

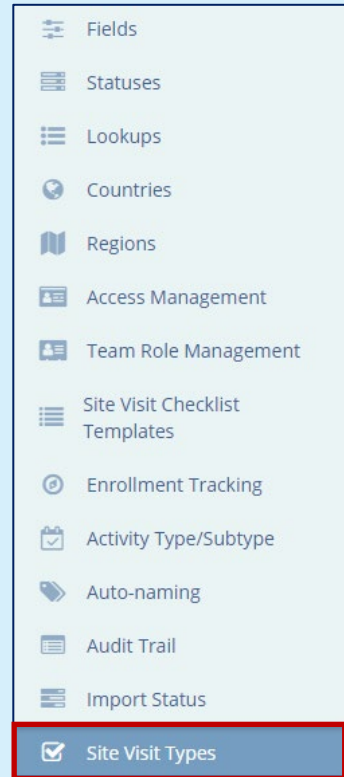
APPLICABLE TO:

- Company Admin
- Study Manager
- CRA
- CTMS

**1.** Navigate to the Settings area.

**2.** Select 'Site Visit Types' from the navigation links at the left side of the screen.

**3.** Select the site visit type from the list and press the **Edit** button in the menu bar.



Site Visit Types	
<span>+ Add</span> <span style="border: 1px solid red; padding: 2px;">✎ Edit</span> <span>⏻ Deactivate</span>	
7 Items 1 Selected	
Value	Label
Ad hoc	Ad hoc
Close out	Close out

4. Click on the Checklist Templates dropdown menu and select the template to be associated with the visit type.

Edit Site Visit Type
□ ×

Value\*

Label\*

Checklist Templates

Close Out Visit ×
× ▾

- CHECKLIST DEMO
- Interim Visit Report
- Interim Visit Report
- Test Visit Report
- Site Initiation Visit Report
- Site Initiation Visit Report
- Site Initiation Visit Report

5. Press **Save**.