

- APPLICABLE TO:
- ☒ Company Admin

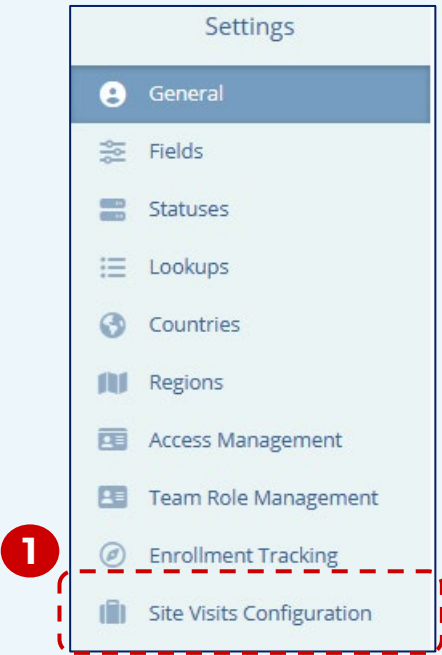
☐ Study Manager

☐ CRA

**Where necessary, ensure that the replacement checklist has already been created and associated with the related visit types before retiring the existing template in order to avoid delays.

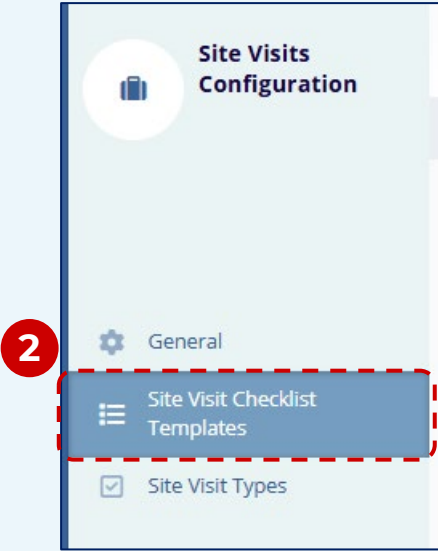
1

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.

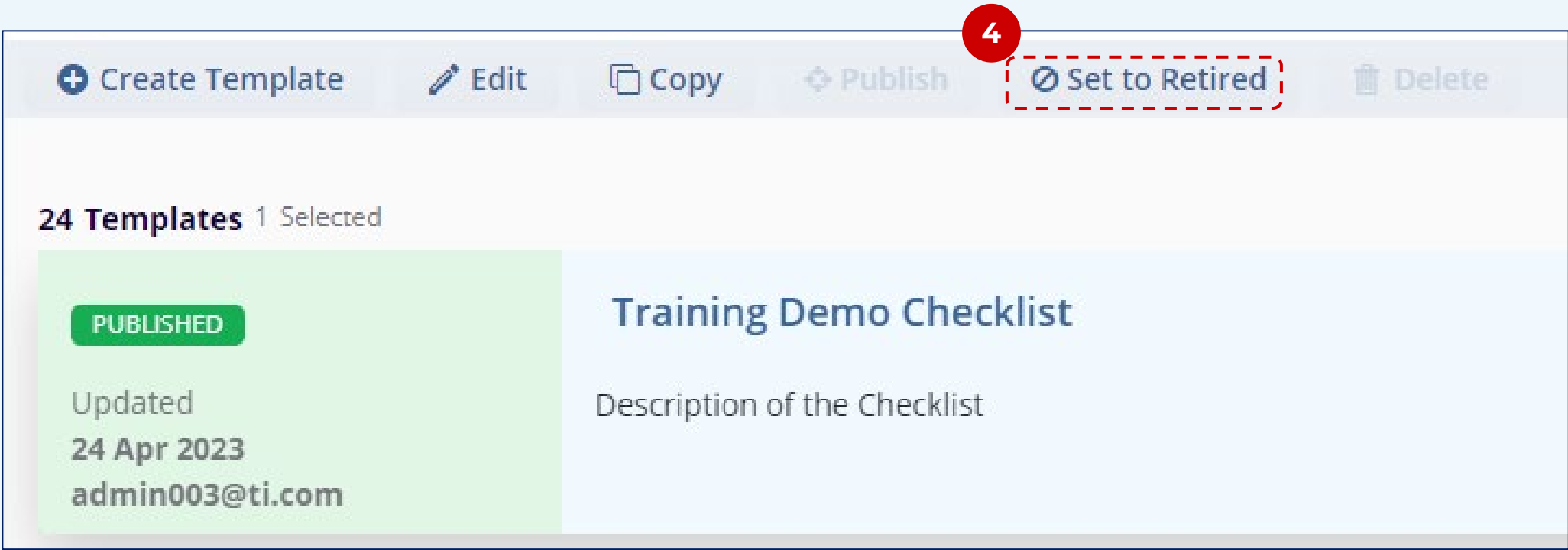


3

Select the checklist to be Retired from the list displayed.

4

Press the **Set to Retired** button in the menu above the list.



- 5
- In the popup window the opens, press the **Set Retired** button to confirm that you wish to retire the checklist template.

Set Retired Site Visit Checklist Template

Do you want to set the following Checklist Template to Retired?

Name

Training Demo Checklist

Status

PUBLISHED

Description

Description of the Checklist

Cancel

5Set Retired

****Once the checklist template is retired, be sure to associate to the new checklist template with the appropriate visit types. Failure to do so may result in delays in the generation and/or execution of site visits and site visit reports in the CTMS.**