

CTO STREAM



Managing Study Access Using Applicant Roles

Online Helpdesk:
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Roles

Access to projects in CTO Stream can be shared with other users through the use of “Roles”. Anyone with a CTO Stream account (as an applicant) can be given a role on an existing study within CTO Stream. A variety of roles are available to share access to other members of the study team, including specific roles for Sponsors/CROS.

The role a user is given determines which forms they can access within a study and which email notifications they will receive about applications within it. The permissions for each role have been pre-defined by CTO to allow users to perform the tasks that they are responsible for (when they are given the correct role).

When a new project is created in CTO Stream, initially only the Project Owner (the person who created the project) will have access to it. The Project Owner must utilize the various Roles available to share access with other members of their own study team, the study team at each participating site and the sponsor group (if necessary). Once a user is given a role on a project, they in turn can give roles to other users.

I. Role Types

Roles in CTO Stream are categorized into two different types: Provincial-level and Centre-level. The access level granted with each role type is described below:

- **Provincial roles:** Must be given on the Provincial Initial Application (PIA) for the study and allows a user to access all current provincial and centre forms, plus any provincial or centre forms that are created in the future.
- **Centre roles:** Must be given on a Centre Initial Application (CIA) and allows a user to access all current and future forms for a specific site (the site corresponds to the CIA on which they were given a role on). Users can be given roles on multiple CIAs, if necessary (e.g., if a coordinator is completing the application forms on behalf of multiple sites).

Both role types provide a user with access for the entire duration of the study, or until their role is removed. When a member of the study team leaves the project, it is the responsibility of the remaining members of the study team to ensure the access of the user leaving is removed from the project.

II. Role Permissions

The permission for each role has been pre-defined by the system administrator to allow users to view, edit, receive notifications, etc. on forms for their site. Permissions for each user within a project depends on role they were given. A complete listing of all available roles and the associated permissions can be found in [Appendix 1 – Roles in CTO Stream](#), on page 5.

Note: access and permissions to projects in CTO Stream is determined by Roles only. Listing an individual within an application form (e.g., filling out the Provincial Applicant contact question in the PIA) **does NOT grant access; the user must also be given a corresponding role.**

III. How to Give a Role

1. To assign a Provincial-level role (i.e., Provincial Applicant, sponsor/CRO etc.) select the PIA in the Project Tree, like in Figure 1. To assign a centre-level role, the CIA for the site must be selected in the project tree.
2. With the form selected, press the 'Roles' button that is visible under the Actions Menu on the left-hand side of the page.

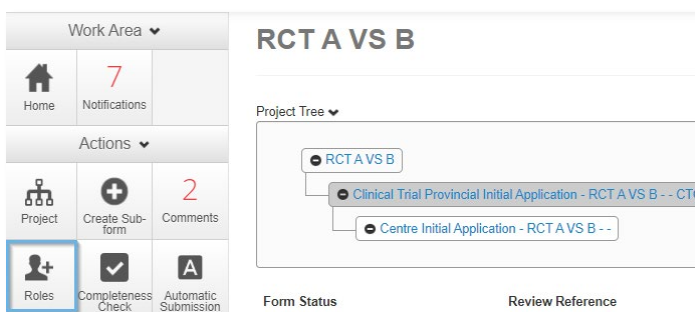


Figure 1 – PIA Selected in Project Tree

3. The Share Roles pop-up window will appear with a “collaborator email” field where new collaborator’s email address can be entered into the “Collaborator email” field.
4. Select a role from the drop-down menu located to the right of the collaborator email field (Figure 2) and then press the green ‘Share Role’ button in the lower right-hand corner of the window to complete the process.

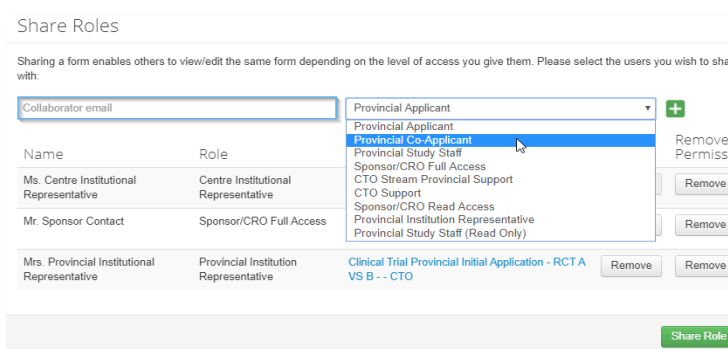


Figure 2 – Select the Role

Tip: The drop-down menu in Figure 2 will list either Provincial or Centre level roles, depending on whether giving a role on a PIA or CIA.

