

Essential Site Visit Documents

If a Project/Site is Synced from CTMS to PhlexTMF, when a Site Visit Status is changed to Sent to Sponsor, these Essential Site Visit Documents are uploaded from CTMS to the PhlexTMF reference location shown.

Visit Type	CTMS Document	Naming Convention	eTMF Reference Artifact and Sub-Artifact
Site Initiation (SIV)	Confirmation Letter to SIV	<SSS>_<PI LastName>_SIV_CL_<YYYY-MM-DD>	05.03.01 - Trial Initiation Monitoring Report >> Trial Initiation Monitoring Confirmation letter
		<SSS>_<PI LastName>_SIV_CL_UB_<YYYY-MM-DD>	05.03.01 - UB Unblinded Trial Initiation Monitoring Report >> Unblinded Trial Initiation Monitoring Confirmation letter-UB
	Follow Up Letter to SIV	<SSS>_<PI LastName>_SIV_FL_<YYYY-MM-DD>	05.03.01 - Trial Initiation Monitoring Report >> Trial Initiation Monitoring Follow-up letter
		<SSS>_<PI LastName>_SIV_FL_UB_<YYYY-MM-DD>	05.03.01 - UB Unblinded Trial Initiation Monitoring Report >> Unblinded Trial Initiation Monitoring Follow-up letter-UB
	SIV Report	<SSS>_<PI LastName>_SIV_TR_<YYYY-MM-DD>	05.03.01 - Trial Initiation Monitoring Report >> Trial Initiation Monitoring Report
		<SSS>_<PI LastName>_SIV_TR_UB_<YYYY-MM-DD>	05.03.01 - UB Unblinded Trial Initiation Monitoring Report >> Unblinded Trial Initiation Monitoring Report-UB
Site Selection (SSV)	Confirmation Letter to SSV	<SSS>_<PI LastName>_SSV_CL_<YYYY-MM-DD>	05.01.04 - Pre Trial Monitoring Report >> Pre Trial Monitoring Confirmation letter
		<SSS>_<PI LastName>_SSV_CL_UB_<YYYY-MM-DD>	05.01.04 - UB Unblinded Pre Trial Monitoring Report >> Unblinded Pre Trial Monitoring Confirmation letter-UB
	Follow Up Letter to SSV	<SSS>_<PI LastName>_SSV_FL_<YYYY-MM-DD>	05.01.04 - Pre Trial Monitoring Report >> Pre Trial Monitoring Follow-up letter
		<SSS>_<PI LastName>_SSV_FL_UB_<YYYY-MM-DD>	05.01.04 - UB Unblinded Pre Trial Monitoring Report >> Unblinded Pre Trial Monitoring Follow-up letter-UB
	SSV Report	<SSS>_<PI LastName>_SSV_TR_<YYYY-MM-DD>	05.01.04 - Pre Trial Monitoring Report >> Pre Trial Monitoring Report
		<SSS>_<PI LastName>_SSV_TR_UB_<YYYY-MM-DD>	05.01.04 - UB Unblinded Pre Trial Monitoring Report >> Unblinded Pre Trial Monitoring Report-UB
Site Selection/Initiation (SSV/SIV)	Confirmation Letter to SSV/SIV	<SSS>_<PI LastName>_SSV-SIV_CL_<YYYY-MM-DD>	05.03.01 - Trial Initiation Monitoring Report >> Trial Initiation Monitoring Confirmation letter
		<SSS>_<PI LastName>_SSV-SIV_CL_UB_<YYYY-MM-DD>	05.03.01 - UB Unblinded Trial Initiation Monitoring Report >> Unblinded Trial Initiation Monitoring Confirmation letter-UB
	Follow Up Letter to SSV/SIV	<SSS>_<PI LastName>_SSV-SIV_FL_<YYYY-MM-DD>	05.03.01 - Trial Initiation Monitoring Report >> Trial Initiation Monitoring Follow-up letter
		<SSS>_<PI LastName>_SSV-SIV_FL_UB_<YYYY-MM-DD>	05.03.01 - UB Unblinded Trial Initiation Monitoring Report >> Unblinded Trial Initiation Monitoring Follow-up letter-UB
	SSV/SIV Report	<SSS>_<PI LastName>_SSV-SIV_TR_<YYYY-MM-DD>	05.03.01 - Trial Initiation Monitoring Report >> Trial Initiation Monitoring Report
		<SSS>_<PI LastName>_SSV-SIV_TR_UB_<YYYY-MM-DD>	05.03.01 - UB Unblinded Trial Initiation Monitoring Report >> Unblinded Trial Initiation Monitoring Report-UB
Periodic Monitoring (PMV)	Confirmation Letter to PMV	<SSS>_<PI LastName>_PMV_CL_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Monitoring Visit Confirmation Letter
		<SSS>_<PI LastName>_PMV_CL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Confirmation Letter-UB
	Follow Up Letter to PMV	<SSS>_<PI LastName>_PMV_FL_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Monitoring Visit Follow-up Letter
		<SSS>_<PI LastName>_PMV_FL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Follow-up Letter-UB
	PMV Report	<SSS>_<PI LastName>_PMV_TR_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Monitoring Visit Report
		<SSS>_<PI LastName>_PMV_TR_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Report-UB
Remote (REMV)	Confirmation Letter to Remote Visit	<SSS>_<PI LastName>_REMV_CL_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Monitoring Visit Confirmation Letter
		<SSS>_<PI LastName>_REMV_CL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Confirmation Letter-UB
	Follow Up Letter to Remote Visit	<SSS>_<PI LastName>_REMV_FL_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Monitoring Visit Follow-up Letter
		<SSS>_<PI LastName>_REMV_FL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Follow-up Letter-UB
	Remote Monitoring Visit Report	<SSS>_<PI LastName>_REMV_TR_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Monitoring Visit Report
		<SSS>_<PI LastName>_REMV_TR_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Report-UB
Periodic Monitoring/Close-Out (PMV/COV)	Confirmation Letter to PMV/COV	<SSS>_<PI LastName>_PMV-COV_CL_<YYYY-MM-DD>	05.04.08 - Final Trial Close Out Monitoring Report >> Final Trial Close Out Confirmation letter
		<SSS>_<PI LastName>_PMV-COV_CL_UB_<YYYY-MM-DD>	05.04.08-UB - Final Trial Close Out Monitoring Report >> Unblinded Final Trial Close Out Confirmation letter-UB
	Follow Up Letter to PMV/COV	<SSS>_<PI LastName>_PMV-COV_FL_<YYYY-MM-DD>	05.04.08 - Final Trial Close Out Monitoring Report >> Final Trial Close Out Follow-up letter
		<SSS>_<PI LastName>_PMV-COV_FL_UB_<YYYY-MM-DD>	05.04.08-UB - Final Trial Close Out Monitoring Report >> Unblinded Final Trial Close Out Follow-up letter-UB
	PMV/COV Report	<SSS>_<PI LastName>_PMV-COV_TR_<YYYY-MM-DD>	05.04.08 - Final Trial Close Out Monitoring Report >> Final Trial Close Out Monitoring Report
		<SSS>_<PI LastName>_PMV-COV_TR_UB_<YYYY-MM-DD>	05.04.08-UB - Final Trial Close Out Monitoring Report >> Unblinded Final Trial Close Out Monitoring Report-UB

