

How to Submit a Visit 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. These steps can only be done by the user who created the report and is assigned the appropriate access privileges.

1 Open the visit report.

1

Make Changes

PENDING

2

Waiting for Review

3

Waiting for eSignature

4

Waiting for Approval

▶ Start Approval Workflow

✎ Edit Document

🔗 Go To Visit

FileViewPlugins

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✎ Edit New Version

Modify a new version of the document from scratch without referencing previous versions

📄 Edit with Comparison

Edit a new version while comparing it with the previously rejected one to ensure improvements align with past feedback

Report

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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

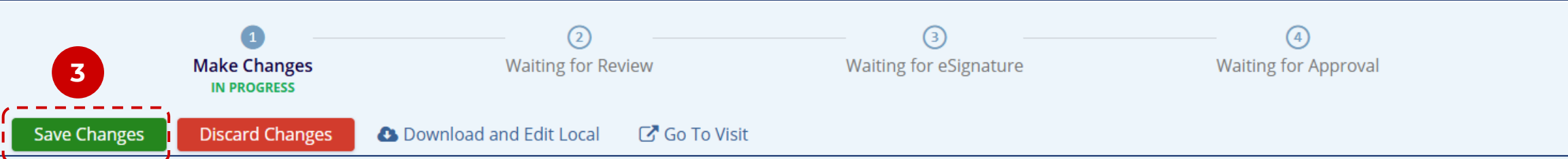
2 Press **Edit Document**. The screen will reload with the document in an editable view.

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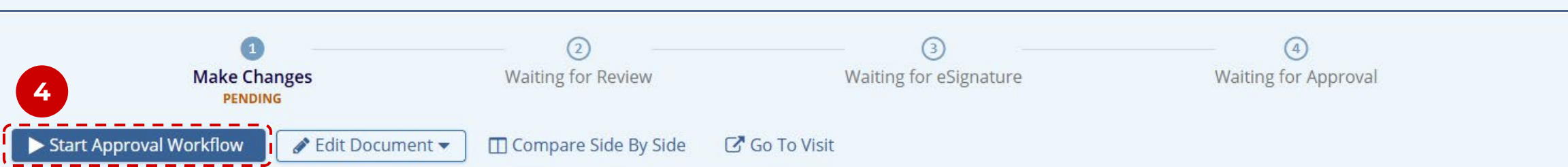
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3 Make any required edits and, in the menu bar above the document, press **Save Changes**.



4 Once the screen reloads, press **Start Approval Workflow** in the menu bar above the document. This will send the document to the reviewer so that they can conduct their review of the document.



The screen will refresh and show that the first step of the review workflow is complete.

