How to Create a Checklist Template

CTMS version 2.0

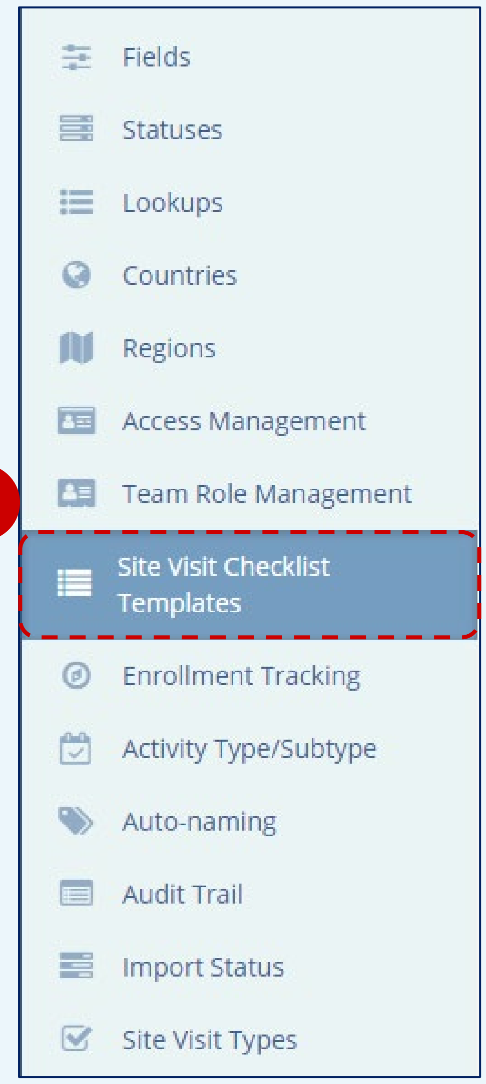
TRIAL INTERACTIVE

APPLICABLE TO:

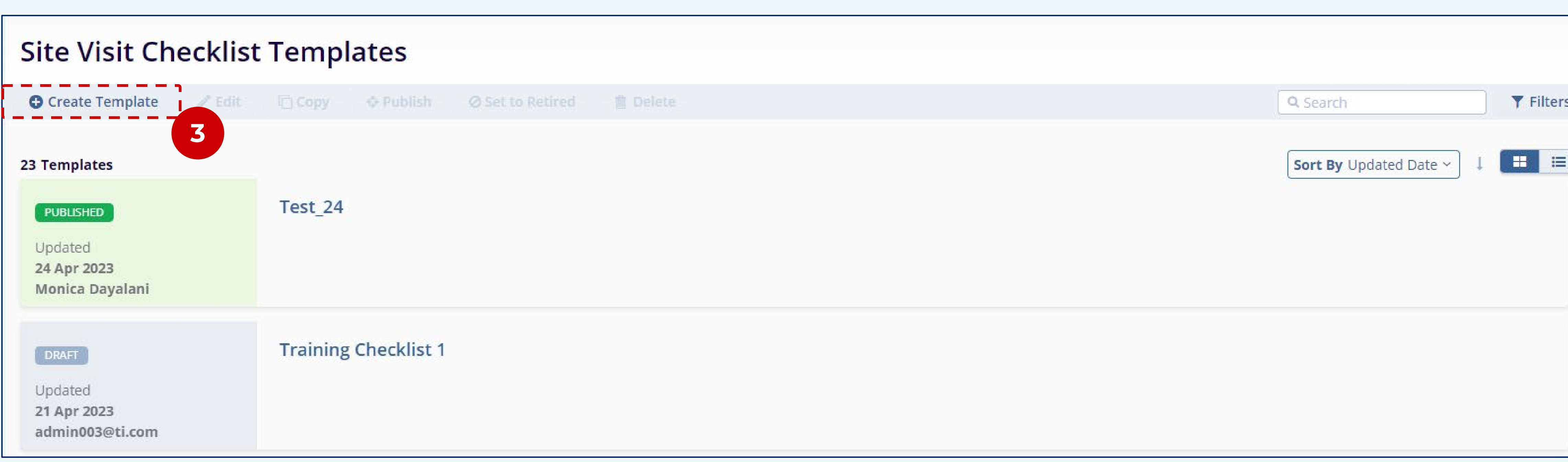
- ● **Company Admin**
- ○ **Study Manager**
- ○ **CRA**

