

## *CTMS Close-Out: Suggested Activities*

<b>Protocol Internal Personnel</b>	Add appropriate end dates to attached internal personnel list and return with final closeout documentation
<b>Site Contacts</b>	Verify that at least the PI has an address associated at every site. (Go to the Protocols Screen tab, Site Contacts View tab and query on the role of PI.) From here you can clearly see those who do not have an address. Associate addresses as needed.
<b>Milestones</b>	Verify that crucial Site Milestones have been tracked (if applicable) Examples include: Contract Sent, Contract Executed, Reg Pack Sent, Reg Complete and Activated for Enrollment
<b>Conversation Logs</b>	Verify that all appropriate Conversations have been tracked.
<b>Site Status</b>	Verify all sites have been moved to the correct status. The " <b>Final</b> " site status should be one of the following: Approached Stop, Interested Stop or Closed
<b>Site Visits/Trip Reports</b>	Verify all Site Visits have been tracked / completed / approved. <i>If you need an electronic copy of all Trip Reports (including attachments), please note this in the final closeout documentation (indicate structure, i.e. by site, by region, etc.).</i>
<b>Follow-up Items</b>	Verify all Follow-up Items have been resolved.
<b>Protocol Deviations</b>	Verify all Protocol Deviations have been recorded and resolved.
<b>CTMS Reports</b>	Export an electronic copy and/or print out any CTMS reports you wish to keep for future reference
<b>Final Protocol Close-out from CTMS</b>	Email <b>Service Desk</b> ( <a href="mailto:helpdesk1@dm.duke.edu">helpdesk1@dm.duke.edu</a> ) the following information: <ul style="list-style-type: none"> <li>• CTMSR authorizing Protocol Close-Out (<b>REQUIRED</b>)</li> <li>• Completed Internal Personnel List (including end dates) (<b>REQUIRED</b>)</li> <li>• <b>The date the study was closed.</b> If it was closed prematurely, provide reason. (<b>REQUIRED</b>)</li> <li>• Comments or additional information that should be included in the CTMS Protocol comments for documentation purposes.</li> <li>• Request an electronic copy of Trip Reports (if applicable).</li> </ul>