How to Generate a Visit Report
CTMS v 1.3

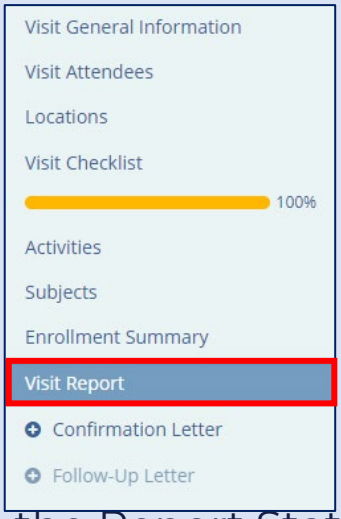
APPLICABLE TO:

- ○ Company Administrator
- ● CTMS
- ○ 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 marking the Visit Status as completed.

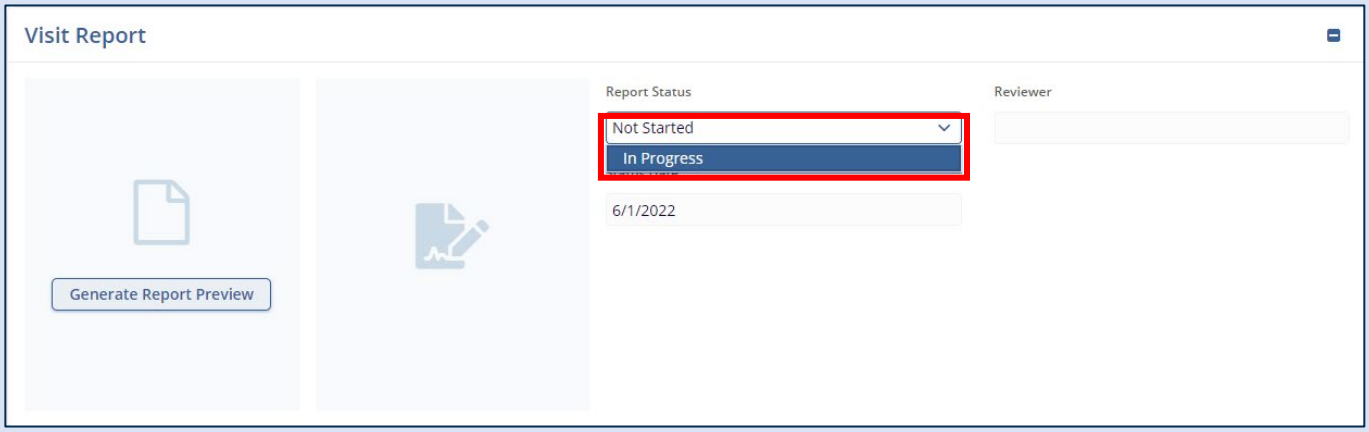
****Additionally, it is imperative that the Study Manager has assigned report reviewers prior to the creation of any visit reports.****

1. Log into the CTMS and navigate to the site visit.

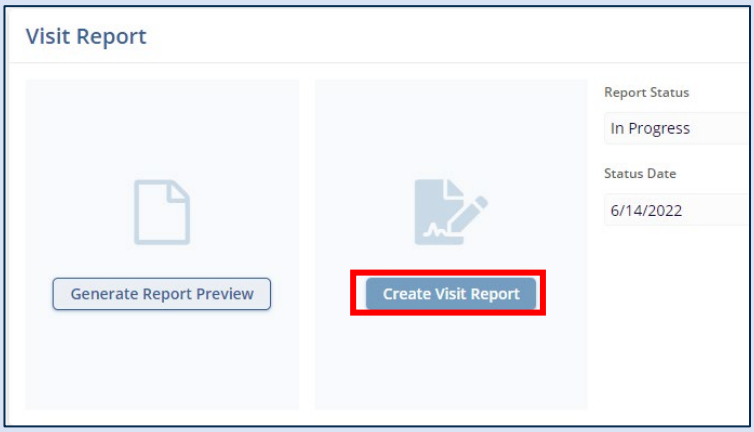


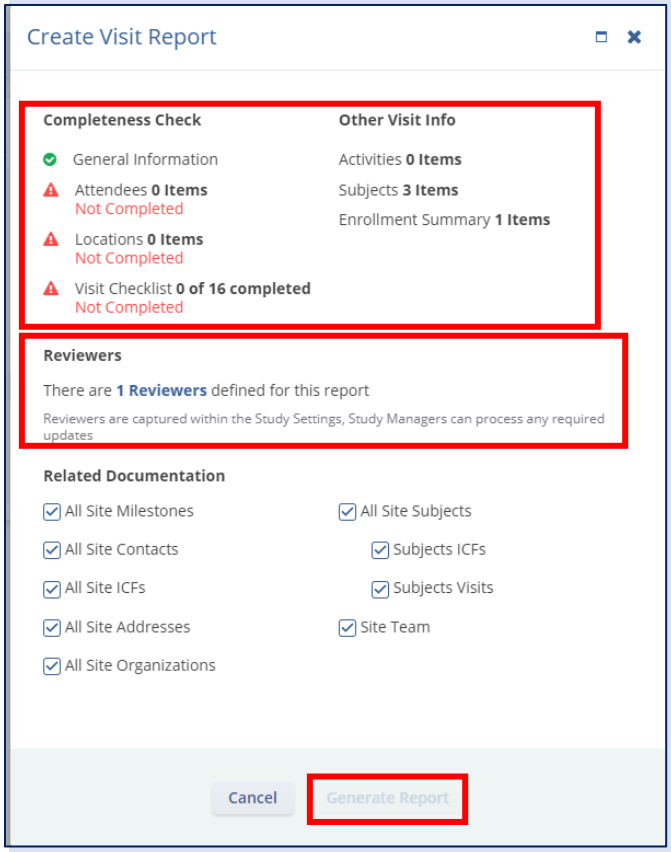
2. Click on “Visit Report”

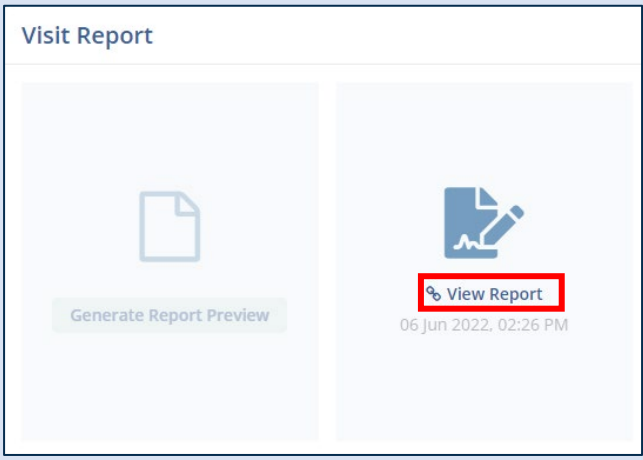
3. Change the Report Status to “In Progress” and press **Save**.



4. Press the **Create Visit Report** button.





5. The **Create Visit Report** window will open, indicating if anything remains to be completed before the report can be generated. When all items show as complete, press **Generate Report.**

At this point, the visit report will be generated. This process may take a couple of minutes to complete. You will then be able to select the **View Report** button in order to be taken to the document.