



QuickSTART Digital Platform User Manual

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CTO Stream, CTO Registry and the QuickSTART Platform

Stakeholders may already be familiar with CTO Stream, the online streamlined ethics platform offered by CTO. CTO Stream provides an online environment to facilitate multi-site ethics reviews. CTO has developed a companion system, the CTO Registry, to accompany CTO Stream and provide an environment for CTO programs outside of the direct scope of ethics reviews. The first of these programs is the QuickSTART digital platform.

User Accounts

All stakeholders who will have a role assigned to them in the QuickSTART digital platform must have a user account in CTO Registry. Existing CTO Stream users will already have a Registry account for use with QuickSTART. However, users must go to: <https://ctoregistry.com/> and use the 'Reset your password' link to verify the account and set the password. For ease of use, this password may be the same as Stream.

New users to CTO's systems can contact CTO for a user account. You will need to provide CTO with your name, company/institution, role within QuickSTART and email address.

After CTO creates your user account, you will receive an account set up email from the system prompting you to verify and change your password. This link will be valid for 24 hours, after which you may reset by selecting 'Reset your password' (at <https://ctoregistry.com/>).

Roles

There are three different parties represented on the QuickSTART digital platform: the Sponsor, CRO and the Institution. Within these parties there are specific roles that can be assigned. User access is as follows:

Sponsor

- **Full access** – Users can make changes to the form/forms for which they have access, including uploading documents when creating applications and making changes on the status of the application

Sponsor Roles

- Study Sponsor Contact
- Sponsor Contract Contact
- Sponsor Budget Contact

Contract Research Organization (CRO)

- **Full access** – Users can make changes to the form/forms for which they have access, including uploading documents when creating applications and making changes on the status of the application

CRO Roles

- Study CRO Contact
- CRO Contract Contact
- CRO Budget Contact

Institution

- **Full access**— Users can make changes to the form/forms for which they have access, including uploading documents, adding users and assigning approvers, as well as making changes on the status of the application
- **Read-Only** – ‘Read-Only Users’ have read only access and can view the documents as well as view the status of the application

Institutional Roles

- Research Coordinator (RC)
- Investigator
- Contract Reviewer
- Budget Reviewer
- Approver
- Read-only

Notifications

Users will receive notifications based on what type of role and responsibility they have been assigned. See [Appendix A](#) to review the type and timing of notifications for each role. Read-only roles only receive the final completion notifications.

Assigning a Role

To assign a person a role in the QuickSTART engagement screen, the RC would select ‘Add/Update User’ in the Roster section.



A pop-up screen will ask you to identify the person as a ‘Site User’ (has a responsibility and write access) or ‘Read-Only Users’ (read access). If the person is identified as a Site User, a prompt for role and name will follow.

QuickSTART - Add / Update User ✕

Add / Update User

User Type

Site Users Read-Only Users

 ⓘ Select Site Users to add users from this site to the application roles, i.e. Contract Reviewer.
 Select Read-Only Users to add a Read-Only role to a user from the site.

✕ Cancel
Submit ⚙️

Once you select Site User, you will then be able to assign a role from the list: Investigator, Research Coordinator, Budget Reviewer, and Contract Reviewer.

A list of all users for an application will be visible in the 'Roster' section.

▼ Roster + Add / Update User	
Research Coordinator	Mx Research Coord <qsResearch>
Principal Investigator	Mx Primary Investigator <qsInvestigator>
Contract Reviewer	Mx Review Contract <qsContract>
Budget Reviewer	NOT ASSIGNED
Read-Only	Mx Second Approver <qsApprover2>

Removing a Read-Only User's Role

The garbage can icon at the end of a Read-Only user's name will allow you to remove the user's access. You will receive a prompt to confirm this action. Confirm by selecting 'Remove User'.

QuickSTART - Remove User ✕

You are about to remove user: **Ms. Susan Marlin** with the role **Read-Only** from this QuickSTART Site application.

Please confirm that you want to remove this user by clicking on the **Remove User** button below

✕ Cancel
Remove User 🗑️

Who Gets What Role?

Appendix A outlines the notifications that will be associated with each role. There are a number of ways to determine who should receive a role. The following section describes the nature of each role.

Study Sponsor User

The Sponsor user has full access. There may be multiple Study Sponsors for a QuickSTART application. This user is considered the main sponsor contact for the QuickSTART application. The Study Sponsor User can perform all Sponsor actions, receives all Sponsor notifications and can assign other Sponsor Users. They also create the QuickSTART application.

Sponsor Contract User

The Sponsor Contract User is assigned by the Study Sponsor User and has full access. The Sponsor contract user can upload the contract information into the application before it is complete. The Sponsor Contract user can respond to comments on the contract portion of applications and edit the contract information. The Sponsor Contract User will only receive notifications related to the contract review.

Sponsor Budget User

The Sponsor Budget User is assigned by the Study Sponsor User and has full access. The Sponsor contract user can upload the contract information into the application before it is complete. The Sponsor Budget user can respond to comments on the budget portion of applications and edit the budget information. The Sponsor Budget User will only receive notifications related to the budget review.

Study CRO User

The CRO user has full access. There may be multiple Study CRO users for a QuickSTART application. This user is considered one of the main study contacts (along with the Sponsor contact) for the QuickSTART application. The Study CRO User can perform all Sponsor actions, receives all Sponsor notifications and can assign other Sponsor Users. They also can assist the Sponsor in creating the QuickSTART application.

CRO Contract User

The CRO Contract User is assigned by the Study Sponsor User or Study CRO User and has full access. The CRO contract user can upload the contract information into the application before it is complete. The CRO Contract user can respond to comments on the contract portion of applications and edit the contract information. The CRO Contract User will only receive notifications related to the contract review.

CRO Budget User

The CRO Budget User is assigned by the Study Sponsor User or Study CRO User and has full access. The CRO contract user can upload the budget information into the application before it is complete. The CRO Budget user can respond to comments on the budget portion of applications and edit the budget information. The CRO Budget User will only receive notifications related to the budget review.

Research Coordinator

The Research Coordinator (RC) will act as the primary contact (quarterback) from the site for the given QuickSTART application. This person may be the RC at the departmental level or may be the primary contact in a clinical services team. The RC may also assign themselves other Reviewer and Approver roles if they do not wish to have the individuals receiving notifications from the QuickSTART platform.

Investigator

The investigator is one of the *engaged parties* in QuickSTART, and therefore must be identified on the QuickSTART application. The investigator will have full view of the engagement screen and status screen, and may also be assigned as a reviewer or approver. If timelines are not being met during the QuickSTART process, the investigator will receive additional notifications in order to inform and escalate.

Contract Reviewer

A Contract Reviewer is the user responsible to review and approve the contract. Documents in the 'Study Documents' Section will be available to the reviewer for additional information that may be required during contract review. The user who is assigned this role will receive notifications on the timeline and status of this activity.

Budget Reviewer

A Budget Reviewer is the user responsible to review and approve the budget. Documents in the 'Study Documents' Section will be available to the reviewer for additional information that may be required during budget review. The user who is assigned this role will receive notifications on the timeline and status of this activity.

Approver

The Approver role is a broad role that can be assigned to any user who must approve resources, final documentation or any other activity that is established at the institution. When an Approver is added, the Type and Task details can be used to identify the impact on other activities and the timeframe that this approval takes place within.

Setting up a User Account

The QuickSTART platform can be accessed at: <https://ctoregistry.com>

The Sponsor contact or CRO contact is responsible for starting a QuickSTART application and will need to have a User Account before starting a QuickSTART application. All additional contacts will also require a verified account before they can be added to a QuickSTART application.

