How to Publish a Checklist Template

CTMS version 3.1

**TRIAL INTERACTIVE**

APPLICABLE TO:

- ● Company Admin
- ○ Study Manager
- ○ CRA

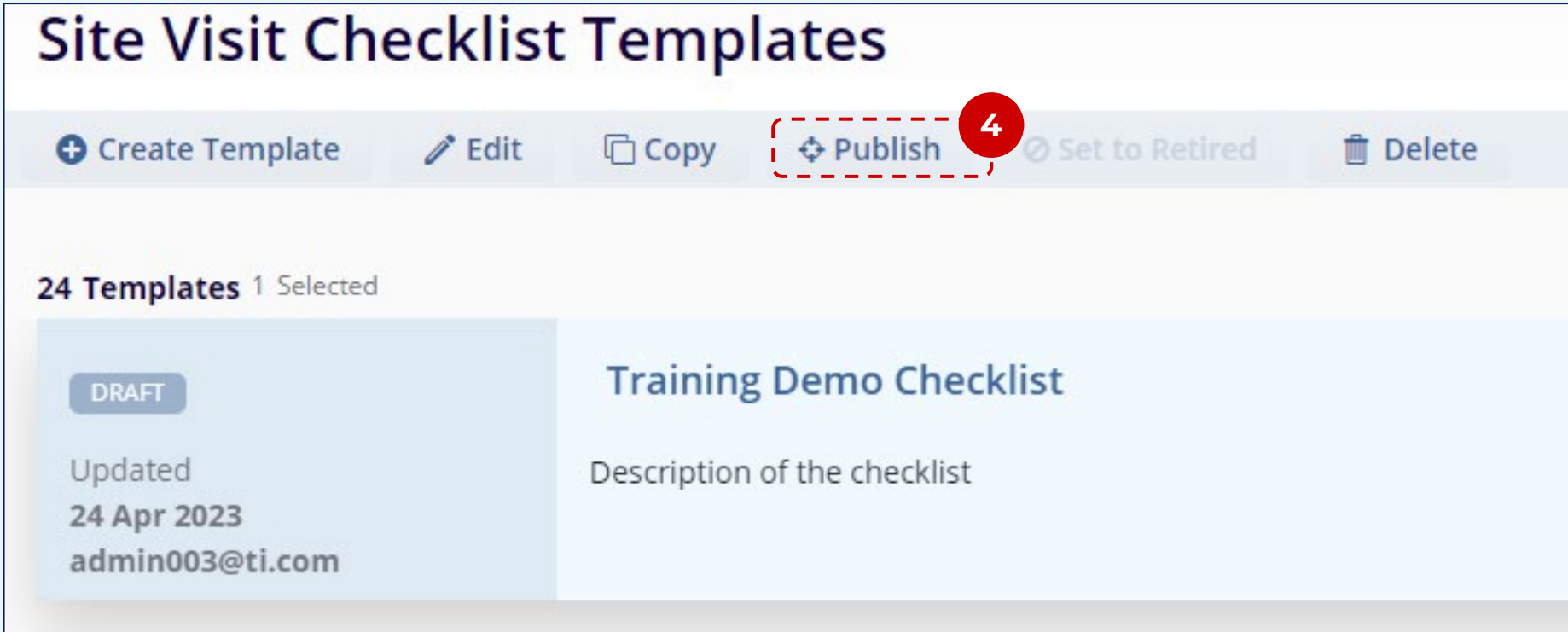**1** Navigate to the Settings area and select "Site Visits Configuration."

Settings

- 👤 General
- ⚏ Fields
- ▦ Statuses
- ☰ Lookups
- 🌐 Countries
- 🏛 Regions
- 🪪 Access Management
- 🪪 Team Role Management
- ⊘ Enrollment Tracking
- 🗄 Site Visits Configuration

1

Site Visits Configuration
🧳
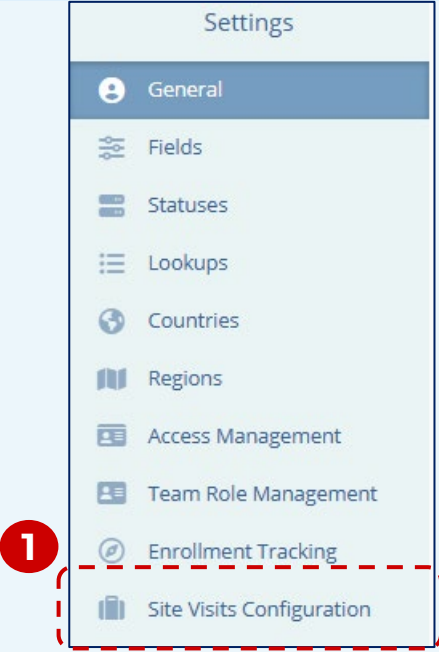
2 Select 'Site Visit Checklist Templates' from the navigation links at the left side of the screen.

