

How to Associate a Checklist Template with a Visit Type

CTMS version 3.1



- 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.

A screenshot of a settings menu. The menu is a vertical list of items, each with an icon and a text label. The items are: 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, and Site Visit Types. The 'Site Visit Types' item at the bottom is highlighted with a blue background and a red dashed box. A red circle with the number '2' is placed next to the dashed box.

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

A screenshot of the 'Site Visit Types' page. The page has a title 'Site Visit Types' at the top. Below the title is a menu bar with three buttons: '+ Add', 'Edit', and 'Deactivate'. The 'Edit' button is highlighted with a red dashed box and a red circle with the number '3'. Below the menu bar is a table with 7 items. The first item is 'Ad hoc' with a label 'Ad hoc'. The second item is 'Close out' with a label 'Close out'. The table has two columns: 'Value' and 'Label'.

Value	Label
Ad hoc	Ad hoc
Close out	Close out

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

Edit Site Visit Type

Value*

Close out

Label*

Close out

4

Checklist Templates

Close Out Visit x |

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**.

****Please note that you can associate multiple checklist types with any given visit type. This would mean that CRAs would need to always select the appropriate checklist when creating a visit.**

A preferable practice might be to associate one generally applicable template and then, where necessary instruct Study Managers to override this and associate a different checklist type for their specific study depending upon the needs of the study/sponsor/region, etc. Instructions for how to do this are in a related job aid.