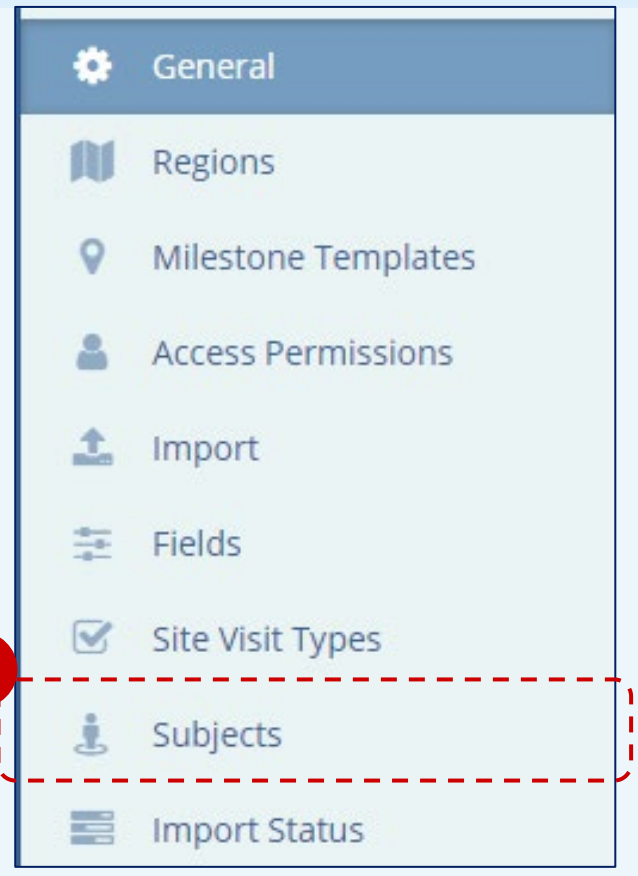
How to Create a Subject Visit Schedule

CTMS version 2.0

APPLICABLE TO:

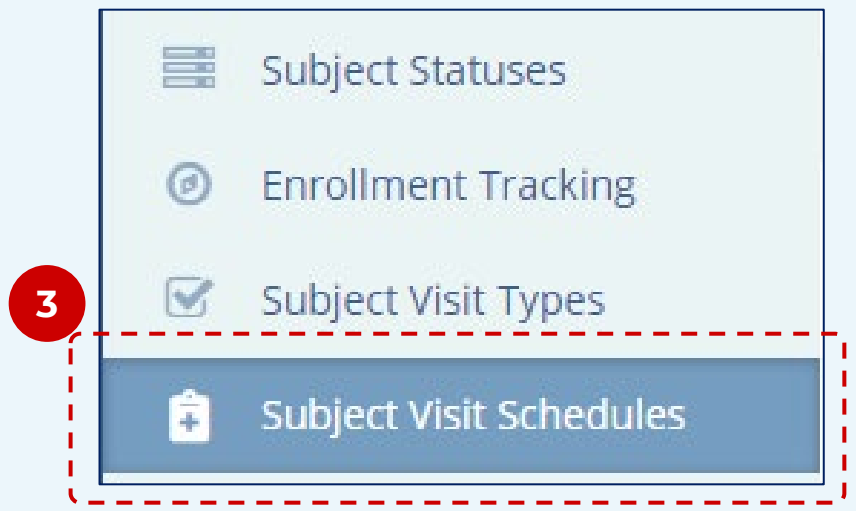
- ● **Company Admin**
- ● **Study Manager**
- ○ **CRA**