1 Navigate to the Settings area.

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

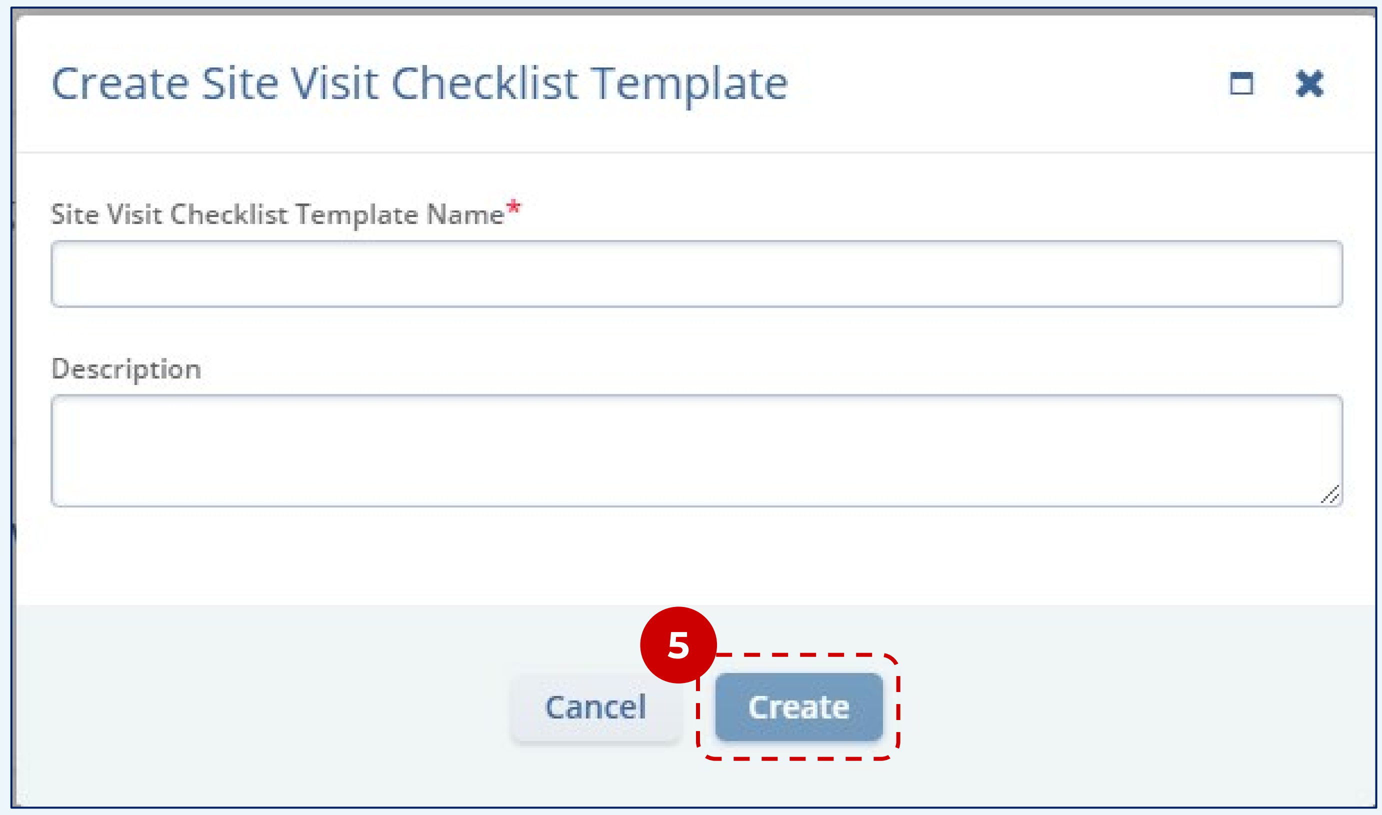


3 Press the **Create Template** button above the grid.



4 Name the Checklist Template and, if desired, add a description.

5 Press **Create.**



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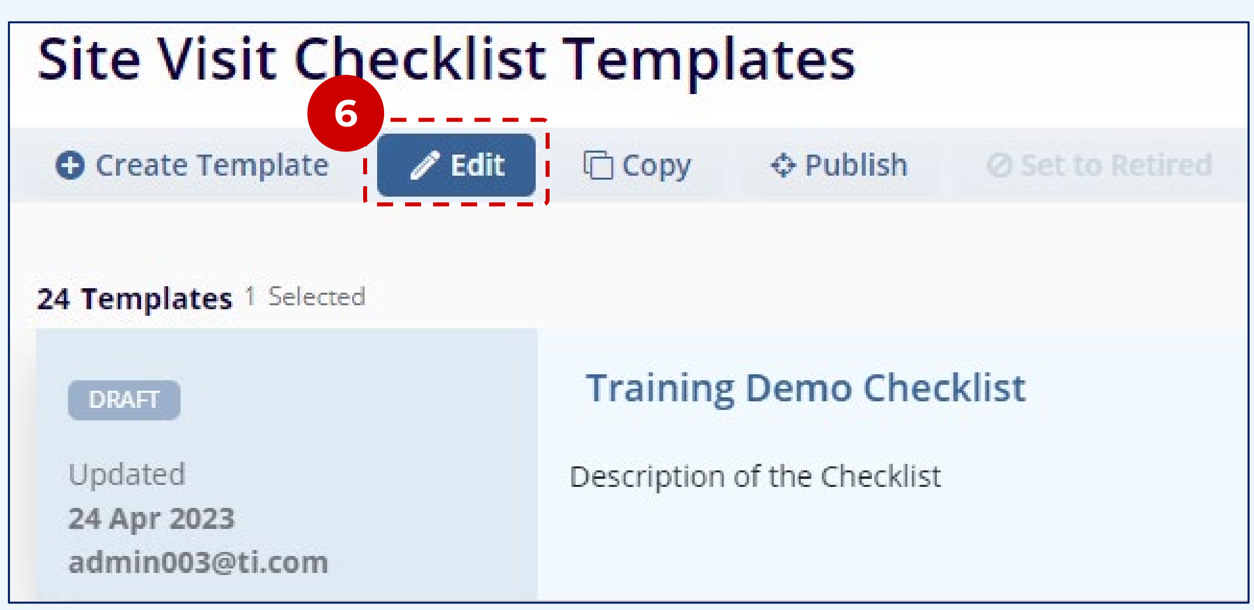
6 Select the new checklist and press **Edit** at the top of the screen.