For existing CTO Stream users, on first use, the user will need to reset their CTO Registry password by selecting 'Reset your password' and then following the onscreen instructions:

CTO Registry

Member Login

Username

Password

[Login ↗](#)

Not Registered? [Register](#)
Forgot password? [Reset your password](#)

CTO Registry - Password Reset

ⓘ Provide either the email you used during registration or one of the email associated to an institution you added to your profile. An email will be sent to that email containing the instructions to update your password.

Enter your Email Address

[Request Password Reset 🔒](#)

CTO Registry - Password Reset

✔ Success

Your request to reset the password for your *CTO Registry* account is being processed.

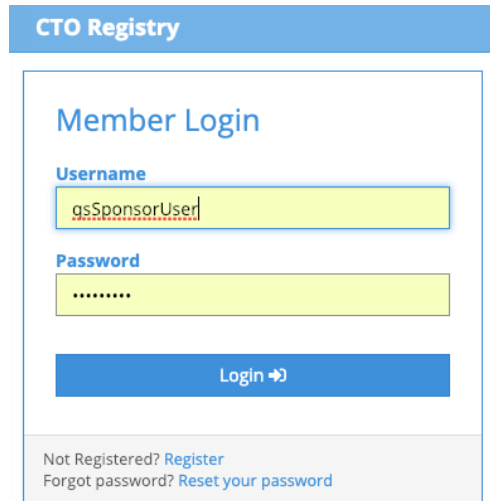
We will send you a message to the email address that you provided if an account is associated to that email address.

Thank you.

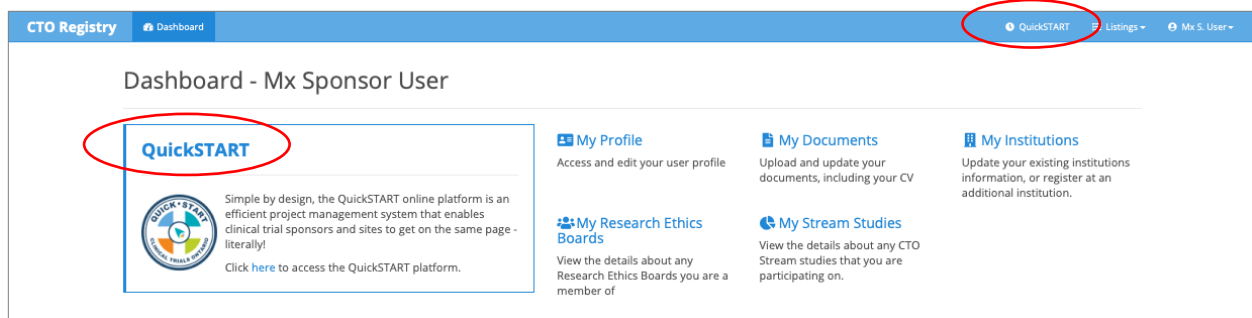
A password reset email will be sent to the email indicated for you to set up your new password and finalize your account creation.

Creating a QuickSTART application

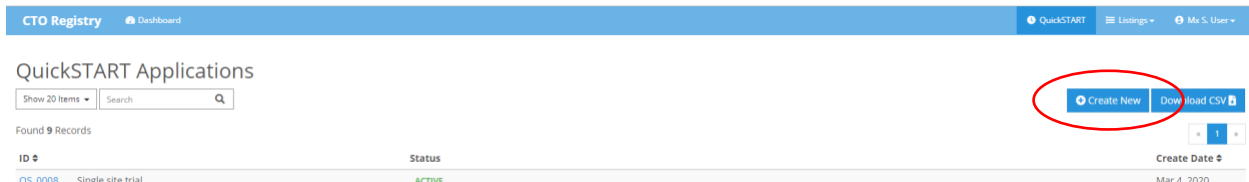
To start a QuickSTART application, the Sponsor contact or CRO contact will login to the QuickSTART digital platform at: <https://ctoregistry.com>



QuickSTART can be selected on the menu bar or by the QuickSTART link. If you do not see QuickSTART link displayed, please contact CTO to have your account settings reviewed.



To start a new application, select “Create New” button.



This will open a new application screen where the Sponsor/ CRO contact may enter all the study information including: Short title, Sponsor name, Study Sponsor contact(s), Study type/phase, therapeutic area and if available the Stream Project ID (this may be added later also), CRO contact(s) (if applicable).

Study Details

The information entered on this page will be used for all the site applications created for this QuickSTART study. After the study has been created, you can update these values at any time from this same screen if needed. (See this section for more details: [Adding New QuickSTART Site Engagements to an Existing QuickSTART Study](#))

Study Details

Study Short Title	<input type="text" value="Enter the Study Short Title"/>
Study Type	<input type="text" value="Select the Study Type -"/>
Therapeutic Area	<input type="text" value="Enter the Therapeutic Area"/>
Is this a Single Site Study using local REB?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Stream Project Id Number	<input type="text" value="Enter the Stream Project Id Number"/> <small> ⓘ If the study has already been created in CTO Stream, you can record the Project ID Number (ie 1010). If the application has not been created in CTO Stream at this point you can leave this field empty and CTO will populate it during the QuickSTART pre-screen process. </small>
QuickSTART ID	<input type="text" value="Enter the QuickSTART ID"/> <small> ⓘ If you would like this QuickSTART application to have a specific ID you can enter it here. If this field is left blank, then an ID will be automatically generated for this application. </small>

The Stream Project ID Number can be entered if this is already available at the time of the application creation. The QuickSTART ID can be entered by the sponsor, otherwise it will be generated by the system.

If the REB will be a single site application, select 'yes' and then enter the name of the REB who will review this study. In this case, The Stream Project ID number will not be required.

Is this a Single Site Study using local REB?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Study REB	<input type="text" value="Start typing the name of the REB..."/> <input type="button" value="x"/> <small> ⓘ Study REB is required. </small>
QuickSTART ID	<input type="text" value="Enter the QuickSTART ID"/> <small> ⓘ If you would like this QuickSTART application to have a specific ID you can enter it here. If this field is left blank, then an ID will be automatically generated for this application. </small>

Sponsor Details

Sponsor contacts can be specified by specific responsibilities, such as contract and budget, or can be generalized (i.e., Study Sponsor Contact). At least one Study Sponsor contact will be required. Additional Study Sponsor Contacts can be added also. These users will receive all sponsor notifications.

Note: *If there are more than one users who will interact with contacts or budget during start-up, consider adding the additional Study Sponsor contacts here.*

Sponsor Details

Study Sponsor	QS Test Sponsor ✓
Study Sponsor Contact	Start typing the name of the Sponsor Contact... + Add Additional Study Sponsor Contact
Sponsor Contract Contact ⓘ	Start typing the name of the Sponsor Contract Contact...
Sponsor Budget Contact ⓘ	Start typing the name of the Sponsor Budget Contact...

If a CRO will be involved in the study start-up and QuickSTART engagement, select 'yes' in the CRO Details section and assign users accordingly using the same logic as described for sponsor users.

Note: *If a CRO is included, it is required to identify one Study Sponsor Contact on the QuickSTART application to ensure full engagement.*

CRO Details

Does this Study involve a CRO?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Study CRO	Start typing the name of the CRO...
Study CRO Contact	Start typing the name of the CRO Contact...
CRO Contract Contact ⓘ	Start typing the name of the CRO Contract Contact...
CRO Budget Contact ⓘ	Start typing the name of the CRO Budget Contact...

