STREAM

Applicant User Manual:

Getting Started

Stream Helpdesk:

support.ctontario.ca

Table of Contents

1. GETTING STARTED

1.1. How to Access the System

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

1.2. Browser Settings

The Stream platform supports the latest versions of the following browsers:

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

Please note the Stream system uses pop-up windows. You will need to configure your browser to ensure pop-ups are allowed.

1.3. Technical Support

- Stream Helpdesk: support.ctostream.ca
- Email: streamline@ctontario.ca

1.4. Stream Home Page

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

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

Users who do not have an account yet can register for one by following the instructions in the next section.

Figure 1

1.5. Register for a New Account

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

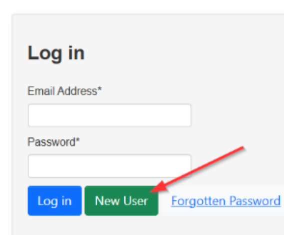


Figure 2

Upon completing registration, a verification email will be automatically sent to the email address provided. This email contains a link to verify the new account and is sent from donotreply@infonetica.net (the same is true for all system email notifications). Only after this verification step has been completed will the new user be able to login to their account.

Check "spam" or "junk mail" mailbox as the email may have been misclassified.

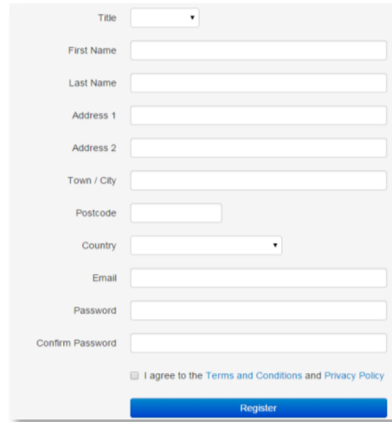


Figure 3

1.6. How to Log In

Once the registration process has been completed, enter your email address and password on the applicant login page, then click ‘Log In’.

2. NAVIGATING THE SYSTEM

2.1. Work Area

When you log into your account, the first page you arrive on is called the ‘Work Area’. This page acts like a dashboard for the projects you have access to, system notifications, signature requests, and more. Table 1.0 below provides a description of the various features of the Work Area as shown in below in *Figure 4*.

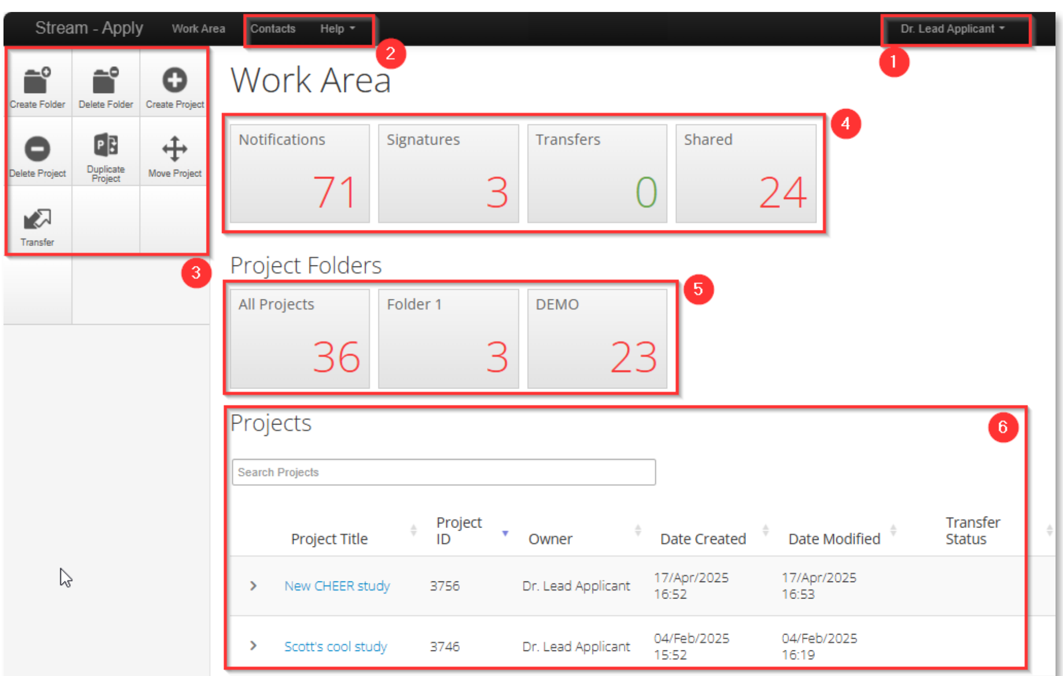


Figure 4

Table 1.0 – Work Area

	Description
1. Account name	Your full name and email address are 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 3 - Account Settings.
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, see Section 2.2 – Navigation Bar.
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 Stream. For more information, see Section 2.4 - Actions.
4. General tiles	The General tiles include 'Notifications', 'Signatures', 'Transfers' and 'Shared'. For more information, see Section 2.5 – General Tiles.
5. Folders	You can create folders to organize the projects you have access to.
6. Projects list	The list of projects which you have access to.

