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| **Ad Hoc Exchange and Reminder Email Template Instructions** |
| **Remove this table prior to sending****\*Remove information about Safety Letter Distribution if customer is not using the Safety Letter Distribution feature\*****Purpose:** This memo can be sent to a site after documents have been sent to a Site for completion. This can also be used to remind sites of how to complete connected study related tasks. Sponsor/CRO customers are not responsible for answering SiteVault related questions from sites, Sponsor/CRO users should direct sites with questions to Veeva Site Support. Sites with study specific questions should be directed to the correct Sponsor/CRO contact.**Timepoint:** Prior to sending additional documents to sites or when documents are past due.**Role Responsible to Sending:** Veeva recommends this is sent by the Study Team member responsible for sending additional study documents to sites. |

Re: Study Name and Number

Dear Dr. Investigator Name or Site Contact,

Thank you for being a great partner with us for Study Name and Number. We recently sent you a few more documents in SiteVault and we want to be sure you know how to complete them:

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| --- | --- |
| **How do I complete the documents I’ve been sent?** | * Find and accept the Regulatory Document Package task in your Home Tab for Study Name and Number and locate the documents that were sent to you in the **Documents>Regulatory Request** tab
* Complete the **Documents to Return Section**:
	+ Revise and send back documents requiring updates. [Step by Step Guide here](https://sites.veevavault.help/gr/connected-studies/regulatory-document-requests/%22%20%5Cl%20%22revising-and-returning-a-document)
	+ Complete requests for site-original documents. [Step by Step Guide here](https://sites.veevavault.help/gr/connected-studies/regulatory-document-requests/#providing-an-original-document)
	+ Process other received documents like Sponsor Templates and Financial Disclosure Forms. [Step by Step Guide here.](https://sites.veevavault.help/gr/connected-studies/regulatory-document-requests/#processing-other-received-documents)
* File and complete the **Other Received Documents Section**:
	+ Finalize other remaining documents in the Received from Sponsor/CRO state from the Other Received Documents Section. [Step by Step Guide here](https://sites.veevavault.help/gr/connected-studies/regulatory-document-requests/#processing-other-received-documents)
	+ Send Training Material documents for a Read and Understood workflow to your team. [Step by Step Guide here](https://sites.veevavault.help/gr/documents/r%26umdw/)
* Send any other documents back to us using the Send to Sponsor/CRO document action. [Step by Step Guide here](https://sites.veevavault.help/gr/connected-studies/sending-documents/)
 |
| **What should I do for Safety Reports?** | **Remove if not using Safety Letter Distribution:*** Expedited Safety Reports will be sent to your SiteVault and can be acknowledged automatically or through a task based on the preference of your site. [Step by Step Guide here](https://sites.veevavault.help/gr/connected-studies/confirming-safety-documents/)
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If you need additional support completing these documents, reach out to Veeva Site Support at sitevaultsupport@veeva.com. Should you have any study related questions that you need help with, please do not hesitate to contact me, I can be reached at ###-###-#### or <Study Team Email>.

Sincerely,

Name

Title

Email: <Study Team Email>