Veeva SiteVault

**Tipsheet - Preparing & Uploading Source Files**

The eISF Reference Model specifies seven types of source records:

1. Informed Consent Form (signed)
2. Source (includes visit related, lab results, medical history, concomitant medications, completed diaries)
3. Protocol Deviations (Logs)
4. Participant Adverse Event (Logs)
5. IP Accountability (Logs)
6. *[not relevant for this procedure] CRF Corrections*
7. *[not relevant for this procedure] Completed CRFs*

## 1. Prepare & scan a single study participant's source files

- Organize the participant's files (scans, PDF printouts, original source in Word, Excel, or email formats) **by type of source**; consider limiting individual scanned files to a reasonable number of pages (to better facilitate monitor review).

  *[OPTIONAL]* Use the SiteVault naming convention (a date and a description separated by a double underscore) to save time during upload.

  *Example file names:* 20200610__Visits 1-5.pdf, Signed ICF v2__07Jun2020.pdf

  *Accepted Date Formats:* DDMonYYYY, YYYYMMDD, YYYY-MM-DD

- If you don't have proper **approvals to share PHI/PII** with Monitors, redact your files.

## 2. Log into SiteVault and navigate to the Documents → Source Upload tab

- Drag the files from your computer and drop them on the page. Update field values as appropriate for each file. Use the page's table **header row** to quickly update all files at once.
- Click Save to upload files to Vault.
- Review each document in Vault, using the document action "Finalize Source" to **verify it is suitable for monitoring**.
- Once the finalization process is complete, the document will be visible to the study's assigned Monitor(s).

## 3. Delete any scanned files from your computer and repeat for the next participant

**For more details & training videos, click here to open online Help.**