2.2. Navigation Bar

The Black Navigation Bar *(Figure 5)* at the top of the page is always visible, regardless of what page you are on and contains the following links:

Work Area – Takes you back to the Work Area.

Contacts – A repository of contacts that have been saved to your Stream account. These contacts can be loaded directly into contact questions of forms.

Help – Contains the following useful links:

- *Contact Information*: Contact details for system support.
- *Help*: Same as contact information above.
- *FAQ*: Frequently asked system and process-related questions.
- *Templates*: Contains links to video tutorials and user guides on about how to use the system.

About –Address and contact information.

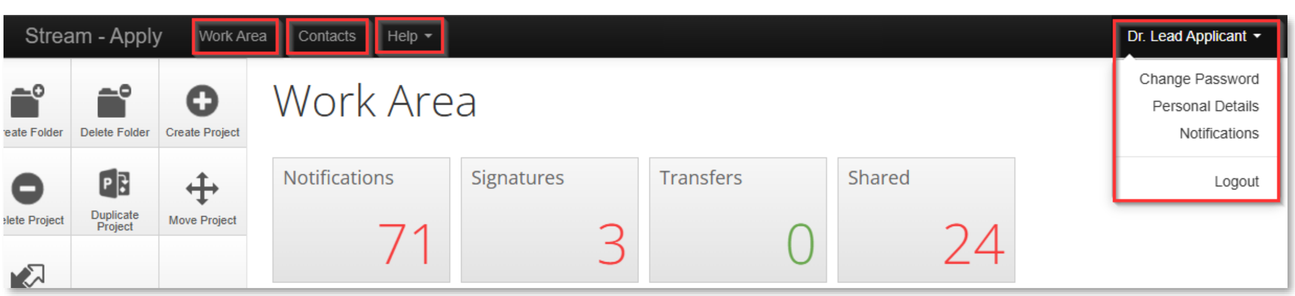


Figure 5

2.3. Contacts

The contacts page allows users to save contact information for individuals and then load this information into contact questions of application forms. Users can save new contacts, edit existing contacts, or remove contacts at any time.

2.3.1. Adding a New Contact

To add a new contact, click '+ Add Contact' (*Figure 6*) and complete the contact detail fields on the "New Contact" pop-up window. Click 'Save' when finished editing the contact details and the new contact will be saved to your Contacts list.

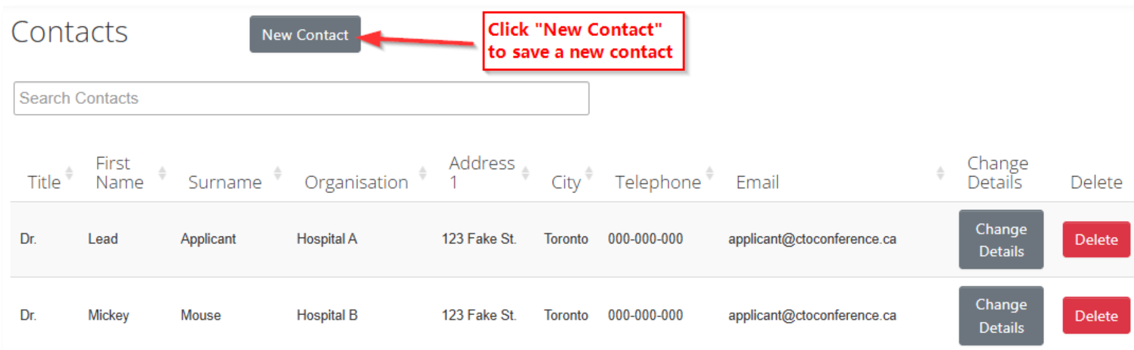


Figure 6

2.4. Actions

The Actions menu (*Figure 7*) shows the available action buttons on the current page. The actions are dynamic, which means the buttons will change depending on what page of the you are currently on (i.e., Work Area, inside the form, etc.).

