Clinical Trials Ontario

CTO STREAM

Getting Started

Online Helpdesk:

support.ctontario.ca

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Contents

1. ABOUT CTO STREAM

CTO Stream is a web-based electronic platform for coordinating research ethics reviews and is built using modern infrastructure which exhibits a vast set of features, while maintaining an easy-to-use interface. CTO Stream has been developed to meet the needs of researchers and REBs across the province by enabling research ethics review, document management and communication between multiple institutions and REBs.

CTO Stream is designed for any multi-site research study. All studies will use the same interface and REB application forms, regardless of which REB is pending oversight. Furthermore, CTO Stream is built on the principles of transparency and consistency in submission requirements.

CTO Stream has been developed in partnership with Infonetica Ltd. This continued relationship ensures that CTO Stream will be continuously monitored and maintained to meet the needs of researchers and REBs across the province.

1.1 Target Audience

This guide is intended for all CTO Stream Users and will provide useful information for first time users on how to create an account and navigate the online application system.

1.2 How to Access the System

To access the applicant login portal of CTO Stream, go to https://apply.ctostream.ca.

1.3 Internet Settings

CTO Stream supports the latest versions of the following browsers:

- Microsoft Edge
- Mozilla Firefox
- Google Chrome
- Apple's Safari

Please note that Internet Explorer 11 and the old Microsoft Edge browser are no longer supported by the CTO Stream system. Please use one of the alternate web browsers listed above.

CTO Stream uses pop-ups, so users will need to configure their browser to ensure CTO Stream pop-ups are allowed.

1.4 Technical Support

- CTO Stream Helpdesk: https://support.ctostream.ca
- Email – streamline@ctontario.ca

2. GETTING STARTED

2.1 CTO Stream Home Page

To access the applicant login portal for CTO Stream, type the following URL into the address bar of a web browser: https://apply.ctostream.ca.

Users with an account can enter the email address associated with their CTO Stream account and password to login *(Figure 1)*.

Users that do not yet have an account yet can create one by following the instructions in the following section of this manual ([Section 2.2 How to Register a New Account]).

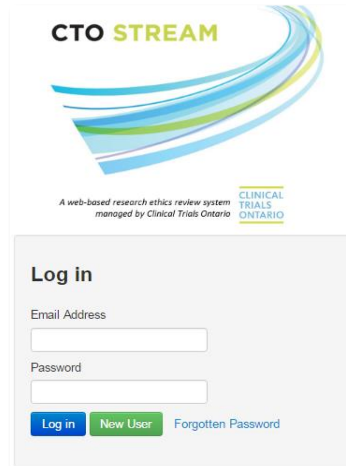


Figure 1

2.2 How to Register a New Account

To register for a CTO Stream account, press the 'New User' button *(Figure 2)* from the CTO Stream applicant login portal. The account registration page will appear (*Figure 3*) where the mandatory fields (marked with an asterisk) must be completed, and the Terms and Conditions/Privacy Policy must be agreed to. Lastly, click the blue 'Register' button at the bottom of the page to complete the registration.

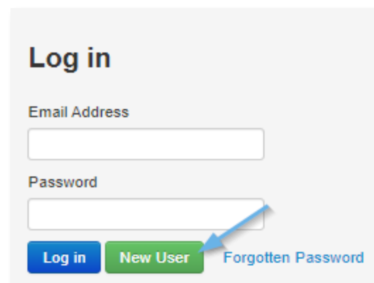


Figure 2

Once registered, an email notification will be sent to the email address provided which contains a link to verify their new account. Only after the verification step has been completed will new users be able to login to their CTO Stream account.

