

How to Sign a Visit Report (Legacy Version)

CTMS version 3.1



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

Note: This process may vary depending upon which electronic signature vendor is being used for your specific environment. However, the steps for sending the document for signature are broadly applicable across vendors.

If you are signing a document that someone else has sent to you, skip to step 4.

1 Open the visit report.

1

2

3

4

Make Changes
Complete

Waiting for Review
Complete
CSM3@ti.com on 26 Feb 2024

Waiting for eSignature
Pending

Waiting for Approval

☐ Compare with Previous Version

☐ Go To Visit

☐ Go To Document Profile

2

☒ Send document for eSignature

2 Press **Send document for eSignature**.

3 Ensure that all required signatories are added to the process by moving them to the right side of the window and press **OK**.

Send For ESignature

eSignature Type Parallel Serial

Search

2 columns

<input type="checkbox"/>	Name	Title	
<input type="checkbox"/>	CRA3@ti.com	Author	✓
<input type="checkbox"/>	CSM3@ti.com	Reviewer	✓

2 columns

<input type="checkbox"/>	Name	Signer Role	Title
<input type="checkbox"/>	CSM3@ti.com	Reviewer	Reviewer
<input type="checkbox"/>	CRA3@ti.com	Author	Author

Previous 1 of 1 Next

3

Cancel OK

How to Sign a Visit Report (Legacy Version)

CTMS version 3.1



4 Once the screen loads, press **Sign Document**.

✓
Make Changes
Complete

Compare with Previous Version

✓
Waiting for Review
Complete
CSM3@ti.com on 26 Feb 2024

Go To Visit

3
Waiting for eSignature
In Progress
0 of 2 Completed View Details

Go To Document Profile

4
Waiting for Approval

4
Sign Document

Decline Signature

5 Provide a reason for signing and press **Sign Document**.

Sign Document

Reasons*
I have reviewed this document

Comments

5
Cancel Sign Document

6 Enter your system access credentials and press **OK** to complete the signature process.

Please Provide Your Credentials

Username*

Password*

6
Cancel OK