How to Submit a Report
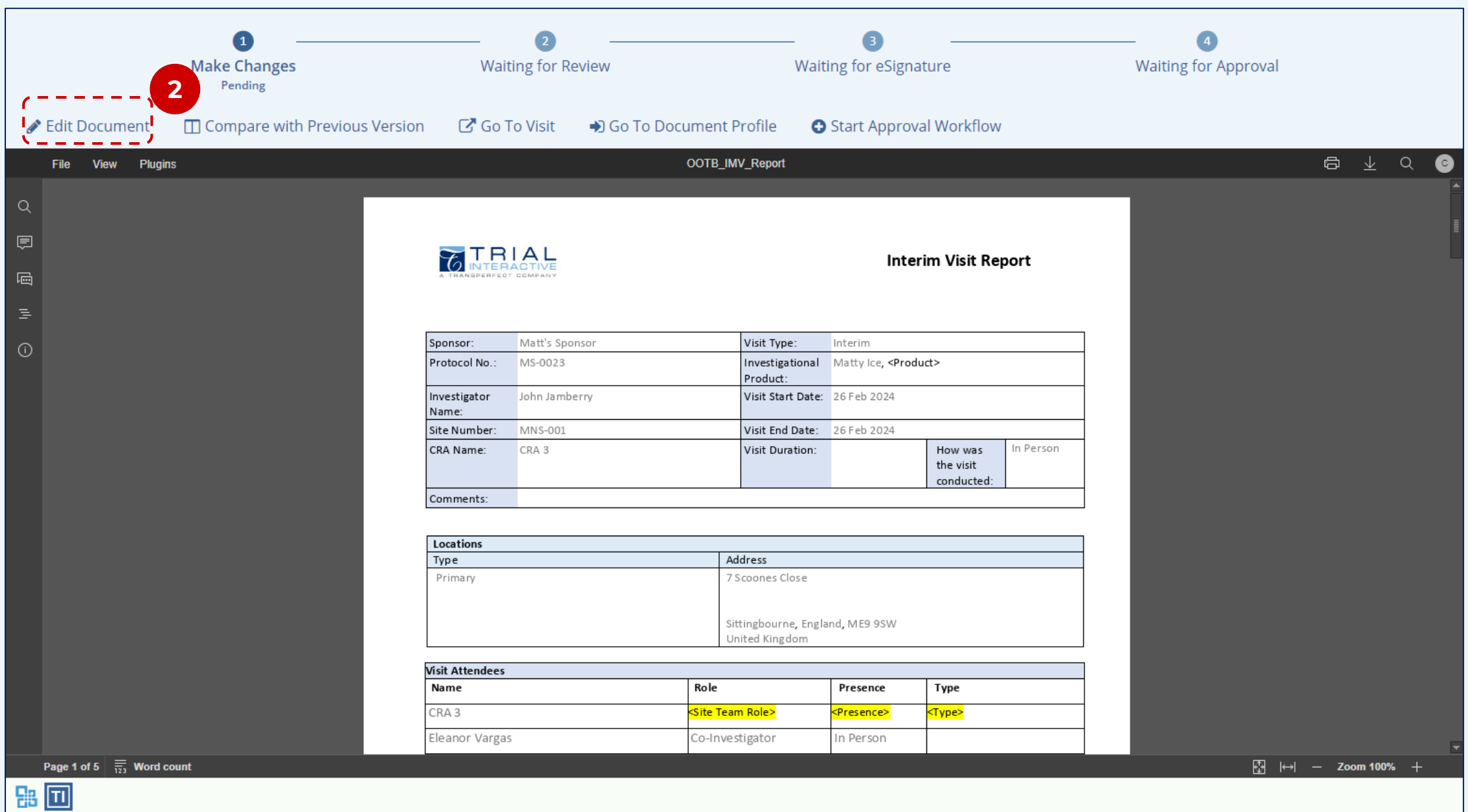
CTMS version 2.0

TRIAL INTERACTIVE

APPLICABLE TO:

- ○ Company Admin
- ○ Study Manager
- ● CRA

Note: This assumes that the visit report has already been created. These steps can only be done by the user who created the report and is assigned the appropriate access privileges.

1 Open the visit report.

2 Press **Edit Document.** The screen will reload with the document in an editable view.

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3 Make any required edits and, in the menu bar above the document, press **Save Changes.**
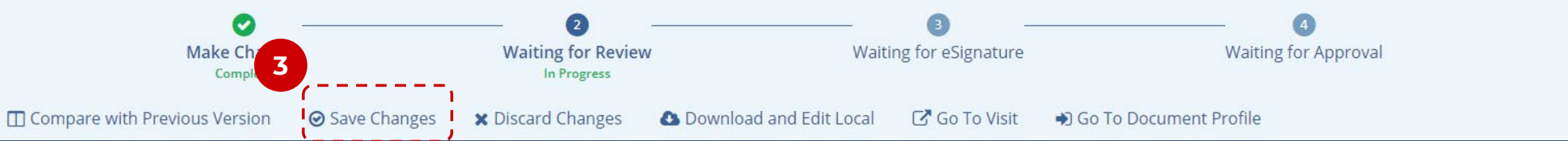
4 Once the screen reloads, press **Start Approval Workflow** in the menu bar above the document. This will send the document to the reviewer so that they can conduct their review of the document.
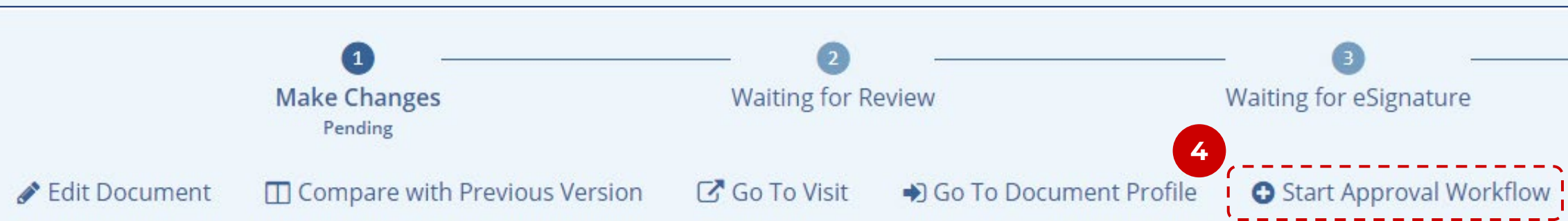
The screen will refresh and show that the first step of the review workflow is complete.