

QuickGuide: Creating a Participating Site Initial Application (PSIA)

The Participating Site Initial Application (PSIA) is created by Lead study team for the project in CTO Stream. Once a PSIA is created, a 'Role' can be given to the study coordinator and/or principal investigator from the site. This site-level role will allow the study team at the site to access to all existing forms for their own site and read-only access to all study-wide forms. Giving the study team a role for on their PSIA ensures they receive email notifications regarding any study-wide form submissions, and submissions for their own site.

More details about 'Roles' within CTO Stream can be found in the [Collaboration Features – Roles and Sharing](#) manual.

How to create a PSIA:

1. Log in to CTO Stream and go into the Project you wish to create a new PSIA for.
2. Click on the Clinical Trial Initial Application form in the Project Tree so it becomes highlighted in grey. If using the observational forms, click on the Observational Study Initial Application.
3. Click 'Create Sub-form' (*Figure 1*) from the Action Menu on the left-hand side of the page.

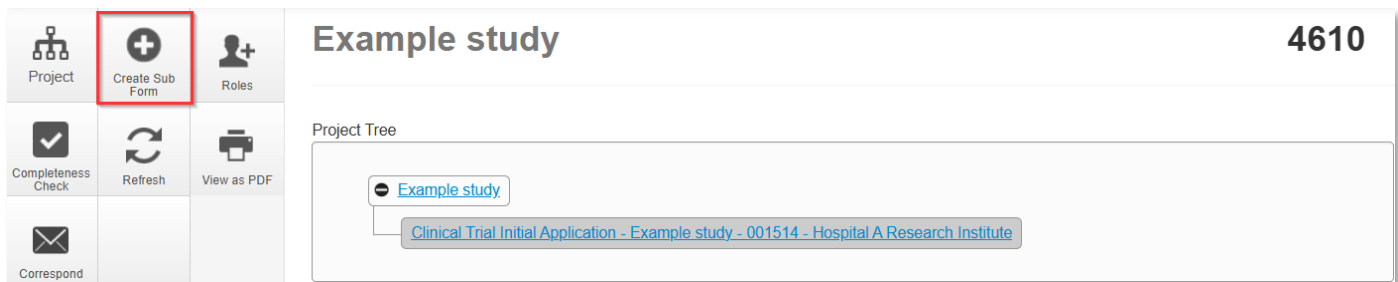


Figure 1

4. In the pop-up window, select "Participating Site Initial Application" as the type of sub-form (*Figure 2*) in the first drop-down menu.

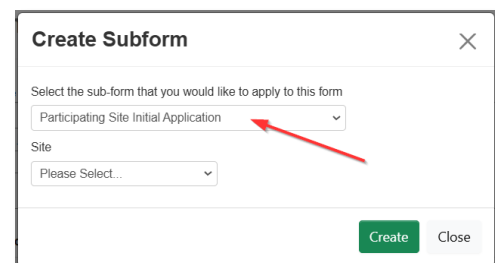


Figure 2

5. In the second drop-down menu (*Figure 3*), select the research site, or "Site" you are creating the application for. Next, tick off the checkbox at the bottom of the blue box to confirm you agree to share access to the new form with any Institutional Representatives or Institution Admins at the site. Finally, click the green 'Create' button to create the form.

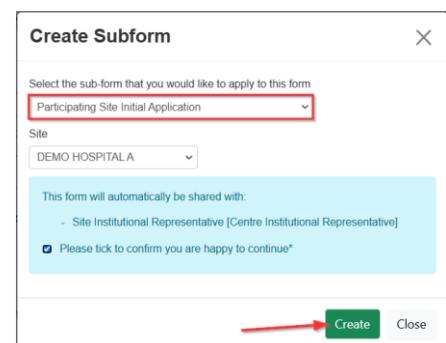


Figure 3

- Provide members of the study team at the new site access to the form you just created by clicking on the 'Roles' button while the site's PSIA is selected in the project tree (Figure 4).

