How to Create a Checklist Template

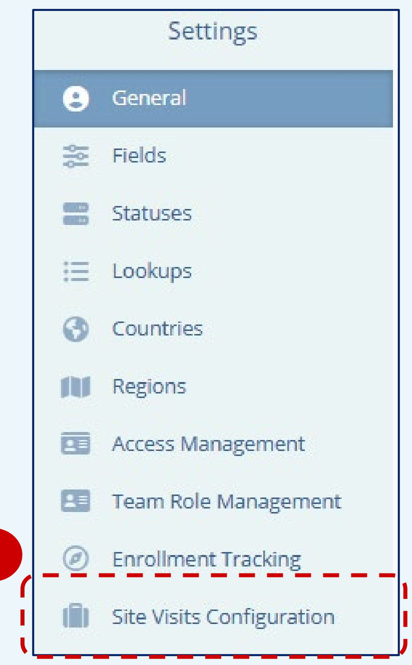
CTMS version 3.1

TRIAL INTERACTIVE

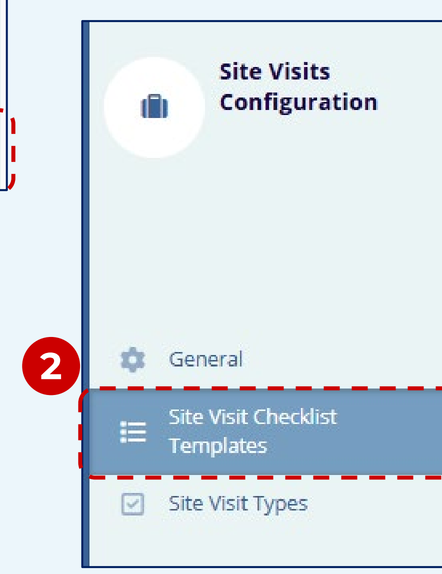
APPLICABLE TO:

- ● 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.

