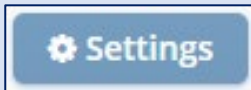
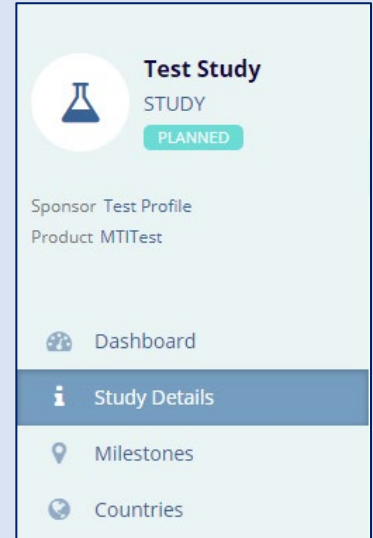


APPLICABLE TO:

- Company Administrator
- Study Manager
- CRA
- CTMS

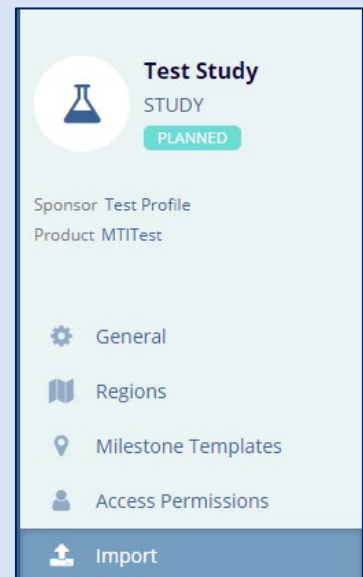
1. Log into the CTMS, navigate to the study to which you would like to import subject data.

