

## Archiving Studies Checklist



### Steps to archive a study in SiteVault to ensure you are audit-ready.

- Study Tasks & Workflows**  
Ensure all study tasks and workflows are complete
- Study Documentation**
  - Check for any draft documents in the library that may need added to the eBinder
  - Ensure the eBinder contains all essential documents
  - Ensure all essential documents have been monitored and set to 'Complete (No Issues)'
- Study Participants**  
If applicable, ensure all participants are no longer active on the study
- Partner Organizations**  
Set all partner organization(s) to inactive
- External Users**  
Set all study monitor assignments to inactive
- Products**  
Set all study product(s) to inactive
- Study Team Assignments**  
If not using digital delegation, set all study team members to inactive  
If using digital delegation:
  - Set all study team members, except the PI, to inactive
  - Set all study responsibilities to inactive
  - Send inactive assignments to PI for approval
  - Once approved, set PI to inactive
  - Ensure digital delegation has been monitored
- Archive Study**  
Set study to Archived
- Export Study Documentation**  
If applicable, export study documents, per your site's record-keeping SOP(s)