How to Associate a Checklist Template with a Visit Type

CTMS version 3.0

TRIAL INTERACTIVE
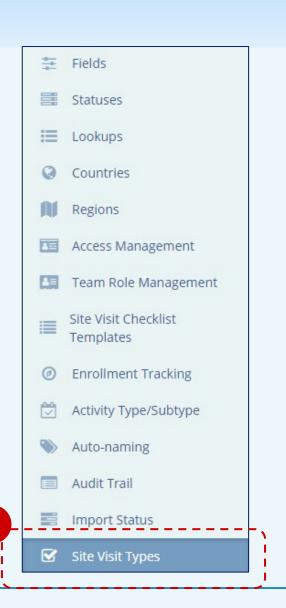
APPLICABLE TO:

- ● 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.

- 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
- **2** ☑ Site Visit Types

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

Site Visit Types

3

⊕ Add   ✏ Edit   ⟁ Deactivate

7 Items 1 Selected

Value	Label
Ad hoc	Ad hoc
Close out	Close out

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

4

Edit Site Visit Type

Value*

Close out

Label*

Close out

Checklist Templates

Close Out Visit ×

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.**