Once registered, an email with a link to activate the new account is automatically sent to the email provided (email comes from [donotreply@infonetica.net]). ***Check "spam" or "junk mail" mailbox as the email may have been misclassified.***

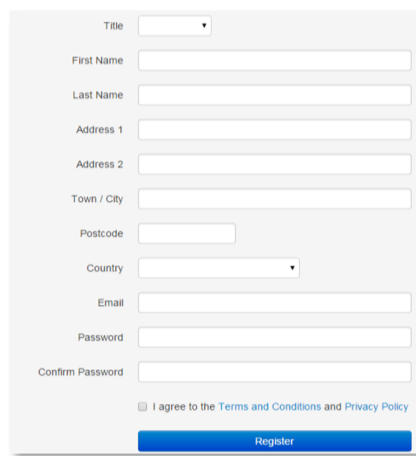


Figure 3

2.3 How to Log In

Once the registration process has been completed, enter the username/email address and password associated with your account and click 'Log In' *(Figure 4)*.

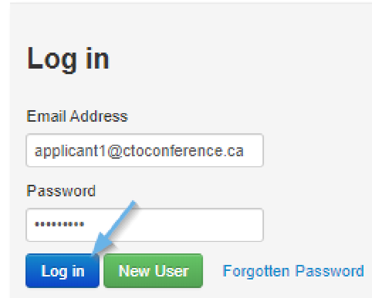


Figure 4

3. NAVIGATING CTO STREAM

Once you have logged into your CTO Stream account, you will arrive at the 'Work Area' which acts like a hub for all the system notifications you receive. *Table 1.0* below provides a description of each part of the Work Area in shown in *Figure 5* below.

3.1 Work Area

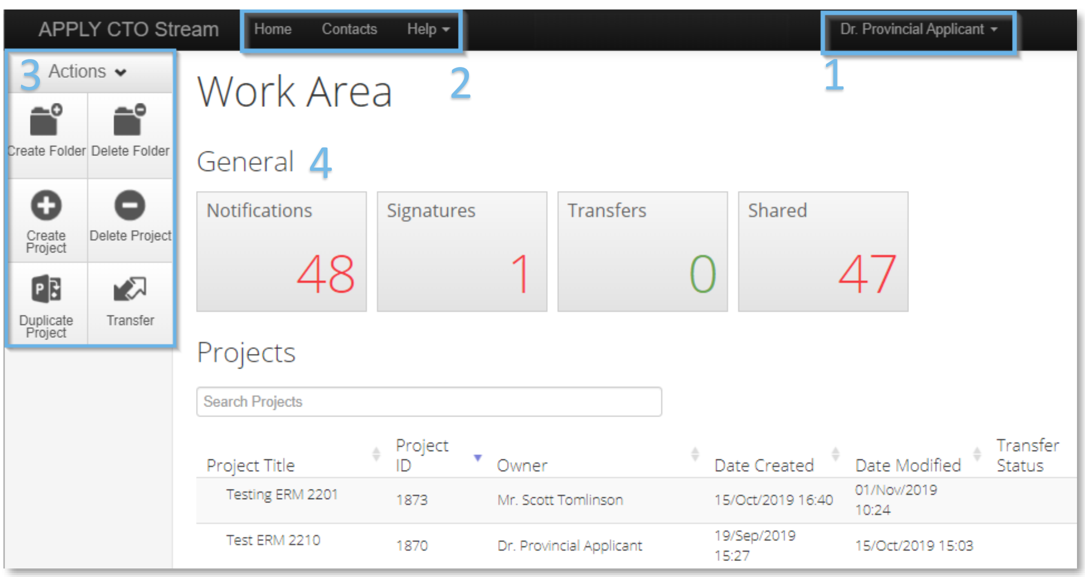


Figure 5

Table 1.0

	Description
1. Account name	Your full name and email address is displayed on the black bar in the top-right hand corner of the screen. Click on your name to: reset your password, change your contact details, check your notifications, or logout of your account. For more information about account settings, see Section 4.0.
2. Navigation bar	The navigation bar is the black bar spanning across the top of the page. This is visible from any page or workspace in the system. For more information go to Section 3.2.

