# How to Generate a Visit Report



### **CTMS version 3.0**

### **APPLICABLE TO:**

- O Company Admin
- O 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.\*\*



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	
	00%
Activities	
Subjects	
Enrollment Summary	
Visit Report	
• Confirmation Letter	
• Follow-Up Letter	

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

Visit Report		8
Generate Report Preview	Report Status Rev   Not Started    In Progress   6/1/2022	iewer



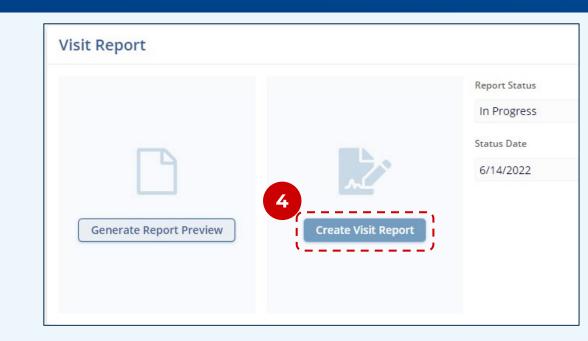


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4 Press the Create Visit Report button.



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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.** 

Create Visit Report	□ ×
Completeness Check	Other Visit Info
<ul> <li>General Information</li> </ul>	Activities 12 Items
Attendees 1 Items	Subjects <b>2 Items</b>
Locations 1 Items	Enrollment Summary 0 Items
Visit Checklist 0 of 0 required completed	
Reviewers	
There are <b>4 Reviewers</b> defined for th	nis report
Reviewers are captured within the Study Se updates	ettings, Study Managers can process any required
<b>Related Documentation</b>	
All Site Milestones	All Site Subjects
All Site Contacts	Subjects ICFs
All Site ICFs	Subjects Visits
All Site Addresses	Site Team
All Site Organizations	
5	,
Cancel	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.

Generate Report Preview         O6 Jun 2022, 02:26 PM
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