

# CTO **STREAM**



## Getting Started with CTO Stream (REBs)

CTO HELPDESK:  
[SUPPORT.CTONTARIO.CA](mailto:SUPPORT.CTONTARIO.CA)



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## 1) About CTO Stream

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CTO Stream is a web-based electronic platform for coordinating research ethics reviews, built using an Ethics Review Management (ERM) system developed by Infonetica Ltd. CTO works closely with Infonetica Ltd. to continually make improvements to CTO Stream and ensure optimal website performance, at all times. The system has been designed to meet the needs of researchers and REBs across Ontario to streamline multi-site research ethics review in Ontario.

### 1.1 Accessing the System

To access the REB portal of CTO Stream, go to <https://review.ctostream.ca>.

### 1.2 Internet Settings and Operating System Requirements

CTO Stream supports the latest versions of the following web browsers:

- Microsoft Internet Explorer (Version 10 or later) or Edge
- Mozilla Firefox
- Google Chrome
- Apple's Safari

CTO Stream uses pop-ups. You will need to configure your browser to ensure CTO Stream pop-ups are allowed. Users must be operating on Windows 7, Windows 8 or Windows 10. For security reasons, CTO Stream does not support Windows XP or Windows Vista.

### 1.3 Technical Support

Technical support is provided by Clinical Trials Ontario (CTO) through our online helpdesk. If you have any questions or issues related to CTO Stream, visit [support.ctontario.ca](http://support.ctontario.ca) to submit a ticket. We encourage users to register for a CTO Helpdesk profile in order to keep a running list of all submitted tickets and solutions.

## 2) Getting Started

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CTO will work with each REB to create user accounts for REB members and the REB office staff. Requests for new REB user accounts should be sent by the REB Manager, directly to CTO. Please include the individuals' full contact details for any new accounts being requested. CTO can provide the REB with a spreadsheet to facilitate this process if multiple accounts are being requested at once.

## 2.1 Logging into CTO Stream

When a new account has been created by the CTO Administrator, a temporary password will be sent to the new CTO Stream user by email. To login to the Review side of CTO Stream:

- a. Go to the login portal for REB users at [review.ctostream.ca](http://review.ctostream.ca).
- b. Enter the password and email address associated with your account.
- c. Click on the 'Log in' button to go to your Work Area

**Tip:** Ensure that you do not include "www" when typing "review.ctostream.ca" into the address bar of your web browser.

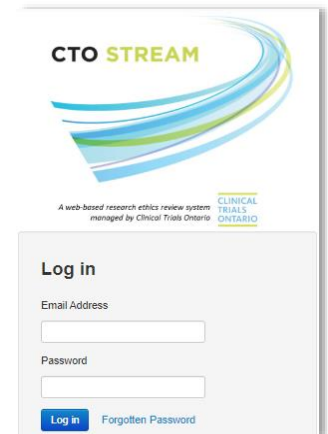


Figure 1 – Login portal

## 2.2 Account Settings

The Navigation Bar is the black bar that is always visible at the top of the webpage. Users can change their contact information or password by clicking on their name in the top right-hand corner of the Navigation Bar, and then selecting Personal Details.

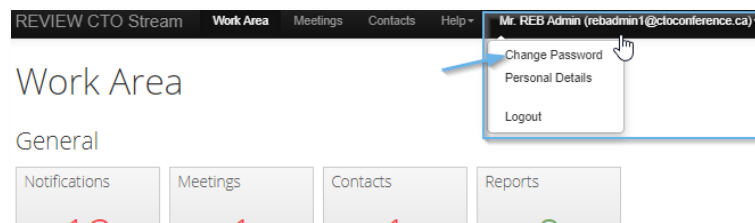


Figure 2 – Account Settings

## 2.3 Changing Password

Users can change their CTO Stream password by clicking 'Change Password' (Figure 2) to access the **Change Password** page. Enter the required information to change your password.

**Tip:** Passwords must contain at least seven characters and include an uppercase letter, lowercase letter and a number.