5. The email entered for the new collaborator must be associated with an active CTO Stream account. If the email does not match any CTO Stream users, a message will appear which says, “User does not exist on the system”. If this happens, an ‘Invite’ button will appear (Figure 3), which will send an email to the email address entered in the collaborators email field.

The invitation email comes from donotreply@infonetica.net and includes a link to the CTO Stream account registration page. The invited user can only be given a role once they’ve registered and activated their CTO Stream account.

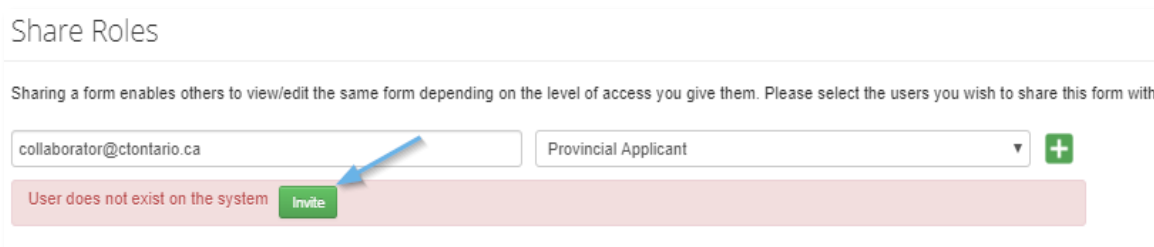


Figure 3 – Invite Collaborator button

- Once the role is given the pop-up window will close and a green banner will briefly appear at the top of the page with the message: “Form Shared Successfully” (Figure 4)

Users can also verify that the role was given successfully by looking in the History tab of the application where the role share event is recorded.

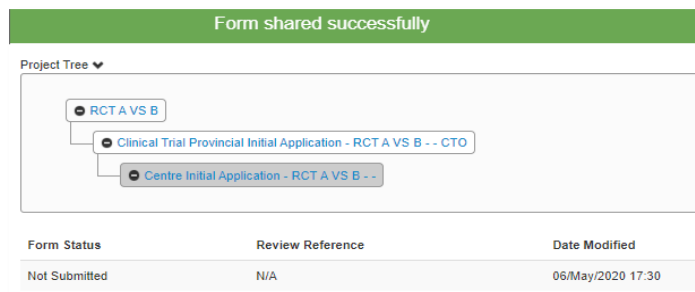


Figure 4 – Form Shared Successfully

IV. How to Remove a Role

- To remove a user’s Role, select the PIA or CIA the user was originally given a role on in the project tree, then press the ‘Roles’ button.
- The Share Roles pop-up window will appear with a table listing all the users who have a role on the current form. In the far-right column of the table is the ‘Remove’ button (Figure 4), which the user can press within the row containing a user’s name to remove their role. Once the role has been removed a green message will appear at the top of the screen with the message: “Role removed successfully”.

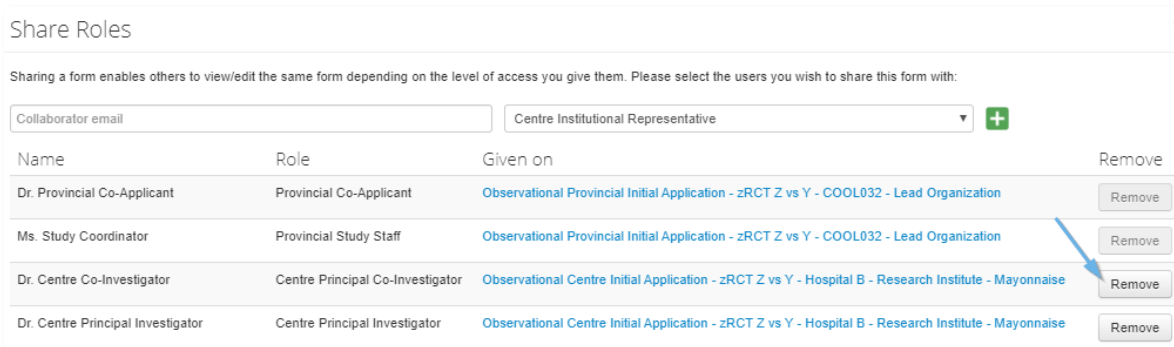


Figure 5 – Removing a Role

V. Collaborators

As mentioned previously, users can see which users have a role on a form by pressing the ‘Roles’ button with the form selected in the project tree.

