

CTO STREAM



REB Letter Review Pathway

CTO Helpdesk:
support.ctontario.ca

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1) Letter Review Pathway

Prior to issuing the REB letter for an application to the research team, the REB staff may first need to send the letter to the REB Chair for review and ‘approval’. The Chair can either make changes to the REB letter themselves directly or list the changes for REB office staff to make in a separate document. Throughout this guide the ‘Chair’ is designated as the **Letter Reviewer**, however CTO recognizes that this may not be the case for every REB office. Anyone who has a role with the REB in CTO Stream can be assigned as the **Letter Reviewer**.

Tip: Using the Letter Review pathway is completely optional. It has been pre-built into the system and is always available to facilitate compliance with the REB’s SOPs, if required. Some REBs may choose to perform their letter review outside of the system (i.e., by email).

2.1 Letter Review Required/No Letter Review Actions

Once the REB letter has been drafted by the REB staff (i.e., an approval letter), two buttons will appear in the Actions Menu called ‘**No Letter Review**’ and ‘**Letter Review Required**’ (Figure 1). When required (according to SOPs), the latter can be used to send a drafted letter to the Chair to review.

If the Chair does not need to review the letter prior to being issued, the REB staff can press ‘No Letter Review’ and skip the letter review pathway.

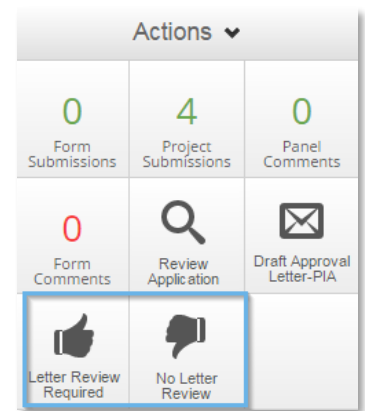


Figure 1 - Letter Review and No Letter Review Actions

2.2 Assigning the Letter Reviewer

When the ‘Letter Review Required’ option is selected, the buttons displayed in the Action menu change to reveal a button called ‘Assign Letter Reviewer’. Press this button to show the Assign Letter Reviewer pop-up window, then select the Chair (or other appropriate individual) as the Letter Reviewer in the “Assign Submission” column (Figure 2).

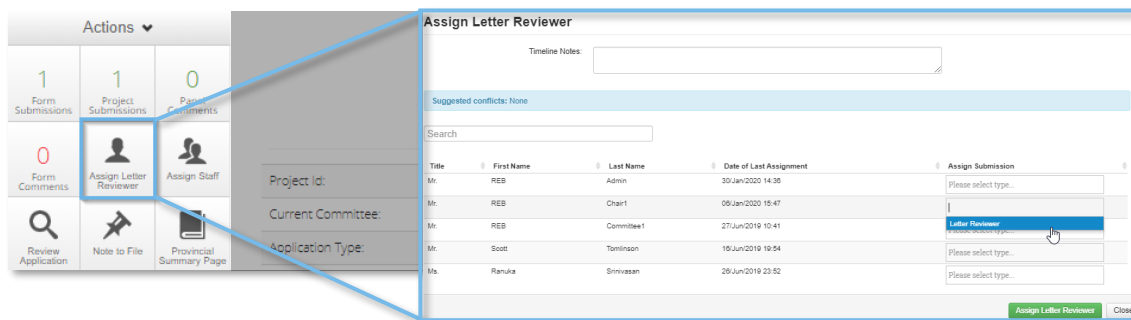
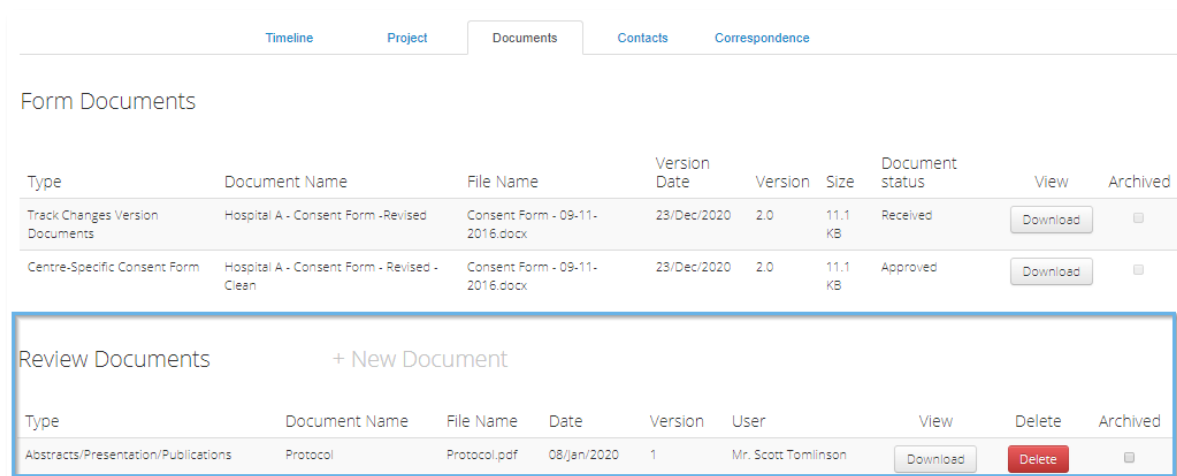