3. Actions menu	Actions allow you to perform certain tasks within a project (i.e., create a project, transfer a project to another user, etc.). The actions available at any given time depend on what the user is doing within CTO Stream. For more information go to Section 3.4.
4. General tiles	The General tiles include 'Notifications', 'Signatures', 'Transfers' and 'Shared'. For more information go to Section 3.5 – General Tiles.
5. Projects list	The list of projects which you have access to.

3.2 Navigation Bar

The Black Navigation Bar *(Figure 6)* is always visible at the top of the screen, regardless of what you are doing in CTO Stream. The following links are located within the Navigation Bar:

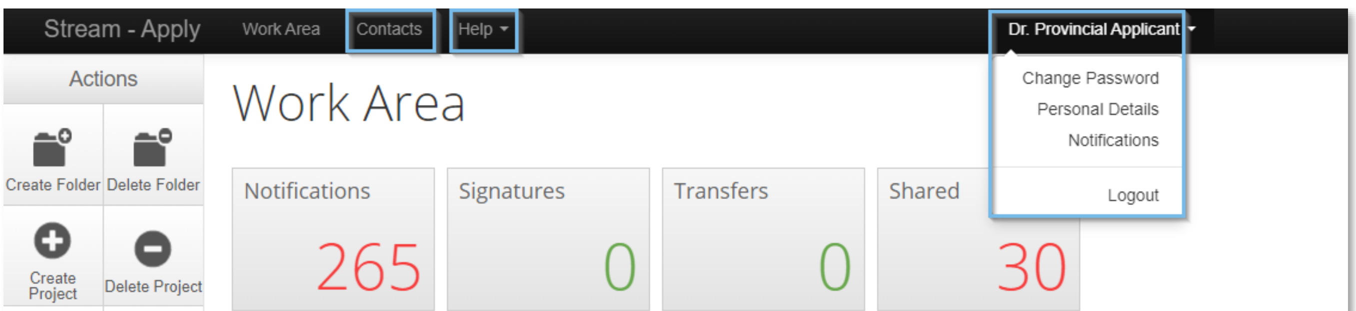


Figure 6

Work Area – Takes you back to the Work Area.

Contacts – A repository of contacts that have been saved to your CTO Stream account. These contacts can be loaded directly into a contact question of an application form.

Help – Contains the following useful links:

- *Contact Information*: Contact details for CTO Stream support.
- *Help*: Same as contact information above.
- *FAQ*: Frequently asked questions related to CTO Stream.
- *Templates*: Contains links to CTO Stream video tutorials and user guides on ctontario.ca.
- *About*: Address and contact information for Clinical Trials Ontario.

3.3 Contacts

The contacts page allows users to save contact information for individuals which can then be loaded into contact questions of the application forms CTO Stream. Users can save new contacts, edit existing contacts, or remove contacts at any time.

3.3.1. Adding a New Contact:

To add a new contact, click '*+ Add Contact*' (*Figure 7)* and complete the contact detail fields on the "New Contact" pop-up window. Once finished, click 'Save' and the new contact will be saved to your Contacts list.

