How to Generate a Visit Report

CTMS version 2.0

APPLICABLE TO:

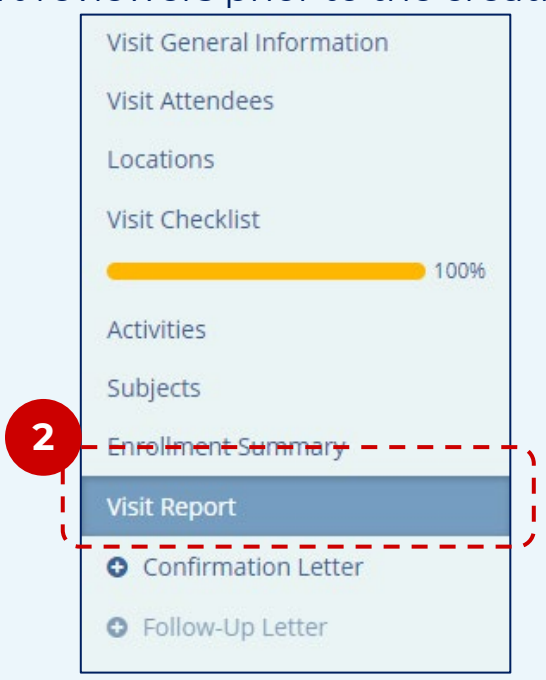
- ○ **Company Admin**
- ○ **Study Manager**
- ● **CRA**

Note: This job aid assumes that you have already created the site visit, filled in the necessary information, including completion of the visit checklist, and marked the Visit Status as completed.

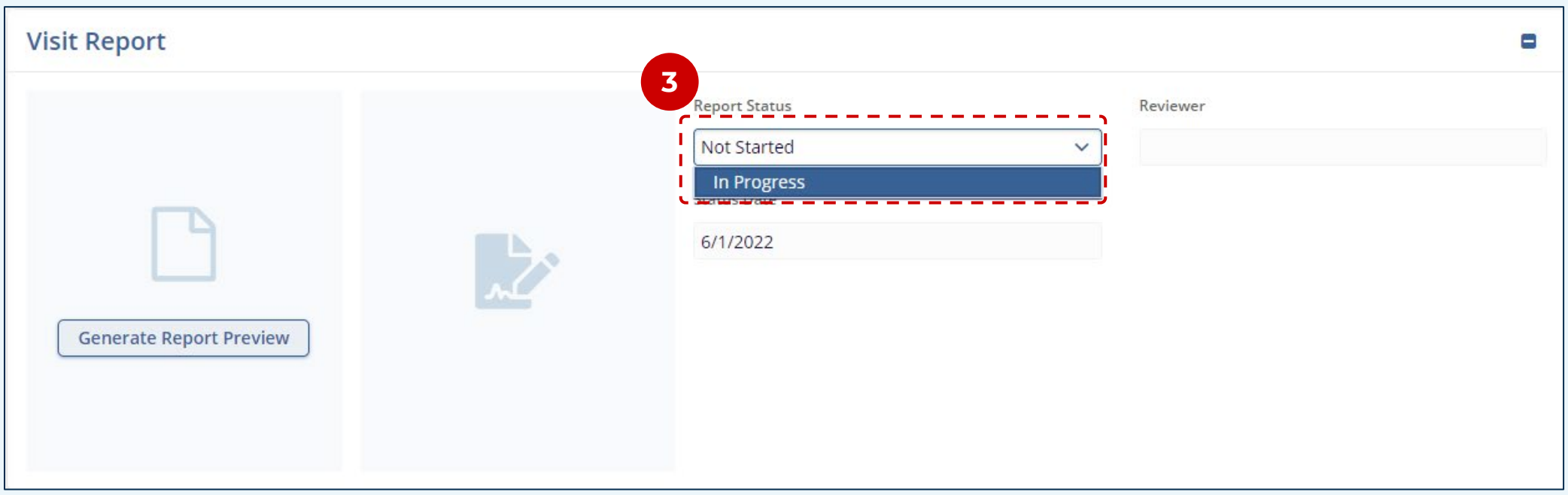
****Additionally, it is imperative that the Study Manager has assigned report reviewers prior to the creation of any visit reports.****

