

How to Review a Report

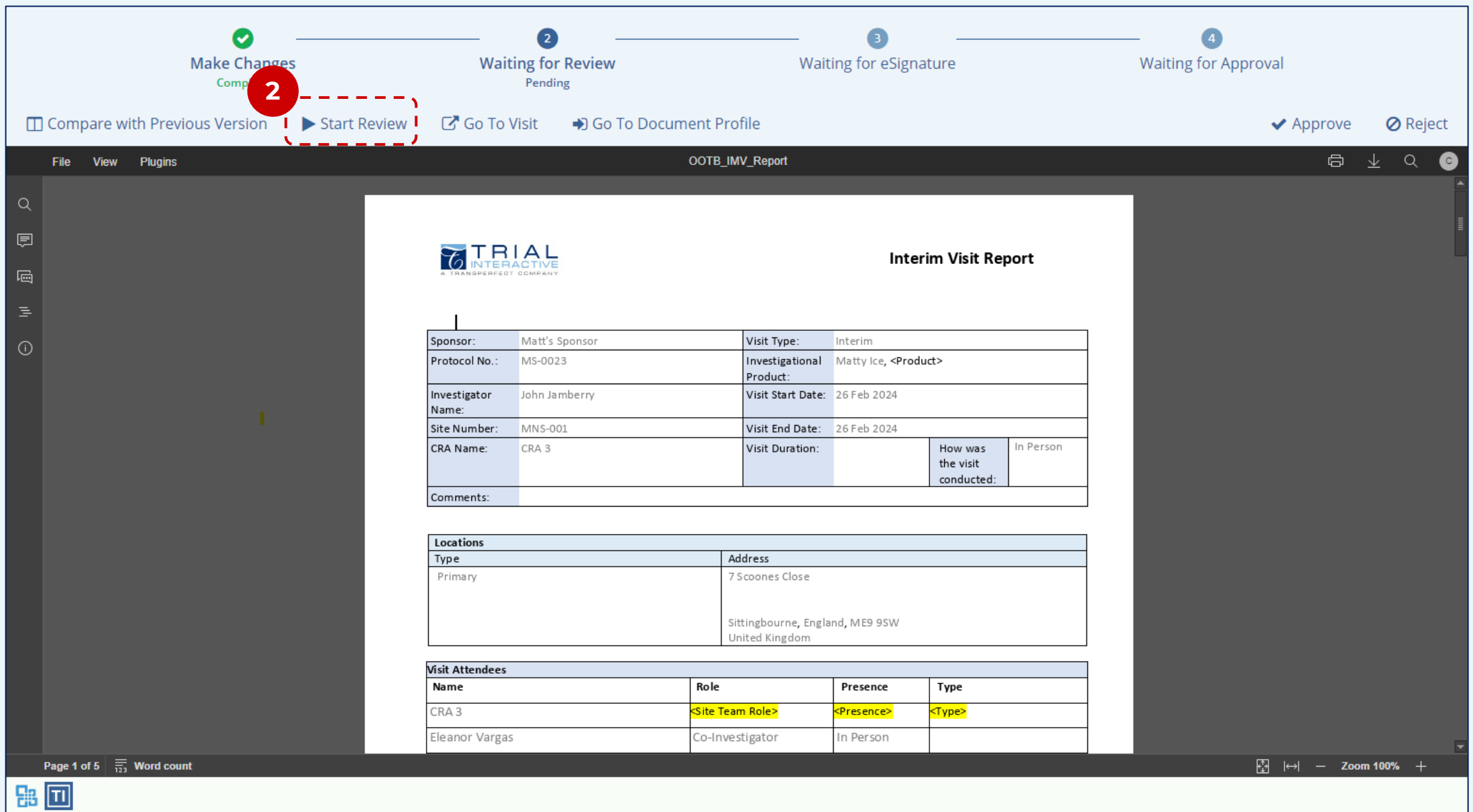
CTMS version 2.0

APPLICABLE TO:

- Company Admin
- Study Manager
- CRA

Note: This assumes that the visit report has already been created and submitted for review. These steps can only be done by the user who has been assigned the appropriate access privileges and has been designated as a report reviewer for the study.

