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| **Remote Monitoring Readiness Email Template Instructions** |
| **Remove this table prior to sending****Purpose:** This memo is intended to be distributed to sites who have agreed to use SiteVault for remote monitoring. This memo provides the site with “how to” information and resources to ensure they are ready for an upcoming remote monitoring visit in SiteVault. Sites should reach out to the customer contact if there are study related questions regarding customer’s intent to remote monitor via SiteVault. The site should reach out to *Veeva Site Success at* *sitesuccess@veeva.com*if they need support in any way in ensuring they are ready for remote monitoring via SiteVault.**Audience:** Investigator and/or Research Staff**Timepoint:** send at least 2 business weeks in advance of a scheduled remote monitoring visit to provide enough time for sites to finalize documents and ensure they understand the remote monitoring workflow. **Role Responsible to Sending:** Veeva recommends this is the study team member assigned as oversight to the study site (usually the Clinical Research Associate/Monitor) |

Re: Study Name and Number- Readiness for Remote Monitoring via Veeva SiteVault

Dear Dr. Investigator Name or Site Contact,

Now that your site is signed up for Veeva SiteVault, we would like to conduct your first remote monitoring visit for Study Name and Number *in the next X business weeks*. This will be completed remotely in SiteVault and allow you to provide external access to your monitor so they can provide feedback electronically to you in real time on your study documents. There are a few things your team will need to do to prepare for this visit, so we have created a list below of what you need to have completed prior to the start of the visit.

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| **How do I get setup?** | * Create the Sponsor Study Name and Number study with study team members, organization(s) and product(s) created as applicable. [Step by Step Guide here](https://sites.veevavault.help/gr/studies/managing-studies/#creating-and-editing-studies)
* Add additional study team members who will be working with monitors in SiteVault. [Step by Step Guide here](https://sites.veevavault.help/gr/profiles/managing-users/#:~:text=their%20User%20record.-,Creating%20Users,-3%3A36)
* Upload and approve study documents in SiteVault. [Step by Step Guide here](https://sites.veevavault.help/gr/documents/studydocs/)
* Create Patients and Participants and add to the study. [Step by Step Guide here](https://sites.veevavault.help/gr/studies/managing-participants/)
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| **What do I need to do to prepare?** | * Complete Veeva’s On Demand Remote Monitoring Deep Dive training [here](https://sites.veevavault.help/gr/resources/videos/training/#remote-monitoring-deep-dive)
* Ensure all study documents to be monitored are in an approved or steady state (e.g. Approved for Use, Current, Final). [Step by Step Guide here.](https://sites.veevavault.help/gr/documents/sourcedocs/)
* Setup your assigned CRA/Monitor as an External User in SiteVault **AND** ensure that they are added to the Monitor & Auditor Assignments. Note: You can save time by scheduling monitor study access in advance. [Step by Step Guide here](https://sites.veevavault.help/gr/profiles/grant-monitor-access/)
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| **More questions?** | Reach out to Veeva Site Success (sitesuccess@veeva.com) with any additional questions. |

Veeva Site Success (sitesuccess@veeva.com) is available to support your site in any way while you get your SiteVault ready for remote monitoring visits. Please do not hesitate to reach out to Site Success to help ensure your remote monitoring readiness.

We look forward to the upcoming remote visit and to continuing to partner with your site on this study.

Sincerely,

Sponsor Study Team Contact

Title