

How to Review a Report (Legacy Version)

CTMS version 3.1



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

Note: This assumes that the visit report has already been created and submitted for review. These steps can only be done by the user who has been assigned the appropriate access privileges and has been designated as a report reviewer for the study.

1 Open the visit report.

2

Make Changes
COMPLETE

2

Waiting for Review
PENDING

3

Waiting for eSignature

4

Waiting for Approval

Start Review

Approve

Reject

Compare Side By Side

Go To Visit

FileViewPlugins

OOTB_IMV_Report

Interim Visit Report

Sponsor:	Sponsor #1	Visit Type:	Interim	
Protocol No.:	001002A	Investigational Product:	Thinking Putty, <Product>	
Investigator Name:	Sarah Mondrian	Visit Start Date:	28 Feb 2025	
Site Number:	T003	Visit End Date:	09 Apr 2025	
CRA Name:	CRA 3	Visit Duration:		How was the visit conducted: In Person
Comments:				

Locations	
Type	Address
Primary	West Market Street Leesburg, Virginia, 12345 United States

Visit Attendees			
Name	Role	Presence	Type
CRA 3	<Site Team Role>	<Presence>	<Type>
Sarah Mondrian	Principal Investigator	In Person	

Page 1 of 5

Word count

Zoom 100%

2 Press **Start Review**. The screen will reload with the document in an editable view.

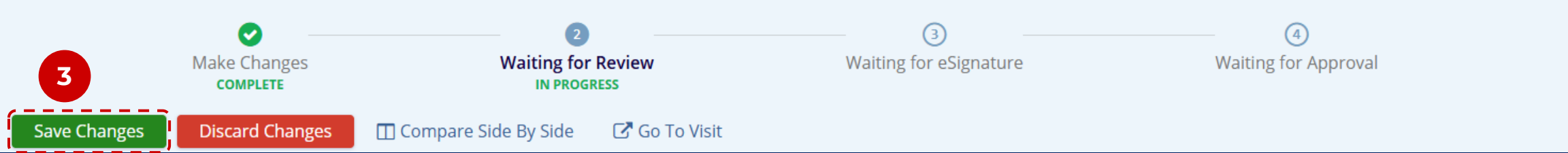
Note: Any comments that you make are automatically saved as you complete them. You may leave the session and return at another time without pressing **Save Changes** to end the session.

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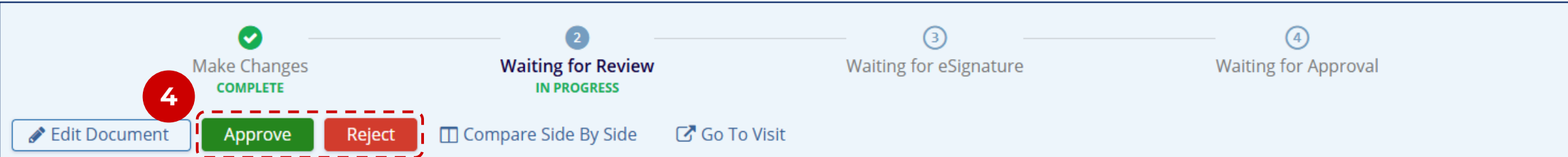
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3 Make any required comments by highlighting a section either right-clicking or using the menu above the document viewer. When you are done, select **Save Changes** in the menu bar above the document.



4 Once the screen reloads, press **Accept** or **Reject** as appropriate.



5 Provide a Reason for Rejection or confirmation of your intent to approve the document, as necessary.

Reject

Enter reason for rejection*

Cancel

Reject

Document Approval

?

Are you sure you want to approve this document?

No

Yes