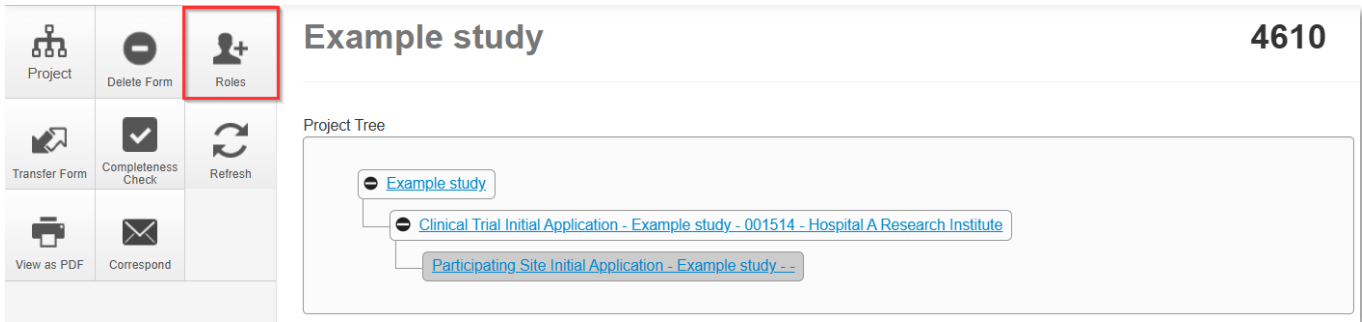


Figure 4

- The Share Roles pop-up window will appear, with a "Collaborator email" field for the email address of the user being given a role to be entered. Once the email address is entered, select the site-level role to be granted from the drop-down menu (Figure 5). Finally, press the green, 'Share Role' button at the bottom of the window to share the role.
Note: Users must have a CTO Stream account to be given a role.

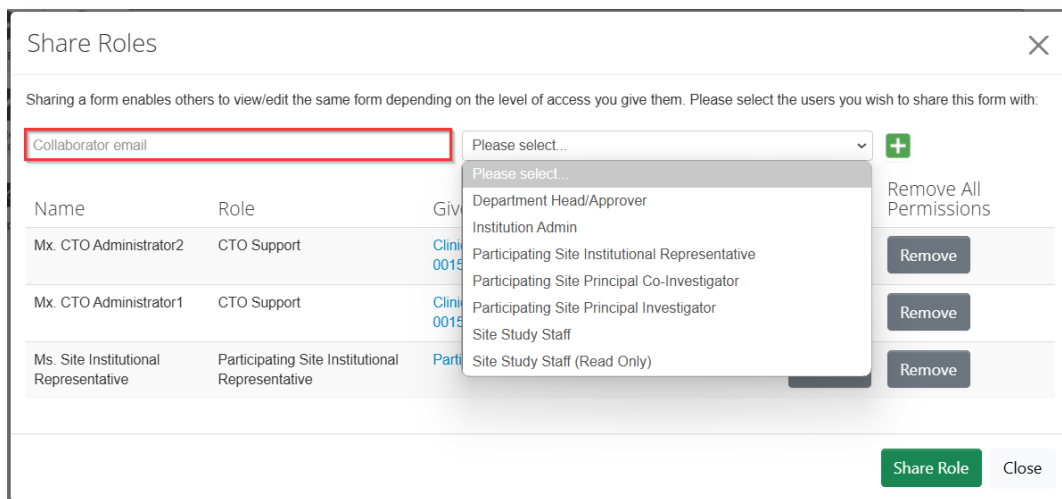


Figure 5

Tips:

- If the wrong research site name or "Site" is selected during step 4, this can be corrected by clicking the "Sites" Tab of the PSIA (below the project tree). The site name appears in the REB letter so it is important it is correct.
- The lead study team must give one or more members from each site a role on the PSIA created for their site. Once they've been given access, they can then add other personnel at their site who need access.

Questions? Submit a support ticket at support.ctontario.ca