1 Log in an navigate to the site visit.

2 Click on 'Visit Report' in the navigation links at the left side of the screen.



3 Change the Report Status to 'In Progress' and press **Save.**



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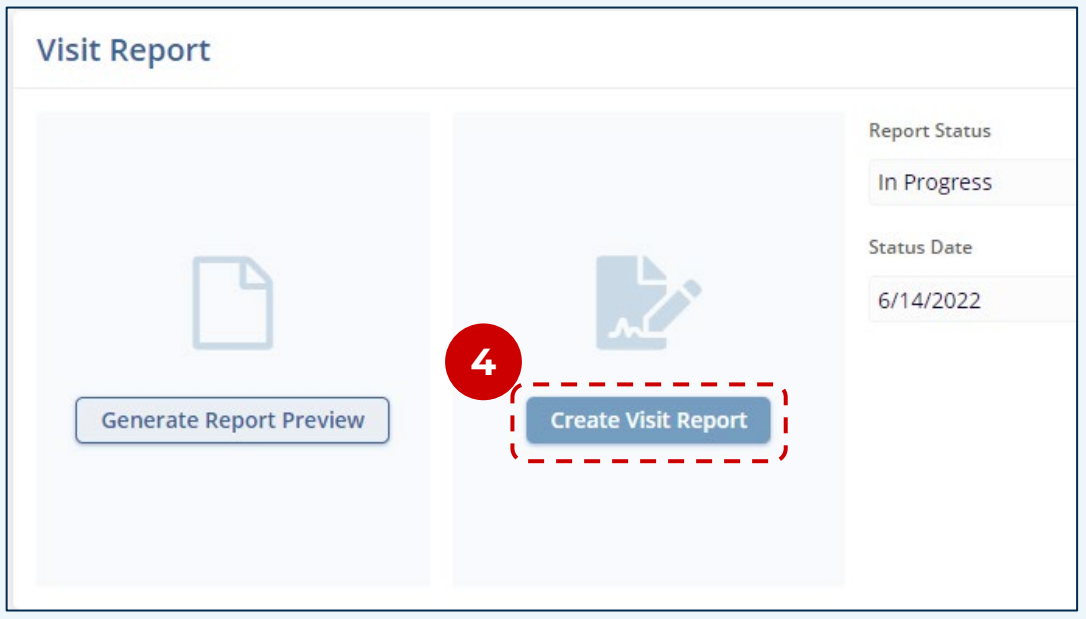
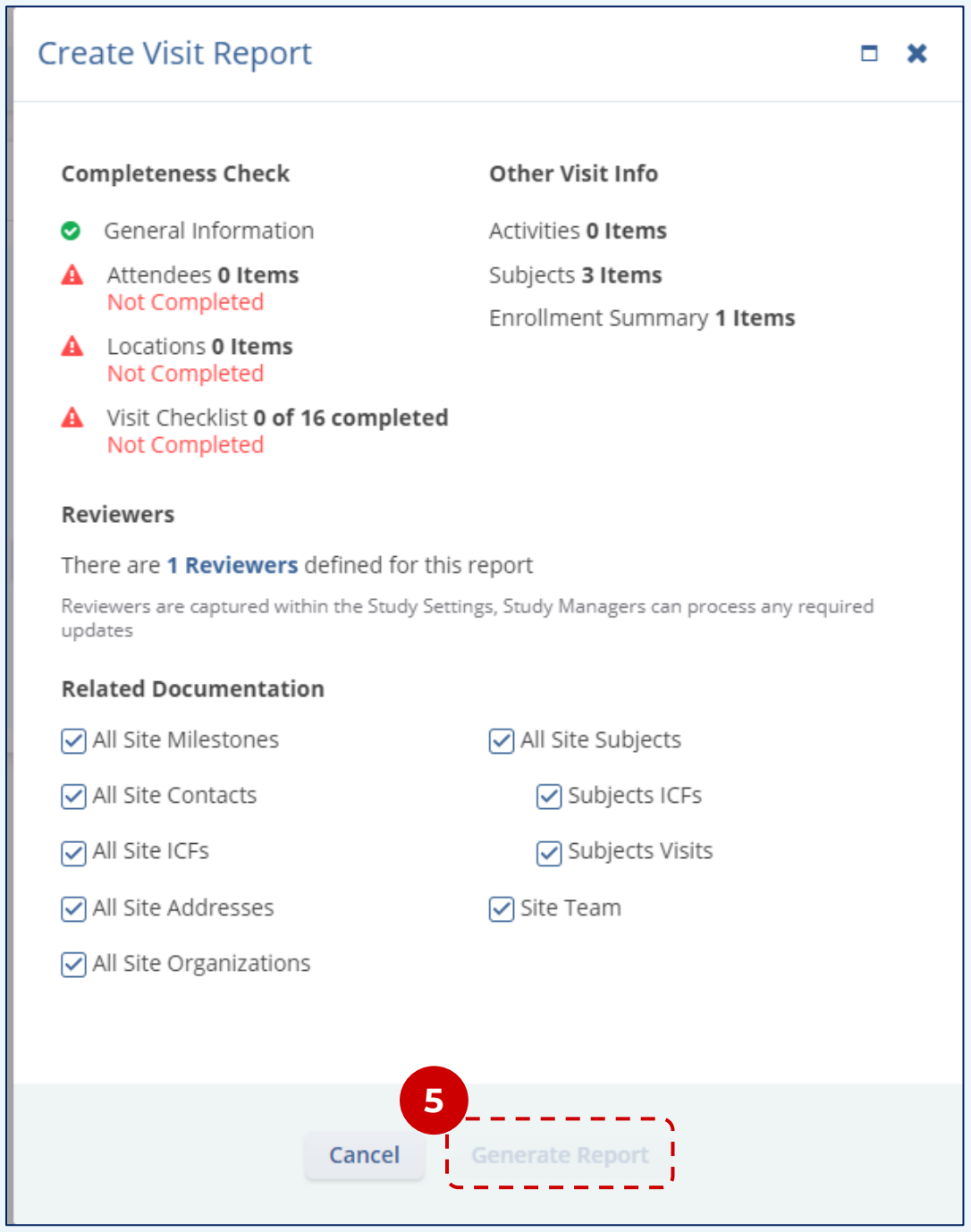
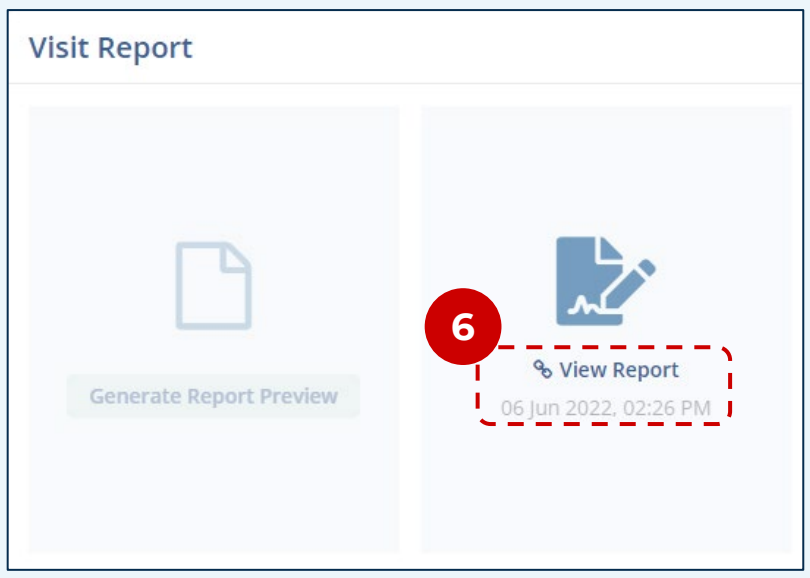
4 Press the **Create Visit Report** button.



5 The **Create Visit Report** window will open, indicating if anything remains to be completed before the report can be generated. When all items show as complete, press **Generate Report.**



6 At this point, the visit report will be generated. This process may take a couple of minutes to complete. You will then be able to select the **View Report** button in order to be taken to the document.