1 Open the visit report.



The screenshot shows the CTMS interface with a progress bar at the top. The first step, 'Make Changes', is completed. The second step, 'Waiting for Review', is pending. The 'Start Review' button is highlighted with a red circle and a red dashed box. Below the progress bar, there are buttons for 'Compare with Previous Version', 'Start Review', 'Go To Visit', and 'Go To Document Profile'. On the right, there are 'Approve' and 'Reject' buttons. The main content area displays an 'Interim Visit Report' document with a table of visit details and a table of visit attendees.

Sponsor:		Visit Type:	
Matt's Sponsor		Interim	
Protocol No.:		Investigational Product:	
MS-0023		Matty Ice, <Product>	
Investigator Name:		Visit Start Date:	
John Jamberry		26 Feb 2024	
Site Number:		Visit End Date:	
MNS-001		26 Feb 2024	
CRA Name:		Visit Duration:	
CRA 3			
		How was the visit conducted:	
		In Person	
Comments:			

Locations	
Type	Address
Primary	7 Scoones Close Sittingbourne, England, ME9 9SW United Kingdom

Visit Attendees			
Name	Role	Presence	Type
CRA 3	<Site Team Role>	<Presence>	<Type>
Eleanor Vargas	Co-Investigator	In Person	

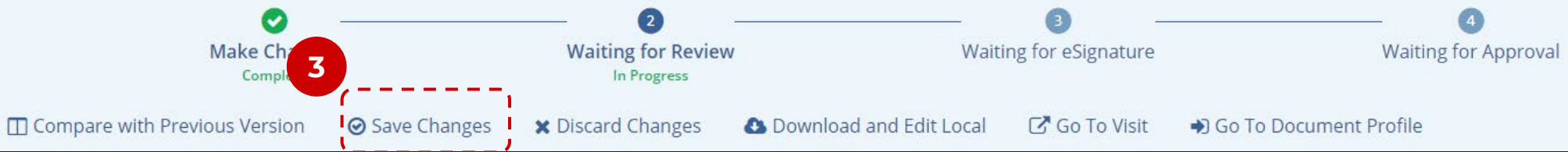
2 Press **Start Review**. The screen will reload with the document in an editable view.

Notes:

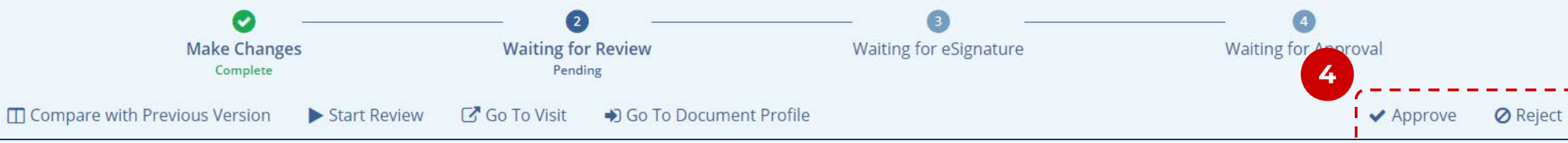
*The functionality in this editable view is very much like that of most other document editing software. Users can select a section of the document and right-click to create a new comment.

* All comments made on the document are auto-saved in real time. Reviewers can leave the review session and return to it without fear of losing their progress. The **Save Changes** button ends the editing session and does not allow the reviewer to add additional comments.

3 Make any required comments and, in the menu bar above the document, press **Save Changes**.



4 Once the screen reloads, press **Accept** or **Reject** as appropriate.



5 Provide a Reason for Rejection or confirmation of your intent to approve the document, as necessary.

Reject

Enter reason for rejection*

Document Approval

Are you sure you want to approve this document?