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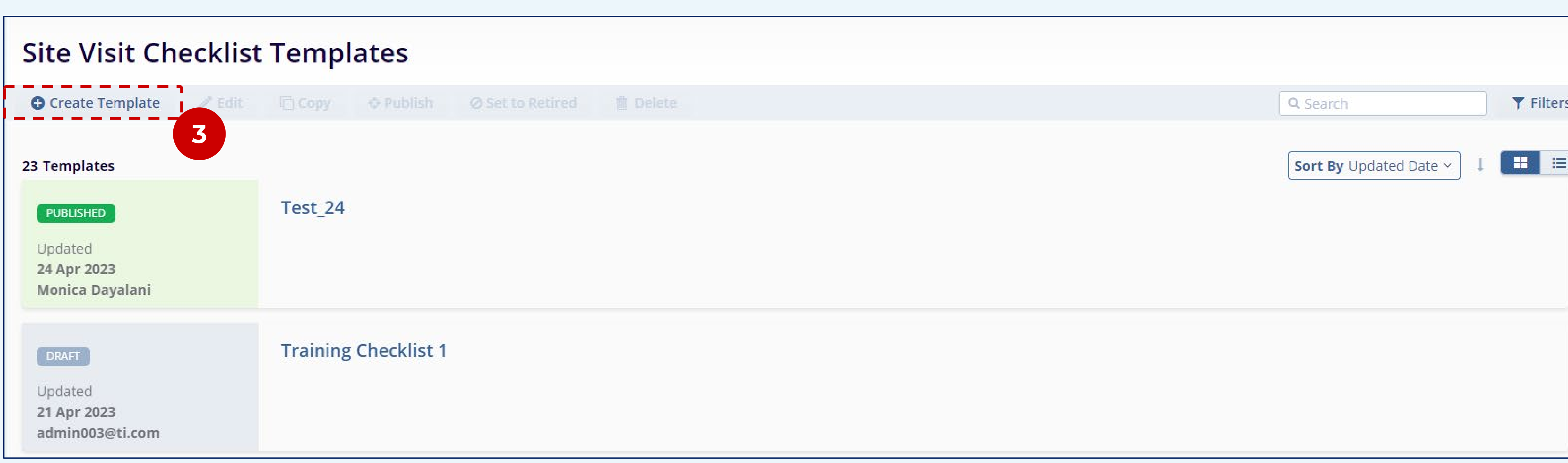
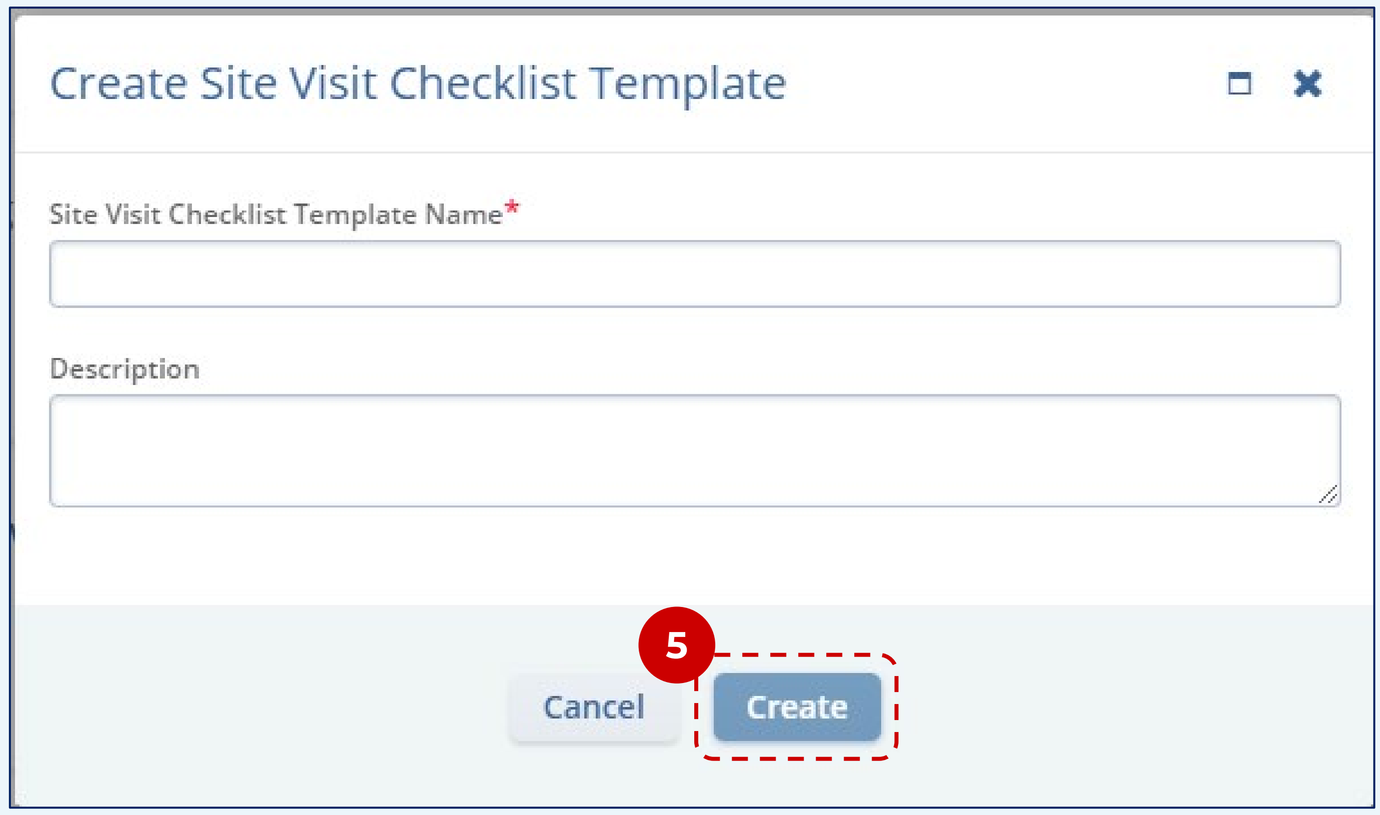
3 Press the **Create Template** button above the grid.