Study Documents

Study documents may be uploaded to the platform at this time, or can be indicated as 'sent manually' outside of the platform. In order to benefit most from the QuickSTART process, it is encouraged that documents be uploaded to the platform. Documents may be password protected for additional security. See the CTO *Electronic System Compliance Review* for additional information on security.

QuickSTART Application - QS_1111

Study [Study Documents](#) [Contract](#) [Budget](#) [Sites](#)

Study Documents

Protocol Document	<input checked="" type="radio"/> Upload Protocol <input type="radio"/> Send Protocol Manually <div style="border: 1px dashed gray; padding: 5px; text-align: center;">Drag & Drop your file here or click here to upload</div>
Protocol Document Name	<input type="text" value="Enter the Protocol Document Name (Free Text)"/>
Additional Study Documents	+ Add Additional Study Document
Study Document Notes	<input type="text" value="Enter any additional notes related to the Study Documents (Free Text)"/>

[◀ Previous](#) [Next ▶](#)

Additional study documents may include informed consent form, investigator brochure, sub-study protocols, letter of intent, etc. Many additional documents may be added. All documents that are added here will be available on the QuickSTART engagement screen for assigned users.

Note: For additional document security, you may upload password protected documents. If you choose to use password protected documents, it will be up to you to communicate the document password(s) separate from the QuickSTART platform.

Contract

As part of QuickSTART, a streamlined contract strategy is required. The Sponsor contact may select from a number of streamlined contract strategies including the CCTCC model CTA (without changes or with playbook terms) or a site specific master agreement. 'Other' may include previously used contract with playbook terms addressed.

The contract can be uploaded to the application or sent manually.

QuickSTART Application - QS_1111

Study ✓ Study Documents ✓ **Contract** Budget Sites

Contract Details

Contract Document	<input type="radio"/> Upload Contract <input type="radio"/> Send Contract Manually
Contract Document Name	<input type="text" value="Enter the Contract Document Name (Free Text)"/>
Contract Strategy	<input type="radio"/> mCTA (CCTCC) without changes <input type="radio"/> mCTA with Playbook Terms <input type="radio"/> Site Specific Master Agreement <input type="radio"/> Other (Specify)
Additional Contract Documents	+ Add Additional Document
Contract Notes	<input type="text" value="Enter any additional notes related to the contract (Free Text)"/>

[◀ Previous](#) [Next ▶](#)

Budget

The study budget may be uploaded to the application or sent manually. Any additional documents to support the budget review may also be uploaded on this screen.

QuickSTART Application - QS_1111

Study ✓ Study Documents ✓ Contract ✓ **Budget** Sites

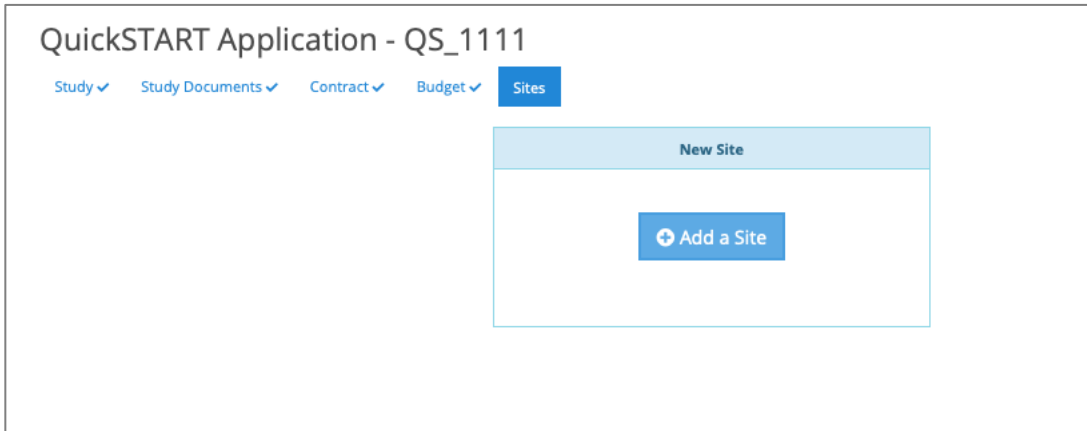
Budget Details

Budget Document	<input type="radio"/> Upload Budget <input type="radio"/> Send Budget Manually
Budget Document Name	<input type="text" value="Enter the Budget Document Name (Free Text)"/>
Additional Budget Documents	+ Add Additional Document
Budget Notes	<input type="text" value="Enter any additional notes related to the budget (Free Text)"/>

[◀ Previous](#) [Next ▶](#)

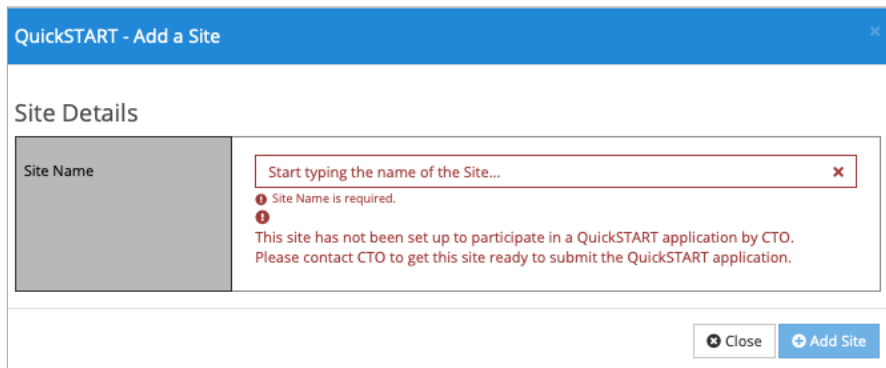
Adding Sites

On this tab, the Sponsor can add a new site to the application. If this is a new QuickSTART application, 'New Site' will be the only available option. If the Sponsor contact is adding an additional site to an existing QuickSTART application, all site engagements for this study will be available here.



To add a new site click on the blue 'Add a Site' button within the 'New Site' box. On the next screen, you will be prompted to input the site name.

If the site is not yet QuickSTART Ready you will receive this message. Please contact CTO to ensure that the site is ready to proceed with a QuickSTART study application.



If a site is QuickSTART Ready, it will be available to select. Next, add the names of the Primary Investigator and Research Coordinator that will be working on this study.

QuickSTART Applications

Any time a QuickSTART application is assigned to a user, the user will be able to see and access the QuickSTART engagement page from the QuickSTART applications list. The QS_ID will take Sponsor User to the QuickSTART application page for that study. Selecting the site name in the study list, will bring all users to the respective engagement page.

The QuickSTART timer is visible on this page for each engagement.

ID	Name	Status	Timer	Create Date
QS_0008	Single site trial	ACTIVE		Mar 4, 2020
	▶ QS Test Site	ACTIVE	0 1	90 Mar 4, 2020
QS_1111	User Manual	ACTIVE		Mar 4, 2020
	▶ QS Test Site	ACTIVE	0 1	90 Mar 4, 2020

Pre-Screen

Once this is complete, you will have an opportunity to review the application and make changes as you wish. If you are satisfied with the application, select 'Send to Pre-Screen' to have CTO review the application prior to sending to the site.

If you have identified any documents as being sent manually, you may enter the 'sent date' at this time by selecting the 'Record sent date' button for each section as applicable. A pop-up screen will appear and allow you to select the date (this may also be back dated to ensure accurate records).

If a document is identified as being sent manually and you have not entered a date, you will receive a reminder about this before confirming that the application is being sent to pre-screen.