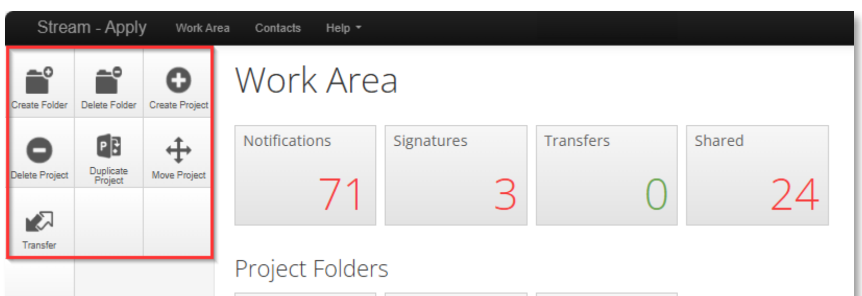


Figure 7

2.4.1. Create a New Project

To create a new project, click the 'Create Project' button *(Figure 8).* This will open the Create Project dialog box. In the "Project Title" field (*Figure 9)* enter a 'Study Nickname' or an abbreviated version of the complete title for the new study. This field is important field because it will be used to label to identify the study in the Work Area project table and is included in all system notifications and REB correspondence (including REB letters).

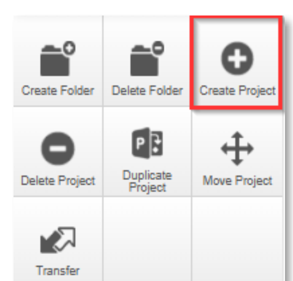


Figure 8

Next, select whether the forms will use the clinical trial or observational forms and agree to share access to the new study with system administrators *(Figure 10)*. This allows system administrators to provide necessary support and maintenance. When finished, click the 'Create' button to create the new project.

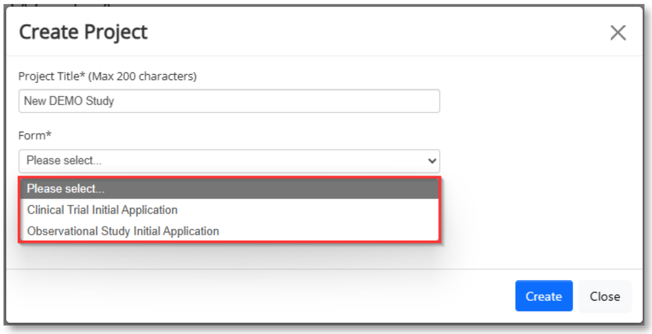


Figure 9

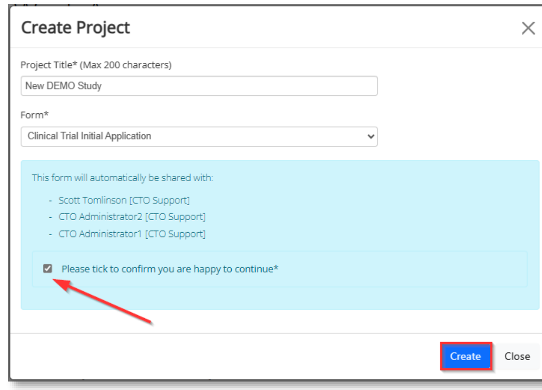


Figure 10

2.4.2. 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 11)* will cause a pop-up window to appear where the study you want to duplicate can be selected from a drop-down menu. Enter a unique title for the duplicated version of the study and then press the green, 'duplicate' button to complete the task.

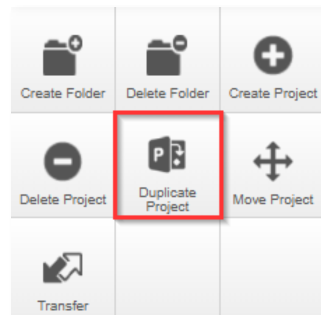


Figure 11

2.4.3. Transfer Button

When a user creates a new project in the system, they automatically become the Project Owner for the study. Ownership of the study can be transferred to another user at any time via a **Project Transfer** which can be initiated by pressing the 'Transfer' button (*Figure 12*) from the Work Area page. Once the project transfer is accepted by another user, the original Project Owner will lose access to the study.

Note: Only Project Owners can initiate a transfer of a study.
More information about Project Transfers is in the "Project Transfers" QuickGuide and the "Transferring Project Ownership" video tutorial which users can access from the [Training & Resources page](#).