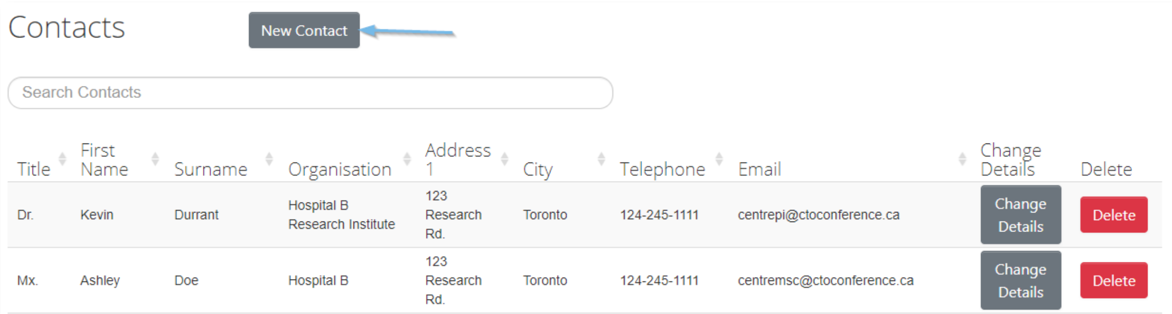


Figure 7

3.4 Actions Menu

The Actions menu shows the action buttons on the current page. The menu is dynamic, which means the buttons (*Figure 8)* change depending on what page of the system the user is currently open (i.e., Work Area, inside the form, etc.).

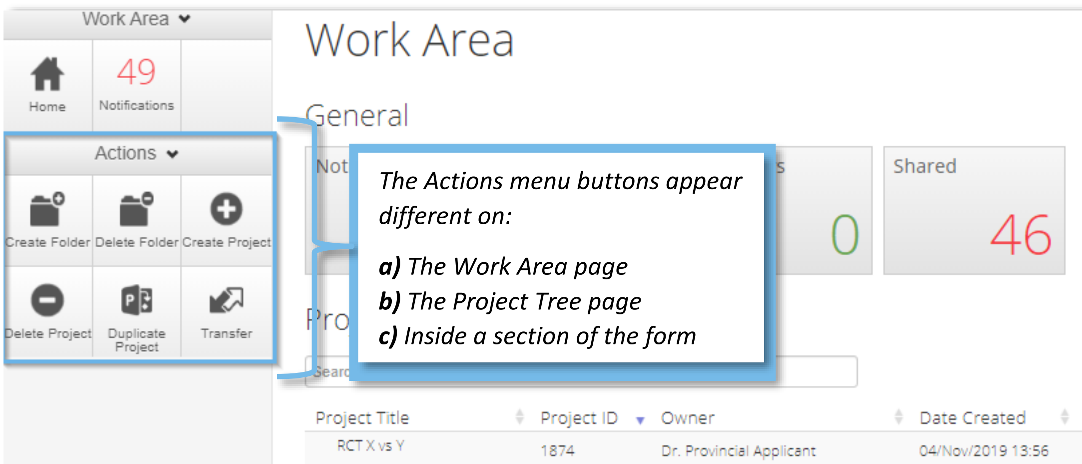


Figure 8

3.4.1. Create Project

To create a new project, click the 'Create Project' button *(Figure 9)* to bring up the Create Project dialog box.

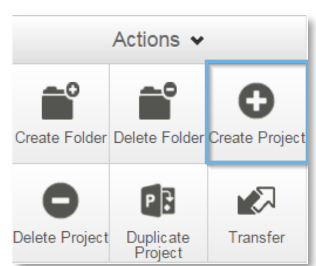


Figure 9

Enter a 'Study Nickname' (or an abbreviated version of the complete title) for the new study in the "Project Title" field (*Figure 10).* This is an important field as it will be used to label identify the study in the project table of the Work Area and is included in all system notifications and REB correspondence (includes REB letters).

Next, select whether the forms will use the clinical trial or observational forms and agree to share access to the new study with CTO system administrators *(Figure 11)*. When finished, click the 'Create' button to create the new project.

