

How to Review a Report

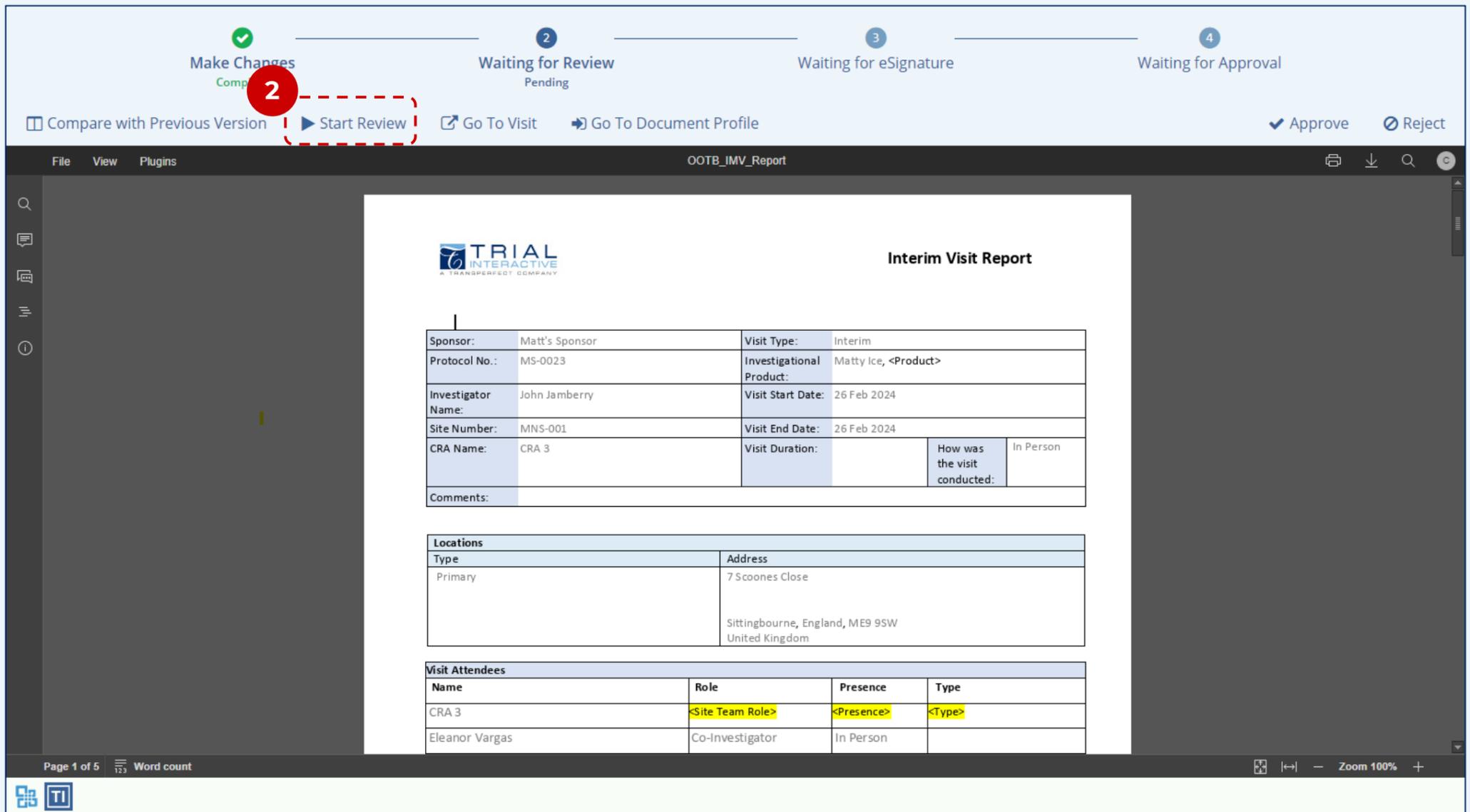
CTMS version 2.0

APPLICABLE TO:

- Company Admin
- Study Manager
- CRA

Note: This assumes that the visit report has already been created and submitted for review. These steps can only be done by the user who has been assigned the appropriate access privileges and has been designated as a report reviewer for the study.

1 Open the visit report.



The screenshot displays the CTMS interface for reviewing a report. At the top, a progress bar shows four stages: 1. Make Changes (Completed), 2. Waiting for Review (Pending), 3. Waiting for eSignature, and 4. Waiting for Approval. Below the progress bar, a toolbar contains buttons for 'Compare with Previous Version', 'Start Review' (highlighted with a red dashed box and a red circle with the number 2), 'Go To Visit', 'Go To Document Profile', 'Approve', and 'Reject'. The main content area shows a document titled 'Interim Visit Report' with the TRIAL INTERACTIVE logo. The document contains the following tables:

Sponsor:		Visit Type:	
Matt's Sponsor		Interim	

Protocol No.:		Investigational Product:	
MS-0023		Matty Ice, <Product>	

Investigator Name:		Visit Start Date:	
John Jamberry		26 Feb 2024	

Site Number:		Visit End Date:	
MNS-001		26 Feb 2024	

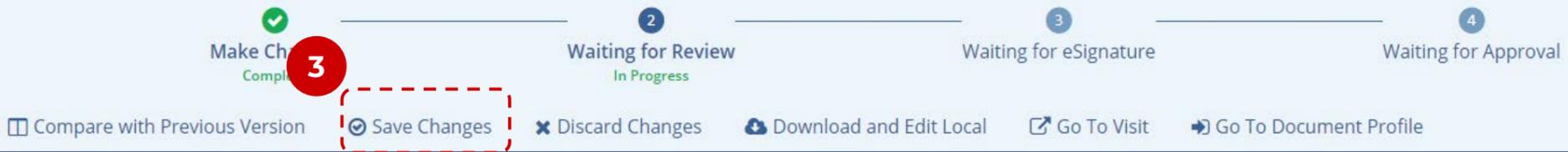
CRA Name:		Visit Duration:		How was the visit conducted:	
CRA 3				In Person	

Locations	
Type	Address
Primary	7 Scoones Close Sittingbourne, England, ME9 9SW United Kingdom

Visit Attendees			
Name	Role	Presence	Type
CRA 3	<Site Team Role>	<Presence>	<Type>
Eleanor Vargas	Co-Investigator	In Person	

2 Press **Start Review**. The screen will reload with the document in an editable view.

3 Make any required comments and, in the menu bar above the document, press **Save Changes**.



4 Once the screen reloads, press **Accept** or **Reject** as appropriate.



5 Provide a Reason for Rejection or confirmation of your intent to approve the document, as necessary.

Reject

Enter reason for rejection*

Document Approval

Are you sure you want to approve this document?