This can also be discerned by going to the Collaborators Tab with the form selected (Figure 6) in the project tree. To view the email associated with a collaborator’s CTO Stream account, hover the cursor over their name.

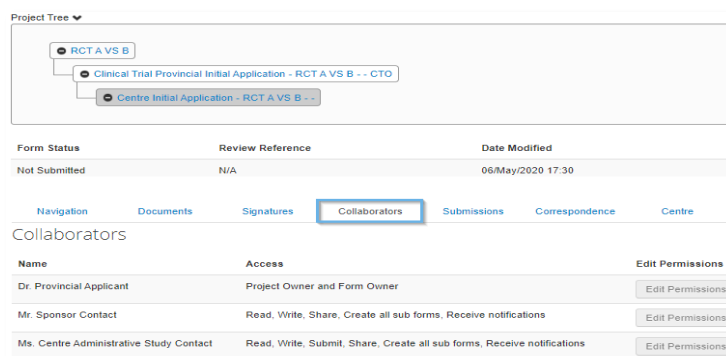


Figure 6 – Collaborators Tab

Appendix 1: CTO Stream Roles Types

A list of Provincial and Centre roles and associated permissions can be viewed in Table 1 beginning on page 6.

†**Centre collaborators** receive email notifications for any application submitted from their site. They also receive notifications via email whenever a Provincial Amendment (PAM), Provincial Continuing Review (PSC) or Provincial Reportable Event (PRE) is submitted or whenever an REB letter is sent regarding a Provincial Application for the project.

***Provincial collaborators** receive email notifications for all provincial submissions. They also receive an email whenever a centre continuing ethics review submission for a participating site is approved. Or when a participating site is sent continuing ethics review reminders, expiry notices or ethics approval suspension/termination notices.

Table 1 – Provincial Roles

Provincial Roles				
Role Name	Role Type	Permissions on Provincial forms:	Permissions on Centre forms (all centres):	Can grant the following roles:
Provincial Applicant	Provincial	<ul style="list-style-type: none"> • Read • Write • Submit • Share • Create all sub-forms • Receive notifications • Receive emails* 	<ul style="list-style-type: none"> • Read • Write • Submit • Share • Create all sub-forms • Receive notifications • Receive emails* 	<ul style="list-style-type: none"> • Provincial Applicant • Provincial Co-Applicant • Provincial Study Staff • Provincial Study Staff (read only) • Centre Institutional Representative • Provincial Institutional Representative • Centre Principal Investigator • Centre Co-Investigator • Centre Study Staff • Centre Study Staff (read only) • Department Head/Approver • Sponsor/CRO Full Access • Sponsor/CRO Read Access
Provincial Co-Applicant	Provincial	<ul style="list-style-type: none"> • Read • Write • Submit • Share • Create all sub-forms • Receive notifications • Receive emails* 	<ul style="list-style-type: none"> • Read • Write • Submit • Share • Create all sub-forms • Receive notifications • Receive emails* 	<ul style="list-style-type: none"> • Provincial Applicant • Provincial Co-Applicant • Provincial Study Staff • Provincial Study Staff (read only) • Centre Institutional Representative • Provincial Institutional Representative • Centre Principal Investigator • Centre Co-Investigator • Centre Study Staff • Centre Study Staff (read only) • Department Head/Approver • Sponsor/CRO Full Access • Sponsor/CRO Read Access

