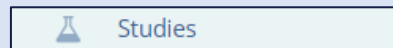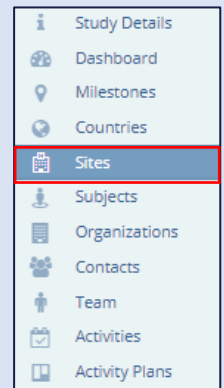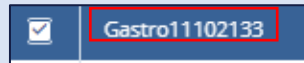**T R I A L INTERACTIVE**

APPLICABLE TO:

- ● Company Administrator   ● CTMS
- ● Study Manager
- ● CRA

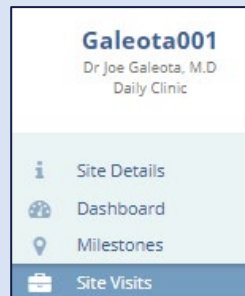**Note:** This job aid assumes that the user has already completed the steps in the "Site Visit Preparation" job aid.

1. Log into the CTMS and click on **Studies** on the left.

⚗ Studies

2. Click on the **Study Name and** navigate to **Sites.**

☑ Gastro11102133

- ℹ Study Details
- 🕸 Dashboard
- 📍 Milestones
- 🌐 Countries
- 💼 **Sites**
- 🔬 Subjects
- 📋 Organizations
- 👥 Contacts
- 👤 Team
- 📅 Activities
- 📖 Activity Plans

3. Choose a Site, then click on **Site Visits** from the options on the left.

Galeota001
Dr Joe Galeota, M.D
Daily Clinic

- ℹ Site Details
- 🕸 Dashboard
- 📍 Milestones
- 💼 **Site Visits**

4. Select the relevant Site Visit.

PLANNED   ⧉ **IMV 1**

Type
Interim

Owner   Conducted   Report **IN PROGRESS**
👤 admin admin   👤 In Person   🔗 View Report

TRANSPERFECT

5. Select **Visit Report** from the navigation options at the left.

If you have not yet generated the visit report, please see the job aid "How to Generate a Visit Report."

Visit Checklist	
▬▬▬▬▬▬▬▬▬▬	100%
Activities	
Subjects	
Enrollment Summary	
Visit Report	
Generated 06 Jun 2022	
Confirmation Letter	
Generated 06 Jun 2022	
⊕ Follow-Up Letter	

6. Press the **View Report** button to be taken to the report.

⁂ View Report

06 Jun 2022, 02:26 PM

7. Once the report loads, you will be able to edit the document or to start the approval workflow. The requirements and process may vary based on your system configuration.

① Make Changes	② Waiting for Review	③ Waiting for eSignature	④ Approved

✎ Edit Document   ⊕ Start Approval Workflow