QuickSTART - Send to Pre-Screen

⚠ Documents Sent Manually

You have specified that documents (Protocol, Contract, Budget) will be sent manually. these documents will not be available to users through the application and must be forwarded by you manually to the required parties.

✔ QuickSTART Application Ready for Pre-Screen!

Your application is ready to be pre-screened by Clinical Trials Ontario. After you click the "Send to Pre-Screen" button below, Clinical Trials Ontario will review your application and reply with any comments and/or feedback relevant. Thank you for participating in the QuickSTART program!

✖ Cancel
Send to Pre-Screen

The application status for each site is indicated at the top of the engagement screen as well as on the QuickSTART Applications page.

QuickSTART - QS_1111 - QS Test Site

QuickSTART Details		Add Custom Data
Site	PRE-SCREEN QS Test Site	
QuickSTART ID	QS_1111	Study Type
Study Short Title	User Manual	Phase 3
Stream Project Id Number	N/A	Therapeutic Area
		Cardiovascular
		Sponsor
		QS Test Sponsor

QuickSTART Applications

Show 20 Items

Found 8 Records

ID	Status
▶ QS Test Site	PRE-SCREEN

CTO will review the pending QuickSTART application for completeness and to ensure streamlined strategies are in place. CTO will not review the content of the study documents, contracts, budgets, etc.

Once pre-screen is complete, the Sponsor user will be notified. The pre-screen review section will alert the Sponsor to any comments. If there is nothing outstanding, the Sponsor user can begin the QuickSTART engagement by selecting 'Send QuickSTART to Site'. This will start the QuickSTART Timer and the Site contact will be notified.

Submitting an application

Pre-Screen Review		
Area	Comment	Acknowledge
This QuickSTART Site Application was reviewed by CTO and does not have any comments.		
◀ Back To Sites Send QuickSTART to Site ▶		

QuickSTART - Send to Site

✔ QuickSTART Timer Starting!

When you click the "Send QuickSTART to Site" button below, the QuickSTART timer will start counting down for this Site.

This application will be sent to:

- Mx Primary Investigator
- Mx Research Coord

Thank you for participating in the QuickSTART program!

If there are comments from the CTO pre-screen, the Sponsor/CRO user will need to acknowledge the comment before the QuickSTART application can be sent to the site. A pop-up screen will alert you to the default acknowledgement of these comments.

QuickSTART - Send to Site

⚠ Un-Acknowledged Pre-Screen Action

You did not mark your acknowledgement of the following Pre-Screen action :

Contract
mCTA is confirmed by site

By Clicking the "Send QuickSTART to Site" button below, your acknowledgement will be marked for these issues.

✔ QuickSTART Timer Starting!

When you click the "Send QuickSTART to Site" button below, the QuickSTART timer will start counting down for this Site.

This application will be sent to:

- Mx Primary Investigator
- Mx Research Coord

Thank you for participating in the QuickSTART program!

Pre-screen comments can be reviewed and acknowledged in the 'Pre-Screen Review' section.

Pre-Screen Review		
Area	Comment	Acknowledge
Contract	mCTA is confirmed by site	<input checked="" type="checkbox"/>
		All <input type="checkbox"/>

[Send QuickSTART to Site ▶](#)

Reminder: Submitting a QuickSTART application will start the timer for that engagement. In order to best utilize the QuickSTART platform, it is important that the site and sponsor have agreed to this timing.

If you chose to send any documents manually, you will need to ensure all documents are sent by the time a QuickSTART application begins, and record this on the QuickSTART engagement page. Only the Sponsor can record or edit this date and it should reflect the date that the documents were sent to the site.

Budget Documents			Edit Application	Add Document
Document	Link	Document Name		
Budget	SENDING MANUALLY	Record Sent Date Study 1111 Budget v1		

Contract Documents			Edit Application	Add Document
Document	Link	Document Name		
Contract	SENDING MANUALLY	Record Sent Date Study 111 contract v1		
Contract Strategy: mCTA (CCTCC) without changes				

Adding New QuickSTART Site Engagements to an Existing QuickSTART Study

Once a QuickSTART engagement has been created for one site, a second site may be added very easily. The sponsor user can access the QuickSTART application for the study of choice and then select the 'Sites' tab. This will bring the sponsor user to this screen and the user can select 'Add a Site'.

QuickSTART Application - QS_1111

[Study](#) [Study Documents](#) [Contract](#) [Budget](#) **[Sites](#)**

Active 1 / 90

QS Test Site

[Open ▶](#)

New Site

[Add a Site](#)

The user can then enter the new site name, investigator and research coordinator (RC) and submit. The contract and budget strategies will automatically default to the options that were utilized in the application for the first QuickSTART site in that study. However, if this is different for the new site, the sponsor user can customize these by selecting 'Edit Application' in any of the sections of the engagement screen prior to sending for pre-screen.

The screenshot displays four sections of the engagement screen, each with an 'Edit Application' button circled in red:

- Study Documents:** A table with columns 'Document', 'Link', and 'Document Name'. The first row shows 'Protocol' with a status of 'SENDING MANUALLY' and a 'Record Sent Date' button. The document name is 'CIP'.
- REB:** A section titled 'REB' with the message 'No REB Events Recorded'.
- Budget Documents:** A table with columns 'Document', 'Link', and 'Document Name'. The first row shows 'Budget' with a status of 'SENDING MANUALLY' and a 'Record Sent Date' button. The document name is 'budget'.
- Contract Documents:** A table with columns 'Document', 'Link', and 'Document Name'. The first row shows 'Contract' with a status of 'SENDING MANUALLY' and a 'Record Sent Date' button. The document name is 'contract'. Below the table, it says 'Contract Strategy: Site Specific Master Agreement'.

QuickSTART Engagement Screen

Quick Tabs along the left side of the screen will allow a user to jump to the area of interest on the engagement screen.

The screenshot shows the QuickSTART engagement screen with a sidebar on the left containing 'QuickSTART Details', 'Roster', 'Study Documents', 'Budget', 'Contract', and 'Approvals'. The main content area includes:

- Roster:** A table listing roles and users:

Research Coordinator	Mx Primary Investigator <qpInvestigator>	Budget Reviewer	NOT ASSIGNED
Principal Investigator	Mx Research Coord <qpResearch>	Approver	Mx Primary Investigator <qpInvestigator>
Contract Reviewer	Mx Review Contract <qpContract>	Sponsor Contact	Mx Sponsor User <qpSponsorUser>
- Study Documents:** A table with columns 'Document', 'Link', and 'Document Name'. The first row shows 'Protocol' with a status of 'SENDING MANUALLY' and a 'Record Sent Date' button. The document name is 'CIP_1111 study'.

The QuickSTART Engagement screen is shared by the Sponsor/ CRO (if applicable) and Institution. The Roster will display all the users who are engaged on this page and have visibility to the study documents and approval status.

If documents were sent manually, they will not be available from this engagement page.

Research Coordinator assignments

Once an application is sent to the site, the assigned Investigator and Research Coordinator (RC) will be notified from the digital platform. The timer also starts at **Day 0** upon submission.

The RC will be able to access the engagement screen from the notification email or by logging into the QuickSTART digital platform. Upon receiving a new QuickSTART engagement, the RC may need to enter a number of details. The RC will need to assign the reviewer and approver roles from this screen (see [Assigning a Role](#) section).

Custom Data

This optional field may be utilized by the site to identify any internal ID that may be linked to this study and approval processes. Select 'Add Custom Data', then the Label name and ID.