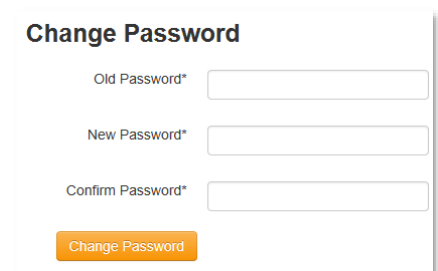


Figure 3.1 – Changing

## 2.4 Changing Your Personal Account Information

Users can update their contact information by clicking 'Personal Details' (Figure 2) which will bring the user to the **Change Personal Details** page where the necessary information can be updated.

**Tip:** If you need to update the email address used for your CTO Stream account, please submit a support ticket at [support.ctontario.ca](http://support.ctontario.ca).

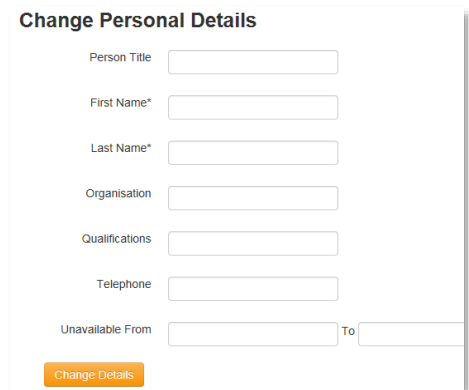


Figure 3.2 – Change Personal Details

## 3) The Navigation Bar

As mentioned previously, the black Navigation bar shown in Figure 4 is always visible at the top of the page in CTO Stream and contains several buttons which are described in detail below.

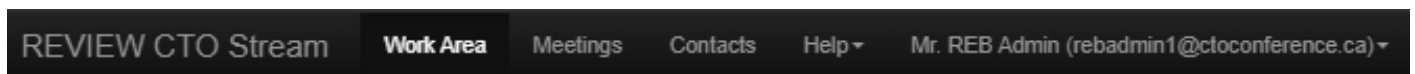


Figure 4 – Navigation Bar

- **Work Area** – Directs user to the [Work Area](#)
- **Meeting** – Takes you to the Meetings page (further information about meetings can be found in the separate *Meetings* manual)
- **Contacts** – Takes you to the Contacts page (not used by REB users)
- **Help** – The help bar links to:
  - o *Help* contact information for Online Helpdesk
  - o *FAQ* – Frequently Asked Questions and answers
  - o *About* – Provides information about Clinical Trials Ontario
  - o *Contact Us* – contact information for Online Helpdesk

## 4) The Work Area (Tile System)

When users log into CTO Stream, they are immediately directed to the Work Area, which acts like a dashboard and access point for notifications and applications submitted to the REB. The grey rectangles shown in Figure 5 are the tiles that make up the tile system. Tiles are organized into six different categories.

The six categories of tiles in the Work Area are:

1. General
2. My Tasks\*
3. Administrative\*
4. Delegated\*
5. Full Board\*
6. Summary\*

\*Review tiles that are not visible to all users. The Review tiles that appear in a user’s Work Area depend on the user’s REB role(s) within CTO Stream. A user with the “REB Member” role for example will not see the Administrative tiles.

