

# How to Generate and Submit a Site Visit Report

CTMS version 3.1.1

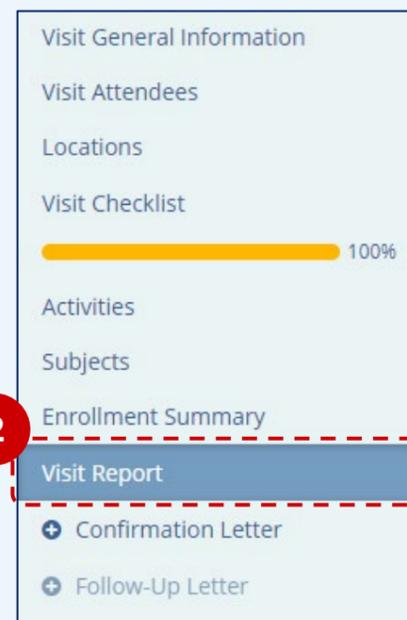
## APPLICABLE TO:

- Company Admin
- Study Manager
- CRA

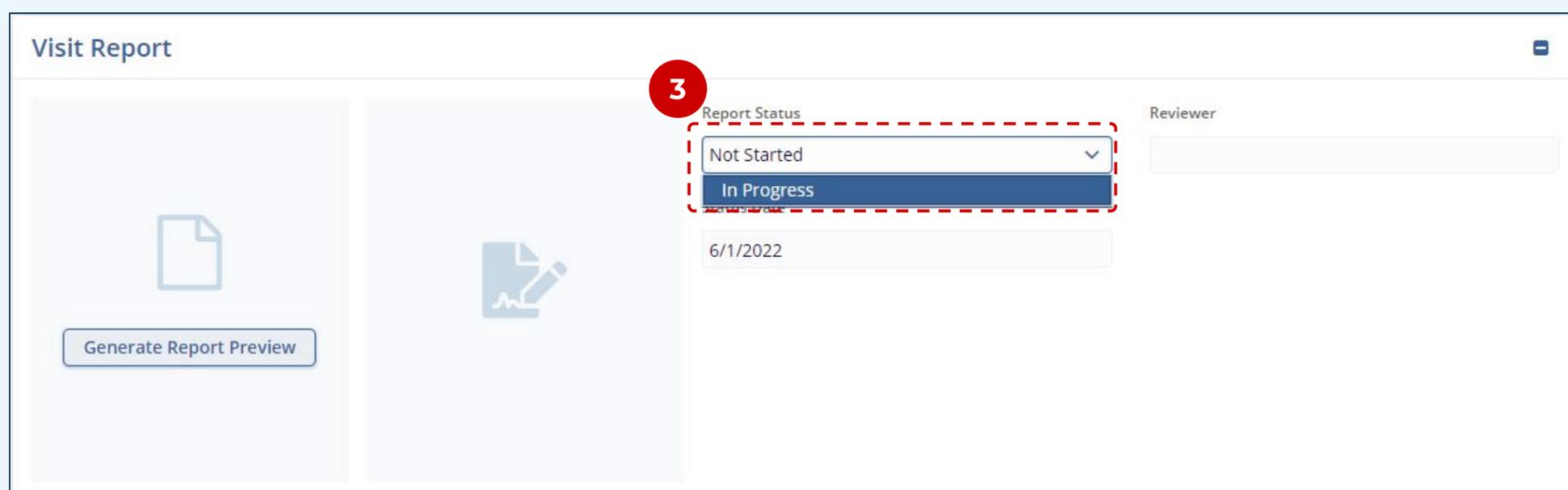
**Note:** This job aid assumes that you have already created the site visit, filled in the necessary information, including completion of the visit checklist, and that you have marked the Visit Status as completed.

**1** Log in and navigate to the site visit.

**2** Click on 'Visit Report' in the navigation links at the left side of the screen.



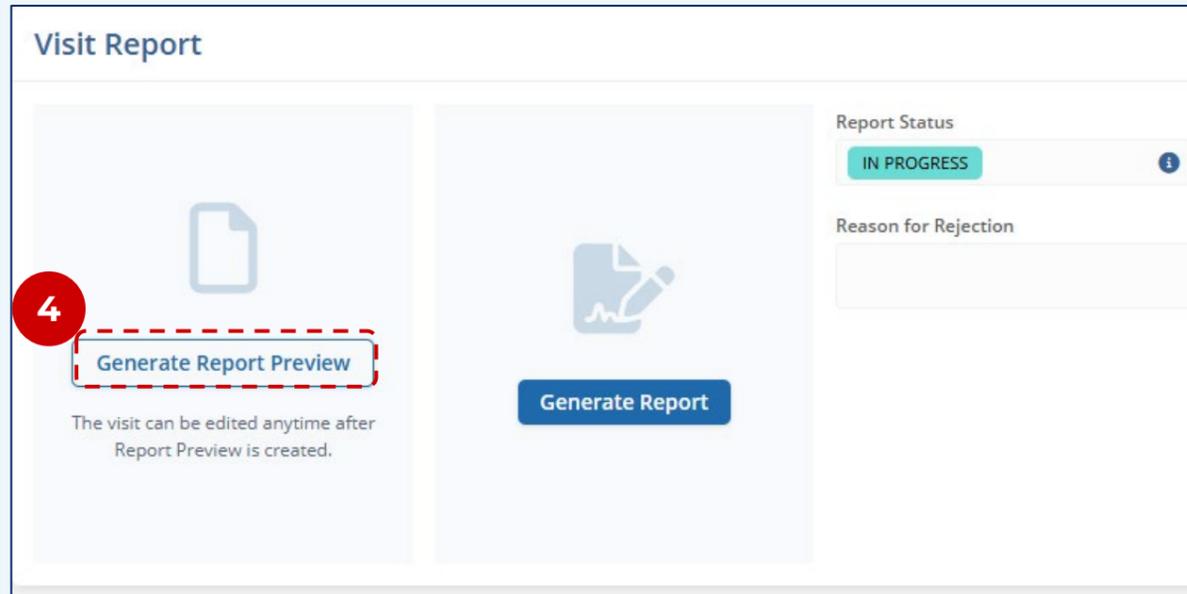
**3** Change the Report Status to 'In Progress' and press **Save**.



