

How to Submit a Visit Report

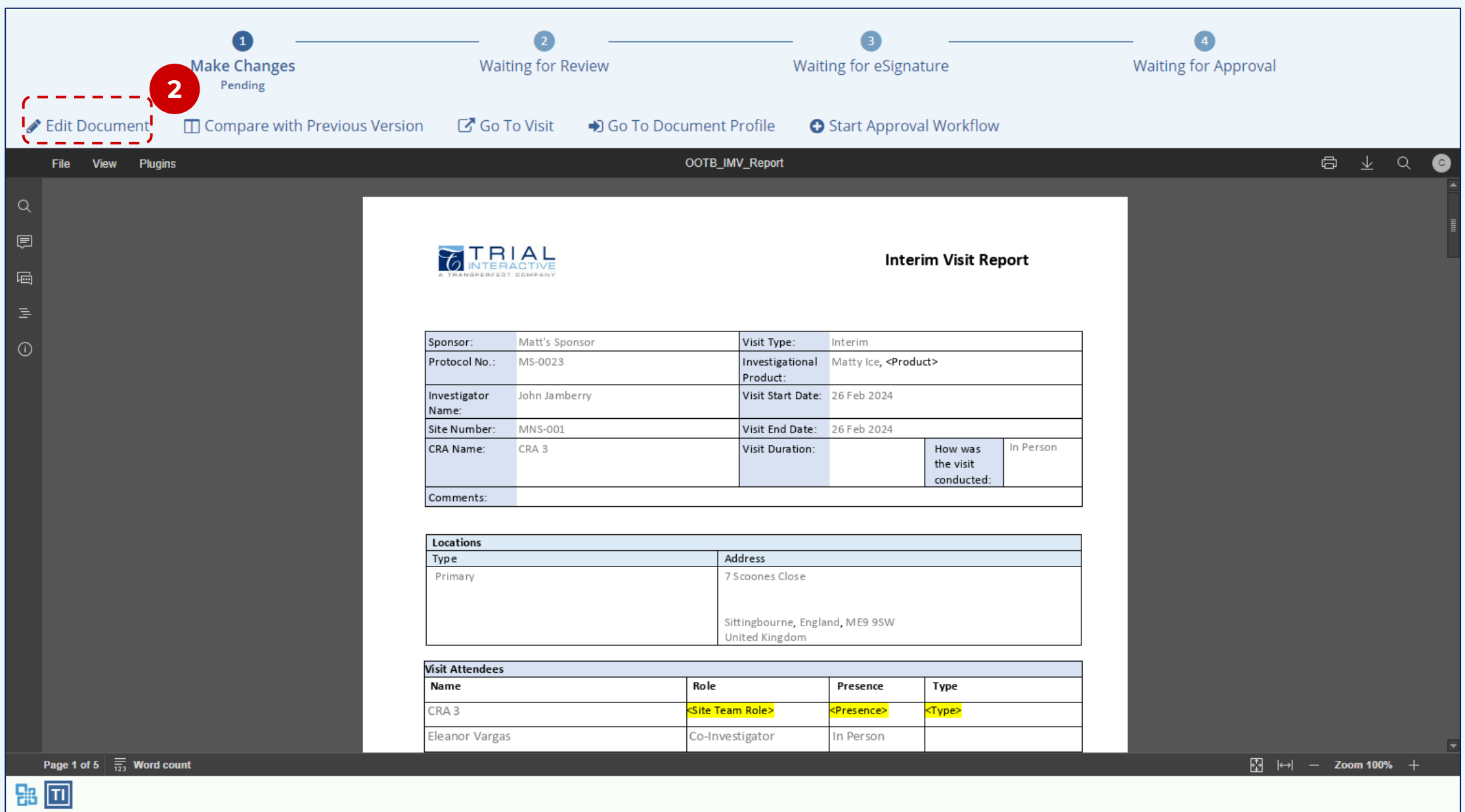
CTMS version 2.1

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.



The screenshot displays the CTMS interface for viewing a visit report. At the top, a progress bar shows four stages: 1. Make Changes (Pending), 2. Waiting for Review, 3. Waiting for eSignature, and 4. Waiting for Approval. Below the progress bar, a toolbar contains several actions: 'Edit Document' (highlighted with a red dashed box and a red '2'), 'Compare with Previous Version', 'Go To Visit', 'Go To Document Profile', and 'Start Approval Workflow'. The main content area shows a document titled 'Interim Visit Report' with the TRIAL INTERACTIVE logo. The document contains the following information:

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

Below this is a 'Locations' table:

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

Finally, there is a 'Visit Attendees' table:

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

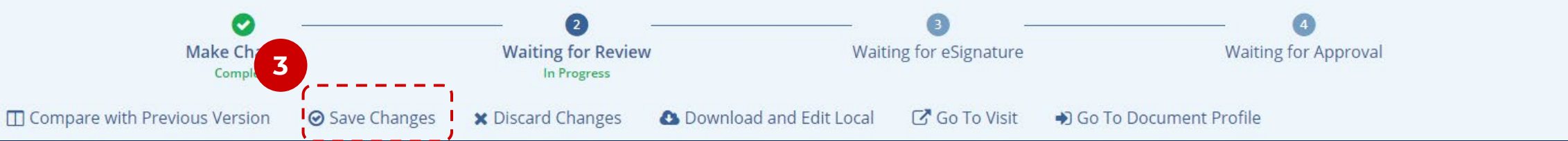
The bottom of the screenshot shows a footer with 'Page 1 of 5', a word count of 123, and a zoom level of 100%.

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

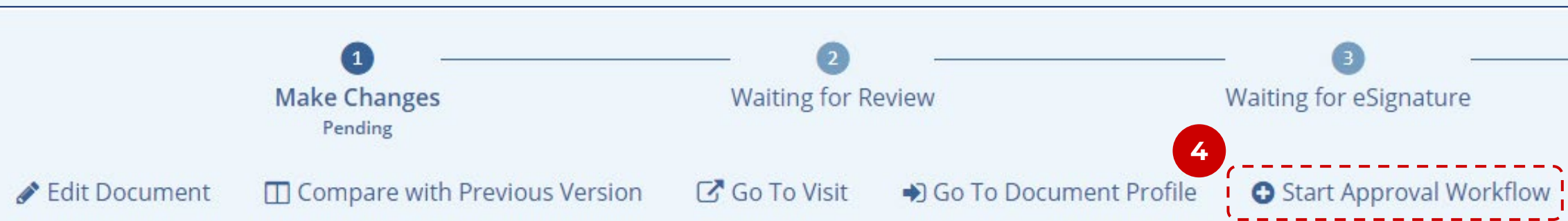
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3 Make any required edits and, in the menu bar above the document, press **Save Changes**.



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.