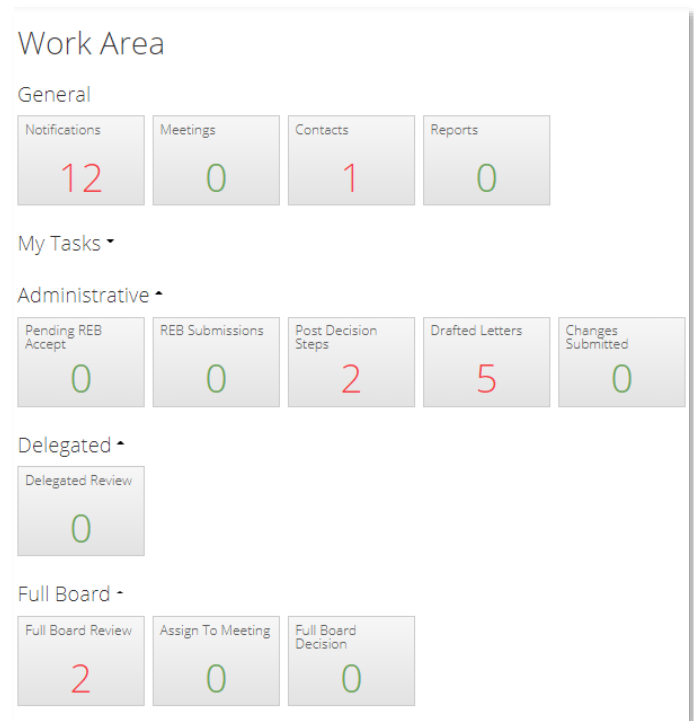


Figure 5 – Work Area

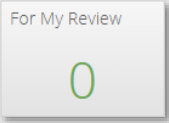
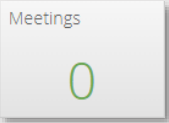
#### 4.1 General Tile Group

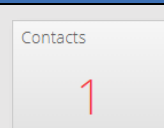
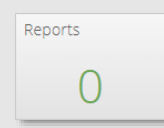
The top row of tiles in the Work Area are called the General tiles and do not contain REB submissions. Instead, these tiles contain a list of the user’s in-system notifications, REB reports, and a list of past/future full board meetings. The number on the front of each tile corresponds to the number of items within the tile.

The tiles found in the General tile group are described below in Table 1.

Table 1 – General Tile Group

#### GENERAL TILES

TILE NAME	DESCRIPTION	VISIBLE TO	VIEW
NOTIFICATIONS	Contains notifications about REB submissions including general updates about the status of a submission or alerts the REB user that an action from them is required. REB users will also receive an email alert for any notifications that require them to perform actions in CTO Stream	• All users	
MEETINGS	Contains the Meetings page which lists past/future full board meetings for the REB	• All users	

TILE NAME	DESCRIPTION	VISIBLE TO	VIEW
CONTACTS	The Contact page contains contact information for anyone the user has saved to their contact directory. <b>This Review tile is of little value to REB users</b>	<ul style="list-style-type: none"> <li>All users</li> </ul>	
REPORTS	Contains reports for the REB that have been created by CTO. Access to reports inside the tile depends on a user's REB role	<ul style="list-style-type: none"> <li>REB Director/Manager</li> </ul>	

## 4.2 Review Tiles

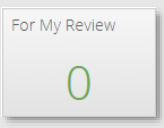
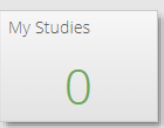
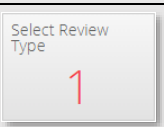
Tiles which appear below the General tile group are called **Review** tiles and REB users will use these to access the applications under review by their research ethics board. The Review tiles are named in such a way as to indicate where in the REB review process (REB workflow) the submissions are currently at. As an application progresses through the REB workflow, it “moves” from one Review Tile to another within the Work Area.

The Review tiles are divided into five different groups, described in Table 2.

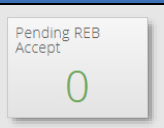
**Tip:** The tiles that appear in the Work Area depend on the user's role with the REB. Users can re-arrange the order of the tiles in any tile group in their Work Area.

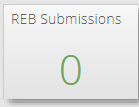
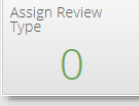
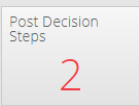
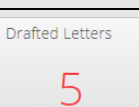
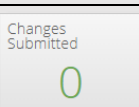
**Table 2 – Review Tiles:**

### MY TASKS TILE GROUP

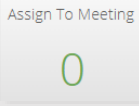
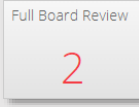
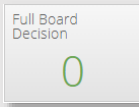
TILE NAME	DESCRIPTION	VISIBLE TO	VIEW
FOR MY REVIEW	Applications on which the REB user has been assigned as a Reviewer (i.e., Primary Reviewer, Secondary Reviewer, Other Reviewer)	<ul style="list-style-type: none"> <li>All users</li> </ul>	
MY STUDIES	List of applications to which the REB user has been assigned as “REB staff”	<ul style="list-style-type: none"> <li>REB Chair</li> <li>REB Staff</li> </ul>	
SELECT REVIEW TYPE	Only visible to the REB Chair, contains applications which are waiting for the level of review to be selected by the Chair (i.e., Full Board, Delegated)	<ul style="list-style-type: none"> <li>REB Chair</li> </ul>	

