



REB User Manual: Getting Started

Stream Helpdesk:

support.ctontario.ca



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1. About Stream

The Stream system is a web-based electronic platform designed for coordinating research ethics reviews. It was built upon Ethics Review Management (ERM), a SaaS product developed by Infonetica Ltd. This system was designed to meet the needs of both researchers and Research Ethics Boards (REBs) by streamlining multi-site research ethics reviews. Over the years we have developed a strategic partnership with Infonetica to continually develop improvements to the platform and ensure optimal website performance at all times.

1.1. Accessing the System

To access the system, go to the reviewer login portal [here](#).

1.2. Browser Settings and Operating System Requirements

The Stream website supports the latest versions of the following web browsers:

- Microsoft Internet Explorer (Version 10 or later) or Edge
- Mozilla Firefox
- Google Chrome
- Apple's Safari

Please configure your browser to ensure pop-ups are allowed. You must be running Windows 7, Windows 8 or Windows 10. For security reasons, Stream does not support Windows XP or Windows Vista.

1.3. Technical Support

Support is provided by via our online helpdesk. Visit the [Stream Helpdesk](#) to submit a ticket for any questions or issues related to your study.

2. Getting Started

Our staff will work with each REB to arrange for account creation for each REB Member and office staff. Around the time your REB receives system training, a spreadsheet will be sent to collect contact details for each user.

2.1 Logging into Your Account

You will be sent a temporary password by email once your account has been created by system administrators.

To login to your reviewer account:

- a. Go to the REB login portal [here](#).
- b. Enter the password and email address associated with your account.
- c. Click on the **Log in** button to go to your Work Area

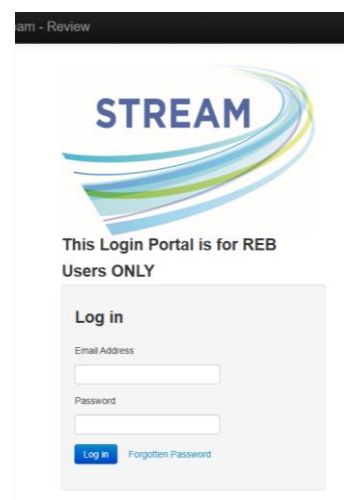


Figure 1

2.2. Account Settings

To change the contact information or password for your Stream account, click your name in the top right-hand corner of the page, then select **Personal Details** or **Change Password**. The black bar at the top of the page is always visible and referred to as the Navigation Bar.

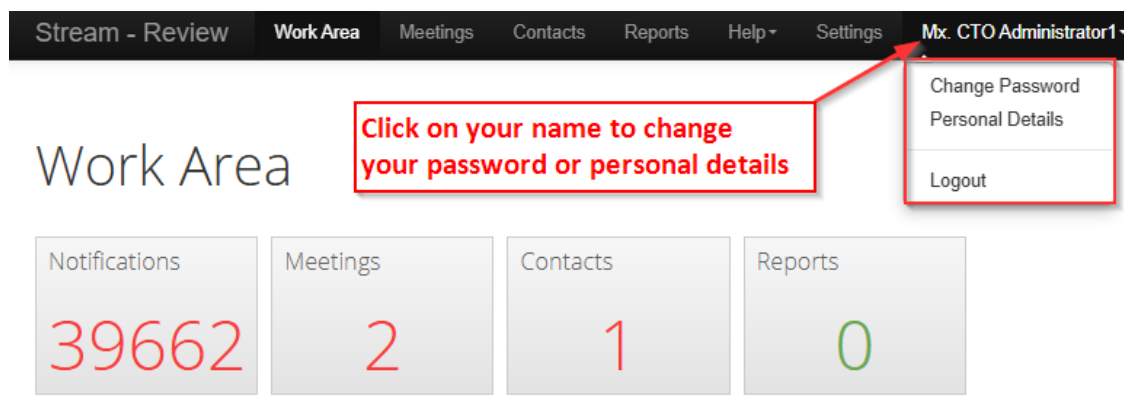


Figure 2

2.3. Changing Password

You can change your account password at any time by clicking **Change Password** (see Figure 2 above). Enter the required information to change your password.

