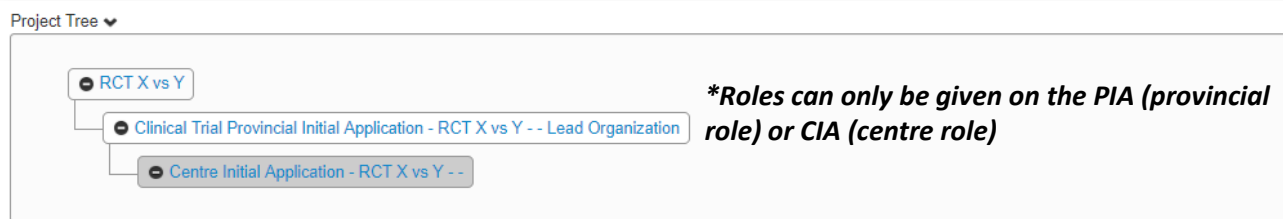


## QuickGuide: Adding Study Team Members using Roles

A user who creates a new study in CTO Stream becomes the 'Project Owner' and initially is the only user that can access the study in CTO Stream. All other users (study team, sponsors and/or CROs, etc.) must be given a 'Role' to access the application forms for the study in CTO Stream. Roles can be given by the Project Owner, or by anyone that already has a Role. Each Role comes with a pre-set level of permissions. The specific access granted for each role can be found in the '[Collaboration – Roles and Sharing](#)' user manual on the CTO website.

### How to give a Collaborator Role:

1. Login to CTO Stream and open the study from the Projects list in your Work Area.
2. Select the Provincial Initial Application (PIA), or the Centre Initial Application (CIA) application you wish to grant access to from within the Project tree
  - To give someone a provincial-level role, select the PIA.
  - To give someone a centre-level role for a participating site, select the specific CIA for that site.
3. Users who have a role on the study can assign roles to other users. **Note: An individual cannot give more access/permissions than what they have themselves** (i.e., a user with a "centre study staff" role at one site cannot give the "provincial study staff" role to someone else).
4. In the pop-up window, enter the email address of the user you want to give a role to in the "Collaborator Email" field, then select the correct role from the drop-down menu. Click the green 'Share Role' button to share the role.
5. A green bar will appear on the screen displaying the message "Form Shared Successfully" when completed.



### Tips:

- Listing the individual's contact details in Section 1.0 of the initial application or amendment **does not** grant them access to the study in CTO Stream. A Role must be given to all those who need access to the applications within CTO Stream.
- Only those users who have a CTO Stream account can be given a role. Otherwise, the error message, "user does not have a CTO Stream account" will be displayed when you attempt to give the role. The 'Invite' button can be used to send the individual a CTO Stream invitation email which includes a link to the CTO Stream account registration page.
- A user cannot give a role with a higher level of permissions than what they have themselves. For example, a user with a 'read-only' role can only grant other users a read-only role.

Questions? Submit a support ticket at [support.ctontario.ca](https://support.ctontario.ca)