The screenshot shows the 'QuickSTART - QS_1111 - QS Test Site' dashboard. The top navigation bar includes 'CTO Registry', 'Dashboard', 'QuickSTART', and 'Listings'. A left sidebar contains navigation options: 'QuickSTART Details', 'Roster', 'Study Documents', 'Budget', 'Contract', and 'Approvals'. The main content area displays site information, including a progress bar from Mar 4, 2020 to Jun 2, 2020. Below this is the 'QuickSTART Details' section, which includes a circled 'Add Custom Data' button. The details table lists: Site (ACTIVE QS Test Site), QuickSTART ID (QS_1111), Study Type (Phase 3), Study Short Title (User Manual), Therapeutic Area (Cardiovascular), and Sponsor (QS Test Sponsor). The 'Roster' section below lists roles and users: Research Coordinator (Mx Research Coord), Principal Investigator (Mx Primary Investigator), Contract Reviewer (Mx Review Contract), Budget Reviewer (NOT ASSIGNED), Approver (Mx Primary Investigator), and Sponsor Contact (Mx Sponsor User). An 'Add / Update User' button is also present.

The 'QuickSTART - Custom Data' form is a modal window with a blue header. It contains two input fields: 'Label' with the placeholder text 'Enter the data label' and 'Value' with the placeholder text 'Enter the data value'. At the bottom of the form are two buttons: 'Cancel' and 'Submit'.

CTO Registry Dashboard QuickSTART Listings

QuickSTART - QS_1111 - QS Test Site

0 Mar 4, 2020 99 Jun 2, 2020

QuickSTART Details Add Custom Data

Site	ACTIVE QS Test Site	Study Type	Phase 3
QuickSTART ID	QS_1111	Therapeutic Area	Cardiovascular
Study Short Title	User Manual	Sponsor	QS Test Sponsor
Stream Project Id Number	N/A		

Roster Add / Update User

Research Coordinator	Mx Research Coord <qresearch>	Budget Reviewer	NOT ASSIGNED
Principal Investigator	Mx Primary Investigator <qsinvestigator>	Approver	Mx Primary Investigator <qsinvestigator>
Contract Reviewer	Mx Review Contract <qcontract>	Sponsor Contact	Mx Sponsor User <qsponsoruser>

Adding Approvals

Select the 'Add Approval' button to enter details in the pop-up screen.

Approvals may only be assigned to QuickSTART users (i.e., verified account) and should be agreed upon in advance of assignment.

QuickSTART - Add Approval

Add Approval

Type	Select the type of the Approval... ▾
User	Start typing the name of the User... <small>ⓘ The user can be entered at a later date</small>
Approval Action	e.g. Complete Local Processes

Approval Due Date

Due Date Type	<input type="radio"/> Fixed Day <input type="radio"/> Relative to Other Action
---------------	--

Approval dates can be fixed (either number of days from Day 0 or date) or relative to another action. The latter may be considered in scenarios where the current approval cannot be completed without a previous approval, as in the case of a contract signature (see example below).

Approval Due Date

Due Date Type	<input checked="" type="radio"/> Fixed Day <input type="radio"/> Relative to Other Action
Timeline Due Day ?	<input type="text"/>
Due Date	<input type="text"/>

Quickstart - Add Approval

Add Approval

Type	Signatures
User	Mx Primary Investigator ✓
Approval Action	PI signature on contract

Approval Due Date

Due Date Type	<input type="radio"/> Fixed Day <input checked="" type="radio"/> Relative to Other Action
Due After Event	<input checked="" type="radio"/> Contract Approval <input type="radio"/> Budget Approval <input type="radio"/> Full Approval (Contract and Budget)
Days After Event ?	<input type="text" value="5"/>

When adding approvals, the user can be left blank and added a later time if it is not known who will be responsible for the approval.

Once approval items have been added to the application, type of approval, the assigned reviewer, the task details and due date will be visible in this section. The assigned reviewer will receive notifications on this item and can select 'Complete Approval' when the task is complete. After this is complete, the approval line will turn green with a completion date recorded and no further edits will be allowed on this item. Due dates can be set according to institutional guidance for each item in this section.

Approvals							Add Approval
Type	User	Task	Due On	Date Due	Date Done	Action	
Signatures	Mx Primary Investigator	PI signature on contract	Contract Approval + 5 days	--		<input type="button" value="Update"/> <input checked="" type="button" value="Complete Approval"/>	

Institution Approval Templates

If an institution has a standard set of Approvals that will always be added to their QuickSTART site engagements, these approvals can be added to the institution as templates, and will then be added to any future QuickSTART site engagements started for that institution.

These templates are created in exactly the same way as approvals, but instead of adding them to each individual site engagement, they are added to the institution.

Access to this feature is controlled by CTO. To add institution approval templates to your institution, contact CTO to gain access to this feature, or CTO can you in set up the templates on your behalf.

Contracts

A contract reviewer must be assigned in the contract section.

Contract Documents					Add Document
Document	Link	Document Name	Assigned Reviewer	Status	
Contract	SENDING MANUALLY	Record Sent Date Study 111 contract v1	Assign Reviewer	PENDING	
Contract Strategy: mCTA (CCTCC) without changes					

Quickstart - Assign Contract Reviewer

Site User

User Role	<input type="radio"/> Research Coordinator <input type="radio"/> Investigator <input checked="" type="radio"/> Contract Reviewer <input type="radio"/> Budget Reviewer
Site User	<input type="text" value="Start typing the name of the User..."/>

Once a contract reviewer has been assigned, they will be visible in this section of the engagement screen. The current status of the contract review is displayed under the status column at the right of the table. Additionally, the 'Contract Review History' will document the movement and current status of the review. The status bar will update automatically as the review is documented.

All sections of the contract can be minimized using the arrows to the left to allow the user to focus on their particular area of interest.

Contract					
Contract Review Started Mar 4, 2020	Site Contract Review 1 --	Sponsor Contract Review 1 --	Site Contract Review 2 --	Sponsor Contract Review 2 --	Contract Approved --
Contract Documents					
Document	Link	Document Name	Assigned Reviewer	Status	
Contract	Sponsor sent manually on Mar 4, 2020	Study 111 contract v1	Mx Review Contract <qsContract>	PENDING	
Contract Strategy: mCTA (CCTCC) without changes					
Contract Review History					
Date	User	Action	Comment		
Mar 4, 2020 3:09 PM	Ms. Linnea Aasen-Johnston	Assigned Reviewer	Mx Review Contract		
Mar 4, 2020 3:10 PM	Mx Primary Investigator	Document Sent	Document sent manually		

Budgets

A budget reviewer must be assigned in the budget section.

Budget Documents				
Document	Link	Document Name	Assigned Reviewer	Status
Budget	SENDING MANUALLY	Study 1111 Budget v1	Assign Reviewer	PENDING

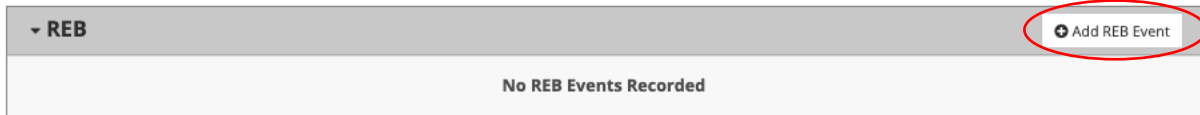
Once a budget reviewer has been assigned, they will be visible in this section. The current status of the budget review is displayed under the status column at the right of the table. Additionally, the 'Review History' will document the movement and current status of the review. Additionally, the 'Contract Review History' will document the movement and current status of the review. The status bar will update automatically as the review is documented.

