

# How to Generate a Visit Report

CTMS version 2.1

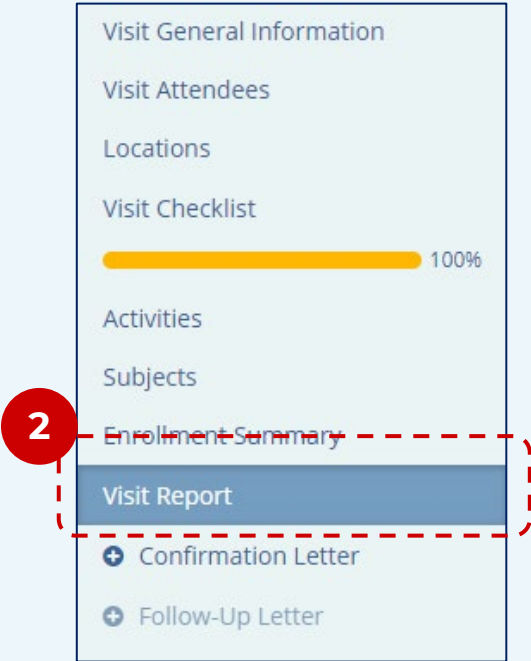
- APPLICABLE TO:
- ☐ Company Admin
  - ☐ Study Manager
  - ☒ CRA

**Note:** This job aid assumes that you have already created the site visit, filled in the necessary information, including completion of the visit checklist, and that you have marked the Visit Status as completed.

**\*\*Additionally, it is imperative that the Study Manager has assigned report reviewers prior to the creation of any visit reports.\*\***

1 Log in and navigate to the site visit.

2 Click on 'Visit Report' in the navigation links at the left side of the screen.



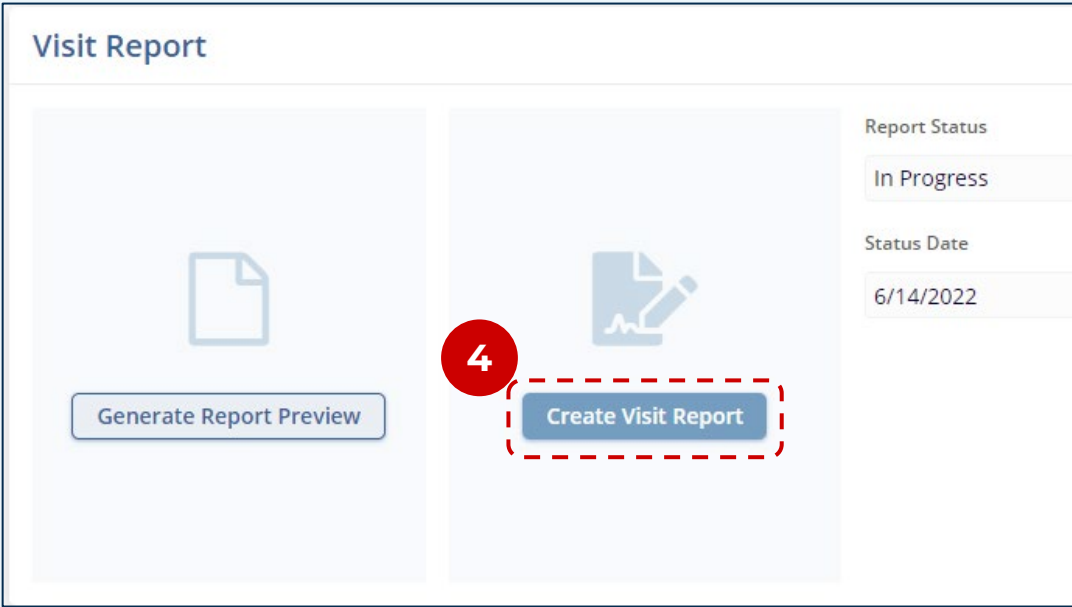
3 Change the Report Status to 'In Progress' and press **Save**.

A screenshot of the 'Visit Report' form. The form has a header 'Visit Report' and a close button. Below the header, there are two large light blue boxes with icons: a document icon and a document with a pencil icon. Below the first box is a button labeled 'Generate Report Preview'. To the right of these boxes, there is a 'Report Status' dropdown menu with 'Not Started' and 'In Progress' (selected and highlighted with a blue background and a red dashed box). Below the dropdown is a date field with '6/1/2022'. To the right of the status and date fields is a 'Reviewer' text field. A red circle with the number '3' is placed next to the 'Report Status' dropdown.

- 4

Press the **Create Visit Report** button.
- 5

The **Create Visit Report** window will open, indicating if anything remains to be completed before the report can be generated. When all items show as complete, press **Generate Report**.



- 6

At this point, the visit report will be generated. This process may take a couple of minutes to complete. You will then be able to select the **View Report** button in order to be taken to the document.