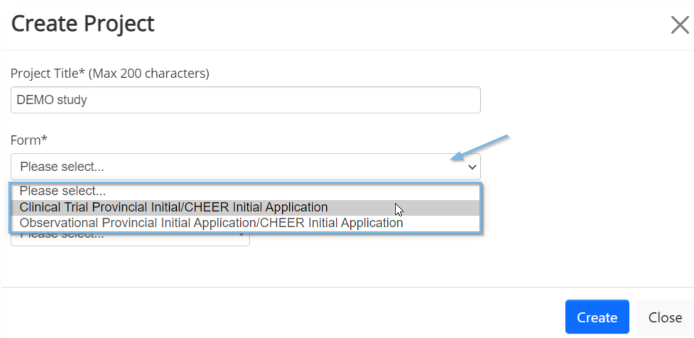


Figure 10

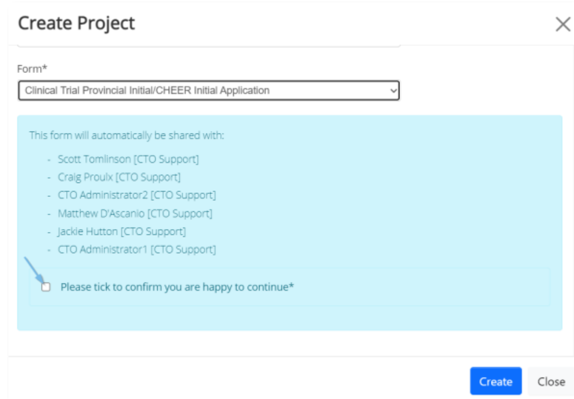


Figure 11

3.4.2. Duplicate Project

The 'Duplicate Project' button is used to create a replicate of an existing project including all applications forms contained within it but without any of the study documents in the original project.

Clicking the 'Duplicate Project' action *(Figure 12)* will bring up a pop-up window, where the study to be duplicated can be selected from the drop-down menu *(Figure 13)*. Enter a unique title for the duplicated version of the study and then press the green, 'duplicate' button to complete the task.

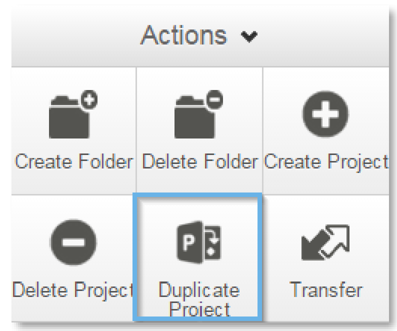


Figure 12

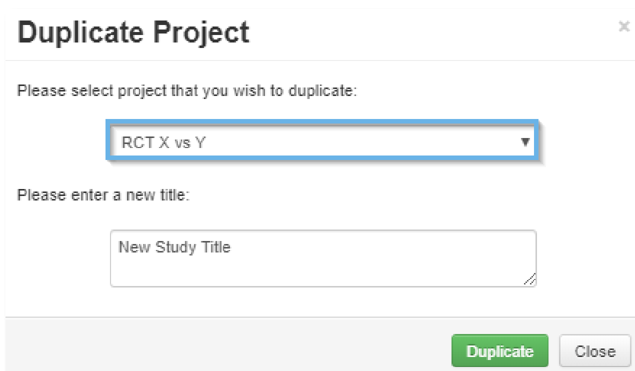


Figure 13

3.4.3. Transfer Button

When a user creates a new project in CTO Stream, they automatically become the Project Owner of that study. Ownership of a study can be transferred to another user by initiating a "project transfer" using the 'Transfer' action. Once the project transfer is accepted, the previous owner will lose access to the study.

Note: Only the project owner can initiate a project transfer for a study.

More information about Project Transfers can be found in the "[Project Transfers](#)" QuickGuide or [Transferring Project Ownership (3:03)](#) video tutorial on the CTO website.

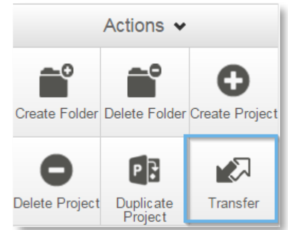


Figure 14

3.5 General Tiles

The General Tiles of the Work Area *(Figure 15)* act as the main hub for in-system notifications, based on four distinct categories. This section describes each of these four tiles in detail. The red number displayed on the front of each tile, corresponds with how many unread items are contained within. If there are no unread item inside a tile, a green "0" will be displayed.

Figure 15

3.5.1. Notifications

The Notifications tile contains a list of the in-system notification that a user receives when specific events occur on applications that they've been given a role on (i.e., signature requests, letters from the REB, etc.).