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Visit Type	CTMS Document	Naming Convention	eTMF Reference Artifact and Sub-Artifact
Site Close-Out (COV)	Confirmation Letter to COV	<SSS>_<PI LastName>_COV_CL_<YYYY-MM-DD>	05.04.08 - Final Trial Close Out Monitoring Report >> Final Trial Close Out Confirmation letter
		<SSS>_<PI LastName>_COV_CL_UB_<YYYY-MM-DD>	05.04.08-UB - Final Trial Close Out Monitoring Report >> Unblinded Final Trial Close Out Confirmation letter-UB
	COV Report	<SSS>_<PI LastName>_COV_TR_<YYYY-MM-DD>	05.04.08 - Final Trial Close Out Monitoring Report >> Final Trial Close Out Monitoring Report
		<SSS>_<PI LastName>_COV_TR_UB_<YYYY-MM-DD>	05.04.08-UB - Final Trial Close Out Monitoring Report >> Unblinded Final Trial Close Out Monitoring Report-UB
	Follow Up Letter to COV	<SSS>_<PI LastName>_COV_FL_<YYYY-MM-DD>	05.04.08 - Final Trial Close Out Monitoring Report >> Final Trial Close Out Follow-up letter
		<SSS>_<PI LastName>_COV_FL_UB_<YYYY-MM-DD>	05.04.08-UB - Final Trial Close Out Monitoring Report >> Unblinded Final Trial Close Out Follow-up letter-UB
Booster Visit (BOV)	Booster Monitoring Visit Report	<SSS>_<PI LastName>_BOV_TR_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Monitoring Visit Report
		<SSS>_<PI LastName>_BOV_TR_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Report-UB
	Confirmation Letter to Booster Visit	<SSS>_<PI LastName>_BOV_CL_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Monitoring Visit Confirmation Letter
		<SSS>_<PI LastName>_BOV_CL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Confirmation Letter-UB
	Follow Up Letter to Booster Visit	<SSS>_<PI LastName>_BOV_FL_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Monitoring Visit Follow-up Letter
		<SSS>_<PI LastName>_BOV_FL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Follow-up Letter-UB
Other	Confirmation Letter to Other visit	<SSS>_<PI LastName>_OTHV_CL_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Other Visit Confirmation letter
		<SSS>_<PI LastName>_OTHV_CL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Other Visit Confirmation letter-UB
	Follow Up Letter to Other visit	<SSS>_<PI LastName>_OTHV_FL_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Other Visit Follow Up letter
		<SSS>_<PI LastName>_OTHV_FL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Other Visit Follow Up letter -UB
	Other Report	<SSS>_<PI LastName>_OTHV_TR_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Monitoring Visit Report: Other
		<SSS>_<PI LastName>_OTHV_TR_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Report: Other-UB
Other1	Confirmation Letter to Other1 visit	<SSS>_<PI LastName>_OTH1V_CL_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Other Visit Confirmation letter
		<SSS>_<PI LastName>_OTH1V_CL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Other Visit Confirmation letter-UB
	Follow Up Letter to Other1 visit	<SSS>_<PI LastName>_OTH1V_FL_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Other Visit Follow Up letter
		<SSS>_<PI LastName>_OTH1V_FL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Other Visit Follow Up letter -UB
	Other1 Report	<SSS>_<PI LastName>_OTH1V_TR_<YYYY-MM-DD>	05.04.03 - Monitoring Visit Report >> Monitoring Visit Report: Other
		<SSS>_<PI LastName>_OTH1V_TR_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Report-UB
Unblinded	Confirmation Letter to Unblinded visit	<SSS>_<PI LastName>_UBV_CL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Confirmation Letter-UB
	Follow Up Letter to Unblinded visit	<SSS>_<PI LastName>_UBV_FL_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Follow-up Letter-UB
	Unblinded Report	<SSS>_<PI LastName>_UBV_TR_UB_<YYYY-MM-DD>	05.04.03-UB Unblinded Monitoring Visit Report >> Unblinded Monitoring Visit Report-UB