

## Managing User Access and Notifications in CTO Stream Through the Roles Feature

**To: All Applicants Submitting Ethics Applications Through CTO Stream**

### Accessing Projects in CTO Stream

Access to individual Projects (studies) is controlled by members of the research study team using the **Roles** feature in CTO Stream. To gain access to a Project, users will contact the Project Owner or a member of the Provincial Applicant site or Centre Study team depending on whether they require access to Provincial or Centre level submissions. The CTO Helpdesk can connect you with the study team if you are unsure of whom to contact to gain access to a study.

Projects

Search Projects

Project Title	Project ID	Owner	Date Created	Date Modified	Transfer Status
RCT A vs B	1856	Dr. Centre Principal Investigator	21/Aug/2019 15:28	21/Aug/2019 16:05	
Test Attestations	1855	Dr. Provincial Applicant	14/Aug/2019 13:41	16/Aug/2019 11:07	
Test V2160	1853	Mr. Sponsor Contact	14/Aug/2019 09:57	14/Aug/2019 13:18	

### Granting or Removing Study Access for Other Users

When an individual joins or leaves a study, it is the study team's responsibility to manage that user's access by adding or removing their **Role**. This is done using the **Roles** button on the Provincial and/or Centre Initial Applications (as applicable). Assigning the correct Role will ensure an individual receives the appropriate email notifications during the course of the study. Removing a person's Role when they leave a study will ensure they no longer receive email notifications and removes their study access.

**Note: Adding or removing an individual's contact information within the application forms does not control access to the study and system notifications.**

#### IMPORTANT NOTICE

DO NOT use the Share button to grant or remove access for other users. If you have "shared" access with someone in error (or discover that access was "shared" with you in error) click [here](#) for instructions on how to correct this.

### Closing a Centre in CTO Stream and Stopping Notifications

After the study is complete at your centre and the REB has processed your Centre Study Closure form, you may wish to stop receiving notifications from CTO Stream. This can be done by removing the Role for each staff member at your site and re-adding them with the "**Centre Study Staff (read-only)**" Role. Once you have changed the Roles for your team members, you will need to ask one of them to do the

same for you. CTO Helpdesk can assist with changing your Role if necessary (i.e., there are no other site staff members).

Please ensure you give the Principal Investigator or Provincial Applicant the correct role to ensure they will receive relevant study notifications and expiry reminders by email. For instructions on how to give or remove Roles, review the [Roles and Sharing](#) user guide.

Feel free to contact the CTO Helpdesk if you have any questions.

Please share this message with team members as required.



Clinical Trials Ontario  
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