Passwords must be between 10-64 characters and include both upper and lowercase at least one uppercase characters, at least one number, and one special character.

Change Password

Old Password*

New Password*

Confirm Password*

Figure 3

2.4. Changing Your Personal Account Information

You can change your contact information by clicking Personal Details (see Figure 2 above).

Tip: If you need to update the email address used for your account, submit a ticket via the [Stream Helpdesk](#).

Change Personal Details

Person Title

First Name*

Last Name*

Organisation

Qualifications

Telephone

Unavailable From To

Figure 4

3. Work Area (Tile System)

When users log into their Stream account, they are immediately directed to the **Work Area** page. This page acts like a dashboard for notifications and REB submissions for the REB. The grey rectangles shown in *Figure 5* below are the tiles that make up the tile system and are divided into six different categories, each in a separate tile row.

The six categories of tiles in the Work Area are:

1. General
2. My Tasks*
3. Administrative*
4. Delegated*
5. Full Board*
6. Summary*

***Review tiles that are not visible to all users. The Review tiles that appear for a user depends on the role they are given for the REB.**

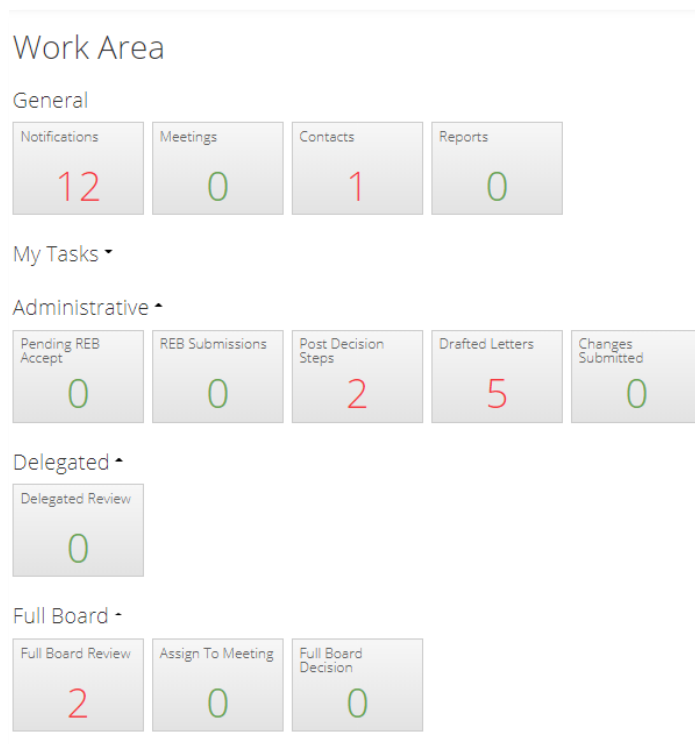


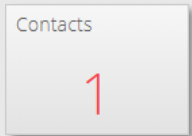
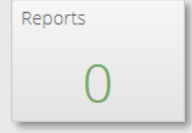
Figure 5

3.1 General Tiles

The top row of tiles in the Work Area are called the General Tiles and do not contain REB submissions. Instead, these tiles contain a list of the user's in-system notifications, REB reports and a list of past/future full board meetings. The number on the front of each tile corresponds to the number of items within. The **General Tile Group** is explained below in **Table 1**.

TABLE 1 - GENERAL TILES

	DESCRIPTION	VIEW
NOTIFICATIONS	Contains notifications about REB submissions. General updates about the status of a submission.	For My Review 0
MEETINGS	Contains the Meetings page which lists past/future full board meetings for the REB	Meetings 0

	DESCRIPTION	VIEW
CONTACTS	The Contact page contains contact information for anyone the user has saved to their contact directory.	
REPORTS	Access REB reports created by system administrators. Access to reports depends on the user's role with the REB.	

