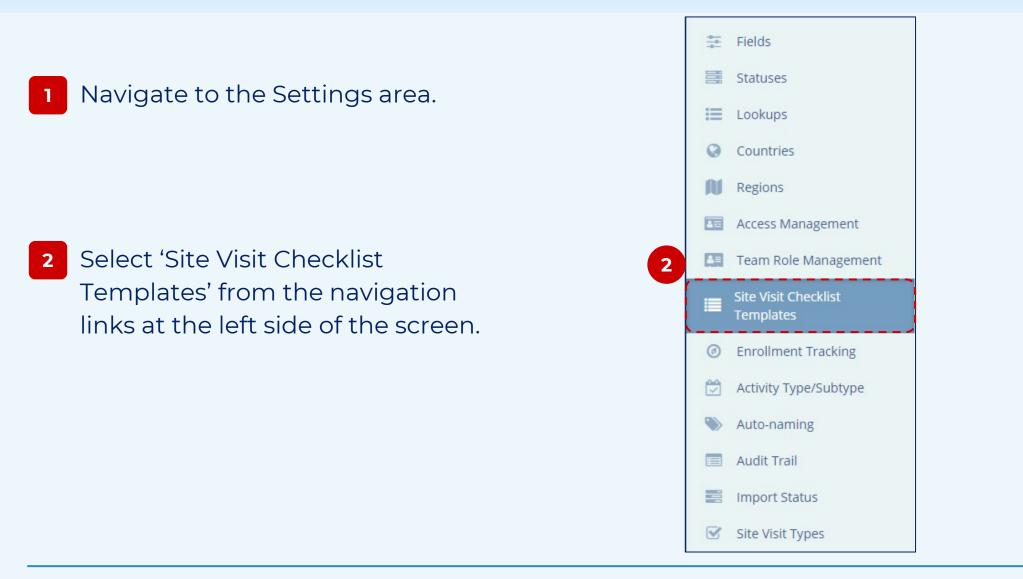
How to Create a Checklist Template

CTMS version 2.0

APPLICABLE TO:

- Company Admin
- Study Manager
- 🔿 CRA





Site Visit Checklist Templates

| 24 Apr 2023 Monica Dayalani | | | |
|--------------------------------|----------------------|--|--|
| DRAFT | Training Checklist 1 | | |
| Updated 21 Apr 2023 | | | |
| admin003@ti.com | | | |





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How to Create a Checklist Template TRIAL INTERACTIVE

| 4 Name the Checklist Ter if desired, add a descrip | • | | |
|---|--------------------------------------|----------|---|
| | Create Site Visit Checklist Template | × | |
| | Site Visit Checklist Template Name* | | |
| | Description | | |
| 5 Press Create. | | | 1 |
| | Cancel Create | | |

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





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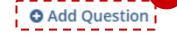
If desired, turn on the Template Numbering via the toggle switch and select the 7 schema.

| Training Demo Checklist | |
|--|--------------------------------------|
| Save Copy Thelete | 7 |
| Site Visit Checklist Template Name* | Template Numbering 🗿 💽 |
| Training Demo Checklist | Section Order |
| Description | Numerical V Configure Preview 1, 2 N |
| Description of the Checklist | Question Order |
| | Numerical V Configure Preview 1, 2 N |
| | |
| 8 Add Section | |

Press Add Section and name the section. 8

9 Press Add Question to begin adding questions

| New Section | |
|---------------------------------|-------------------|
| Section Title* | Section Numbering |
| | Question Order |
| Description | |
| | |
| | |
| | |







How to Create a Checklist Template

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 | Re | quired Question 🛄 🖓 Duplicate 🛚 🛍 Delete |
|------------------------------|-------------------------------|--|
| Question* | Type of Question* | |
| | 😧 Yes, No, N/A | Buttonize Answers 🗸 |
| Description for the Question | 😯 Yes, No, N/A | Buttonize Answers |
| Options | 🗮 Text (Line) | |
| | ■ Text (Paragraph) | |
| Yes | One Answer from the List | |
| | 🔄 🔤 Few Answers from the List | |
| No | 📃 🔄 🖸 Dropdown List | |
| N/A | Buttonize Answers | θ |
| | 🗕 🔚 Date | |
| Add User Comment Field | ≓ Scale | |
| Add Oser 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* | Template Numbering 🚯 🌗 |
| Training Demo Checklist | Section Order |
| Description | Numerical 🗸 |
| Description of the Checklist | Question Order |
| | Numerical 🗸 |



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