Figure 2 – Assign Letter Reviewer Action

The Chair will receive an email from the system to let them know they've been assigned a letter to review. This email contains a link to bring the reviewer directly to the submission timeline of the application. The application for which the letter was drafted can also be found in the For My Review tile of the Chair's Work Area.

REB staff may need to provide the reviewer with documents in addition to the REB Letter itself (i.e., a track-changes consent form is sent to the researcher). In this case the REB staff should upload the document(s) into the Review Documents section of the application (*Figure 3*).

Tip: *There is no mechanism for REB user to REB user communication within CTO Stream so REB staff would need to alert reviewers that review documents have been uploaded and need to be reviewed.*



The screenshot shows the 'Documents' tab in the CTO Stream interface. It is divided into two sections: 'Form Documents' and 'Review Documents'.

Form Documents Table:

Type	Document Name	File Name	Version Date	Version	Size	Document status	View	Archived
Track Changes Version Documents	Hospital A - Consent Form - Revised	Consent Form - 09-11-2016.docx	23/Dec/2020	2.0	11.1 KB	Received	Download	<input type="checkbox"/>
Centre-Specific Consent Form	Hospital A - Consent Form - Revised - Clean	Consent Form - 09-11-2016.docx	23/Dec/2020	2.0	11.1 KB	Approved	Download	<input type="checkbox"/>

Review Documents Table:

Type	Document Name	File Name	Date	Version	User	View	Delete	Archived
Abstracts/Presentation/Publications	Protocol	Protocol.pdf	08/Jan/2020	1	Mr. Scott Tomlinson	Download	Delete	<input type="checkbox"/>

Figure 3 – Review Documents Area

2) Assigned Letter Reviewer Instructions

Users who have been assigned as Letter Reviewer can follow the instructions below to locate the assigned REB letter and make or recommend any changes.

2.1 Reviewing the drafted Letter

As previously mentioned, any time an individual is assigned as a Letter Reviewer in CTO Stream, they receive an email from the system to notify them. A link within the email can be used to take them directly to the Submission Timeline of the application which the letter was drafted on.

The letter can be downloaded from the Timeline Tab by clicking on the paper clip icon displayed in the same row as the Draft Approval Letter action (*Figure 4*). Click the green 'Download' button to download the letter in .PDF format.