The list of notifications is sorted in descending chronological order by default, and the words "**ACTION REQUIRED**" appear message *(Figure 16)* of the notification, whenever the study team is required to complete a task within CTO Stream (i.e., respond to the REB's request for changes). An email is also sent to the study team when an action is required, which includes the words "ACTION REQUIRED" in the subject line.

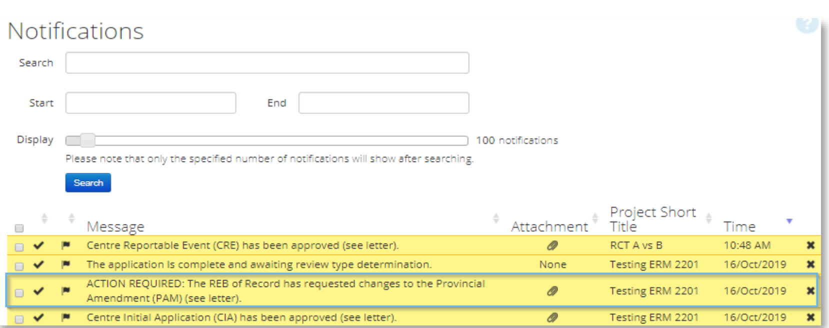


Figure 16

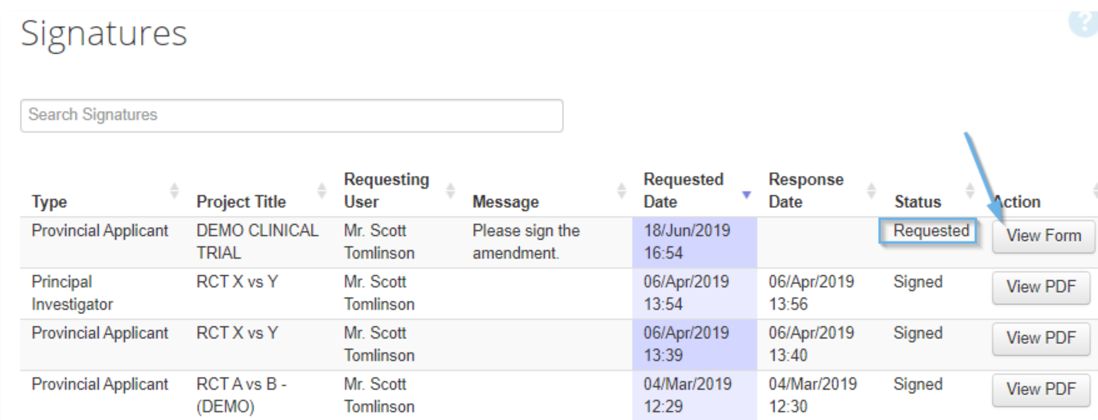
A search bar provides the option to filter the notifications displayed by keyword. The Start and End date fields allow users to see notifications within a specific date range. Each user can manage their own Notifications list by deleting any messages using the "X" button, or marking messages as 'read' using the "✓" button.

Note: A maximum of 1000 notifications can be displayed at once. Deleted notifications cannot be recovered.

3.5.2. Signatures

The Signatures tile *(Figure 15-2)* shows a list of the signature requests a user has received. If the signature request is still pending a response, it will have a status of "Requested" *(Figure 17)* otherwise it will show as "Signed".

The list of requests can be sorted by any of the column headers: Project Title, Requesting Username, Requested Date and Response Date.



