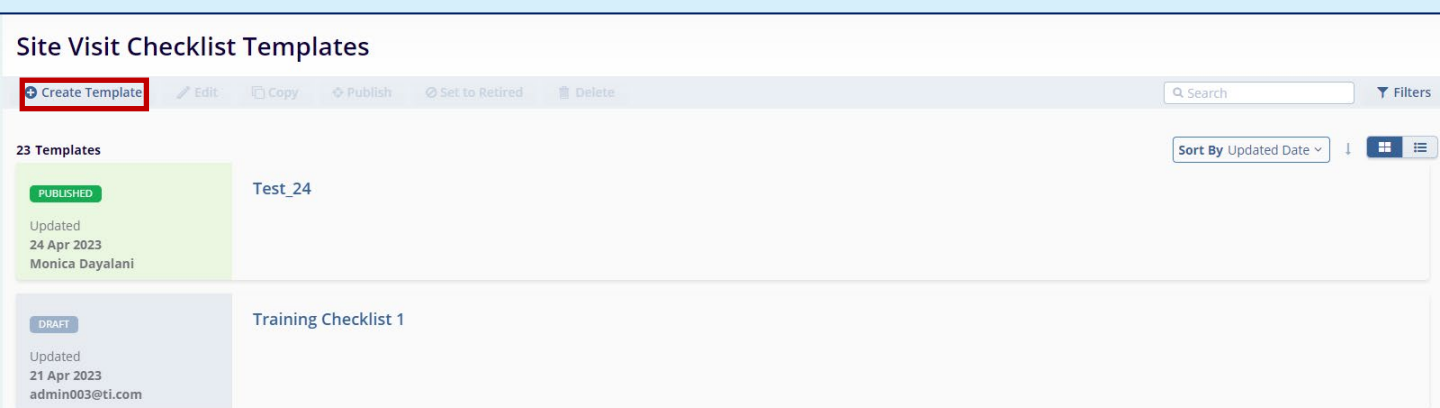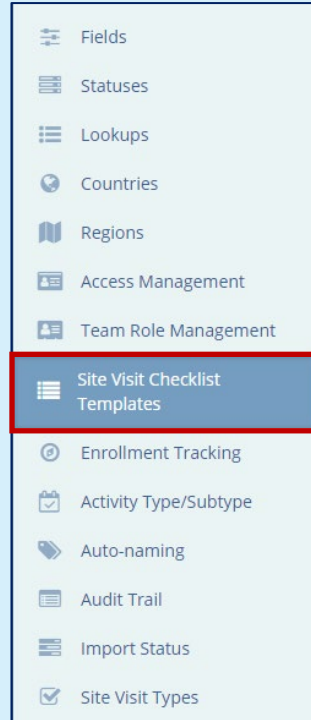**TRIAL INTERACTIVE**

APPLICABLE TO:

- ● Company Admin
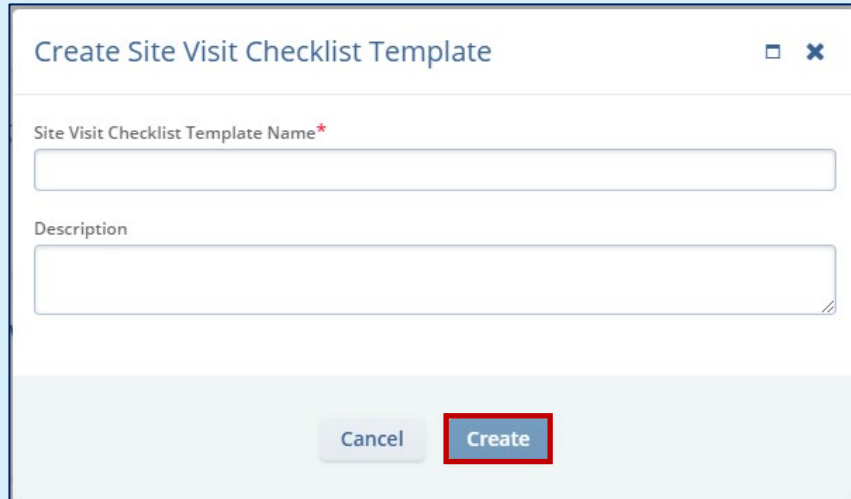- ○ Study Manager
- ○ CRA
- ● CTMS

1. Navigate to the Settings area.

2. Select 'Site Visit Checklist Templates' from the navigation links at the left side of the screen.

3. Press the **+Create Template** button above the grid.

Fields
Statuses
Lookups
Countries
Regions
Access Management
Team Role Management
Site Visit Checklist Templates
Enrollment Tracking
Activity Type/Subtype
Auto-naming
Audit Trail
Import Status
Site Visit Types

Site Visit Checklist Templates

Create Template | Edit | Copy | Publish | Set to Retired | Delete | Search | Filters

