How to Regenerate a Report

CTMS version 2.0

TRIAL INTERACTIVE

APPLICABLE TO:
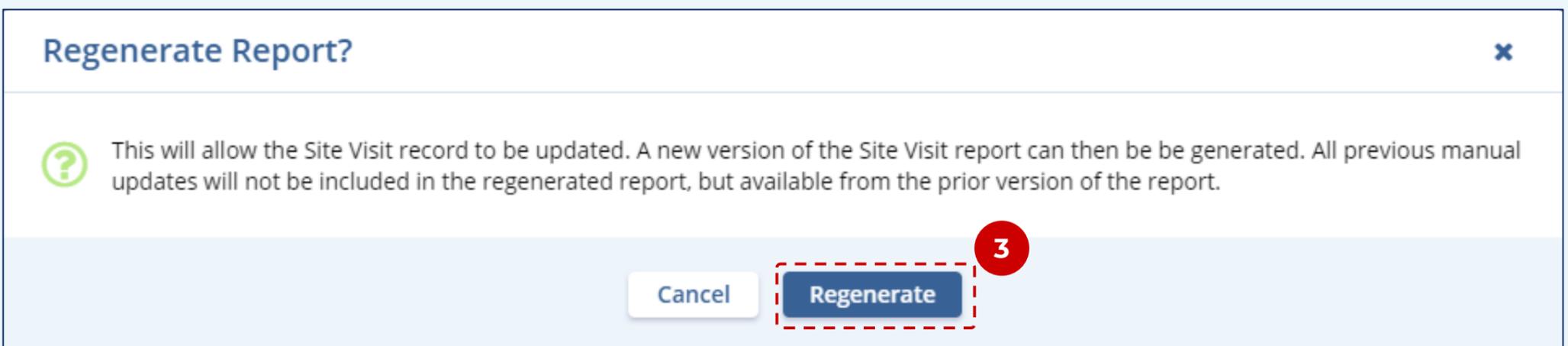
○ Company Admin
○ Study Manager
● CRA

Note: This assumes that the visit report has already been reviewed and rejected and that the comments made by the reviewer need to be addressed by correcting Site Visit information in the CTMS such as updating the site visit checklist responses.

1 Open the Visit Report.

2 Press **Regenerate.**

1 Make Changes Pending	2 Waiting for Review Rejected ⓘ	3 Waiting for eSignature	4 Waiting for Approval

✏ Revise   ↺ Regenerate   ⧉ Compare with Previous Version   ⧉ Go To Visit   ➜ Go To Document Profile

3 Read the message indicating that selecting this option will completely remove all prior manual updates from the document. To continue, press **Regenerate**.

Regenerate Report?   ✖

❓ This will allow the Site Visit record to be updated. A new version of the Site Visit report can then be be generated. All previous manual updates will not be included in the regenerated report, but available from the prior version of the report.

Cancel   **Regenerate**

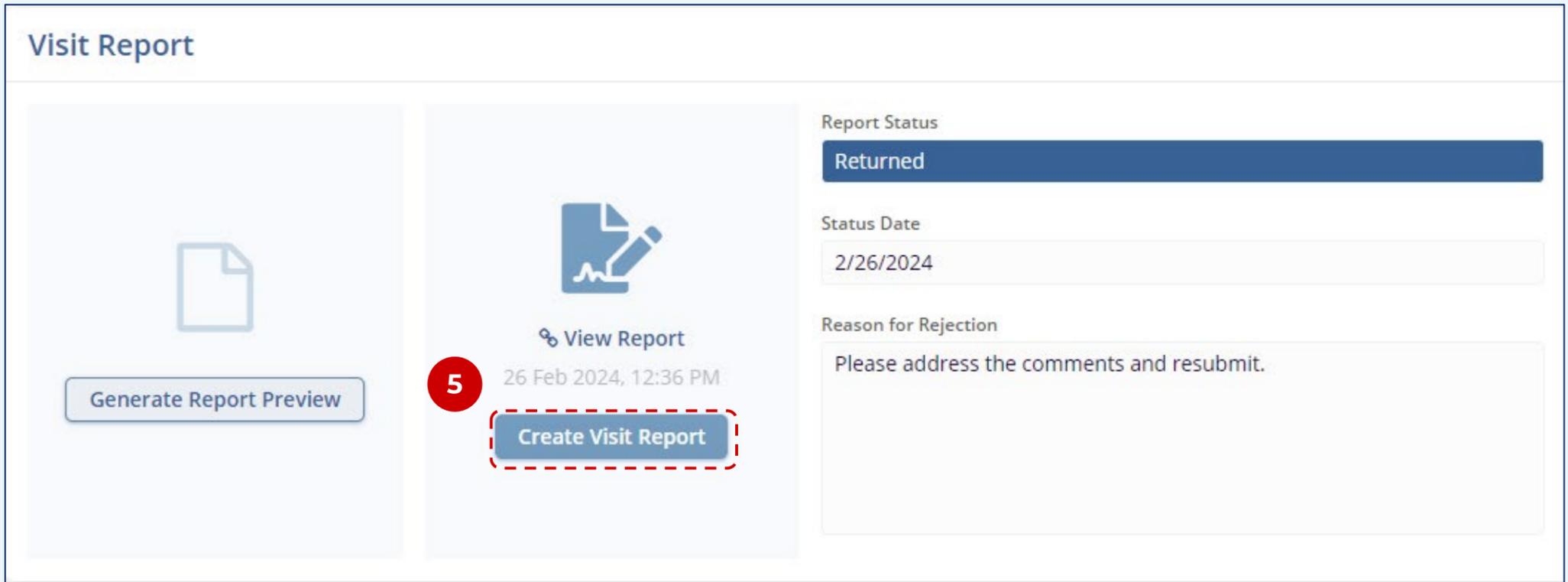**4** Return to the site visit. Once the lock icon has been removed, you can begin making the necessary corrections to the visit information.

COMPLETED   ☆ 🔒 IMV   ➡   COMPLETED   ☆ IMV

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5 Once you are done making the necessary corrections, return to the visit report area of the site visit and press **Create Visit Report.**

Visit Report

Generate Report Preview

% View Report
26 Feb 2024, 12:36 PM

5

Create Visit Report

Report Status
Returned

Status Date
2/26/2024

Reason for Rejection
Please address the comments and resubmit.

6 Press **Generate Report** on the Create Visit Report popup window to initiate the regeneration process.

Create Visit Report

Completeness Check

✓ General Information
✓ Attendees **2 Items**
✓ Locations **1 Items**
✓ Visit Checklist **0 of 0 required completed**

Other Visit Info

Activities **12 Items**
Subjects **3 Items**
Enrollment Summary **0 Items**

Reviewers

There are **1 Reviewers** defined for this report

Reviewers are captured within the Study Settings, Study Managers can process any required updates

Related Documentation

☐ All Site Milestones
☐ All Site Contacts
☐ All Site ICFs
☐ All Site Addresses
☐ All Site Organizations

☐ All Site Subjects
☐ Subjects ICFs
☐ Subjects Visits
☐ Site Team

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Cancel   Generate Report