

QuickGuide: Creating a Centre Initial Application (CIA)

Creating a Centre Initial Application (CIA) for a project in CTO Stream must be done by a member of the Provincial study team. Once a CIA has been created for a new site joining the study, a 'Role' needs to be given to the study coordinator or principal investigator at the new site. This centre-level role will allow the study team at the participating site to access to all current and future forms for their own site and read-only access to all current and future provincial forms. Giving the centre-level role also ensures these users will receive email notifications about the submissions from their own site.

More details about 'Roles' within CTO Stream can be found in the [Collaboration Features – Roles and Sharing](#) manual.

To create a CIA:

1. Log in to CTO Stream and go into the Project that you wish to create a CIA for.
2. Ensure the Provincial Initial Application (PIA) is selected in the Project Tree (it should be highlighted in grey).
3. Click 'Create Sub-form' (*Figure 1*) from the Action Menu on the left-hand side of the page.



Figure 1

4. In the "Create Sub-form" pop-up window, select Centre Initial Application as the application type (*Figure 2*) from the first drop-down menu.

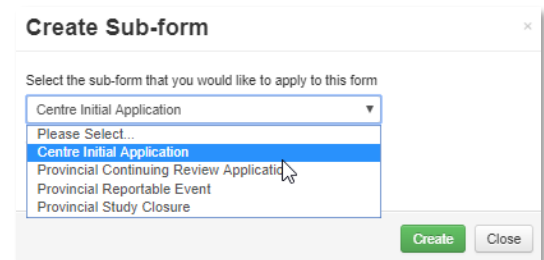


Figure 2

5. Next, select the research site, or "Centre" that you're adding to the study in the second drop-down (*Figure 3*). Check off the checkbox at the bottom of the blue box to ensure you agree to share access to your newly created form with CTO Support staff and finally press the green Create button.

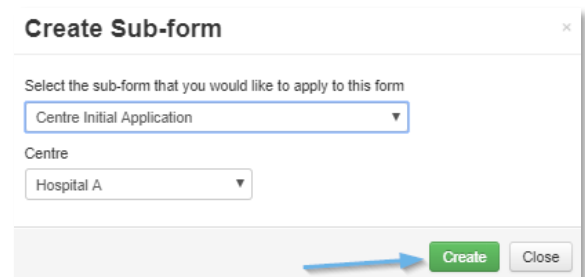


Figure 3

6. Give access to the newly created CIA to one or more members of the study team from the new site new site by pressing the 'Roles' button with the CIA for the site selected in the project tree (*Figure 3*).



Figure 3

7. The Share Roles window will appear, with a “Collaborator email” field for the email address of the user being given a role to be entered. Once the email address is entered, select the centre-level role to be granted from the drop-down menu (Figure 4). Finally, press the green, ‘Share Role’ button at the bottom of the window to share the role.

Note: Users must have a CTO Stream account in order to be given a Collaborator Role. Access to CIAs will automatically be granted to CTO Support staff and select representatives from the selected research site. **Do not remove this access.**

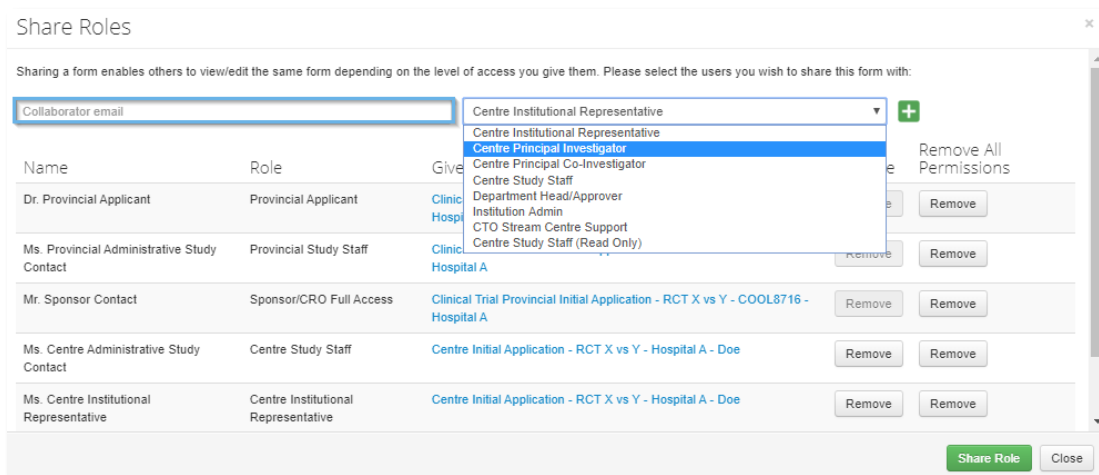


Figure 4

Tips:

- If the wrong research site or “Centre” was selected during step 4, this can be corrected by clicking on the “Centres” Tab of the CIA. This is the site name that will appear in the REB letter, so it is important that this is correct.
- The provincial study team must give one or more members from each site a role on the CIA created for their site. Once they’ve been given access, they can then add other personnel at their site who need access.

Questions? Submit a support ticket at support.ctontario.ca