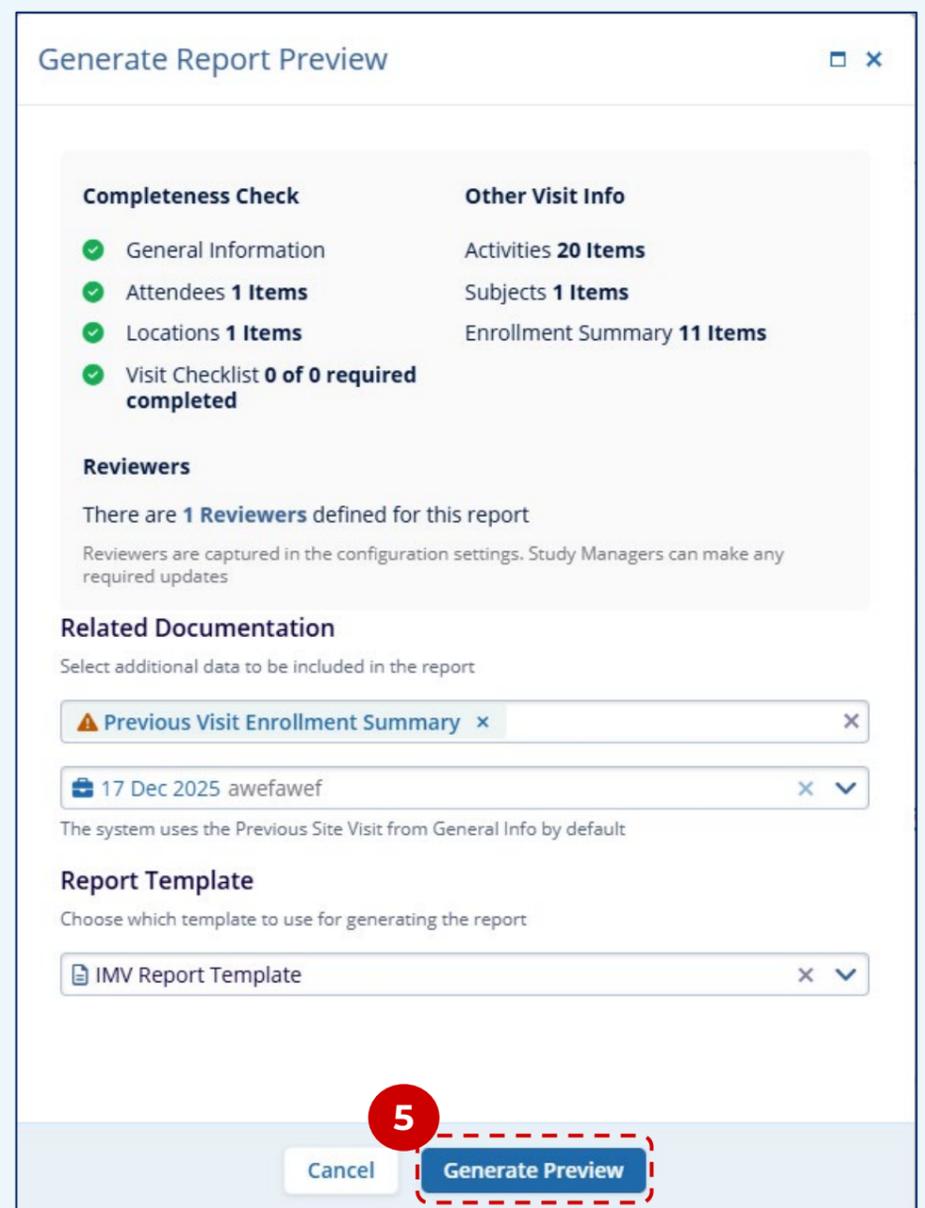
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**4** Press the **Generate Report Preview** button.



**5** The **Generate Report Preview** window will open, indicating if anything remains to be completed before the report can be generated.



You may also need to identify if any related documentation, such as the **Previous Visit Enrollment Summary**, should be added to the report. You may then need to identify which visit was the previous one so that the system can get the correct information.

If more than one **Report Template** is available, select the correct one.

When all items show as complete, press **Generate Preview**.

All Report content will be generated automatically based on the information available in the Site Visit.

**6** At this point, the preview report will be generated. Pressing **View Report Preview** will open the report in a popup window for review.



**Note:** While it is not, strictly speaking, required that you generate and review the Preview Report, it is highly recommended. The report submission process does not have a preview step prior to signature and it is incumbent upon the report author to be fully aware of the contents of the report prior to applying their signature.



**7** Review the preview report. If needed, it can be downloaded as well. At this point, any information can be corrected within the Site Visit itself.

**8** Once you have completed your review of the Preview Report and you are certain that the report is ready for submission, you can press the **Submit for Review** button above the navigation links at the left side of the screen.