All sections of the contract can be minimized using the arrows to the left to allow the user to focus on their particular area of interest.

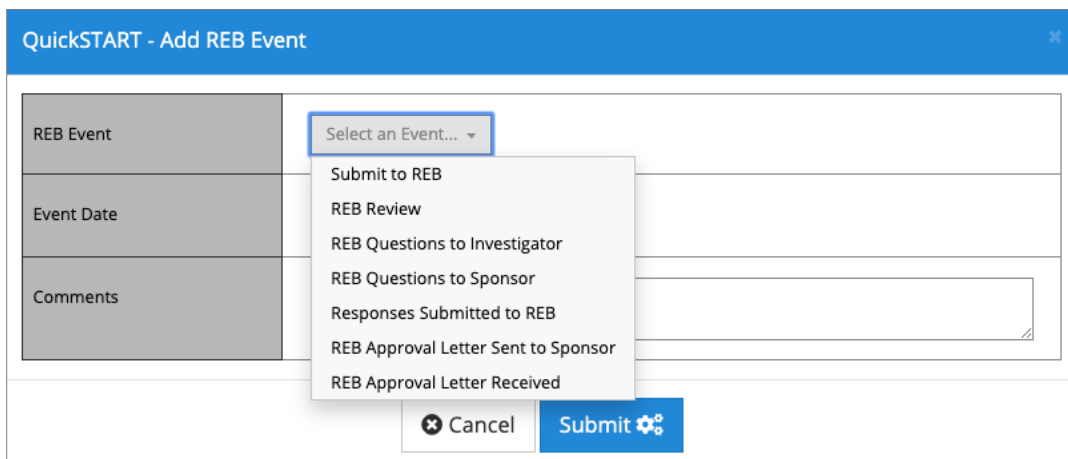
Budget					
Budget Review Started Mar 4, 2020	Site Budget Review 1 --	Sponsor Budget Review 1 --	Site Budget Review 2 --	Sponsor Budget Review 2 --	Budget Approved --
Budget Documents					
Document	Link	Document Name	Assigned Reviewer	Status	
Budget	Sponsor sent manually on Mar 4, 2020	Study 1111 Budget v1	Mx Review Budget <qsBudget>	PENDING	
Budget Review History					
Date	User	Action	Comment		
Mar 4, 2020 3:33 PM	Mx Research Coord	Assigned Reviewer	Mx Review Budget		
Mar 4, 2020 3:34 PM	Mx Research Coord	Document Sent	Document sent manually		

Single Site REB

If a QuickSTART study is a single site trial and Stream will not be utilized for the ethics review portion, the Sponsor will indicate this on the QuickSTART application, allowing the RC to enter information on the REB status.



Status updates can be made as they occur, or can be entered as a planned date in the future (e.g., REB review date).



As the events are completed, they can be checked off by the RC and this will be logged.

- REB			+ Add REB Event
Event	Date	Comment	
<input type="checkbox"/> Submit to REB	Mar 27, 2020	deadline for submission to next meeting	

Reviewing a Document in the QuickSTART Engagement Screen

Site Reviewer

The user who is assigned to review the Contract or Budget can do so by selecting the 'Review' button in that section. The QuickSTART timelines and notifications are based on two rounds of review in order to encourage a full review within the associated timelines (see [Appendix B](#) for QuickSTART Timelines).

▼ Budget					
 Budget Review Started Mar 4, 2020	 Site Budget Review 1 --	 Sponsor Budget Review 1 --	 Site Budget Review 2 --	 Sponsor Budget Review 2 --	 Budget Approved --

A pop-up screen will appear with the choices 'Comment' or 'Send to Sponsor' along with the date associated with the comment/action.

A comments section is available to add in notes for the other party or for the other department within an organization. These notes will appear in the Review History table. A comment will not end the review round, reset the status /timer, or send a notification to the other party.

In order to log the end of the given review round and send notification to the other party that the timer has begun for their review, you must select 'Send to Sponsor'. A notice will pop up to ensure that this is your intention. Select 'Submit' to proceed.

This will be logged in the Review History section.

▼ Budget Review History			
Date	User	Action	Comment
Mar 4, 2020 3:33 PM	Mx Research Coord	Assigned Reviewer	Mx Review Budget
Mar 4, 2020 3:34 PM	Mx Sponsor User	Document Sent	Document sent manually
Mar 5, 2020 2:29 PM	Mx Review Budget	Reviewer Comment	final changes requested
Mar 5, 2020 2:29 PM	Mx Review Budget	→ Sent To Sponsor	

QuickSTART - Review Budget
✕

Document	<Sent Manually>
Review Action	<input type="radio"/> Comment <input checked="" type="radio"/> Send to Sponsor
Action Date	<input type="text" value="03/05/2020"/>
Comments	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>

i Sending to Sponsor

The application will be sent to the sponsor after you click submit. The sponsor user(s) will be notified via email to start preparing their response.

Click the "Submit" button below to send the budget review to the sponsor.

If the document has been uploaded to the platform by the sponsor, the reviewer may upload a revised version of the document upon review by selecting the 'Add Document' button. For more information about the 'Add Document' feature, see The Sponsor user can 'Comment', 'Send to Site' or 'Approve'. If the document was initially uploaded to the platform, the Sponsor can also upload a revised document using the 'Add Document' button.

As with the site review, 'Comment' will only log a comment for that date, however the review timer will continue for the sponsor review cycle and no notification of change in status will be send to the site reviewer. 'Send to Site' will end the sponsor review cycle, notify the site reviewer and restart the timer for the site review.

'Approve' is an action exclusively available to the sponsor reviewer and would signify that the item is approved and negotiations for that section are complete. This should only be completed after the site has indicated that they are approved this from their side and the sponsor is ready to accept this final version.

Once a section has been approved, no additional information can be added to this section. The status will be updated automatically.

Budget					
Budget Review Started Mar 4, 2020	Site Budget Review 1 Mar 5, 2020	Sponsor Budget Review 1 Mar 12, 2020	Site Budget Review 2 --	Sponsor Budget Review 2 --	Budget Approved Mar 12, 2020
Budget Documents					Add Document
Document	Link	Document Name	Assigned Reviewer	Status	
Budget	Sponsor sent manually on Mar 4, 2020 Update Sent Date	Study 1111 Budget v1	Mx Review Budget <qsBudget>	APPROVED	
Budget Review History					
Date	User	Action	Comment		
Mar 4, 2020 3:33 PM	Mx Research Coord	Assigned Reviewer	Mx Review Budget		
Mar 4, 2020 3:34 PM	Mx Sponsor User	Document Sent	Document sent manually		
Mar 5, 2020 2:29 PM	Mx Review Budget	Reviewer Comment	final changes requested		
Mar 5, 2020 2:29 PM	Mx Review Budget	→ Sent To Sponsor			
Mar 12, 2020 2:35 PM	Mx Sponsor User	Approved	site proposals are approved and final budget is complete.		

Adding an Additional Document to a QuickSTART Application.