1 Navigate to the Study Settings area.



2 Select **Subjects** in the navigation links at the left side of the screen.

3 Select **Subject Visit Schedules** in the navigation links at the left side of the screen.



4 Press **Add.**

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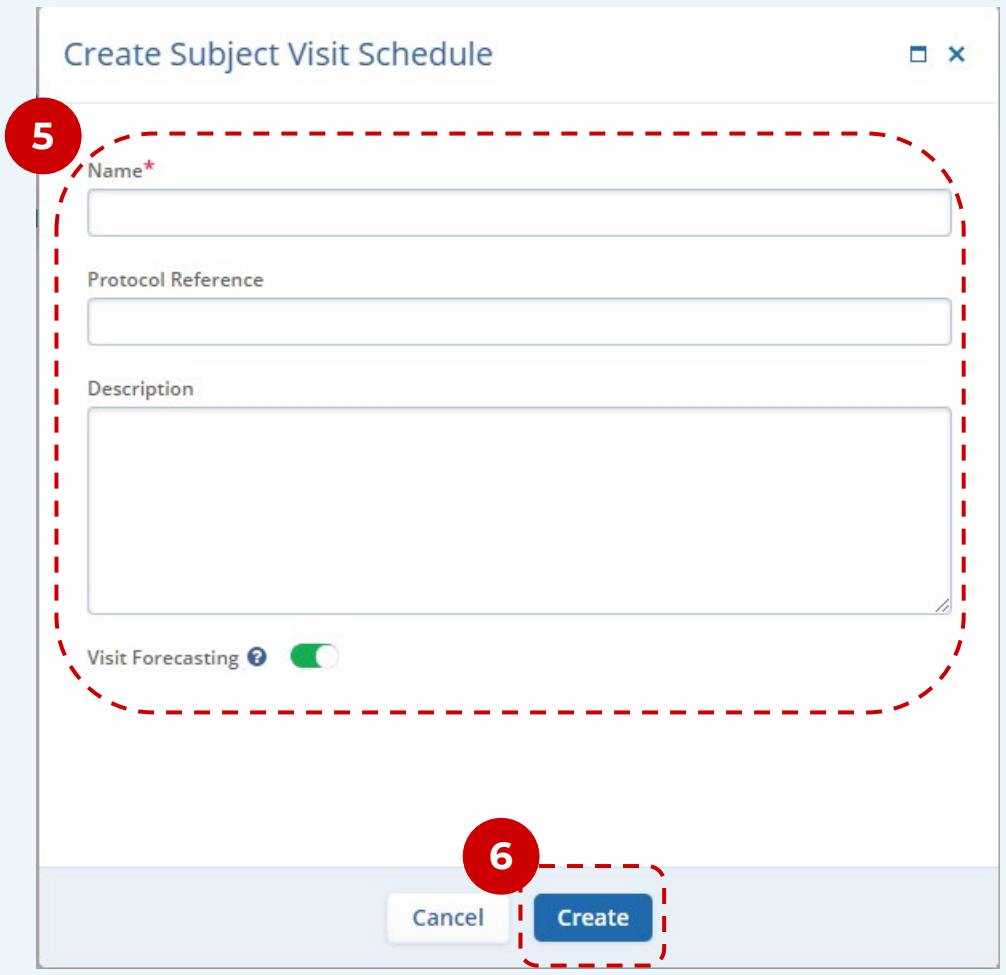
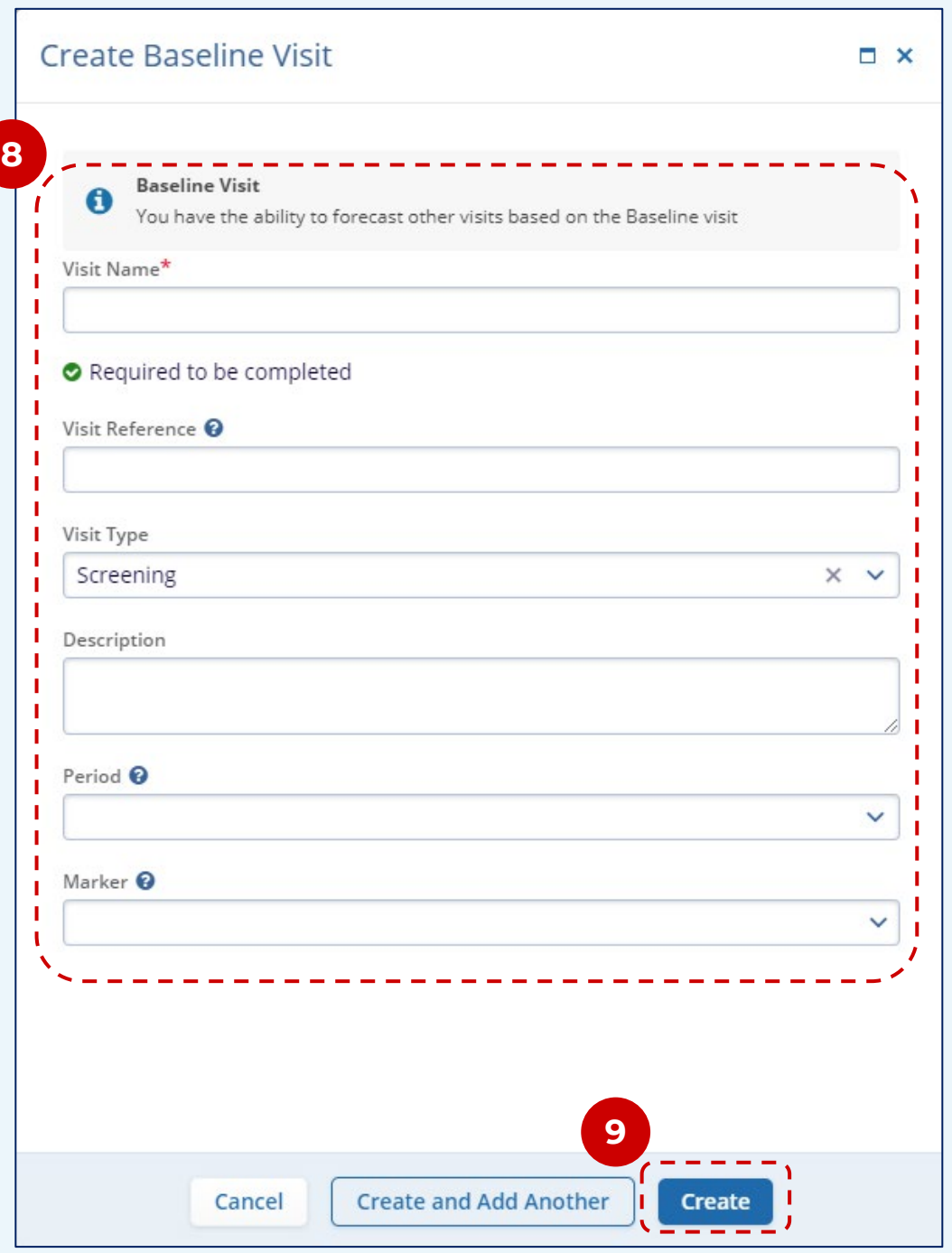
5 Fill in the required information as well as any other desired information. If you want the system to forecast visit dates based on the schedule, use the **Visit Forecasting** toggle switch.