Provincial Roles				
Role Name	Role Type	Permissions on Provincial forms:	Permissions on Centre forms (all centres):	Can grant the following roles:
Provincial Study Staff	Provincial	<ul style="list-style-type: none"> Read Write Submit Share Create all sub-forms Receive notifications Receive emails* 	<ul style="list-style-type: none"> Read Write Submit Share Create all sub-forms Receive notifications Receive emails* 	<ul style="list-style-type: none"> Provincial Applicant Provincial Co-Applicant Provincial Study Staff Provincial Study Staff (read only) Centre Institutional Representative Provincial Institutional Representative Centre Principal Investigator Centre Co-Investigator Centre Study Staff Centre Study Staff (read only) Department Head/Approver Sponsor/CRO Full Access Sponsor/CRO Read Access
Provincial Institutional Representative	Provincial	<ul style="list-style-type: none"> Read Share Receive Notifications Receive emails* 	None	<ul style="list-style-type: none"> Provincial Institutional Representative
Sponsor/CRO Full Access	Provincial	<ul style="list-style-type: none"> Read Write Share Create all sub-forms Receive notifications Receive emails* 	<ul style="list-style-type: none"> Read Write Share Create all sub-forms Receive notifications Receive emails* 	<ul style="list-style-type: none"> Provincial Applicant Provincial Co-Applicant Provincial Study Staff Provincial Study Staff (read only) Centre Institutional Representative Provincial Institutional Representative Centre Principal Investigator Centre Co-Investigator Centre Study Staff Centre Study Staff (read only) Department Head/Approver Sponsor/CRO Full Access Sponsor/CRO Read Access
Sponsor/CRO Read Access	Provincial	<ul style="list-style-type: none"> Read Share 	<ul style="list-style-type: none"> Read 	<ul style="list-style-type: none"> Sponsor/CRO Read Access
Provincial Study Staff (read only)	Provincial	<ul style="list-style-type: none"> Read Share 	<ul style="list-style-type: none"> Read 	<ul style="list-style-type: none"> Provincial Study Staff (read-only)

Table 2 – Centre Roles

Centre Roles				
Role Name	Role Type	Permissions on Provincial forms:	Permissions on Centre forms (site-specific):	Can grant the following roles:

Centre Institutional Representative	Centre	<ul style="list-style-type: none"> • Read • Receive Notifications 	<ul style="list-style-type: none"> • Read • Write • Share • Receive notifications • Receive emails* 	<ul style="list-style-type: none"> • Centre Institutional Representatives • Institutional Admin • Centre Study Staff • Centre Study Staff (read only)
Centre Principal Investigator	Centre	<ul style="list-style-type: none"> • Read • Receive notifications • Receive emails † 	<ul style="list-style-type: none"> • Read • Write • Submit • Share • Create all sub-forms • Receive notifications • Receive emails* 	<ul style="list-style-type: none"> • Centre Institutional Representative • Centre Principal Investigator • Centre Co-Investigator • Centre Study Staff • Centre Study Staff (read only) • Department Head/Approver
Centre Principal Co-Investigator	Centre	<ul style="list-style-type: none"> • Read • Receive notifications • Receive emails† 	<ul style="list-style-type: none"> • Read • Write • Submit • Share • Create all sub-forms • Receive notifications • Receive emails* 	<ul style="list-style-type: none"> • Centre Institutional Representative • Centre Principal Investigator • Centre Co-Investigator • Centre Study Staff • Centre Study Staff (read only) • Department Head/Approver
Centre Study Staff	Centre	<ul style="list-style-type: none"> • Read • Receive notifications • Receive emails† 	<ul style="list-style-type: none"> • Read • Write • Submit • Share • Create all sub-forms • Receive notifications • Receive emails* 	<ul style="list-style-type: none"> • Centre Institutional Representative • Centre Principal Investigator • Centre Co-Investigator • Centre Study Staff • Centre Study Staff (read only) • Department Head/Approver
Department Head/Approver	Centre	<ul style="list-style-type: none"> • Read 	<ul style="list-style-type: none"> • Read • Receive notifications 	<ul style="list-style-type: none"> • Department Head/Approver
Institutional Admin	Centre	<ul style="list-style-type: none"> • Read • Receive notifications 	<ul style="list-style-type: none"> • Read • Share • Receive notifications 	<ul style="list-style-type: none"> • Institutional Admin
Centre Study Staff (read only)	Centre	<ul style="list-style-type: none"> • Read 	<ul style="list-style-type: none"> • Read 	<ul style="list-style-type: none"> • Centre Study Staff (read-only)