

# How to Mark a Site as Closed

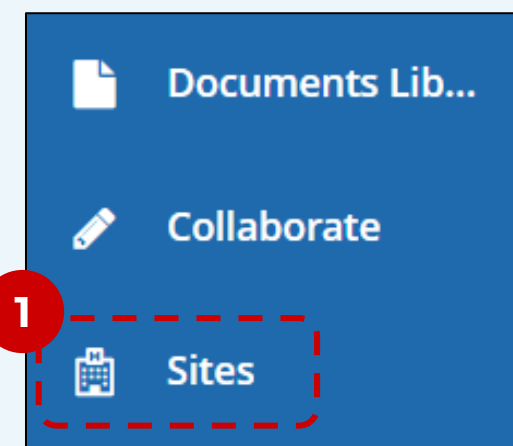
TI version 10.8

## APPLICABLE TO:

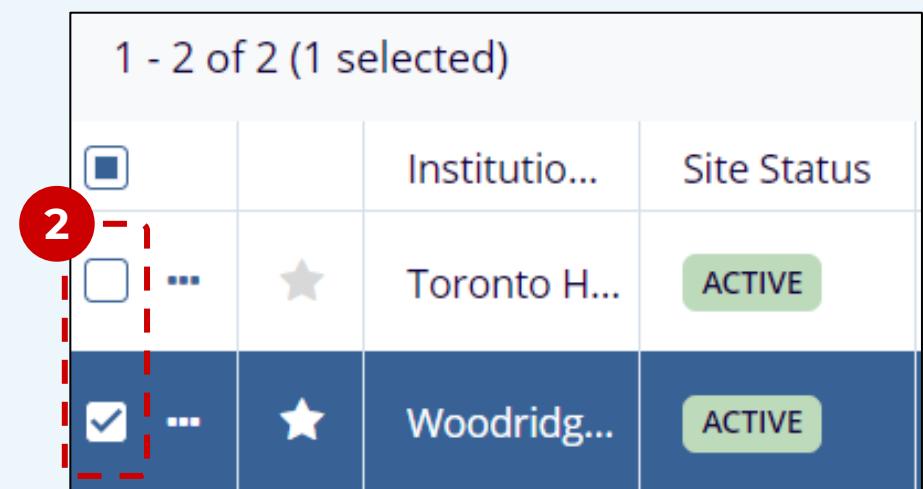
- Admin
- Manager
- Editor
- Reader
- eTMF
- Collaborate
- eISF

As sites conclude their activity for a specific trial or company, the related 'Site' entities in TI need updating. Depending on room configuration, this may require a manual process. This Job Aid guides users in performing that process.

- 1 Using the navigation column, enter the **Sites** area.



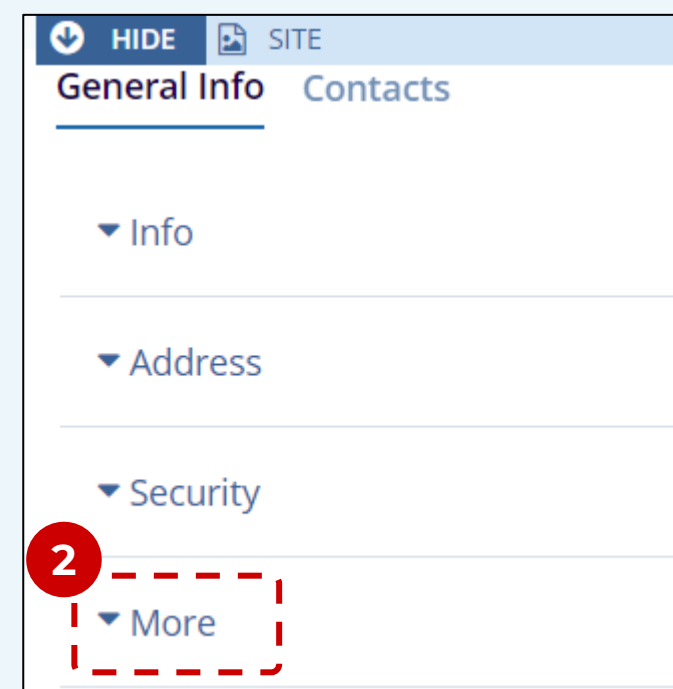
- 2 Select **one** Site.



A screenshot of a table showing a list of sites. The table has four columns: a selection column with checkboxes, an ellipsis column, a star column, a name column, and a 'Site Status' column. The first row is highlighted in blue, indicating it is selected. A red dashed box highlights the first row's selection checkbox, and a red circle with the number '2' is placed to its left.

1 - 2 of 2 (1 selected)			
<input type="checkbox"/>		Institutio...	Site Status
<input type="checkbox"/>	...	Toronto H...	ACTIVE
<input checked="" type="checkbox"/>	...	Woodridg...	ACTIVE

- 3 Expand the Site pane at the bottom of your screen. Scroll to and click on the **More** section.



**4** Extend the Status dropdown, and select **Closed**.



If this dropdown is not selectable, the room is likely integrated with offerings that auto-manage site statuses (like CTMS or SSU).

The screenshot shows a 'More' dropdown menu with several fields: 'Expiration Date' (dd MMM yyyy), 'Status' (ACTIVE), 'Preferred Communication Mode' (ACTIVE), 'Main IRB/EC Name', and 'Reg Pack Sent Date'. The 'Status' dropdown is expanded, showing options: PENDING, ACTIVE, NON PARTICIPATING, REJECTED, MAINTENANCE, and CLOSED. The 'CLOSED' option is highlighted with a red dashed box and a red circle with the number 4.

**5** Scroll to and enter the **Effective Closure Date**.

The screenshot shows the 'Effective Closure Date' field with a date entered as '12 MM yyyy'. The field is highlighted with a red dashed box and a red circle with the number 5.

**6** Save your changes. Button is located at bottom of the Site pane.

The screenshot shows two buttons: 'Save' and 'Save & Next'. The 'Save' button is highlighted with a red dashed box and a red circle with the number 6.

**7** The site is now listed in the **Closed** category.

The screenshot shows a folder view with a dropdown menu open. The dropdown menu shows 'All', 'Active 19', and 'Closed 1'. The 'Closed 1' option is highlighted with a red dashed box and a red circle with the number 7.