6 Press **Create**.

8 If you have toggled visit forecasting on, you will next be asked to create a Baseline Visit. Enter the required information.

Note: It is recommended that you clear the 'Visit Type' field value and use the Visit Name to indicate the type of visit instead.



9 Press **Create.**

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10 Once the baseline visit has been created, the Visit Schedule will appear in the list of visit schedules. Click on the name of the schedule to add additional visits.

11 Press **Add Visit** to add additional visits to your schedule.

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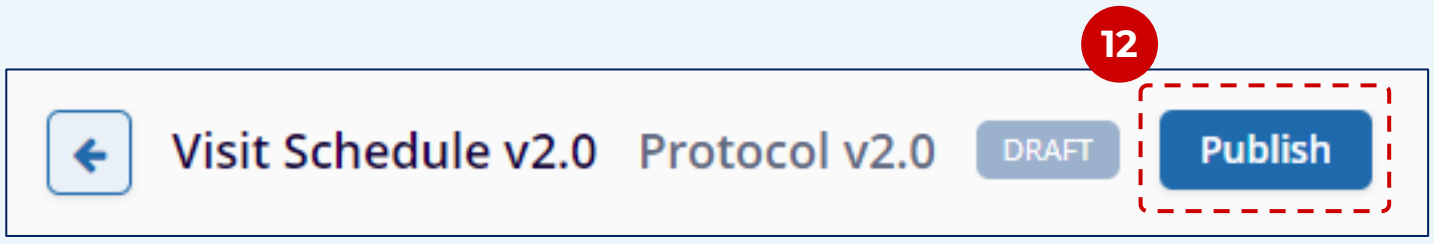
12 Once you have added all of the expected visits into the schedule, press **Publish** so that the schedule can be applied to subjects.

Note: Once the schedule is published, you will not be able to make updates.