Signatures

Search Signatures

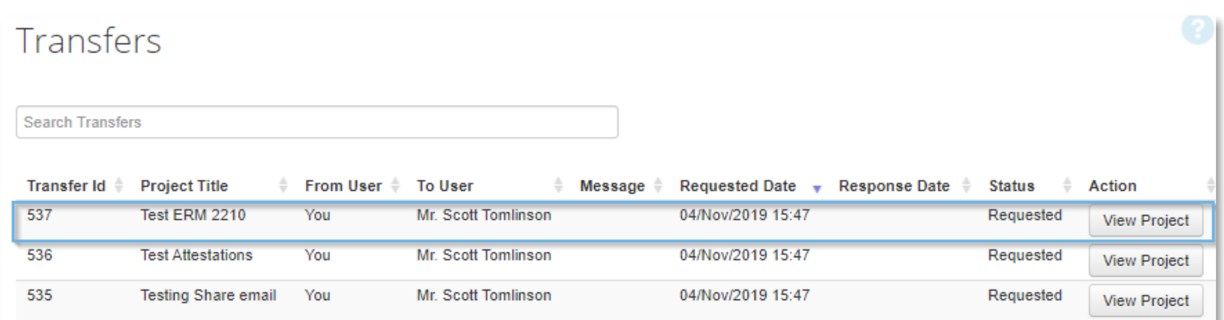
Type	Project Title	Requesting User	Message	Requested Date	Response Date	Status	Action
Provincial Applicant	DEMO CLINICAL TRIAL	Mr. Scott Tomlinson	Please sign the amendment.	18/Jun/2019 16:54		Requested	View Form
Principal Investigator	RCT X vs Y	Mr. Scott Tomlinson		06/Apr/2019 13:54	06/Apr/2019 13:56	Signed	View PDF
Provincial Applicant	RCT X vs Y	Mr. Scott Tomlinson		06/Apr/2019 13:39	06/Apr/2019 13:40	Signed	View PDF
Provincial Applicant	RCT A vs B - (DEMO)	Mr. Scott Tomlinson		04/Mar/2019 12:29	04/Mar/2019 12:30	Signed	View PDF

Figure 17

3.5.3. Transfers

The Transfers tile *(Figure 15-3)* contains a list of any transfer requests received (*Figure 18*). Transfers that are still pending a response will show a status of "Requested".

It is also possible to search through the pending/completed transfer requests using the search bar and the following criteria: Transfer ID, Project Title, Username and Date.



Transfers

Search Transfers

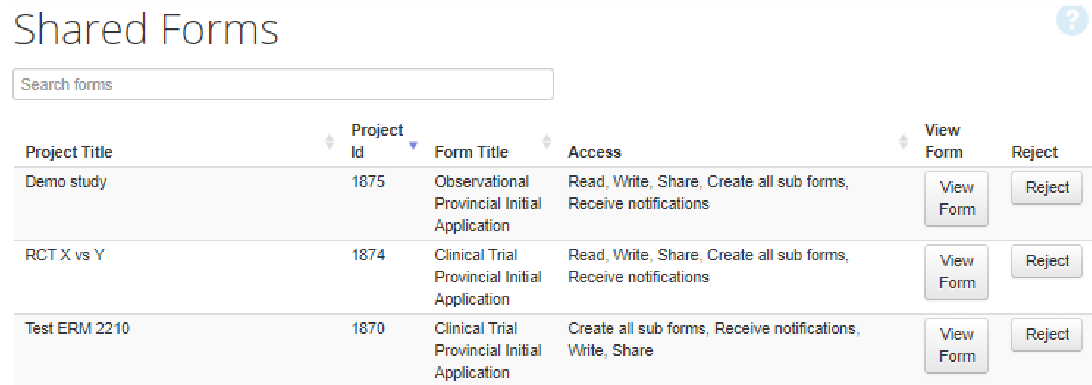
Transfer Id	Project Title	From User	To User	Message	Requested Date	Response Date	Status	Action
537	Test ERM 2210	You	Mr. Scott Tomlinson		04/Nov/2019 15:47		Requested	View Project
536	Test Attestations	You	Mr. Scott Tomlinson		04/Nov/2019 15:47		Requested	View Project
535	Testing Share email	You	Mr. Scott Tomlinson		04/Nov/2019 15:47		Requested	View Project

Figure 18

3.5.4. Shared

The ‘Shared’ tile (*Figure 19*) shows a list of all forms shared with the user and the related information for these application forms. View a form that has been shared by clicking the ‘View Form’ button, (project can also be opened from the Projects list of the user’s Work Area.

