How to Generate a Visit Report

CTMS version 3.0
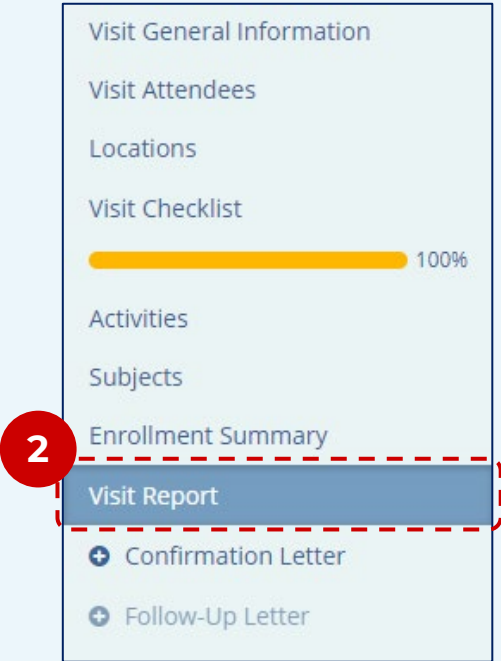
TRIAL INTERACTIVE

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 an navigate to the site visit.

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

Visit General Information

Visit Attendees

Locations

Visit Checklist
100%

Activities

Subjects

Enrollment Summary

2 Visit Report

⊕ Confirmation Letter

⊕ Follow-Up Letter

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

Visit Report

3 Report Status

Not Started ⌄

In Progress

6/1/2022

Reviewer

Generate Report Preview

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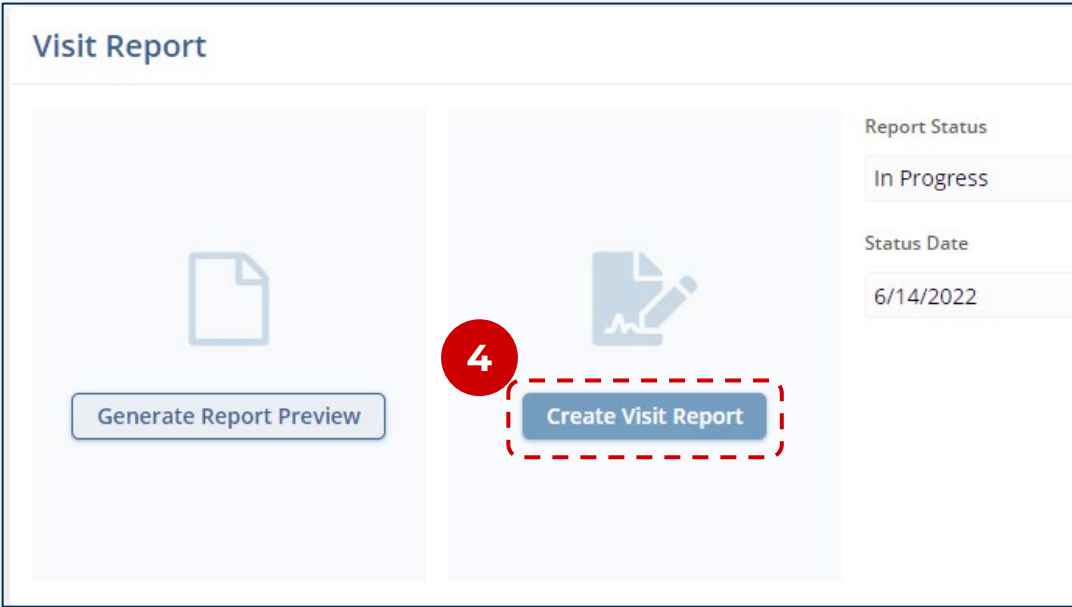
6 At this point, the visit report will be generated. This process may take a couple of minutes to complete. You will then be able to select the **View Report** button in order to be taken to the document.