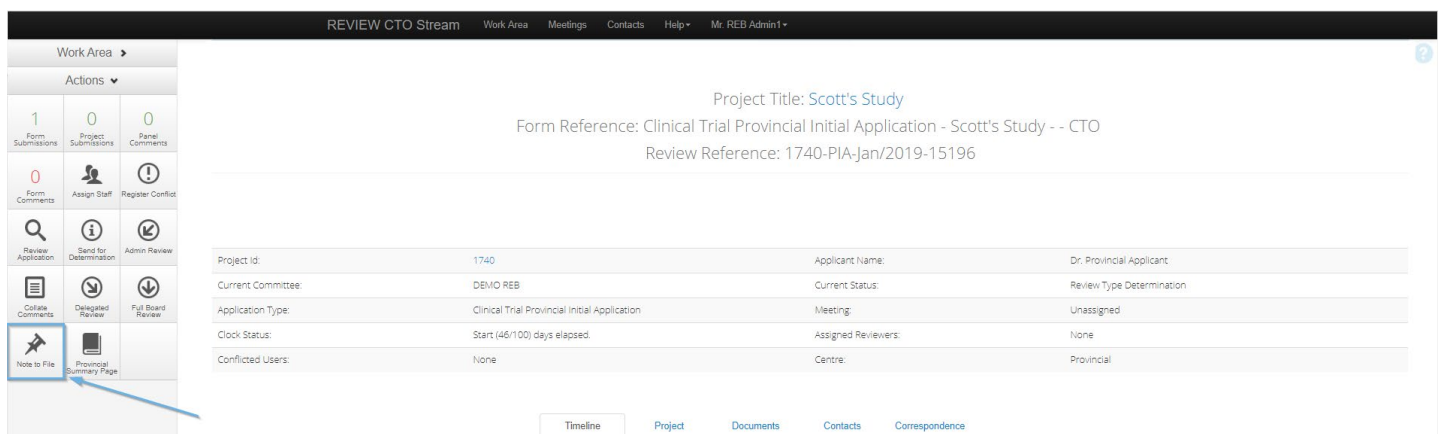


QuickGuide - Creating a Note to File on an Application

A new feature has been added to the Review side of CTO Stream which allows REB users to create a note to file for any submission.

The steps below describe how to use this new feature:

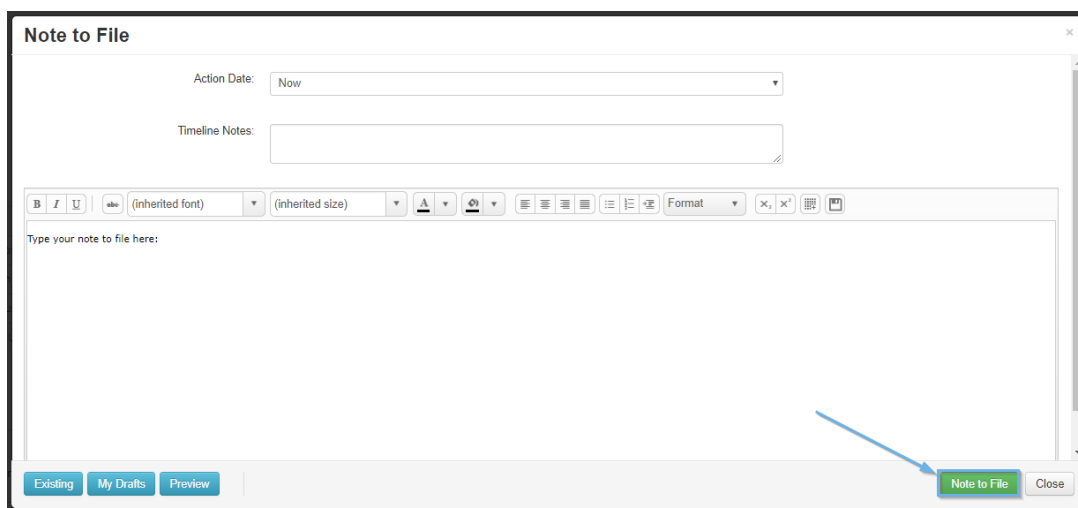
1. While on the submission timeline for an application in CTO Stream, you will notice a button in the Actions Menu called “Note to File”.



The screenshot shows the 'REVIEW CTO Stream' interface. The top navigation bar includes 'Work Area', 'Meetings', 'Contacts', 'Help', and 'Mr. REB Admin'. The left sidebar contains an 'Actions' menu with various icons. The 'Note to File' button is highlighted with a blue box and an arrow. The main content area displays 'Project Title: Scott's Study', 'Form Reference: Clinical Trial Provincial Initial Application - Scott's Study - - CTO', and 'Review Reference: 1740-PIA-Jan/2019-15196'. Below this is a table with application details:

Project Id:	1740	Applicant Name:	Dr. Provincial Applicant
Current Committee:	DEMO REB	Current Status:	Review Type Determination
Application Type:	Clinical Trial Provincial Initial Application	Meeting:	Unassigned
Clock Status:	Start (46/100) days elapsed.	Assigned Reviewers:	None
Conflicted Users:	None	Centre:	Provincial

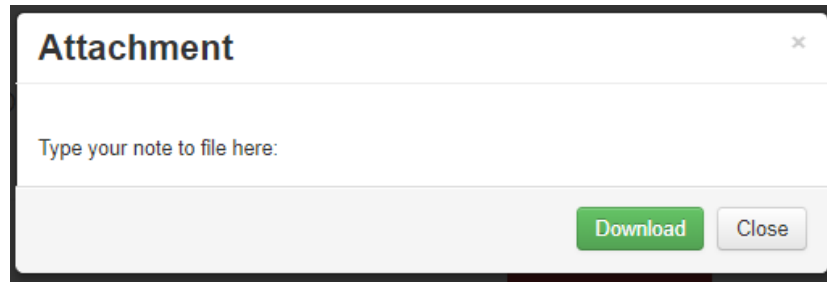
2. Click the “Note to File” button to open a blank document in the text editor that can be used to record a note to file. Press the green “Note to File” button in the bottom right-hand corner, then you will be prompted to confirm you wish to perform this action.



