

Veeva Vault Study Startup Feature Checklist

As trials and protocols increase in complexity, moving beyond Excel trackers to manage study start-up processes becomes critical to ensure on-time site activations. From event-driven automation that triggers downstream updates to unification with other clinical systems, this checklist highlights all of the features you should look for in a study start-up application to optimize start-up activities and get to First Patient First Visit faster.



Study Setup and Planning

- ☐ Milestone durations
- ☐ Predictive planning

Site Qualification and Selection

- ☐ Investigator, organization, and person database
- ☐ Site identification workflow
- ☐ Site identification searching and matching
- ☐ Site qualification and selection workflow
- ☐ Feasibility surveys

Essential Document Collection

- ☐ Site package distribution and document collaboration
- ☐ Document management
- ☐ Site and investigator document re-use
- ☐ Auto-filing in Vault eTMF
- ☐ Shared workflows and data with Vault CTMS in a single, unified environment

Site and Country Activation

- ☐ Country start-up templates and workflows for 45+ countries
- ☐ Role-specific startup homepages
- ☐ Critical path management
- ☐ IRB/EC submission management
- ☐ Milestone auto-completion
- ☐ Ad-hoc events and milestones
- ☐ Contract and budget negotiation workflow
- ☐ Budget tracking
- ☐ Cycle time metrics

Site Greenlight Review and Approval

- ☐ Site activation progress tracking
- ☐ Greenlight package approval workflow

Reporting and Visibility

- ☐ Metrics and cycle time tracking
- ☐ Configurable reports and dashboards

Application Security and Access Controls

- ☐ Granular profile and role permissions
- ☐ Object-level and workflow security

See a demo of all these capabilities in Vault Study Startup today.

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