How to Associate a Checklist Template with a Visit Type

CTMS version 3.1

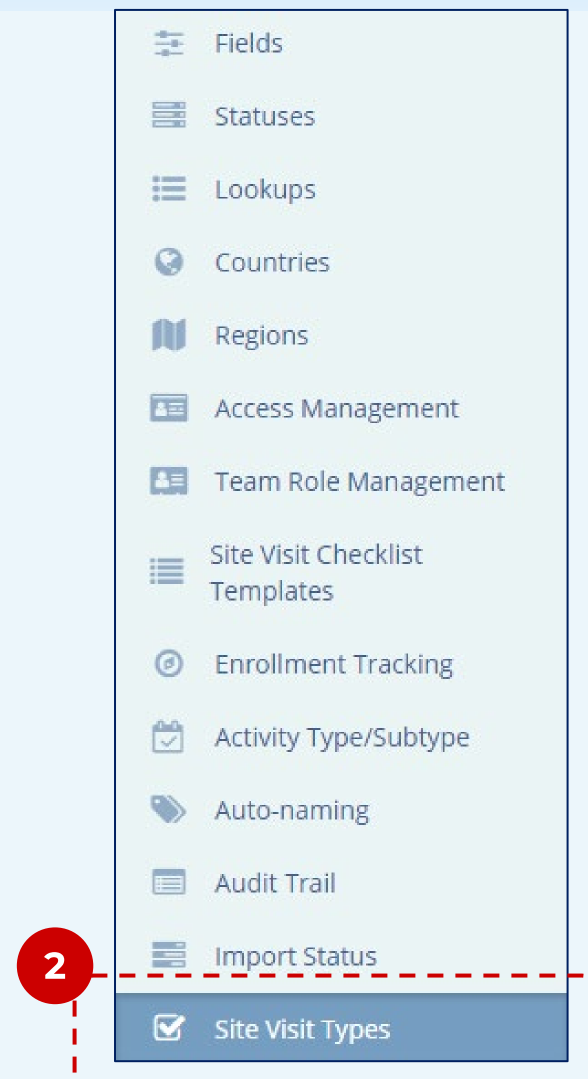
TRIAL INTERACTIVE

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.



