

How to Associate a Checklist Template with a Visit Type

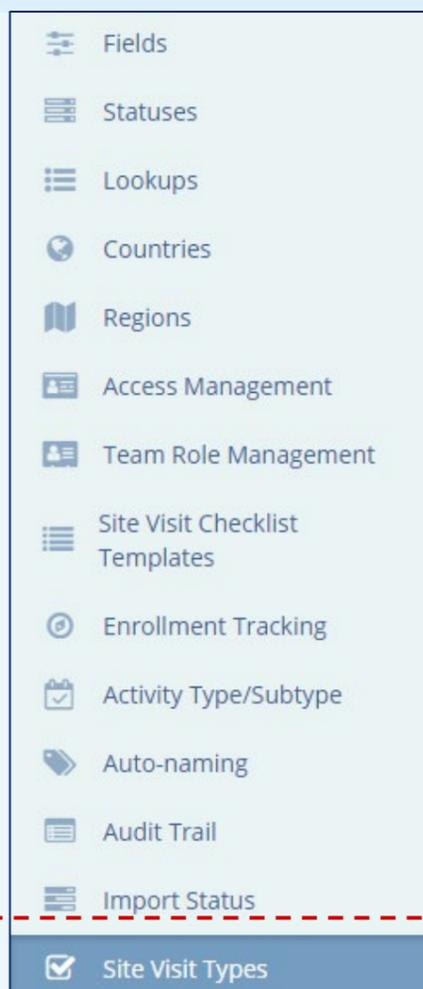
CTMS version 2.1

APPLICABLE TO:

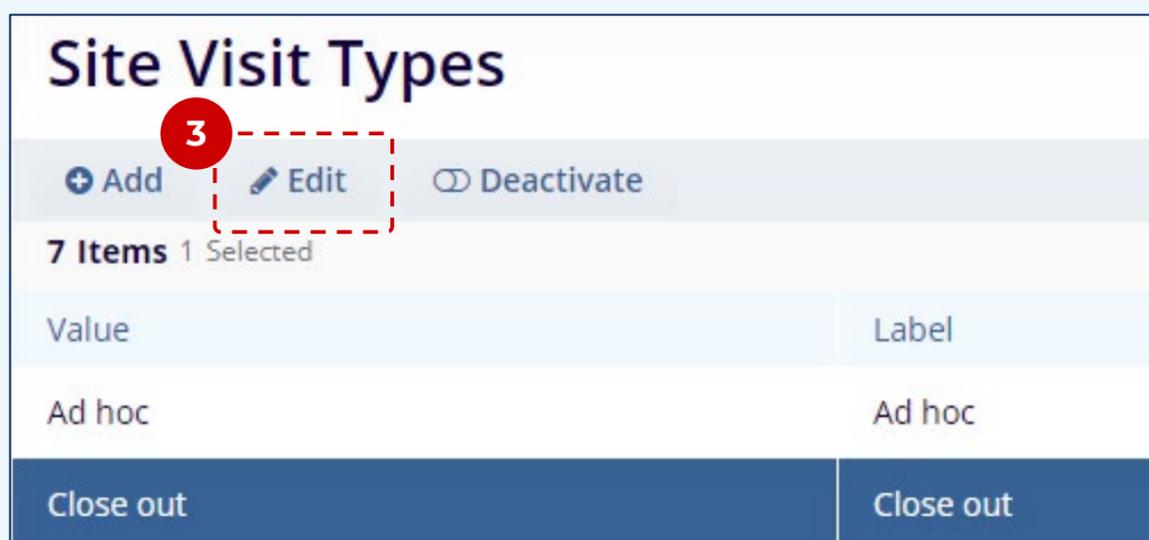
- Company Admin
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1 Navigate to the Settings area.

2 Select 'Site Visit Types' from the navigation links at the left side of the screen.



3 Select the site visit type from the list and press the **Edit** button in the menu bar.



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- Click on the **Checklist Templates** dropdown menu and select the template to be associated with the visit type.

The screenshot shows the 'Edit Site Visit Type' form. At the top, there are two input fields: 'Value*' containing 'Close out' and 'Label*' containing 'Close out'. Below these is a 'Checklist Templates' dropdown menu that is open, showing a list of templates: 'Close Out Visit', 'CHECKLIST DEMO', 'Interim Visit Report', 'Interim Visit Report', 'Test Visit Report', 'Site Initition Visit Report', 'Site Initiation Visit Report', and 'Site Initiation Visit Report'. The 'Close Out Visit' option is currently selected. At the bottom of the form, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red dashed box and a red circle containing the number 5.

- Press **Save**.