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

5 Press **Create.**



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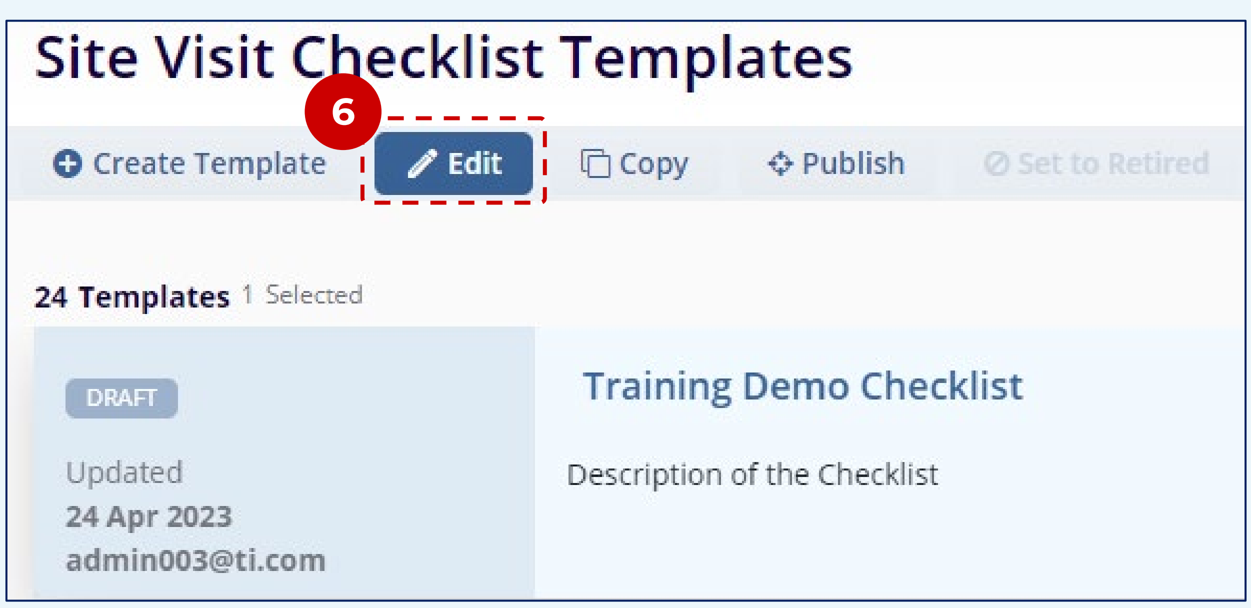
6 Select the new checklist and press **Edit** at the top of the screen.

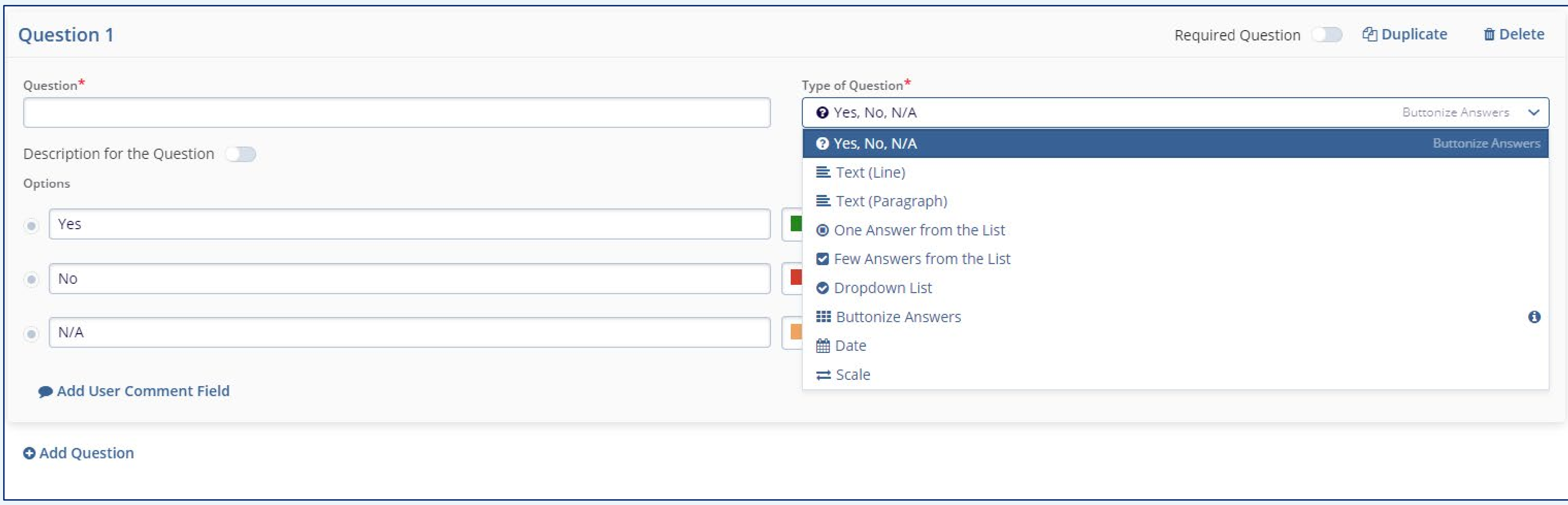


7 If desired, turn on the Template Numbering via the toggle switch and select the schema.

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

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

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



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