

How to Associate a Checklist Template with a Visit Type

CTMS version 3.0

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

1 Navigate to the **Settings** area.

2 Select '**Site Visit Types**' from the navigation links at the left side of the screen.

A vertical list of settings options. The 'Site Visit Types' option at the bottom is highlighted with a blue background and a red dashed box. A red circle with the number '2' is placed next to the dashed box.

- Fields
- Statuses
- Lookups
- Countries
- Regions
- Access Management
- Team Role Management
- Site Visit Checklist Templates
- Enrollment Tracking
- Activity Type/Subtype
- Auto-naming
- Audit Trail
- Import Status
- Site Visit Types**

3 Select the site visit type from the list and press the **Edit** button in the menu bar.

The 'Site Visit Types' interface shows a menu bar with 'Add', 'Edit', and 'Deactivate' buttons. The 'Edit' button is highlighted with a red dashed box and a red circle with the number '3'. Below the menu bar is a table with 7 items, 1 of which is selected.

Value	Label
Ad hoc	Ad hoc
Close out	Close out

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- 4 Click on the **Checklist Templates** dropdown menu and select the template to be associated with the visit type.

Edit Site Visit Type

Value*

Close out

Label*

Close out

4

Checklist Templates

Close Out Visit x

CHECKLIST DEMO

Interim Visit Report

Interim Visit Report

Test Visit Report

Site Initition Visit Report

Site Initiation Visit Report

Site Initiation Visit Report

5

Cancel

Save

- 5 Press **Save**.