23 Templates

Sort By Updated Date

| PUBLISHED | Test_24 |
| Updated 24 Apr 2023 Monica Dayalani | |

| DRAFT | Training Checklist 1 |
| Updated 21 Apr 2023 admin003@ti.com | |

TRANSPERFECT

4. Name the Checklist Template and, if desired, add a description.
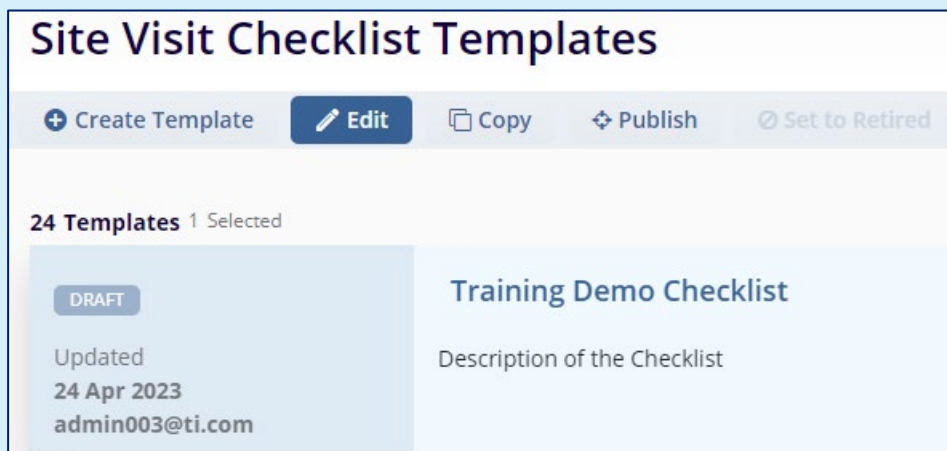
5. Press **Create**.

6. Select the new checklist and press **Edit** from the menu at the top of the screen.

7. If desired, turn on the Template Numbering via the toggle switch and select the schema.

8. Press **Add Section** and name the section.

9. Press **Add Question** to begin adding questions.
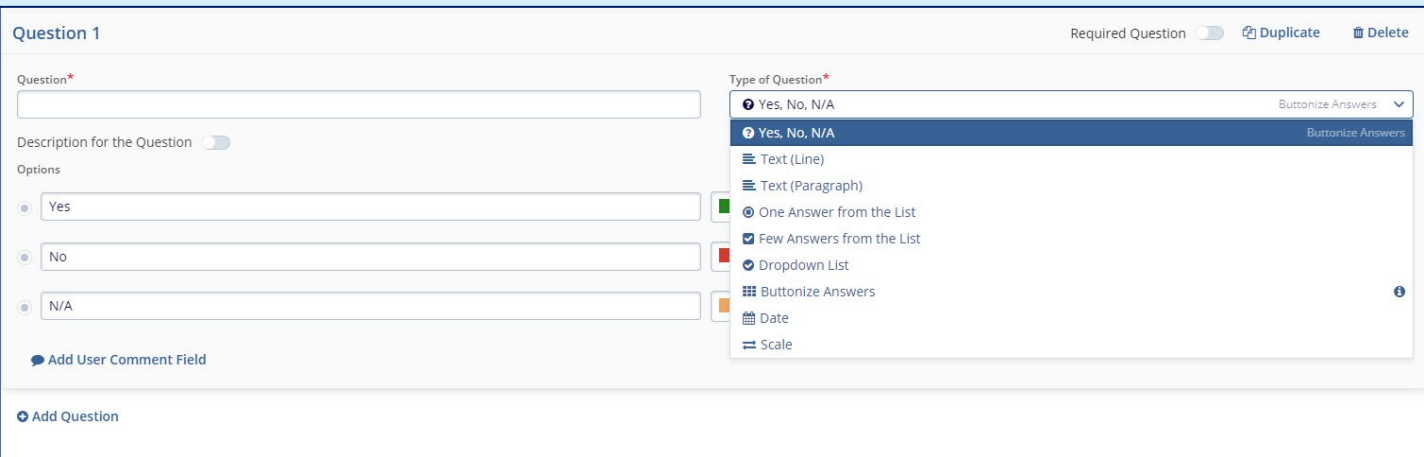
10. Choose the type of question that you would like to add. This selection will determine the steps required to complete configuring the question.

Question 1 — Required Question ⬤ 🗗 Duplicate 🗑 Delete

Question*

Type of Question*
❓ Yes, No, N/A — Buttonize Answers ⌄
❓ Yes, No, N/A — Buttonize Answers
☰ Text (Line)
☰ Text (Paragraph)
◉ One Answer from the List
☑ Few Answers from the List
⊘ Dropdown List
▦ Buttonize Answers ⓘ
📅 Date
⇄ Scale

Description for the Question ⬤
Options
◉ Yes
◉ No
◉ N/A
💬 Add User Comment Field

➕ Add Question

11. Press **Save** whenever you would like to save your progress and when you are done editing the checklist template.

✅ Save | 🗐 Copy | 🗑 Delete

Site Visit Checklist Template Name*
Training Demo Checklist

Template Numbering ⓘ ⬤

Description
Description of the Checklist

Section Order
Numerical ⌄

Question Order
Numerical ⌄