

How to Transfer a Subject

CTMS version 3.1

- APPLICABLE TO:
- Company Admin
 - Study Manager
 - CRA

1 Locate the subject and use the checkbox to select the record.

2 Press the **Transfer** button.

The screenshot shows a table of subjects. A red dashed box labeled '1' highlights the first column containing checkboxes, with the first checkbox checked. Another red dashed box labeled '2' highlights the 'Transfer' button in the top right corner of the table area.

	1 ↓	Subject ID	Current Status
<input checked="" type="checkbox"/>	★	T-002-001	ENROLLED
<input type="checkbox"/>	★	T-001-007	TRANSFERRED IN
<input type="checkbox"/>	★	T-001-008	TRANSFERRED IN

3 In the Transfer Subject window, indicate the Site to which the subject is transferring and the date on which the transfer occurred.

4 Press **Transfer** to complete the transfer process.

The screenshot shows the 'Transfer Subjects' dialog box. A red dashed box labeled '3' highlights the 'Site' dropdown menu and the 'Transferred Date' field, which contains '13 Dec 2024'. Another red dashed box labeled '4' highlights the 'Transfer' button at the bottom right of the dialog.

Transfer Subjects

Please Select Site to which Subjects will be transferred.

i When transferring subjects, the assigned visit schedule will be removed. The following data will be available for the transferred subjects at the new site:

- Subject Details
- Subject Status history - viewable history cannot be edited under the new site
- Subject Visit history - subject visit history cannot be edited under the new site

Site * Transferred Date *

13 Dec 2024

1 Subjects

Subject ID	Status
T-002-001	ENROLLED

Cancel Transfer

Note: You will not be able to edit the subject’s record from this site after this process has been completed.