



**Sheffield Health  
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### **What are the steps to follow when archiving?**

- Request the necessary supplies e.g boxes
- Have the necessary paperwork for completion for both site and sponsor records
- Make sure that all site files and documents are collected and that nothing is missed
- Don't overfill your boxes nor add documents for multiple studies in the same box.
- When preparing your documents, ensure all the duplications are removed-only retain one copy of each document
- Remove documents from ring binders and from plastic wallets. Ensure any rubber bands and paper clips are removed
- Print any associated emails that form part of the site file
- When boxing the documents, organise them to match the checklist template order
- When adding documents relating to participants visit, always store in chronological order with earliest visit on top.
- Label each box clearly with the study name, PI name and IRAS number and the description of the contents. Any patient research data must be clearly identifiable from the box label.
- Double check the contents form and sign

- Allocate box numbers, labels and add details onto the local archiving system
- Keep a copy of the contents form for site records and seal the box.
- Update any local record and EDGE