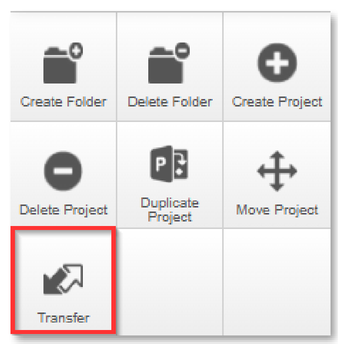


Figure 12

2.5. General Tiles

The General Tiles of the Work Area *(Figure 13)* 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 13

2.5.1. 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 on the notification message whenever action is required from the study team (i.e., responding to a request for changes from the REB). Anytime action is required from the study team an email is sent to the study team with the words "ACTION REQUIRED" in the subject line.

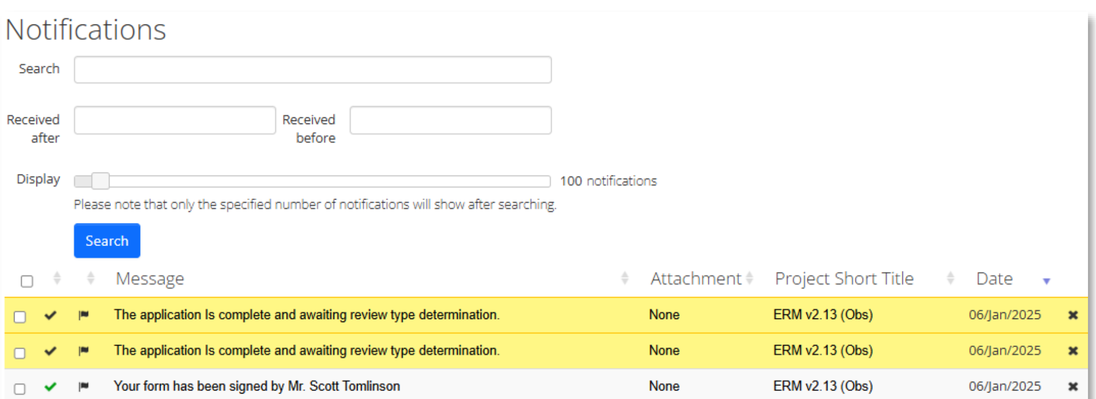
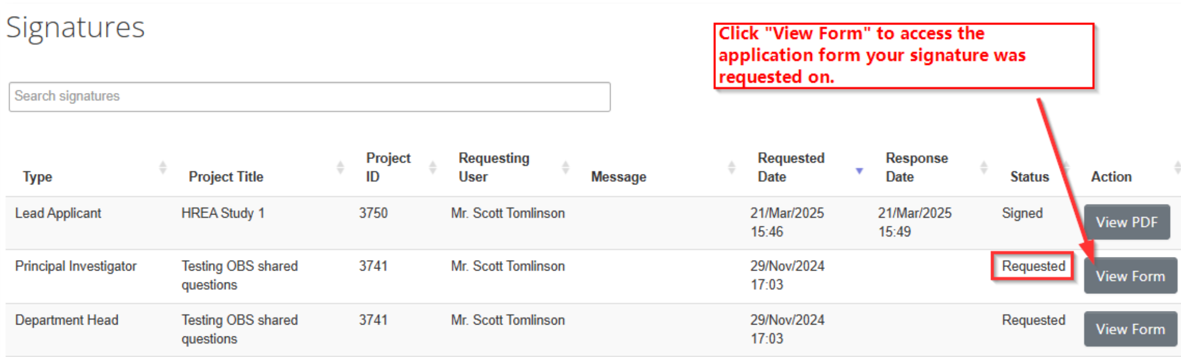


Figure 14

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.

2.5.2. Signatures

The Signatures tile contains a list of the signature requests you have received. If a signature request is still waiting for a response the status will show as “Requested” *(Figure 15),* 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.