3.2 Review Tiles

Tiles which appear below the General Tile group are called Review Tiles and REB users will use them access the applications submitted to their research ethics board. The Review Tiles are named according to the specific step of the REB review process (REB workflow) the submissions are currently at. As an application progresses through the REB workflow, it will move from one Review Tile to another. The **Review tiles** are divided into five different groups, described below in **Table 2**.

Tip: The tiles that appear in the Work Area depend on the role user has. You can re-arrange the order of the tiles in any tile group.

TABLE 2 – REVIEW TILES

TABLE 2.1 - MY TASKS TILE GROUP

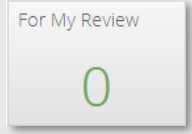
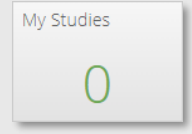
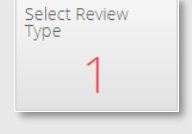
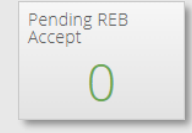
	DESCRIPTION	VISIBLE TO	VIEW
FOR MY REVIEW	Submissions for which you have been assigned as a reviewer	All users	
MY STUDIES	List of submissions to which the REB user has been assigned as "REB staff"	REB Chair, REB Staff	
SELECT REVIEW TYPE	Only visible to the REB Chair. Contains applications which are waiting for the level of review to be selected by the chair (i.e., Full Board, Delegated)	REB Chair	

TABLE 2.2 - ADMINISTRATIVE TILE GROUP

	DESCRIPTION	VISIBLE TO	VIEW
PENDING REB ACCEPT	New study submissions pending acceptance by the REB of Record	REB Director/Manager	

	DESCRIPTION	VISIBLE TO	VIEW
REB SUBMISSIONS	Contains all new submissions regardless of form type	REB Staff, REB Director/Manager	REB Submissions 0
ASSIGN REVIEW TYPE	Submissions deemed complete but waiting to have the level of review selected (e.g., full board, delegated, or administrative review)	REB Staff, REB Director/Manager	Assign Review Type 0
POST DECISION STEPS	Submissions for which a decision has already been made but letter has not yet been drafted or issued	REB Staff, REB Director/Manager	Post Decision Steps 2
DRAFTED LETTERS	Applications for which a REB letter has been drafted	REB Staff, REB Director/Manager	Drafted Letters 5
CHANGES SUBMITTED	Submissions re-submitted by applicants after making revisions	REB Staff, REB Director/Manager	Changes Submitted 0

TABLE 2.3 - FULL BOARD TILE GROUP

	DESCRIPTION	VISIBLE TO	VIEW
ASSIGN TO MEETING	Submissions that have been selected for Full Board Review but not yet assigned to a meeting	REB Staff	Assign To Meeting 0
FULL BOARD REVIEW	Submissions that have been assigned to an upcoming full board REB meeting	REB Staff, REB Members, REB Chair	Full Board Review 2
FULL BOARD DECISION	Submissions that have undergone a full board review and are pending a decision (e.g., approved, request modifications)	REB Staff	Full Board Decision 0

TABLE 2.4 - DELEGATED TILE GROUP

	DESCRIPTION	VISIBLE TO	VIEW
DELEGATED REVIEW	Contains submissions that are undergoing delegated review	REB Staff, REB Director/Manager	Delegated Review 1

TABLE 2.5 - SUMMARY TILE GROUP

	DESCRIPTION	VISIBLE TO	VIEW
CHANGES REQUESTED	Contains applications pending response from the research team	REB Staff, REB Director/Manger	Changes Requested 5
ALL APPLICATIONS	Contains all applications ever been submitted to the REB	REB Staff, REB Chair, REB Director/Manger	All Applications 52