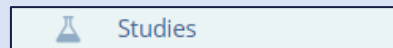


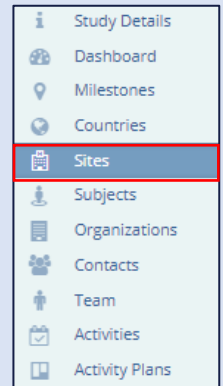
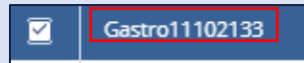
- APPLICABLE TO:
- Company Administrator
  - Study Manager
  - CRA
  - CTMS

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

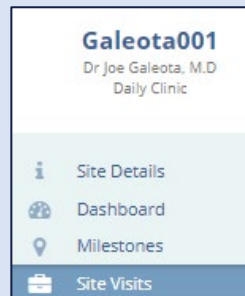
1. Log into the CTMS and click on **Studies** on the left.



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



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



4. Select the relevant Site Visit.

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

Visit Checklist

100%

Activities

Subjects

Enrollment Summary

**Visit Report**

Generated 06 Jun 2022

Confirmation Letter

Generated 06 Jun 2022

+ Follow-Up Letter

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

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

⏪ 1 / 4 ⏩

**azfaefawStudy Information**

Sponsor: Test

Investigational Product: Diagnostiva

Protocol Number: DT-001-US

Study Indication: Digestive System, Mental Health

**Investigator Information**

PI Name: Your text here Your text here

Site #:

Institution Name: Sunshine Network

Institution Address:

Item #	Question	Yes	No	N/A
1.3	Was PI and site staff reminded of possible audit(s) and inspections by sponsor and/or regulatory bodies?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Comments</b>				
1.4	Was PI and site staff reminded of obligation to notify sponsor of any potential audit(s) or inspections?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>