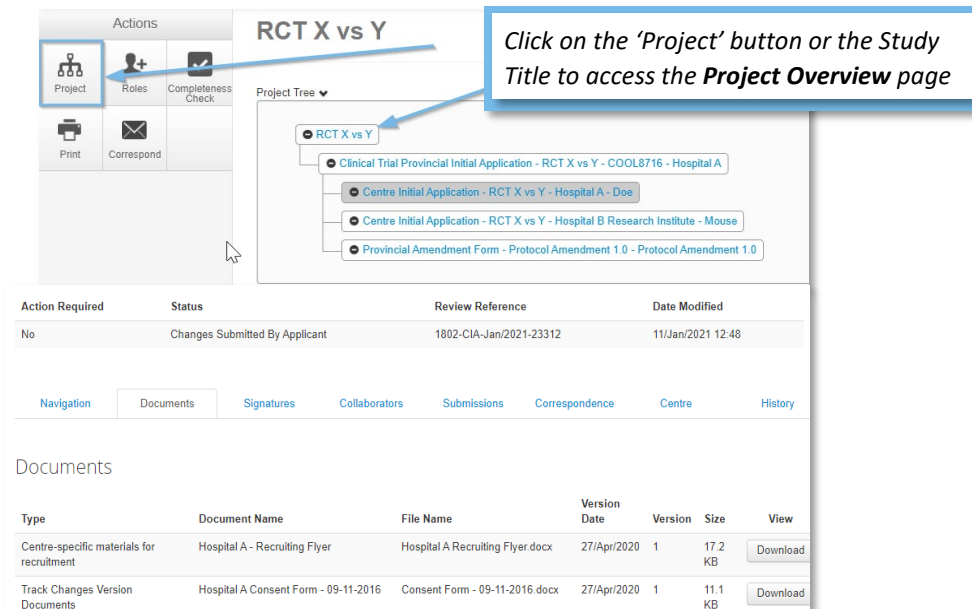


## QuickGuide: Project Overview

When looking at the project tree for a study in CTO Stream, the application form currently selected in the tree appears highlighted in grey. There are 8 various tabs which display several different types of information about the current form. One example is the Documents tab (*Figure 1*) which contains a table of all documents uploaded to the form. The documents tab is an example of application-specific information.

Project-wide information is shown on separate page called the **Project Overview page**. To visit this page, press the 'Project' button in the Actions Menu, or click on the study title at the top of the project tree (*Figure 1*).



**Actions**

- Project
- Roles
- Completeness Check
- Print
- Correspond

**RCT X vs Y**

**Project Tree**

- RCT X vs Y
- Clinical Trial Provincial Initial Application - RCT X vs Y - COOL8716 - Hospital A
- Centre Initial Application - RCT X vs Y - Hospital A - Doe
- Centre Initial Application - RCT X vs Y - Hospital B Research Institute - Mouse
- Provincial Amendment Form - Protocol Amendment 1.0 - Protocol Amendment 1.0

Action Required	Status	Review Reference	Date Modified
No	Changes Submitted By Applicant	1802-CIA-Jan/2021-23312	11/Jan/2021 12:48

**Navigation** | Documents | Signatures | Collaborators | Submissions | Correspondence | Centre | History

**Documents**

Type	Document Name	File Name	Version Date	Version	Size	View
Centre-specific materials for recruitment	Hospital A - Recruiting Flyer	Hospital A Recruiting Flyer.docx	27/Apr/2020	1	17.2 KB	Download
Track Changes Version Documents	Hospital A Consent Form - 09-11-2016	Consent Form - 09-11-2016.docx	27/Apr/2020	1	11.1 KB	Download

Figure 1

The 6 tabs shown below the project tree on the **Project Overview** page do not contain information about a specific application form. Instead, they contain summary information about all forms across the entire project. The Forms tab is shown below (*Figure 2*), along with the 5 other tabs called: Submitted Documents, Transfers, Centres, History and Project Documents\*. These five tabs are described in the table below. Each tab contains a keyword Search bar and each column within the tabs can be sorted.



**Project Tree**

- RCT X vs Y
- Clinical Trial Provincial Initial Application - RCT X vs Y - COOL8716 - Hospital A
- Centre Initial Application - RCT X vs Y - Hospital A - Doe
- Centre Initial Application - RCT X vs Y - Hospital B Research Institute - Mouse
- Provincial Amendment Form - Protocol Amendment 1.0 - Protocol Amendment 1.0

**Forms** | Submitted Documents | Transfers | Centres | History | Project Documents

**Forms**

Search forms...

