How to Apply Study-Specific Checklists

CTMS version v3.0

TRIAL INTERACTIVE

APPLICABLE TO:

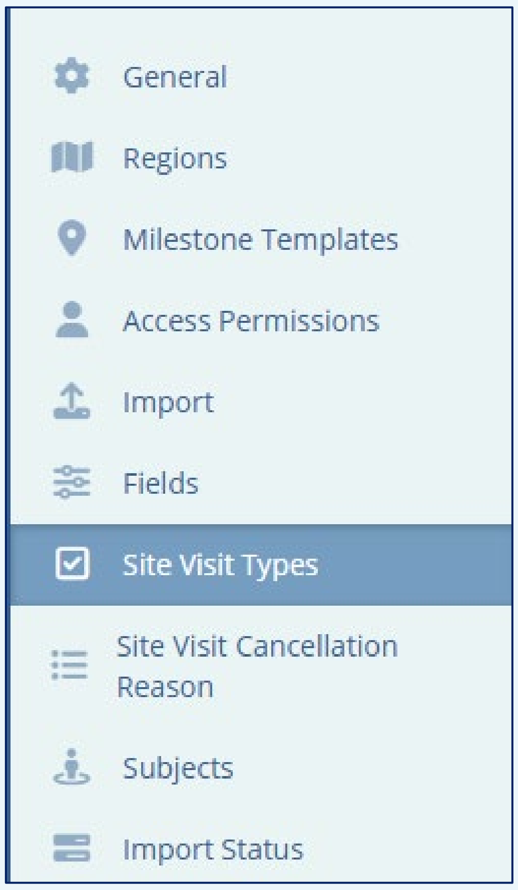
- ● **Company Admin**
- ● **Study Manager**
- ○ **CRA**

Note: In order to designate a checklist as appropriate for your study, the study, checklist, and visit type must already be created and ready for use. For assistance with creating any of these, please see the related training materials.

This functionality is specifically applicable to times when the standard checklist is not appropriate for the study in question for any reason. A minor variation might be handled with an N/A answer to a checklist question, but several significant differences in questions due to scope, region, or specific focus, would likely call for a separate checklist.

1 Navigate to the study settings area.

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



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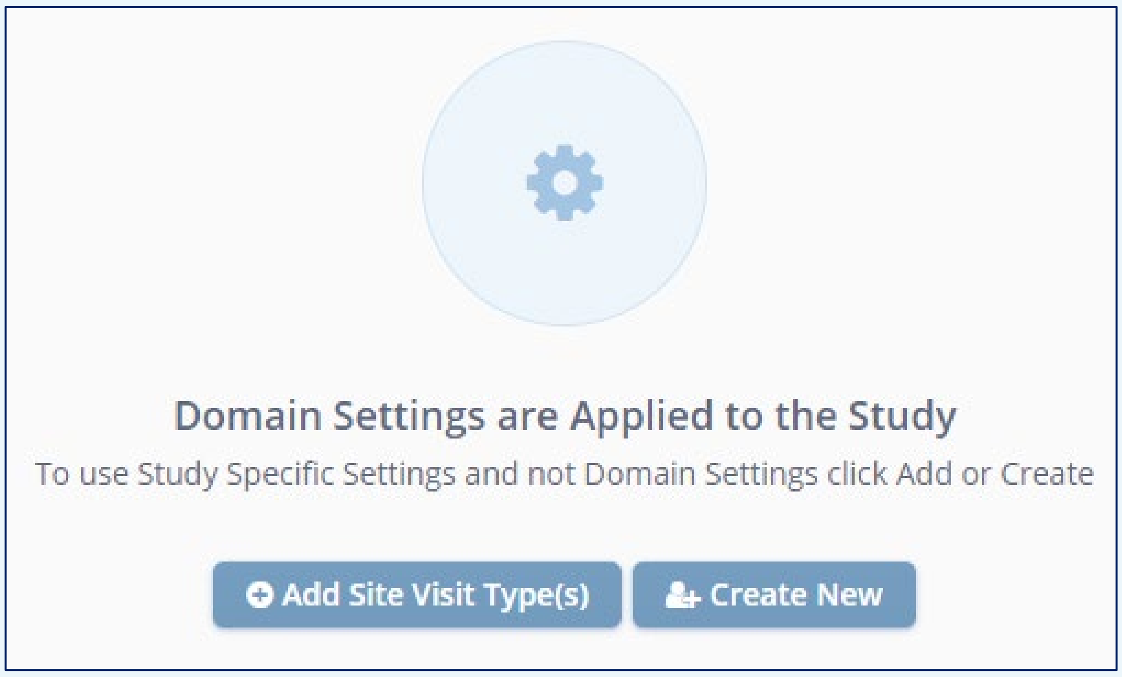
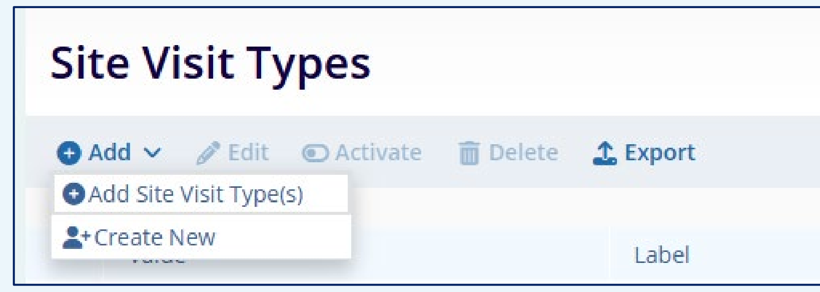
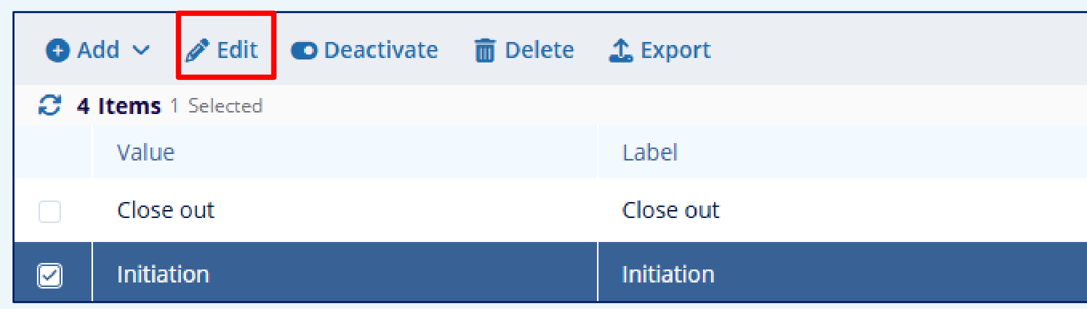
3 A message may be displayed indicating that Domain settings are currently being applied to this study. This will disappear once study-specific settings are chosen.



4 Select which visit types should be available to users associated with this study by pressing the **Add** button. Select **Add Site Visit Types** or **Create New** as appropriate to the situation.



5 Once all site visit types have been added, select a visit type using the checkbox at the left side of the row and then press **Edit** in the menu bar at the top of the screen.



6 In the “Checklist Templates” box of the “Edit Site Visit Type” window, select the checklist that should be used for this visit type in this study and press **Save**.