

# How to Associate a Checklist Template with a Visit Type

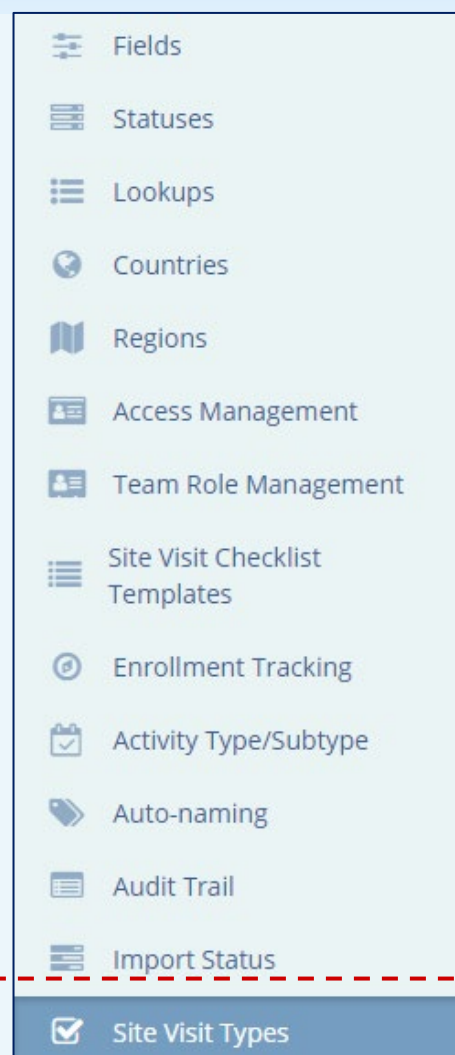
CTMS version 2.0

## APPLICABLE TO:

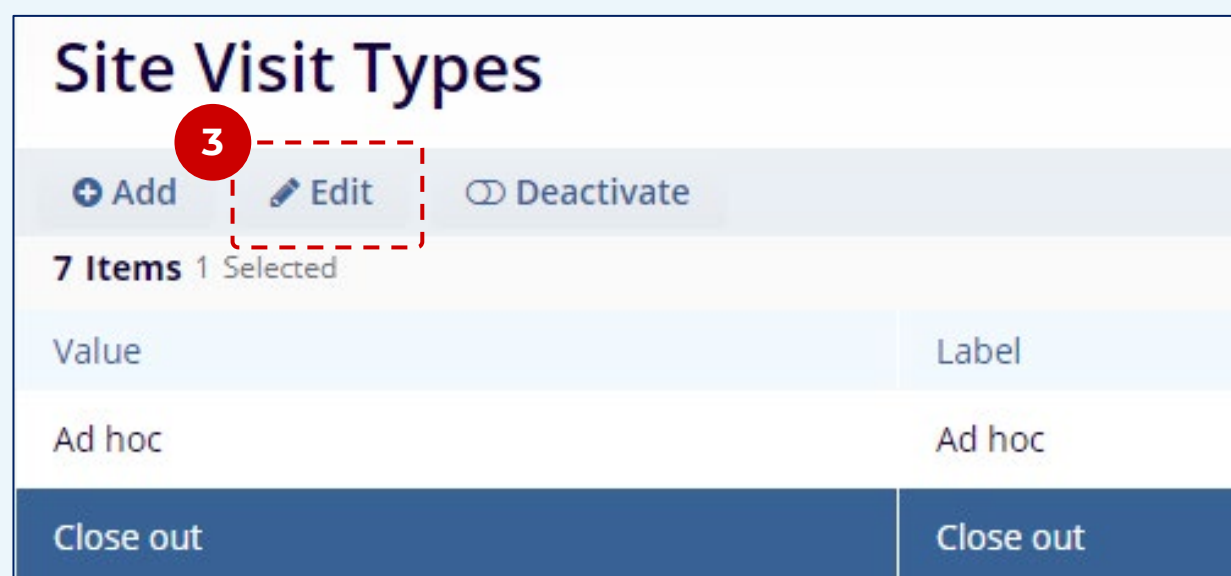
- Company Admin
- Study Manager
- CRA

**1** Navigate to the Settings area.

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



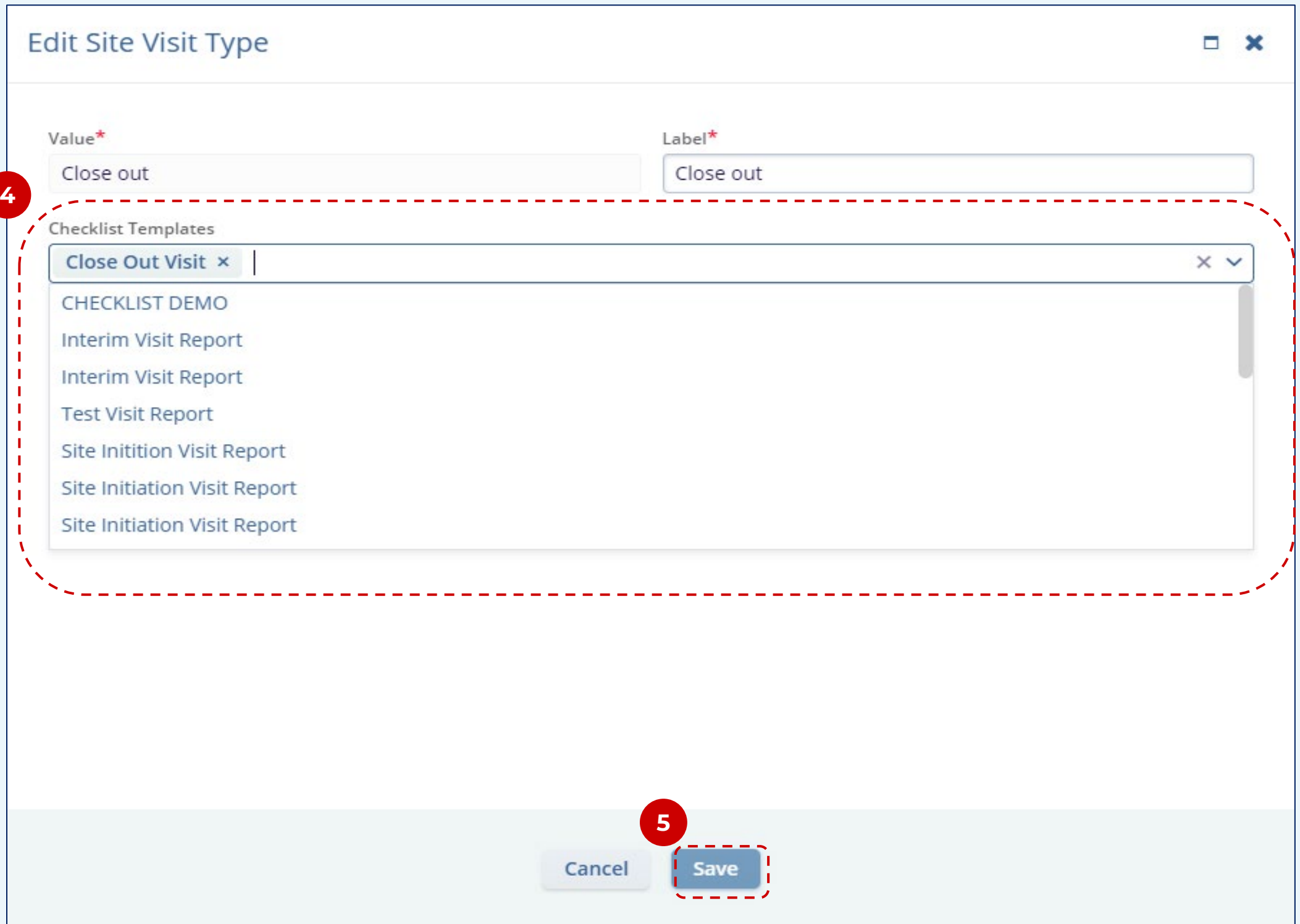
**3** Select the site visit type from the list and press the **Edit** button in the menu bar.



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- 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\*

4 Checklist Templates

Close Out Visit x |

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

5

Cancel Save

- 5 Press **Save**.