### ADMINISTRATIVE TILE GROUP

TILE NAME	DESCRIPTION	VISIBLE TO	VIEW
PENDING REB ACCEPT	Contains Provincial Initial Applications (PIA) for which CTO has requested your REB to act as the REB of Record and are awaiting action from the REB to accept/decline	<ul style="list-style-type: none"> <li>REB Director/Manager</li> </ul>	

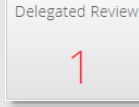
TILE NAME	DESCRIPTION	VISIBLE TO	VIEW
REB SUBMISSIONS	Contains all <u>new</u> submissions (e.g., those that have been received by the REB and not yet assigned a level of review), regardless of form type	<ul style="list-style-type: none"> <li>REB Staff</li> <li>REB Director/Manager</li> </ul>	
ASSIGN REVIEW TYPE	Applications that have been accepted as complete and are awaiting a decision on the level of review (e.g., full board, delegated, or administrative review)	<ul style="list-style-type: none"> <li>REB Staff</li> <li>REB Director/Manager</li> </ul>	
POST DECISION STEPS	Applications on which a decision has already been made (i.e., Approve, Acknowledge, etc.), but the letter has not yet been drafted/issued. Studies undergoing administrative review will also appear in this tile	<ul style="list-style-type: none"> <li>REB Staff</li> <li>REB Director/Manager</li> </ul>	
DRAFTED LETTERS	Applications for which a REB letter has been drafted but not issued.	<ul style="list-style-type: none"> <li>REB Staff</li> <li>REB Director/Manager</li> </ul>	
CHANGES SUBMITTED	Applications re-submitted by applicants following a request for changes made by the REB (or CTO)	<ul style="list-style-type: none"> <li>REB Staff</li> <li>REB Director/Manager</li> </ul>	

### FULL BOARD TILE GROUP

TILE NAME	DESCRIPTION	VISIBLE TO	VIEW
ASSIGN TO MEETING	Applications for which Full Board Review has been selected as the review type, but have not yet been assigned to a meeting	<ul style="list-style-type: none"> <li>REB Staff</li> </ul>	
FULL BOARD REVIEW	Applications that have been assigned to an upcoming full board REB meeting	<ul style="list-style-type: none"> <li>REB Staff</li> <li>REB Members</li> <li>REB Chair</li> </ul>	
FULL BOARD DECISION	Contains applications that have undergone a full board review, and are pending a decision (e.g., approved, request modifications)	<ul style="list-style-type: none"> <li>REB Staff</li> </ul>	

**Tip:** Only after the level of review (Delegated, Full Board) has been selected, will the application appear in REB Members' **For My Review** tile, even if they have been assigned as a reviewer.

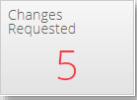
### DELEGATED TILE GROUP

TILE NAME	DESCRIPTION	VISIBLE TO	VIEW
DELEGATED REVIEW	Contains applications that are undergoing delegated review	<ul style="list-style-type: none"> <li>REB Staff</li> <li>REB Director/Manager</li> </ul>	



**Tip:** REB members/Chairs who have been assigned as a reviewer will be able to see applications undergoing delegated review in their **For My Review** tile. If no one has been assigned as a reviewer, only the REB staff will be able to see the application.

### THE SUMMARY TILE GROUP

TILE NAME	DESCRIPTION	VISIBLE TO	VIEW
CHANGES REQUESTED	Contains all applications pending response from the research team (e.g., applications reviewed by the REB and sent back to the PI with a request for changes; PI response is pending)	<ul style="list-style-type: none"> <li>• REB Staff</li> <li>• REB Director/Manger</li> </ul>	
ALL APPLICATIONS	Contains <u>all</u> applications that have been submitted to the REB	<ul style="list-style-type: none"> <li>• REB Staff</li> <li>• REB Chair</li> <li>• REB Director/Manger</li> </ul>	