Form	Reference	Current Status	Date Modified
Clinical Trial Provincial Initial Application	Clinical Trial Provincial Initial Application - RCT X vs Y - COOL8716 - Hospital A	Approval Letter Sent	27/Apr/2020
Centre Initial Application	Centre Initial Application - RCT X vs Y - Hospital A - Doe	Decision Pending	11/Jan/2021
Centre Initial Application	Centre Initial Application - RCT X vs Y - Hospital B Research Institute - Mouse	BoR Changes Requested	08/Jan/2021

Figure 2

TAB NAME	DESCRIPTION AND FEATURES	AVAILABLE INFORMATION
<b>FORMS</b>	<p>Displays all application forms associated with the study.</p> <p>Clicking on the row will take you to the application workspace.</p> <p>Search bar enables users to search for a specific form.</p>	<p><b>Form</b> – displays the name of the form</p> <p><b>Reference</b> – displays Form Reference information including the name, type of form and centre name (if applicable)</p> <p><b>Current Status</b> – displays the current status of the form in the REB review process</p> <p><b>Date Modified</b> – displays the date of the last change made to the form</p>
<b>SUBMITTED DOCUMENTS</b>	<p>Displays all documents which have been submitted to the REB.</p>	<p><b>Form Reference</b> –displays the name of the form which the document was uploaded to (as it appears in the project tree)</p> <p><b>Form Name</b> –displays the type of application the document was uploaded to (i.e., Provincial Amendment)</p> <p><b>Submission Date</b> – displays the date of submission of the listed form</p> <p><b>Status</b> – displays the status of the application form that the document was uploaded to</p> <p><b>Type</b> –displays the category the document belongs too</p> <p><b>Name</b> – displays the name of the document</p> <p><b>Version</b> –displays the version number of the document</p> <p><b>Size</b> –displays the disk space size of the document</p> <p><b>View</b> – button allowing user to download document to computer</p> <p><b>Archived</b> – displays whether the document has been archived by the REB (replaced by subsequent document or submission).</p>
<b>TRANSFERS</b>	<p>Displays transfers of project ownership which have been initiated on the project, along with related information.</p>	<p><b>Transfer ID</b> – displays unique ID assigned for tracking purposes to each transfer request in CTO Stream</p> <p><b>From User</b> – displays the user who initiated the transfer</p> <p><b>To User</b> – displays the user who will receive the transfer request</p> <p><b>Requested Date</b> – displays the date the transfer was initiated</p> <p><b>Status</b> – displays the status of the transfer (Requested, Accepted or Rejected)</p> <p><b>Response Date</b> – displays the date the “To User” responded to the transfer request</p> <p><b>Action</b> – allows a pending transfer request to be canceled by the “From User”</p>
<b>CENTRES</b>	<p>Displays a list of all participating sites involved in the study and the status of</p>	<p><b>Centre Name</b> – displays the name of the participating site</p>

	ethics approval, the expiry date and name of site Principal Investigator.	<p><b>Status</b> – displays the status of ethics approval at the participating site (e.g., Approved, Suspended, Expired)</p> <p><b>Expiry Date</b> – displays the ethics expiry date for the site, once the CIA for the site has been approved</p> <p><b>Contact</b> – displays the name of the Principal Investigator listed in the CIA for the participating site</p>
<b>HISTORY</b>	Displays a complete listing of everything that has occurred in the project since the project was created (in chronological order). Examples include form submissions, project transfers or status changes during the REB review process.	<p><b>Date</b> – displays the date the event occurred</p> <p><b>Form Reference</b> – displays the name of the form in which this event occurred</p> <p><b>User Name</b> – displays the user who initiated the action</p> <p><b>Description</b> – displays information about the event and what actions occurred</p> <p><b>Attachment</b> – displays a direct link to download any forms or letters associated with the event - by clicking the Download button, the document will open in pdf format and be downloaded to your computer.</p>
<b>PROJECT DOCUMENTS</b>	<p>Displays a list of the currently approved/acknowledged documents for the project.</p> <p>(i) new documents will appear as they become approved/acknowledged;</p> <p>(ii) documents are removed from this table when a newer version of the document is approved/acknowledged and the previous version is superseded.</p>	<p><b>Document Name</b> – displays the name of the document</p> <p><b>Document Date</b> – displays the version date of the document</p> <p><b>Document Version</b> – displays the version number of the submitted document</p> <p><b>Document Category</b> – displays if document will be approved, acknowledged, or received</p> <p><b>Download Document</b> – by clicking ‘Download’ button a document will be open in the pdf format and downloaded to your computer</p> <p><b>Document Type</b> – displays the document type within CTO Stream</p> <p><b>Centre Name</b> – displays name of the Centre Organization</p>

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