# How to Generate a Visit Report



### **CTMS version 2.1**

### **APPLICABLE TO:**

- O Company Admin
- O Study Manager
  - **CRA**

**Note:** This job aid assumes that you have already created the site visit, filled in the necessary information, including completion of the visit checklist, and that you have marked the Visit Status as completed.

\*\*Additionally, it is imperative that the Study Manager has assigned report reviewers prior to the creation of any visit reports.\*\*



Log in an navigate to the site visit.

2 Click on 'Visit Report' in the navigation links at the left side of the screen.

	Visit General Information		
	Visit Attendees		
	Locations		
	Visit Checklist		
	_	100%	
	Activities		
	Subjects		
	– Enrol <del>lment</del> -S <del>ummary</del> – –		5
i t	Visit Report		
	Confirmation Letter		
	• Follow-Up Letter		

3 Change the Report Status to 'In Progress' and press Save.

Visit Report			•
Generate Report Preview	Report Status Not Started In Progress 6/1/2022	Reviewer	





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4 Press the Create Visit Report button.



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5 The **Create Visit Report** window will open, indicating if anything remains to be completed before the report can be generated. When all items show as complete, press **Generate Report.** 

Create Visit Repor	t		×				
Completeness Check	Other Visit Info						
<ul> <li>General Informatio</li> </ul>	n Activities <b>0 Items</b>	5					
Attendees 0 Items Not Completed	es O Items Subjects 3 Items pleted Enrollment Summary 1 Items	nary <b>1 Items</b>					
Locations 0 Items Not Completed	Enforment Sum	nary ritems					
A Visit Checklist 0 of Not Completed	16 completed						
Reviewers	Reviewers						
There are <b>1 Reviewers</b> defined for this report Reviewers are captured within the Study Settings, Study Managers can process any required updates							
Related Documentati	on						
All Site Milestones	🖌 All Site Subjec	ts					
All Site Contacts	Subjects I	ICFs					
All Site ICFs	Subjects V	Visits					
✓ All Site Addresses	🖌 Site Team						
✓ All Site Organization	S						
	6						
	Cancel Generate Report						
Visit Pen	ort						

6 At this point, the visit report will be generated. This process may take a couple of minutes to complete. You will then be able to select the **View Report** button in order to be taken to the document.





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