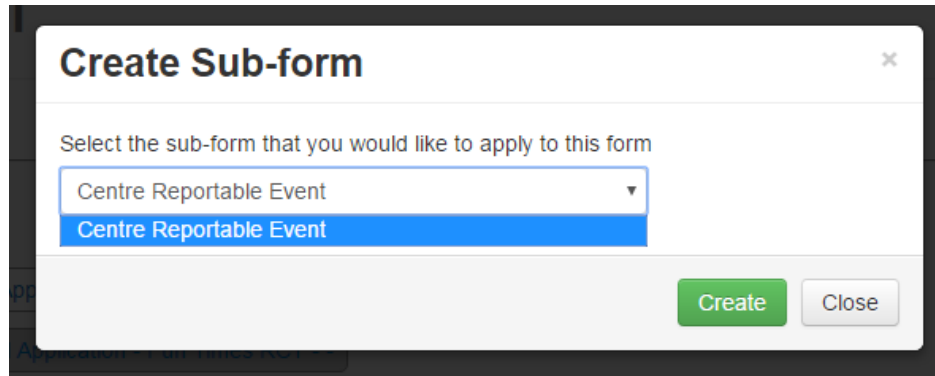
CIA Sub-forms

The following are sub-forms of the CIA:

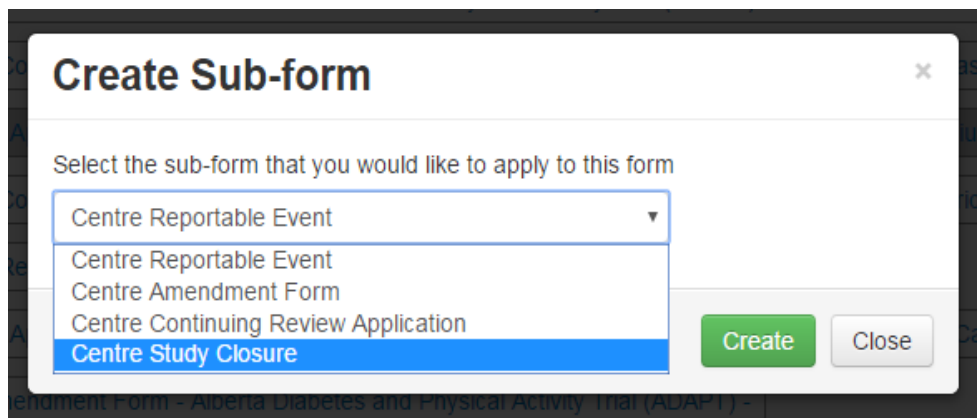
- Centre Reportable Event (CRE)
- Centre Amendment (CAM)
- Centre Continuing Review (CC)
- Centre Study Closure (CSC)

Only one type of CIA sub-form can be created before the CIA receives REB approval – the Centre Reportable Event. All other sub-forms appear after the CIA receives REB approval.

Example 1: Sub-forms available before the CIA is approved:

A screenshot of a web application dialog box titled "Create Sub-form". The dialog has a close button (X) in the top right corner. Below the title, there is a prompt: "Select the sub-form that you would like to apply to this form". A dropdown menu is open, showing a list of options. The first option, "Centre Reportable Event", is selected and highlighted in blue. At the bottom right of the dialog, there are two buttons: a green "Create" button and a grey "Close" button.

Example 2: Sub-forms available after the CIA is approved:

A screenshot of a web application dialog box titled "Create Sub-form". The dialog has a close button (X) in the top right corner. Below the title, there is a prompt: "Select the sub-form that you would like to apply to this form". A dropdown menu is open, showing a list of options: "Centre Reportable Event", "Centre Reportable Event", "Centre Amendment Form", "Centre Continuing Review Application", and "Centre Study Closure". The last option, "Centre Study Closure", is selected and highlighted in blue. At the bottom right of the dialog, there are two buttons: a green "Create" button and a grey "Close" button.

Implementation of Provincial Amendment (IPA) Form

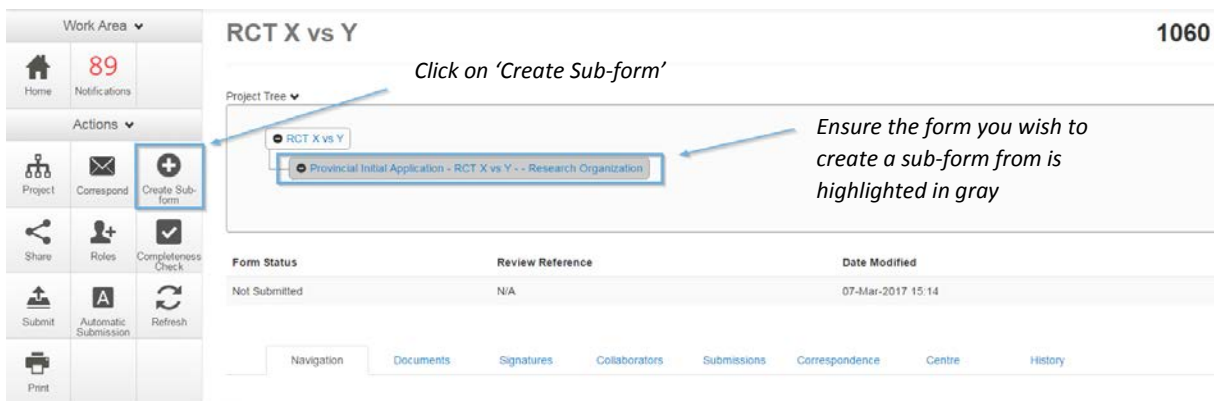
In addition to the PIA and CIA, the PAM can also act as a parent form; its sub-form is the Implementation of Provincial Amendment (IPA) form.