Budget					
Budget Review Started Mar 5, 2020	Site Budget Review 1 --	Sponsor Budget Review 1 --	Site Budget Review 2 --	Sponsor Budget Review 2 --	Budget Approved --
Budget Documents					Add Document
Document	Link	Document Name	Assigned Reviewer	Status	
Budget	QS budget.xlsx	budget	Assign Reviewer	PENDING	

QuickSTART - Add Budget Document

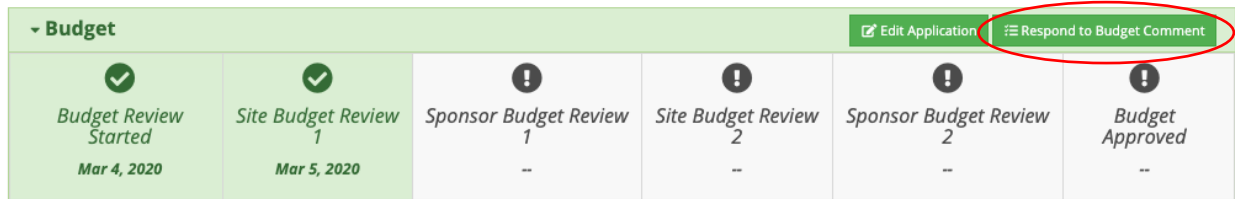
New Document	Drag & Drop your file here or click here to upload
Document Name	<input type="text" value="Enter the Document Name"/>
Document Visibility	<input checked="" type="checkbox"/> Sponsor <input checked="" type="checkbox"/> Site

Sponsor Review

When the Reviewer at the site submits their review (i.e., 'Send to Sponsor'), the QuickSTART platform will notify the applicable Sponsor users to alert them to the change of status and to indicate the next timers have begun for the sponsor's review cycle.

The Sponsor user can access this QuickSTART engagement screen by clicking the link in the email notification or by logging onto the QuickSTART platform and selecting the appropriate study and site.

The Sponsor user can review and respond to the document review by selecting 'Respond to Comments' button.



- Budget					
Budget Review Started	Site Budget Review 1	Sponsor Budget Review 1	Site Budget Review 2	Sponsor Budget Review 2	Budget Approved
Mar 4, 2020	Mar 5, 2020	--	--	--	--

The Sponsor user can 'Comment', 'Send to Site' or 'Approve'. If the document was initially uploaded to the platform, the Sponsor can also upload a revised document using the 'Add Document' button.

As with the site review, 'Comment' will only log a comment for that date, however the review timer will continue for the sponsor review cycle and no notification of change in status will be send to the site reviewer. 'Send to Site' will end the sponsor review cycle, notify the site reviewer and restart the timer for the site review.

'Approve' is an action exclusively available to the sponsor reviewer and would signify that the item is approved and negotiations for that section are complete. This should only be completed after the site has indicated that they are approved this from their side and the sponsor is ready to accept this final version.

Once a section has been approved, no additional information can be added to this section. The status will be updated automatically.

Budget					
Budget Review Started Mar 4, 2020	Site Budget Review 1 Mar 5, 2020	Sponsor Budget Review 1 Mar 12, 2020	Site Budget Review 2 -	Sponsor Budget Review 2 -	Budget Approved Mar 12, 2020
Budget Documents					Add Document
Document	Link	Document Name	Assigned Reviewer	Status	
Budget	Sponsor sent manually on Mar 4, 2020 Update Sent Date	Study 1111 Budget v1	Mx Review Budget <qsBudget>	APPROVED	
Budget Review History					
Date	User	Action	Comment		
Mar 4, 2020 3:33 PM	Mx Research Coord	Assigned Reviewer	Mx Review Budget		
Mar 4, 2020 3:34 PM	Mx Sponsor User	Document Sent	Document sent manually		
Mar 5, 2020 2:29 PM	Mx Review Budget	Reviewer Comment	final changes requested		
Mar 5, 2020 2:29 PM	Mx Review Budget	→ Sent To Sponsor			
Mar 12, 2020 2:35 PM	Mx Sponsor User	Approved	site proposals are approved and final budget is complete.		

Adding an Additional Document to a QuickSTART Application

In addition to uploading revised documents after review, the 'Add Document' feature can be used to add any additional documents to the application for any purpose.

When adding documents you can select the visibility, which will control who from the QuickSTART application can see the uploaded document. The options for document visibility are 'Sponsor' and 'Site'.

- **Sponsor** and **Site**: all users can see this document
- **Sponsor**: all Sponsor and CRO users can see this document
- **Site** : only site users can see this document
- **<None>**: Only visible to the user that uploaded the document

Note: If an additional document was added neither the sponsor and site selected as visible, then a small "eye" icon will be displayed to show the visibility restrictions.

Document Name	Link
Contract	<St
Document for Sponsor	Qu
Document For Everyone	Qu

Document Name	Link
Contract	ai

Document Visibility

This document is only visible to sponsor users.

Contract Review History

Additional documents can be removed at any time by the uploading user or by the RC for the QuickSTART site application by clicking on the garbage can icon next to the document name.

Note: Sponsor users have the ability to update the original documents that are part of the application. It is up to the sponsor whether they would like to update the original document using the 'Edit Application' feature, or upload a new revised document using the 'Add Document' feature.

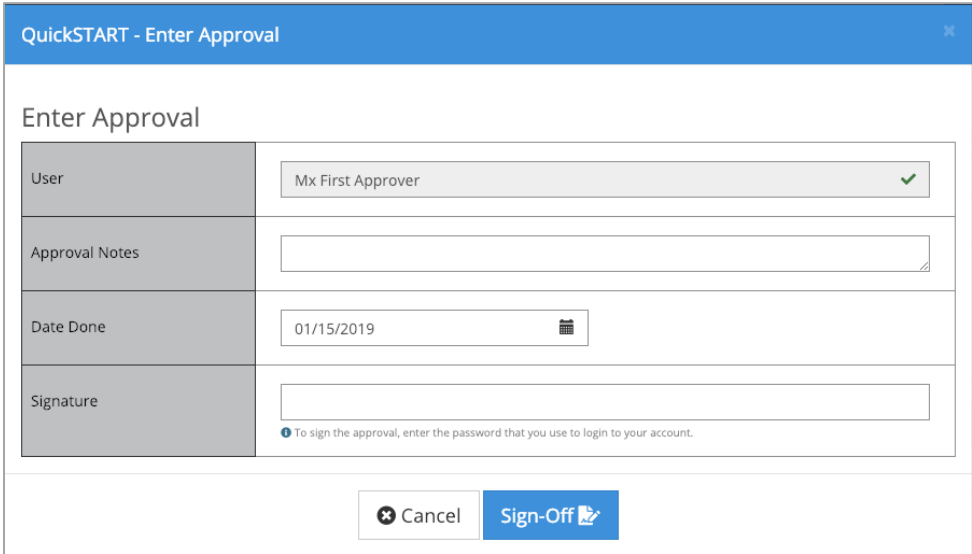
Examples of Extra Documents

- Investigator Brochure
- Final approved Informed Consent form
- Training manual

Entering an Approval Item in the QuickSTART Engagement Screen

Site Approver

The user who is assigned as an Approver can easily do so by selecting the 'Complete Approval' button in the Approvals section for the assigned approval. Selecting this button will open a pop-up screen where the Approval Notes can be entered as well as the date. The approvers signature is required- this is the password for the account of that approver. The final step is to select 'Sign off'.



The screenshot shows a dialog box titled "QuickSTART - Enter Approval". The dialog has a blue header bar with the title and a close button. Below the header, the main content area is titled "Enter Approval" and contains four input fields arranged in a table-like structure:

User	Mx First Approver <input type="checkbox"/>
Approval Notes	<input type="text"/>
Date Done	01/15/2019 <input type="calendar"/>
Signature	<input type="password"/> <small>To sign the approval, enter the password that you use to login to your account.</small>

At the bottom of the dialog, there are two buttons: "Cancel" and "Sign-Off" (with a signature icon).