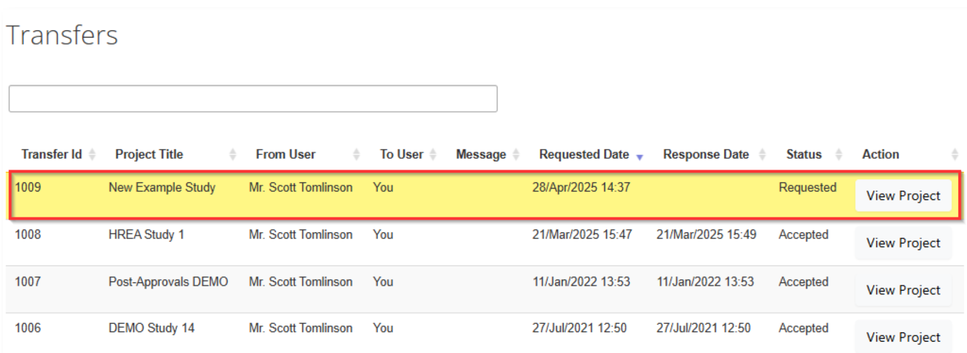


Type	Project Title	Project ID	Requesting User	Message	Requested Date	Response Date	Status	Action
Lead Applicant	HREA Study 1	3750	Mr. Scott Tomlinson		21/Mar/2025 15:46	21/Mar/2025 15:49	Signed	View PDF
Principal Investigator	Testing OBS shared questions	3741	Mr. Scott Tomlinson		29/Nov/2024 17:03		Requested	View Form
Department Head	Testing OBS shared questions	3741	Mr. Scott Tomlinson		29/Nov/2024 17:03		Requested	View Form

Figure 15

2.5.3. Transfers

The Transfers tile contains a list of any transfer requests received (*Figure 16*). Any transfers still pending a response will have a status of “Requested”. You can search through pending and completed transfer requests using the search bar.



Transfer Id	Project Title	From User	To User	Message	Requested Date	Response Date	Status	Action
1009	New Example Study	Mr. Scott Tomlinson	You		28/Apr/2025 14:37		Requested	View Project
1008	HREA Study 1	Mr. Scott Tomlinson	You		21/Mar/2025 15:47	21/Mar/2025 15:49	Accepted	View Project
1007	Post-Approvals DEMO	Mr. Scott Tomlinson	You		11/Jan/2022 13:53	11/Jan/2022 13:53	Accepted	View Project
1006	DEMO Study 14	Mr. Scott Tomlinson	You		27/Jul/2021 12:50	27/Jul/2021 12:50	Accepted	View Project

Figure 16

3. ACCOUNT SETTINGS

While logged into your account, your name and email address are displayed in the upper right-hand corner of the page.

Clicking on your name at the top of the page allows you to change your password, edit contact details, and access notifications *(Figure 17*).

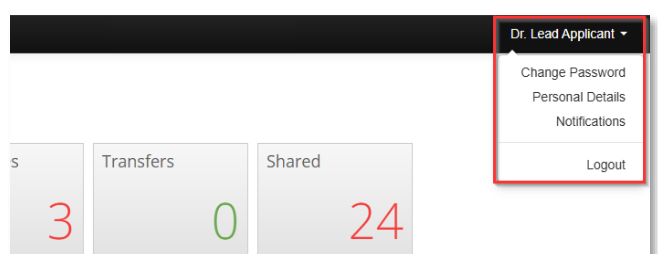


Figure 17

3.1. Changing Account Password

Clicking 'Change Password' directs you to the Change Password page (*Figure 18*). Change your password by entering your old password and choosing a new one, then click 'Change Password'.

Remember: 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.

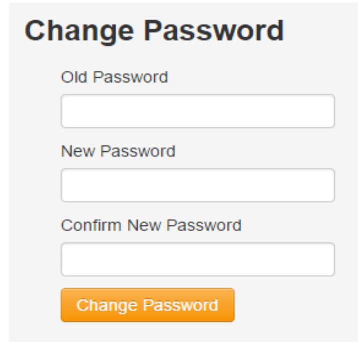


Figure 18

3.2. Change Personal Account Information

To change the contact details for your account, click on the "Personal Details" link in Figure 17. You will be directed to the Change Personal Details page (*Figure 19*) where you can update the contacts details on your account.

If you need to update the email address used for your account, contact system administrators via the [Stream Helpdesk].

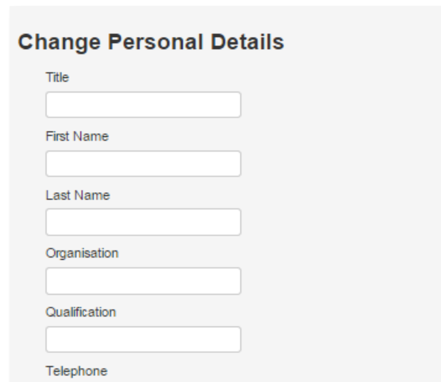


Figure 19