

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.

1 Login to the CTMS. If necessary, navigate to the **My Page** tab of the **Global-Level Dashboard**. Locate the **My Tasks** dashlet. The report should be displayed in the list of available tasks in the **My Assignments** tab.

Click the **Claim** button to claim the document for review.

Dashboard

[My Page](#) [Analytics](#)

Task Name	Study	Related Record	Status	Created Date	Due Date	Action
Review Site Visit	1awefaefawefa AL De...	IMV #1	CREATED	12 Feb 2026	10 Feb 2026	Claim

2 In the popup window that appears, confirm your intent to claim the document for review.

Claim

Workflow Task **Review Site Visit** will be **assigned to you** and will no longer be available to other Recipients

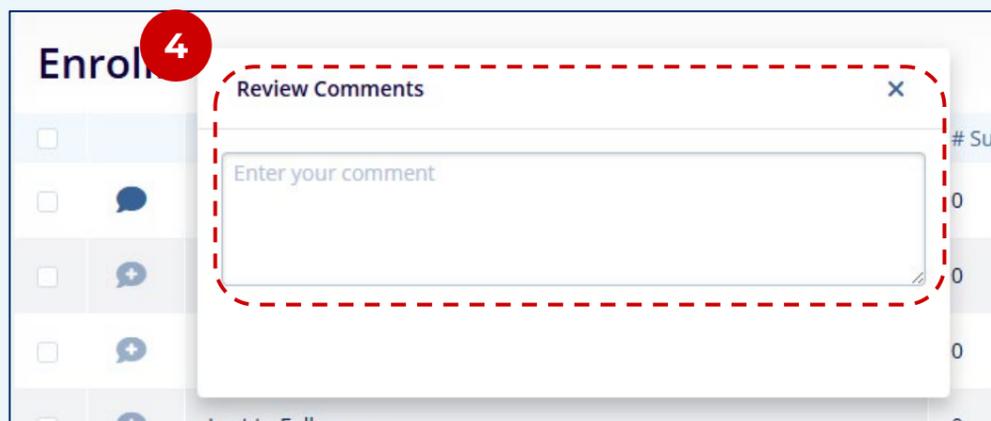
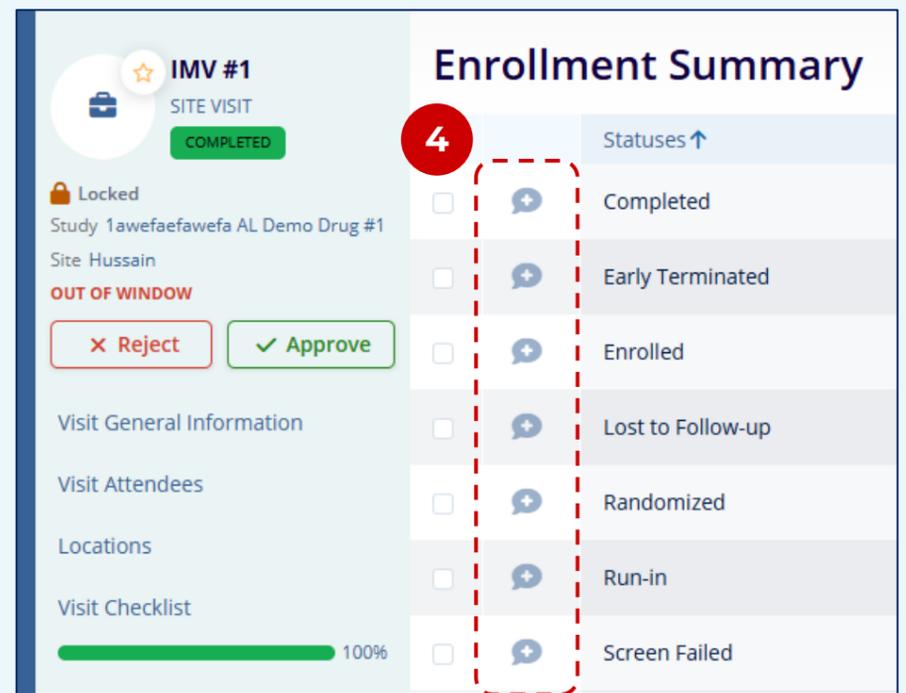
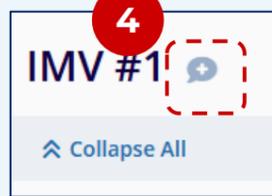
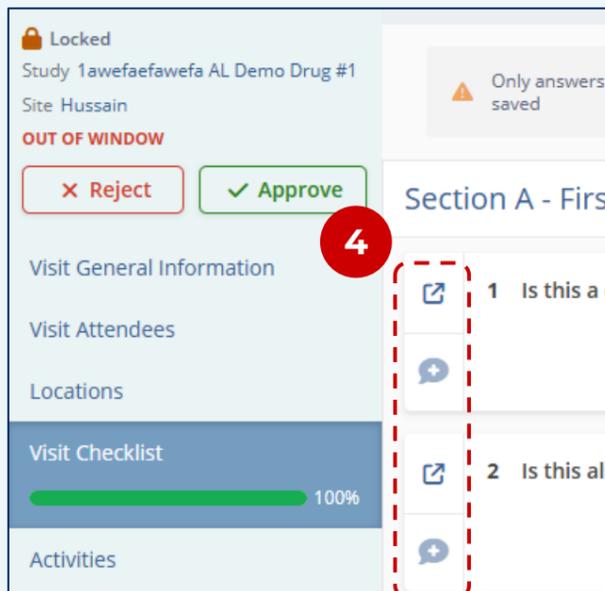
Claim workflow task?