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

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

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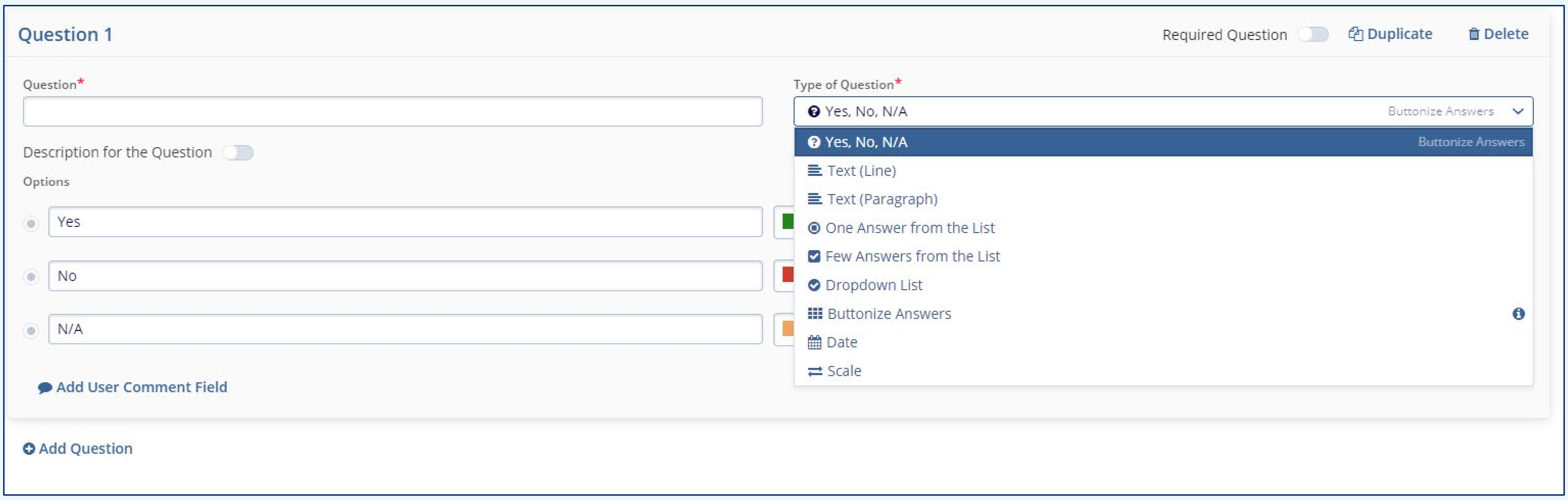
9 Press **Add Question** to begin adding questions

10 Choose the type of question that you would like to add. This selection will determine the steps required to complete configuring the question.



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