

How to Export a Checklist

CTMS version 3.1

- APPLICABLE TO:
- ☒ Company Admin
 - ☐ Study Manager
 - ☐ CRA

1 Navigate to the **Site Visit Checklist Templates** menu in the **Settings** area.

2 Select the checklist to be exported from the list shown.

3 Press the **Export to PDF** button.

4 Verify the content to be exported in the preview window and press **Export** to complete the process.