Cancel Claim

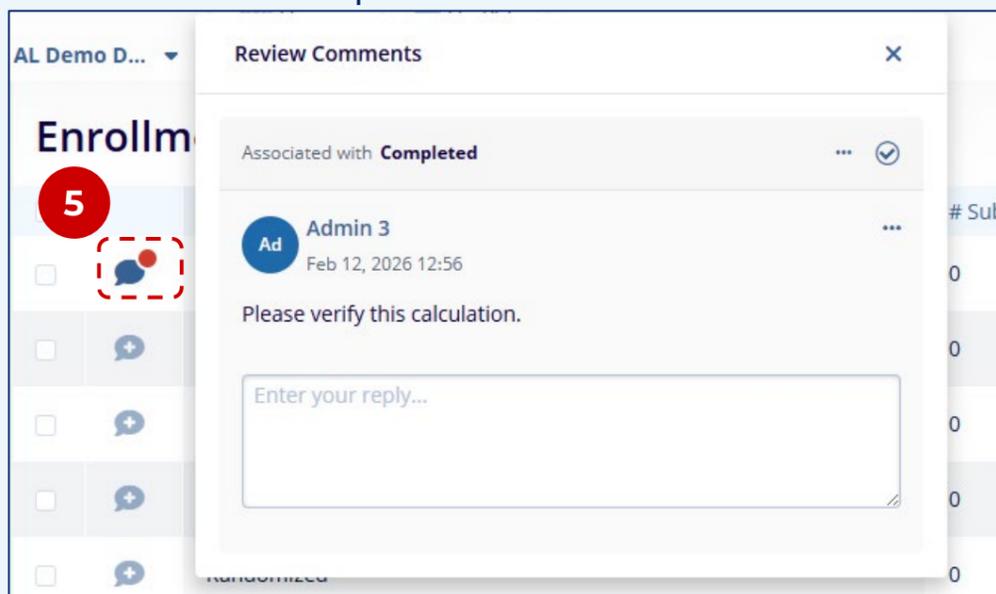
3 Click on the site visit name in the **Related Record** column to begin your review.



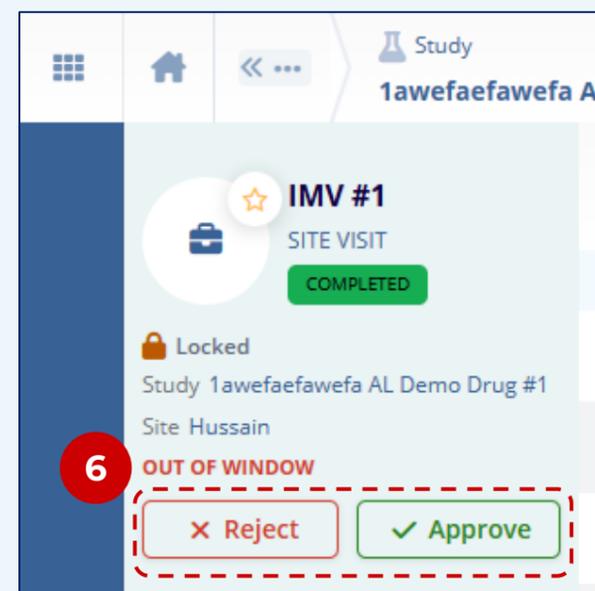
4 Click through each section of the Site Visit to review the contents of the report. In each section there is at least 1 area in which comments can be made. To create a comment, click on the icon as indicated in the screenshots below.



- 5 When a comment has been made, the icon will change to indicate its presence. Clicking on the updated icon will open the comment.



- 6 When you have completed your review, use the **Approve** or **Reject** button located in the upper-left of the screen above the navigation links.



- 7 If you **Reject** the report, provide comments and confirm your decision. If you **Approve** the report, click **Next** to begin the signature process.