2

- ⚙ General
- ☰ Site Visit Checklist Templates
- ☑ Site Visit Types
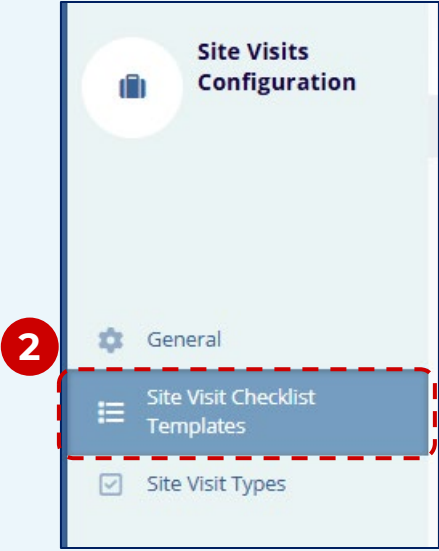
3 Select the checklist to be published from the list displayed.

4 Press the **Publish** button in the menu above the list.

Site Visit Checklist Templates

| ⊕ Create Template | ✏ Edit | ▢ Copy | ⊕ Publish **4** | ⊘ Set to Retired | 🗑 Delete |

24 Templates 1 Selected

DRAFT

Updated
24 Apr 2023
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Training Demo Checklist

Description of the checklist

5 In the popup window the opens, press the **Publish** button to confirm that you wish to publish the checklist template.
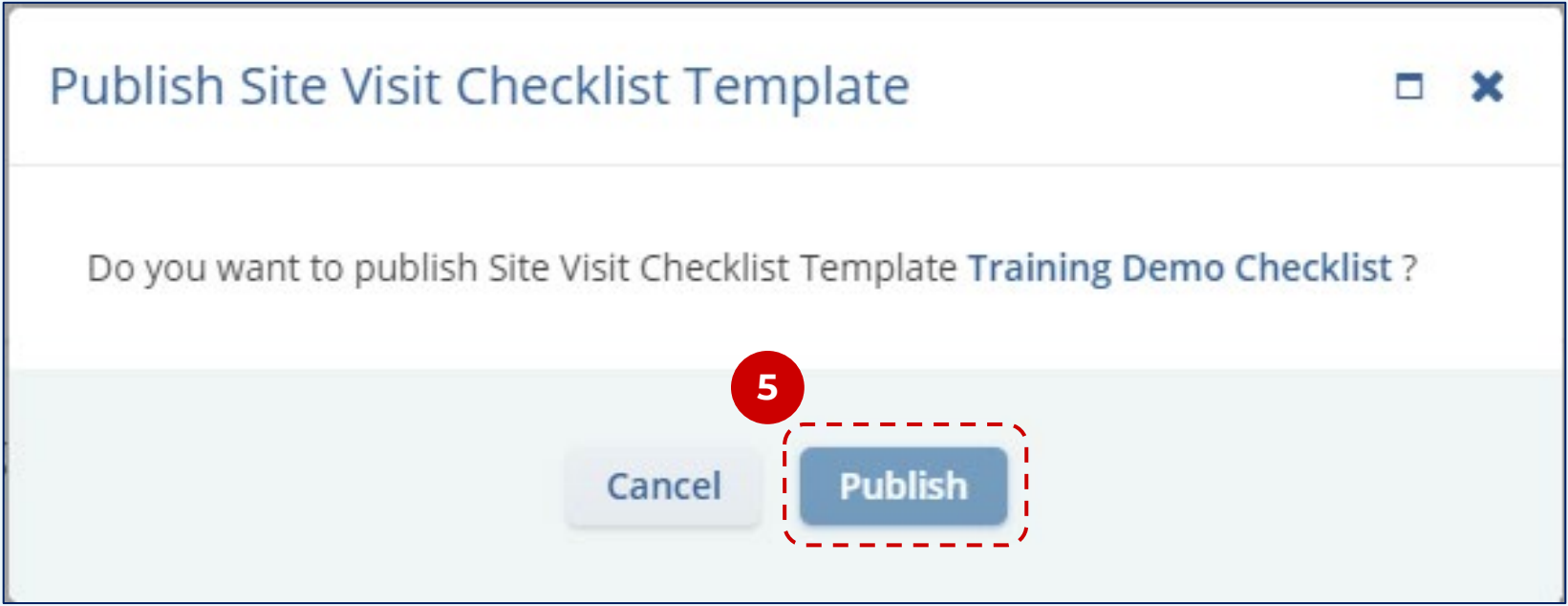
** Before publishing a checklist, be certain that it is correct and that it appears fully accurate. Once a checklist has been published, it can no longer be edited. If you do need to make changes to a published checklist, you will need to copy the checklist, make your edits to the resulting draft, and then publish the new version.

Publishing a checklist does not automatically make it available for CRA users when creating and performing site visits. A published checklist must first be associated with the correct site visit type(s) before they are available for use.

For additional information on how to associate a checklist with a site-visit type, please see the related video and/or job aid.