

- APPLICABLE TO:
- ☒ Company Admin

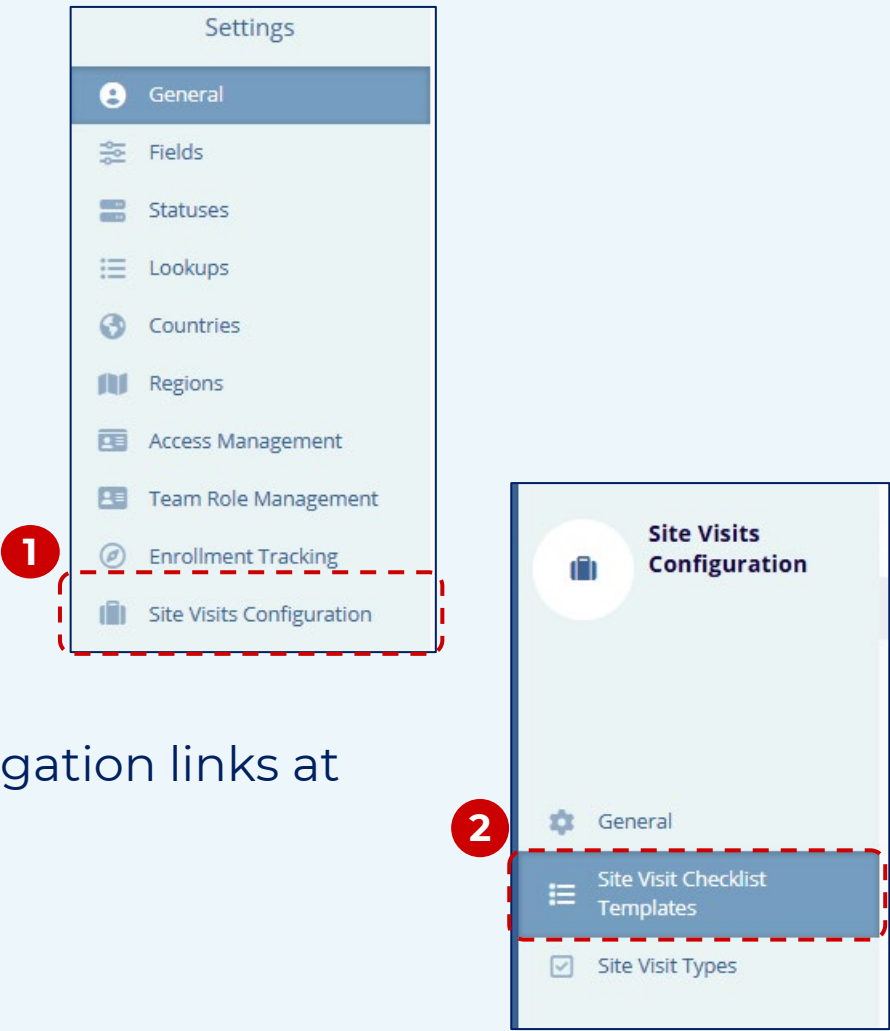
☐ Study Manager

☐ CRA

Site visit checklists allow Study Managers to ensure that a standard list of expectations are met during site visits and that, if there are variances or unexpected complications, those issues are recorded appropriately in a specific location in the system for easy review. Questions asked in these checklists may take the place of activities associated with the site visit if desired, but that practice may make cross-site and cross-study reporting more difficult as these answers are not exportable in the same way as activities and activity-related information.

1

Navigate to the Settings area and select “Site Visits Configuration.”



2

Select ‘Site Visit Checklist Templates’ from the navigation links at the left side of the screen.

3

Press the **Create Template** button above the grid.

Site Visit Checklist Templates

Create Template

Edit

Copy

Publish

Set to Retired

Delete

23 Templates

PUBLISHED

Test\_24

Updated 24 Apr 2023 Monica Dayalani

DRAFT

Training Checklist 1

Updated 21 Apr 2023 admin003@ti.com

Search

Filters

Sort By Updated Date

4 Name the Checklist Template and, if desired, add a description.

5 Press **Create**.

Create Site Visit Checklist Template

Site Visit Checklist Template Name\*

Description

Cancel

Create

6 Select the new checklist and press **Edit** at the top of the screen.

Site Visit Checklist Templates

Create Template

Edit

Copy

Publish

Set to Retired

24 Templates 1 Selected

DRAFT

Updated  
24 Apr 2023  
admin003@ti.com

Training Demo Checklist

Description of the Checklist

**7** If desired, turn on the Template Numbering via the toggle switch and select the schema.

← Training Demo Checklist

DRAFT Publish

Save Copy Delete


Site Visit Checklist Template Name\*

Training Demo Checklist


Description


Description of the Checklist

7


Template Numbering 


Section Order

Numerical 

 Configure Preview 1, 2... N

Question Order

Numerical 

 Configure Preview 1, 2... N

8

+ Add Section

**8** Press **Add Section** and name the section.

**9** Press **Add Question** to begin adding questions

▲ New Section

Section Title\*

Description

Section Numbering 

Question Order

9

+ Add Question

**10** Choose the type of question that you would like to add. This selection will determine the steps required to complete configuring the question.

Question 1

Required Question ☐ Duplicate Delete

Question\*

Description for the Question ☐

Options

☐ Yes

☐ No

☐ N/A

Add User Comment Field

Type of Question\*

Yes, No, N/A

Yes, No, N/A

Text (Line)

Text (Paragraph)

One Answer from the List

☒ Few Answers from the List

☒ Dropdown List

Buttonize Answers

Date

Scale

Add Question

**11** Press **Save** whenever you would like to save your progress and when you are done editing the checklist template.

11

Save Copy Delete

Site Visit Checklist Template Name\*

Training Demo Checklist

Description

Description of the Checklist

Template Numbering ☒

Section Order

Numerical

Question Order

Numerical