Creating a Sub-form

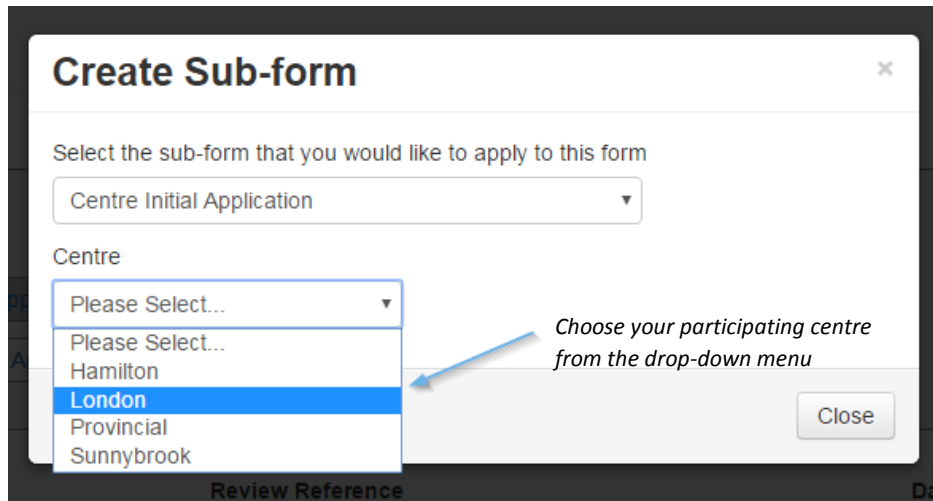
To create a sub-form users must be on the “Main Project Screen” and ensure that the parent form (corresponding to the desired sub-form) is highlighted in grey. If the parent form is not highlighted in grey, simply click on that form to select it. In the screen-shot below, the PIA has been selected as the parent form to create a sub-form from.



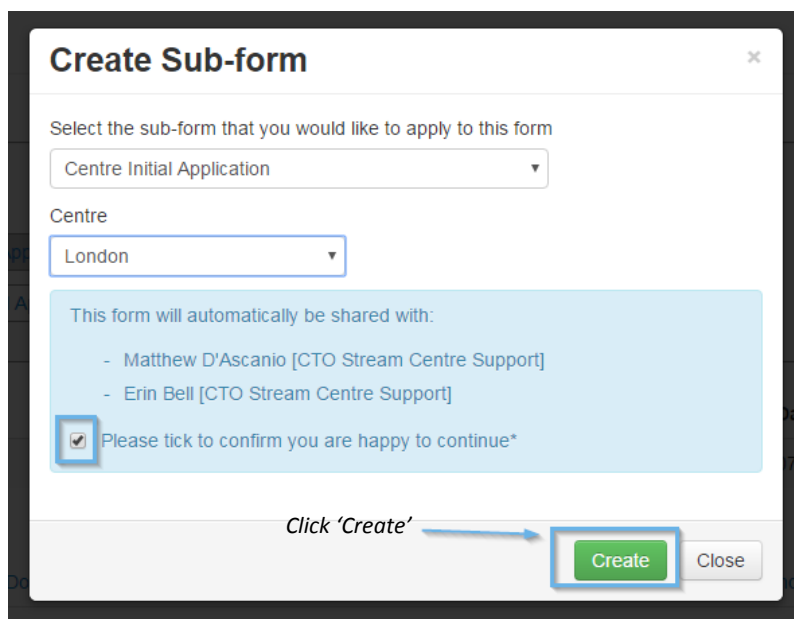
With the parent form selected, click the ‘Create Sub-form’ button in the Actions Toolbar on the left side of the screen and select the type of sub-form you wish to create (shown below). After you have selected the sub-form to create, you will see it added to the Project Tree.



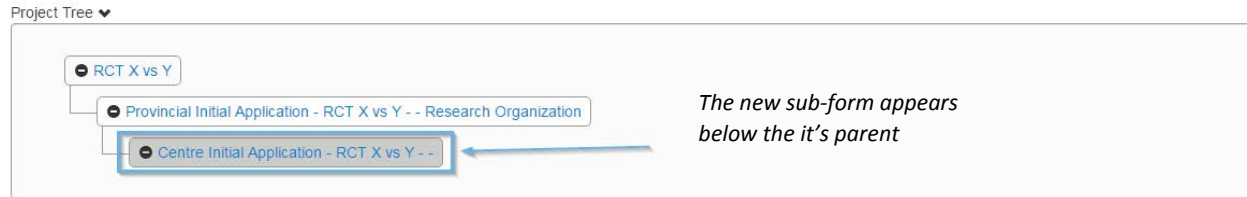
Specify the type of sub-form you would like to create and select the appropriate centre from the ‘Centre’ drop-down menu (this can be changed later if needed).



After selecting your centre, tick the checkbox to confirm that you are “happy to continue” (the new sub-form will be automatically shared with CTO support staff and others as applicable to the centre, as indicated in this pop-up window, and then click the green ‘Create’ button to create the sub-form.



Once you click 'Create', the system will automatically bring you to the new sub-form so that you may begin working on it. The newly created sub-form will also now appear below its parent form in the Project Tree.



REMINDER: When creating a Centre Initial Application or Implementation of Provincial Amendment form, don't forget to add collaborators! Additional information on adding collaborators can be found in the "[Collaboration Features – Roles and Sharing](#)" manual.