SSU COMPRESSION GUIDE:

From Feasibility to Site Activation in 10 Steps

This guide keeps the energy flowing so decisions turn into action without stalls, rework, or inbox archaeology.

This 10-point CTMS Health Check helps sponsors and CROs spot the real causes of slowdowns, such as process issues and owner gaps, before they become inspection findings.

It's vendor-agnostic on purpose and uses controls you can defend in any inspection:

- Clear ownership
- Time-zone-aware timestamps
- Versioned documents
- Traceable handoffs into CTMS, eISF, and eTMF

1 Start where you are, instead of where you wish you were

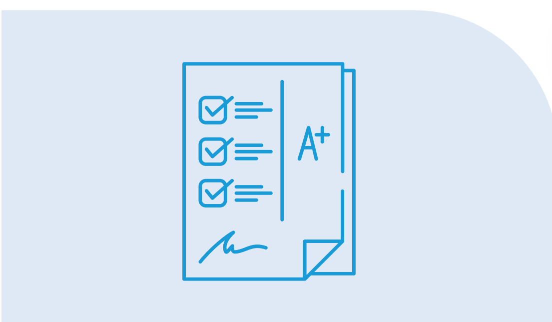
Before you move a single status, gather what you already have: the ranked site list, the notes behind those rankings, and the supporting files. Write down who made the call and when. If an artifact belongs in the TMF, file it now with the required metadata. Remember, you're not "doing admin." You're making sure you never have to explain a ghost decision later.

2 Make the site choice defensible in one page

Capture each selection or deferral using a simple decision sheet: study ID, site ID, what you decided, why you decided it, which data you used, who approved, and the approval timestamp. Link the small handful of files that informed the choice. If you can read this page and nod, you're ready to move on and you won't need a meeting to reconstruct it.

3 Walk the country path before it blocks you

Every country has its own rhythm. List the ethics, authority pathways, and all the documents each one expects. Put a name and a date next to each prerequisite. If a step is blocked, write the blocker and the next action, not just "pending." Owners, dates, and next actions are how work moves without a chase.

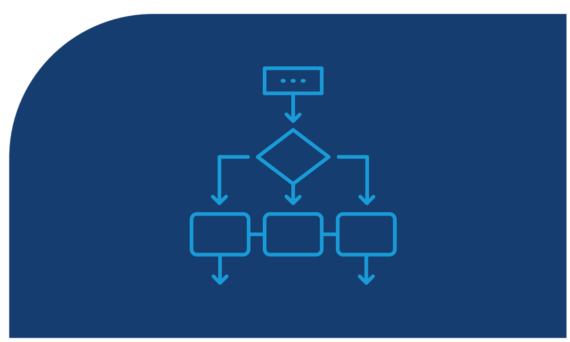


4 Prepare the eISF to show the right version the first time

Pick the documents the eISF will present during SSU. For each one, confirm the rendition is controlled (e.g., PDF/A) and that it carries its source document ID, version, and effective date in a way users can see or retrieve. This is the difference between "a file in a folder" and "a document you can defend."

5 Let CTMS statuses do real work

Statuses are gates and you should treat them as such. Check the transitions your team uses: entry criteria, exit criteria, and who can move them. Align your milestones to those transitions so the plan and the truth don't drift apart. When a status changes, it should be because something specific happened and it needs to be reflected in the file.



6 Pre-stage the tasks you know are coming

From your site choices, generate the SSU tasks you'll need, assign owners, and set due dates. If a task can't start yet, write the reason and the trigger that will unblock it. When the trigger fires—document received, approval granted, status changed—the task is ready to go. This way, the "who's doing this?" emails are not required anymore.

7 Fix access once so you don't fix it five times later

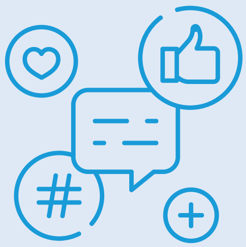
Provision accounts using least-privilege roles and the same identity source wherever possible. Remove test accounts and stale access now, instead of next month. Make sure audit logs capture who did what and when, with time-zone-aware timestamps. Identity hygiene sounds boring until it saves you three days during an inspection.

8 Prove the whole path in 30 minutes

Run a quick drill with one real site: open the decision page and point to the approver and timestamp, publish a controlled rendition that the eISF will present, set the pre-activation status in CTMS and show the entry criteria met, file the decision and the rendition to the TMF with the right metadata, and pop open the audit trail for each step. Two clicks per proof point is the bar. If you can't hit it, you just found the work that needs to be done.

9 Track variance once, then fix the step

When planned SIV or LPI dates slip, note the variance and the root cause in a small tracker. Was it missing country paperwork? Slow document turnaround? Access not provisioned? Record what you'll change next time. The tracker isn't for knowing who to blame, it's for patterns that help you. These patterns are where cycle time hides.



10 Close the loop while the details are still true

After your first activations, hold a 20-minute retrospective. Ask: where did work wait and why? Convert the answer into a template, a checklist item, or a rule in your workflow so it doesn't repeat. File the retrospective notes with the study so the improvement is as real as the activation.

What "Good" Looks Like

(Quick reference)

- Decisions are captured with identity, timestamp, and links to real evidence
- eISF documents are controlled renditions with source ID, version, and effective date
- CTMS statuses have entry/exit criteria that match milestones
- Tasks have owners, dates, and next actions; blockers name the trigger to resume
- Audit logs tell the same story as the files, across all systems, not just one of them

The Variance Tracker

(How you actually reduce cycle time)

For each site, record planned and actual SIV/LPI dates, the variance, the one-line reason, and whether you fixed the step that caused it. If the same reason appears three times, you've found your highest-leverage change.

The 30-Minute Dry Run

(Script you can follow)

- Open one site's decision page, say out loud who approved and when.
- Open the ranked list and show why this site rose to the top.
- Open one controlled rendition, then point to its source ID, version, and effective date.
- Flip to CTMS: show the status change and the entry criteria met.
- Open the audit logs, read the timestamp.
- **Done.** If any step takes hunting, tighten that step tomorrow.

Want to see this run inside a connected platform?

Watch a feasibility-to-SSU flow where decisions, documents, statuses, and filings line up in minutes, instead of daily meetings.

Book a Trial Interactive Demo

Pressure-test your process against a live, inspection-ready workflow.

Trial Interactive is a connected platform designed specifically for clinical research teams who need to move from site feasibility through activation without delays, rework, or lost context. The platform ensures every decision, document, and handoff stays traceable across your CTMS, eISF, and eTMF while maintaining inspection-ready audit trails. See how teams are compressing SSU timelines by eliminating manual coordination and building repeatable workflows that actually scale.