2. Navigate to the **Study Details** area using the navigation links at the left.

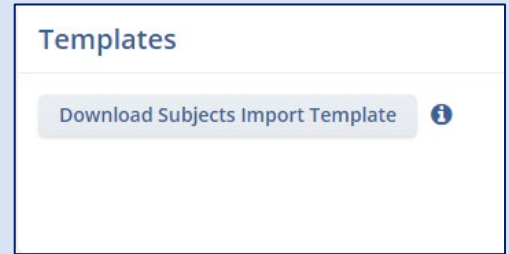


3. Press the **Settings** button at the top-right corner of the screen.

4. Select the **Import** option from the navigation links at the left.



5. Using the link displayed, download the **Subjects Import Template** if you have not already done so.

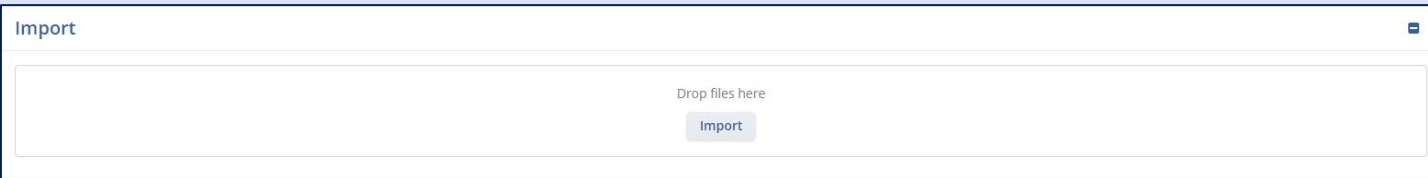


6. Enter the data to be imported onto the template downloaded in step 5.

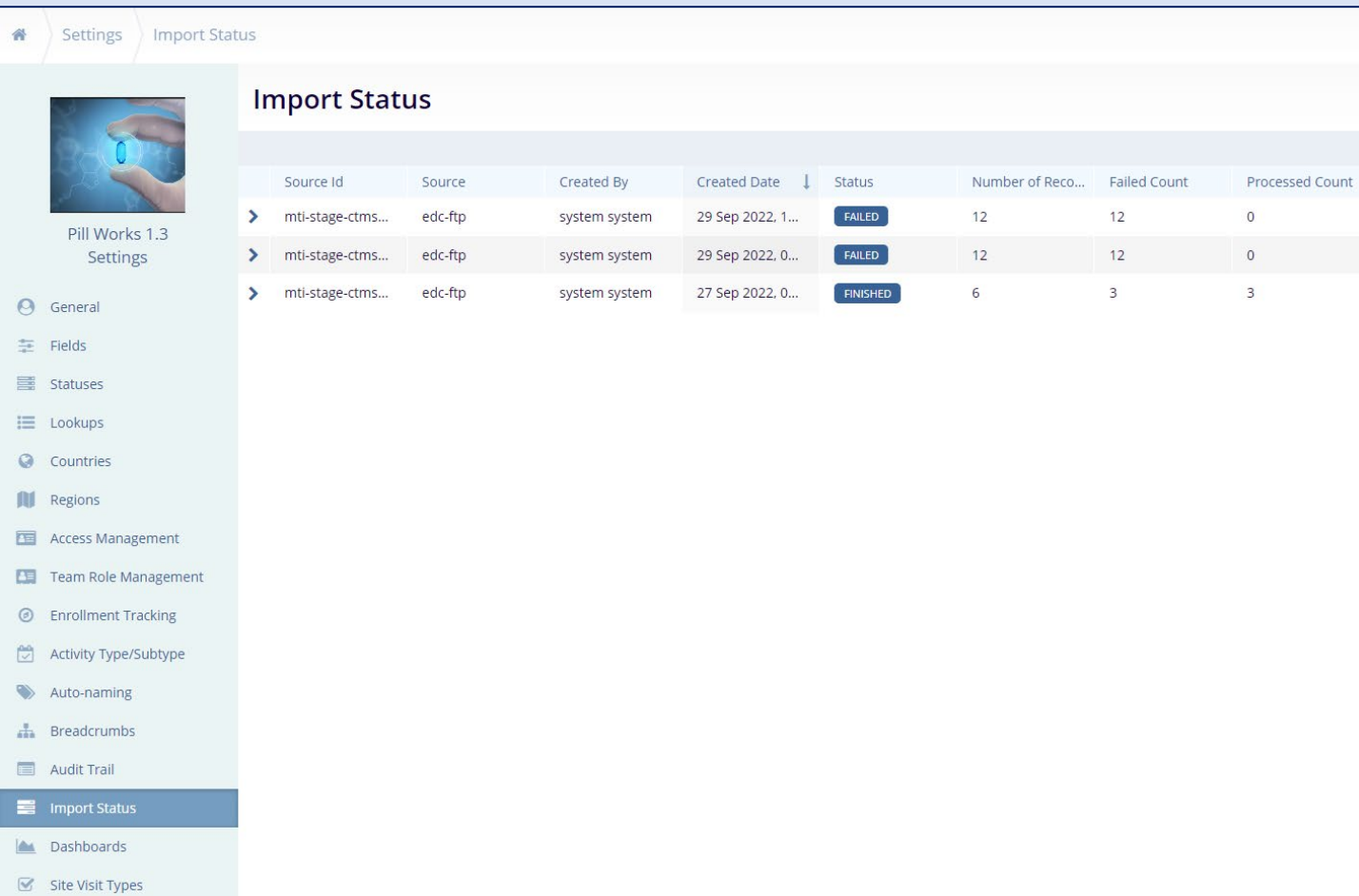
Here are some general tips/info about filling out the template:

- Imported data can be new subject entries or changes to existing subjects.
- Multiple changes to one subject may be imported on the same spreadsheet.
- When updating an existing subject, make sure that the Subject Number, Site Number, etc. are correct so that a new subject is not generated.
- The import file must be in .xlsx format when uploaded.
- The import file must have a site number (Column G) or it will fail.
- To import something new, you need to at least have the Subject ID, correct Site Number of a Site located in the Study, Current Status and Status Date in the correct format on the Subjects tab.
- To update an existing record, the Subject ID and Site Number must be provided.
- The Subject Import function is additive only. The CTMS will not delete information from the subject record if it is not present in the file.
- All entries must conform to the requirements for the import template. Incorrectly formatted data will not upload successfully.

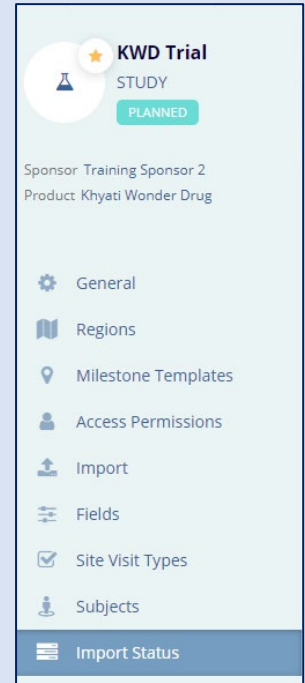
7. Either press the **Import** button or drag and drop the file into the Import area.



8. Company Administrators may navigate to the Settings area and select the **Import Status** option to view the status of import attempts.



9. The status of the import may be tracked from the 'Import Status' area in the navigation links at the left side of the screen.



Import Status

| Source Id | Source | Created By | Created Date ↓ | Status | Number of Recor... | Failed Count | Processed Count | Transaction Id | Destination Id | Destination Type |
|--------------------|-------------|--------------|--------------------|----------|--------------------|--------------|-----------------|----------------|----------------|------------------|
| imports/mti_sta... | file_import | Steven Clark | 10 Oct 2023, 03... | FINISHED | 1 | 0 | 1 | 01HCDKH23Z2... | 01HA7FAB1TM... | Study |