# How to Create a Checklist Template

## CTMS version 2.1

# **APPLICABLE TO:**

- Company Admin
- Study Manager
- CRA





# Site Visit Checklist Templates

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Updated 21 Apr 2023 admin003@ti.com	Training Checklist 1



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4 Name the Checklist if desired, add a des	Template and, cription.	
	Create Site Visit Checklist Template	×
	Site Visit Checklist Template Name*	
	Description	
5 Press <b>Create.</b>		1
	5 Cancel Create	

Select the new checklist and press **Edit** at the top of the screen. 6





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If desired, turn on the Template Numbering via the toggle switch and select the 7 schema.

<ul> <li>Training Demo Checklist</li> </ul>	
Save Copy 💼 Delete	7
Site Visit Checklist Template Name*	Template Numbering 🕄 🇨
Training Demo Checklist	Section Order
Description	Numerical V Configure Preview 1, 2 N
Description of the Checklist	Question Order
	Numerical V Configure Preview 1, 2 N
Add Section	

### Press Add Section and name the section. 8

9 Press Add Question to begin adding questions

<ul> <li>New Section</li> </ul>	
Section Title*	Section Numbering
	Question Order
Description	





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10 Choose the type of question that you would like to add. This selection will determine the steps required to complete configuring the question.

Question 1		Required Question 🔵 🖄 Duplicate 🛛 🛍 Delete
Question*	Type of Question*	
	Yes, No, N/A	Buttonize Answers 🗸
Description for the Question	🕑 Yes, No, N/A	Buttonize Answers
Options	🗮 Text (Line)	
	🔜 📃 Text (Paragraph)	
Yes	One Answer from the List	
	E Few Answers from the List	
No	🔤 🖉 Dropdown List	
	Buttonize Answers	0
	🔲 🛄 Date	
	<b>≓</b> Scale	
Add User Comment Field		
Add Question		

11 Press **Save** whenever you would like to save your progress and when you are done editing the checklist template.

Save 🕞 Copy 💼 Delete	
Site Visit Checklist Template Name*	Template Numbering 🚯 🧲
Training Demo Checklist	Section Order
Description	Numerical 🗸
Description of the Checklist	Question Order
	Numerical 🗸



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