Users can press the ‘Reject’ button if they do not wish to be a collaborator on the application form by clicking the project.



Shared Forms

Search forms

Project Title	Project Id	Form Title	Access	View Form	Reject
Demo study	1875	Observational Provincial Initial Application	Read, Write, Share, Create all sub forms, Receive notifications	View Form	Reject
RCT X vs Y	1874	Clinical Trial Provincial Initial Application	Read, Write, Share, Create all sub forms, Receive notifications	View Form	Reject
Test ERM 2210	1870	Clinical Trial Provincial Initial Application	Create all sub forms, Receive notifications, Write, Share	View Form	Reject

Figure 19

4. ACCOUNT SETTINGS

Your name and email address are displayed in the upper right-hand corner of the Navigation Bar when you are logged in to CTO Stream. Clicking on your name allows you to change password, edit your personal details and access your notifications *(Figure 20*).

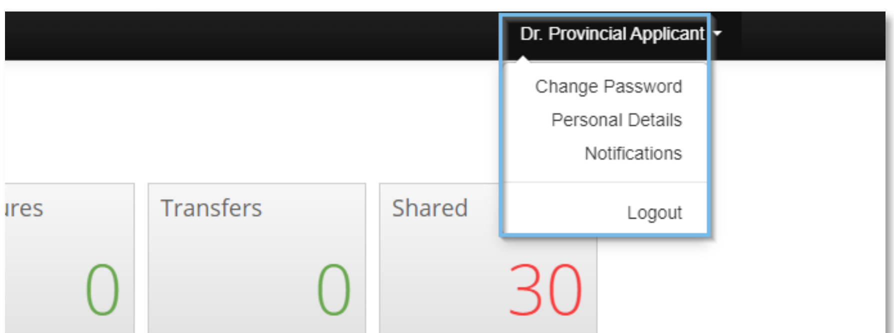


Figure 20

4.1. Changing Account Password

Clicking 'Change Password' directs you to the Change Password page (*Figure 21*). Change your password by entering your old password and choosing a new one (Passwords must be 10 to 64 characters long and contain a number, at least one special character at least one uppercase letter, and at least one lowercase letter), then click 'Change Password'

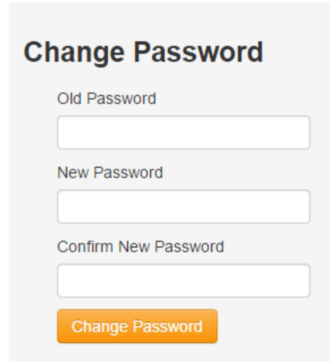


Figure 21

4.2. Change Personal Account Information

To change the contact details for your account, click the "Personal Details" link in *Figure 20.* You will be directed to the Change Personal Details page (*Figure 22*) where you can update the contacts details on your account.

To change the email address associated with your CTO Stream account, please submit a CTO Helpdesk ticket at https://support.ctontario.ca, or contact streamline@ctontario.ca.

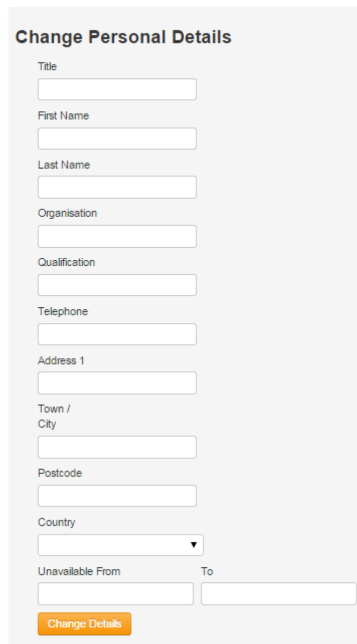


Figure 22