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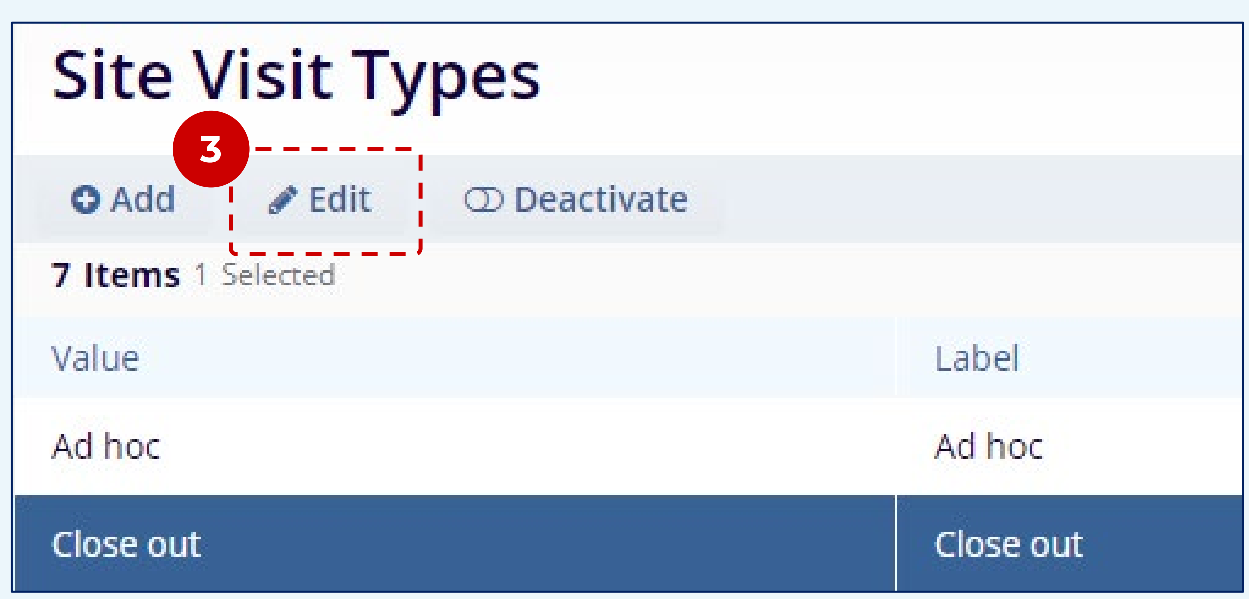
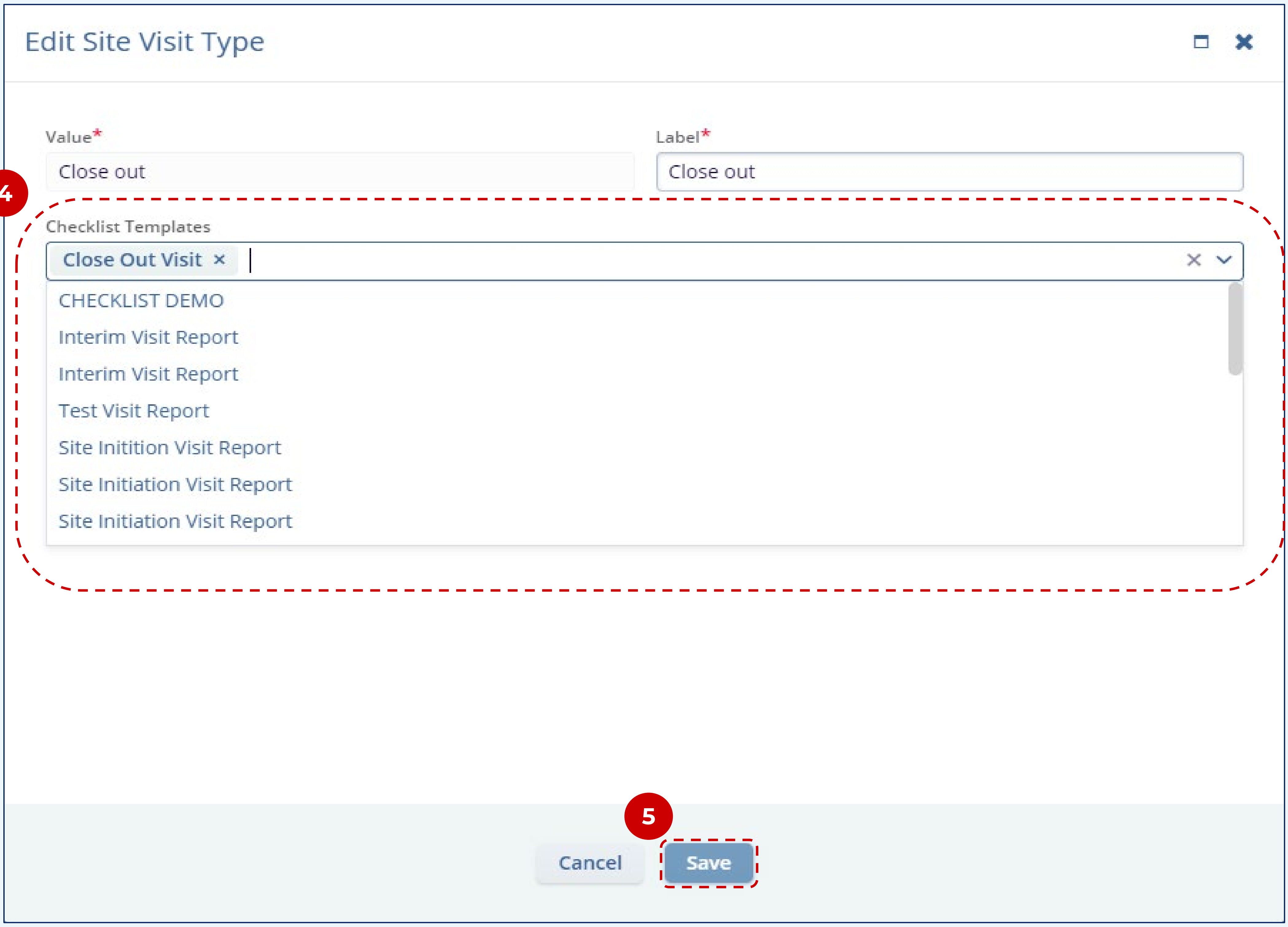
3 Select the site visit type from the list and press the **Edit** button in the menu bar.



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



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.