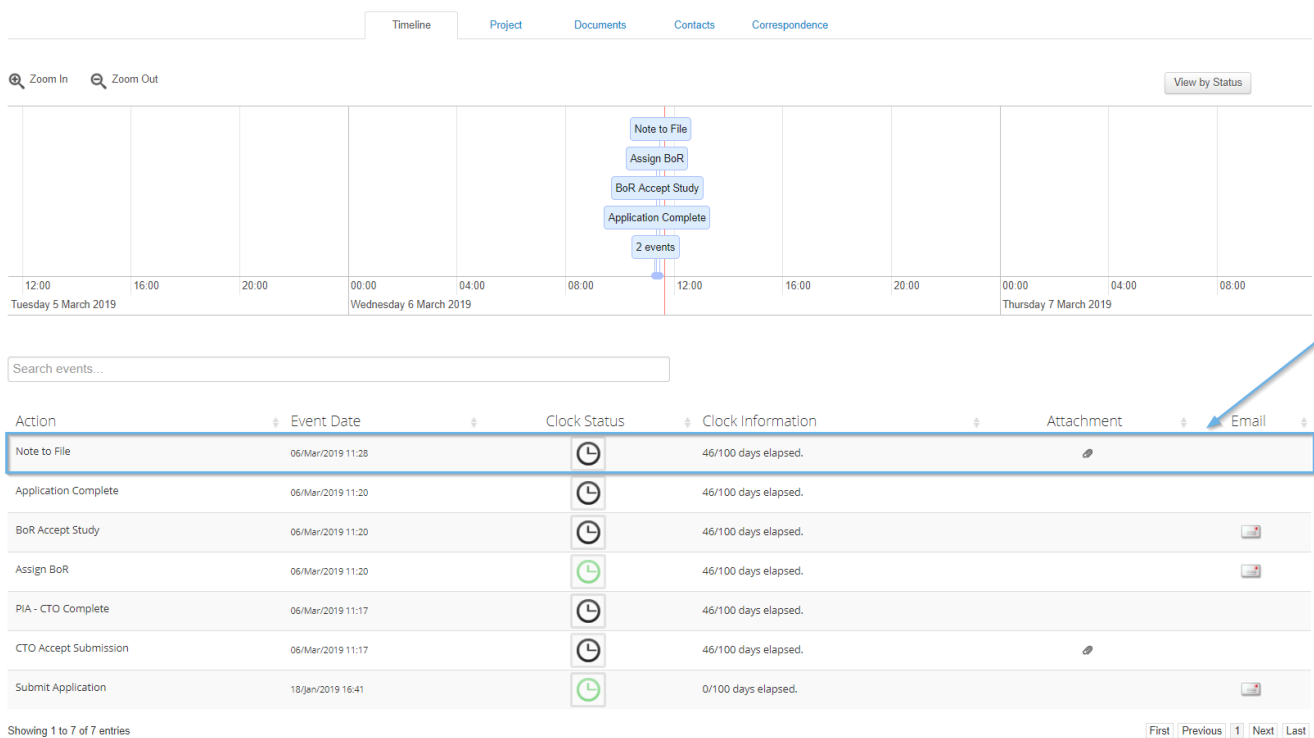
The 'Note to File' dialog box is shown. It includes an 'Action Date' dropdown set to 'Now', a 'Timeline Notes' text area, and a rich text editor with a toolbar. The text editor contains the prompt 'Type your note to file here:'. At the bottom, there are buttons for 'Existing', 'My Drafts', 'Preview', 'Note to File', and 'Close'. A blue arrow points to the 'Note to File' button.

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- Once you confirm, a pop-up will appear where you are able to download a .pdf of the note to file for your records. The downloaded file can be opened in any .pdf viewer and printed if desired.



- Lastly, the Note to File action will be recorded on the timeline, along with the other actions performed on the submission.



Action	Event Date	Clock Status	Clock Information	Attachment	Email
Note to File	06/Mar/2019 11:28	🕒	46/100 days elapsed.	📎	✉️
Application Complete	06/Mar/2019 11:20	🕒	46/100 days elapsed.		
BoR Accept Study	06/Mar/2019 11:20	🕒	46/100 days elapsed.		✉️
Assign BoR	06/Mar/2019 11:20	🕒	46/100 days elapsed.		✉️
PIA - CTO Complete	06/Mar/2019 11:17	🕒	46/100 days elapsed.		
CTO Accept Submission	06/Mar/2019 11:17	🕒	46/100 days elapsed.	📎	
Submit Application	18/Jan/2019 16:41	🕒	0/100 days elapsed.		✉️

Showing 1 to 7 of 7 entries

First Previous 1 Next Last

Questions?

E: streamline@ctontario.ca

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