QuickSTART Status Screen

The QuickSTART Status screen is shared by the Sponsor/CRO and Institution users. There is full visibility to both parties and all users that are included on the 'Roster'. This screen acts as a visual overview of each activity status.

The overall timeline is shown at the top of the screen. The status of each section is noted at the top and bottom of the section. For each review cycle, the review cycle goal is noted in days, the completion date and duration of review (once complete), and the days left to complete or days overdue are displayed when the review is pending.

QuickSTART Status Screen - QS_1111 · Stream Project Id Number: 1855

0 Mar 4, 2020 | 1 Mar 5, 2020 | 90 Jun 2, 2020

Stream REB Status

Provincial Application Created Apr 23, 2019	Provincial Application Approved Aug 30, 2019	Centre Application Created --	Centre Application Approved --
--	---	----------------------------------	-----------------------------------

Budget Status

	SPONSOR	Completion Date	Duration	Days Left to Complete	Days Overdue	Status
Round 1	Site	Goal: 20 Mar 5, 2020 2:29 PM	1	--	--	→ Sent To Sponsor
	Sponsor	Goal: 10 Mar 12, 2020 2:35 PM	7	--	--	APPROVED

Contract Status

	SPONSOR	Completion Date	Duration	Days Left to Complete	Days Overdue	Status
Round 1	Site	Goal: 40 Mar 18, 2020 3:15 PM	14	--	--	→ Sent To Sponsor
	Sponsor	Goal: 10 Mar 29, 2020	--	24	--	PENDING
Round 2	Site	Goal: 15 --	--	--	--	--
	Sponsor	Goal: 10 --	--	--	--	--

Institution Approval Status

	SPONSOR	Completion Date	Duration	Days left to Complete	Days Overdue	Status
Signatures - Mx Primary Investigator		--	--	--	--	PENDING
Overall - Mx First Approver		--	--	--	--	PENDING
Resource Approval - Mx Research Coord		Mar 4, 2020 3:12 PM	0	--	--	COMPLETED

[Back To Site Details](#)

Stream Status

If the QuickSTART application has a Stream Project ID Number, then the status screen will also show a summary of the Stream review for the related provincial and centre applications.

Stream Status

Provincial Application Created --	Provincial Application Approved --	Centre Application Created --	Centre Application Approved --
--------------------------------------	---------------------------------------	----------------------------------	-----------------------------------

As review are completed this section will update to show the dates that the events took place on.

Stream Status			
 Provincial Application Created Feb 17, 2019	 Provincial Application Approved Mar 29, 2019	 Centre Application Created Apr 3, 2019	 Centre Application Approved --

Note: This information is updated from CTO Stream in CTO Registry hourly. Due to this, it may take up to one hour for approvals entered in CTO Stream to be displayed in the QuickSTART application.

QuickSTART Completion and Metrics

A QuickSTART application and engagement is considered complete once all activities and approvals are indicated as 'Approved'. For non-single site applications that have provided a Stream ID, this includes the REB approval.

When a QuickSTART application is complete, metrics will be collected and logged for that site, sponsor and study engagement. Metrics can be further analysed to identify areas of improvement after the completion.

QuickSTART Extension

If a QuickSTART study is determined to be more complex in nature either at the start of the engagement or during the engagement, parties may collectively decide to extend the completion goal. This will still allow the start-up status to be tracked and supported by the QuickSTART platform while maintaining realistic targets.

QuickSTART Termination

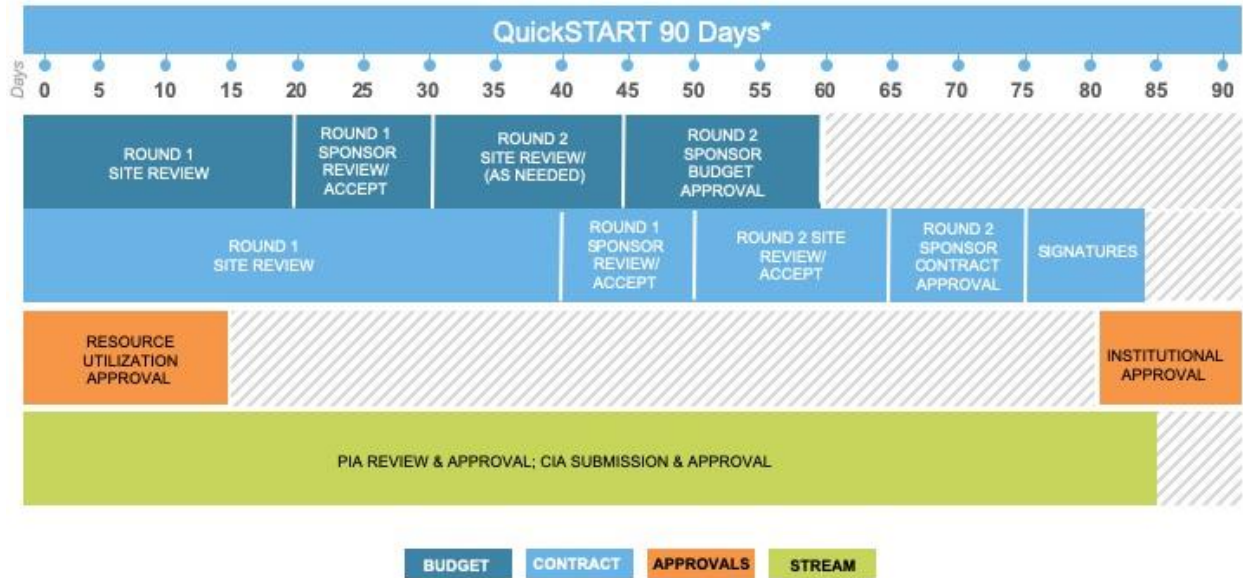
If a QuickSTART application is not being actively maintained by the Sponsor and / or the Institution, the engagement may be terminated. The QuickSTART program is built on the agreement of all parties that they are engaged and willing to meet the timelines within the QuickSTART process. If this is no longer true, the application may be deemed as no longer QuickSTART eligible and will be removed from the system.

Appendix A- QuickSTART Notifications

Timepoint/ Action	Message	User Receiving Message
Create Application	New application created	CTO, Sponsor, Research Coordinator
Pre-Screen	Status of pre-screen	CTO, Sponsor
Application submitted	QuickSTART timer has started	Investigator, Research Coordinator, Sponsor
Reviewer/ Approver is added to application	Notification- Added to a QuickSTART application	Site Reviewer/ Site Approver (newly assigned only)
Review is submitted by Site Reviewer	Notification of change in status	Sponsor
Review is submitted by Sponsor	Notification of change in status	Site Reviewer
Approval entered	Notification of change in status	Research Coordinator
Last Approval/ Review complete	Site Start-up completed	ALL assigned users
Last Approval/ Review complete + Stream PIA and CIA approved	Site is ready	ALL assigned users
Reviewer reminders	Review due in 7 days	Site Reviewer, Research Coordinator
Sponsor reminders	Review due in 4 days	Sponsor
Timeline reminders (45, 70, 80 days)	XX days left	Sponsor, Research Coordinator
Timeline reminders (85, 90 days and past due)	5 days left; Due Today; Past Due	Sponsor, Research Coordinator, Investigator

Note: CRO Users will receive all Sponsor emails

Appendix B- QuickSTART Timelines



*Sponsor application and pre-screen conducted prior to Day 0
Application package sent to site - Day 0