

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

**Note:** This process may vary depending upon which electronic signature vendor is being used for your specific environment. However, the steps for sending the document for signature are broadly applicable across vendors.

If you are signing a document that someone else has sent to you, skip to step 4.

1 Open the visit report.

✓

Make Changes

Complete

✓

Waiting for Review

Complete

CSM3@ti.com on 26 Feb 2024

3

Waiting for eSignature

Pending

4

Waiting for Approval

☐ Compare with Previous Version

☐ Go To Visit

☐ Go To Document Profile

2

☒ Send document for eSignature

2 Press **Send document for eSignature**.

3 Ensure that all required signatories are added to the process by moving them to the right side of the window and press **OK**.

Send For ESignature

eSignature Type

☒ Parallel

☐ Serial

Search

2 columns

<input type="checkbox"/>	Name	Title	
<input type="checkbox"/>	CRA3@ti.com	Author	✓
<input type="checkbox"/>	CSM3@ti.com	Reviewer	✓

2 columns

<input type="checkbox"/>	Name	Signer Role	Title
<input type="checkbox"/>	CSM3@ti.com	Reviewer	Reviewer
<input type="checkbox"/>	CRA3@ti.com	Author	Author

Previous

1 of 1

Next

3

Cancel

OK

# How to Sign a Visit Report

CTMS version 3.0



4 Once the screen loads, press **Sign Document**.

✓  
Make Changes  
Complete

Compare with Previous Version

✓  
Waiting for Review  
Complete

CSM3@ti.com on 26 Feb 2024

Go To Visit

3  
Waiting for eSignature  
In Progress

0 of 2 Completed View Details

Go To Document Profile

4  
Waiting for Approval

4

Sign Document

Decline Signature

5 Provide a reason for signing and press **Sign Document**.

Sign Document

Reasons\*  
I have reviewed this document

Comments

5

CancelSign Document

6 Enter your system access credentials and press **OK** to complete the signature process.

Please Provide Your Credentials

Username\*

Password\*

6

CancelOK