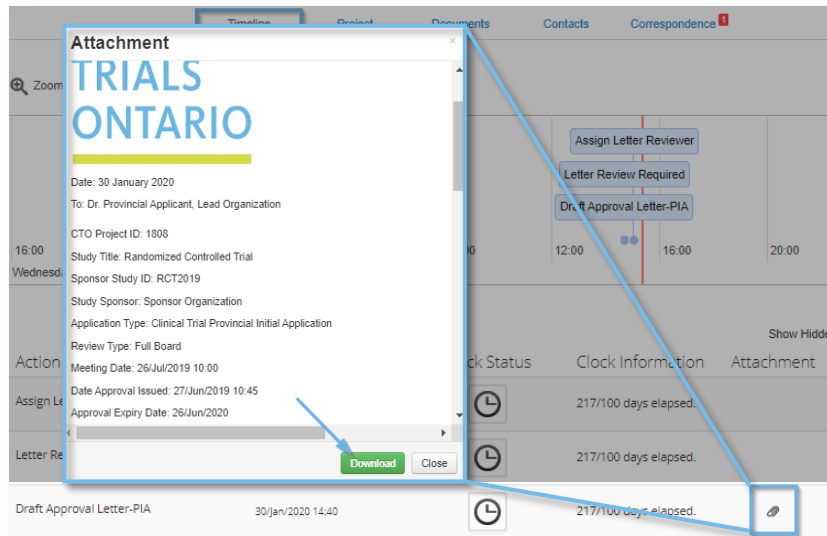


Figure 4

2.2 No Changes Required

If the Letter Reviewer determines no changes to the letter are necessary, they should select 'No Change Required' in the Actions Menu (Figure 5). This will progress the application to the next step of the workflow and allows the REB staff to send the drafted letter as-is.

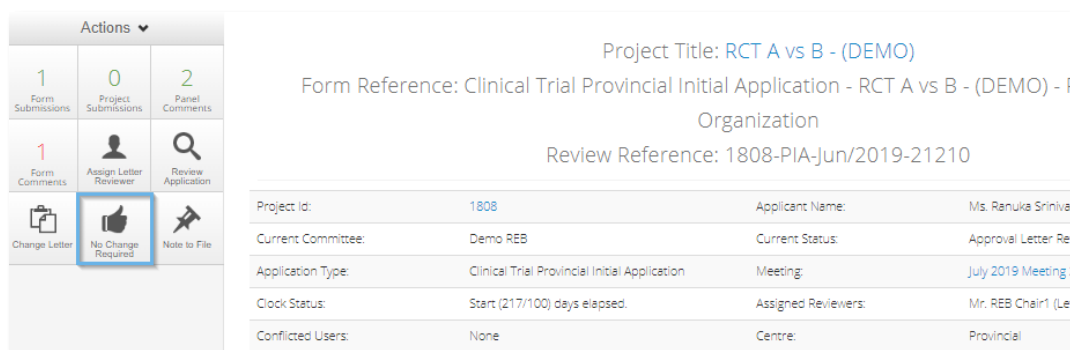


Figure 5

2.3 Changes Required

If changes to the letter are necessary, the Letter Reviewer will press the 'Change Letter' button in the Action Menu, then choose from one of the following two methods for inputting the required changes: type their changes in point-form directly into the text editor or follow the instructions in the pop-up window to add their changes directly into the drafted letter in Figure 6.

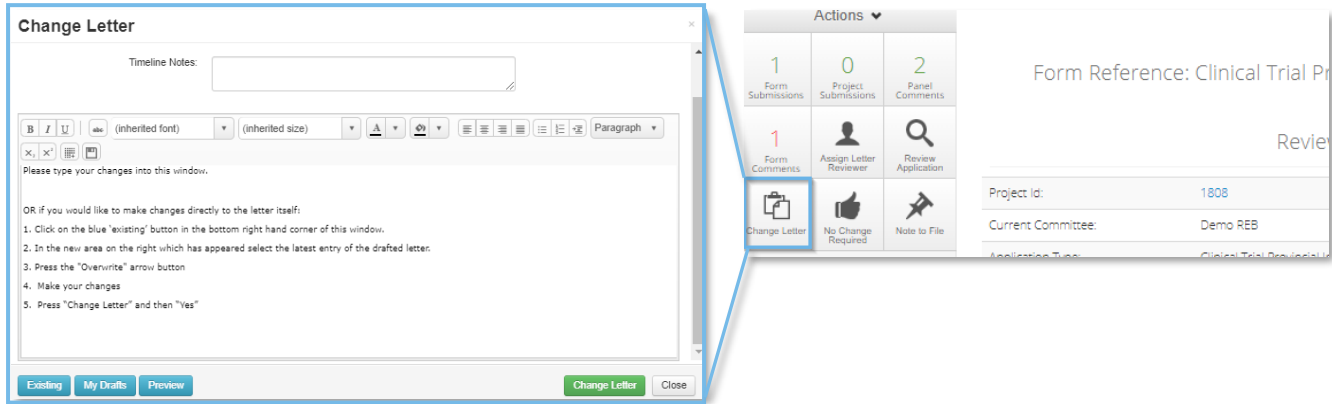


Figure 6