

Quick Reference Card: Clinical Site Monitoring: Viewing Site Visit Documents (CRS)

Q How do I access all site visit documents available for a site visit?

1 Click **Report** on the top menu bar.

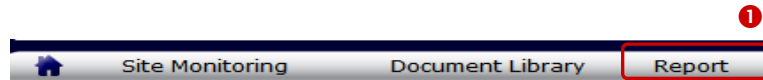


Figure 1: Reports Menu

2 The **Site Visit Summary** Report search options display. Select desired report options.

3 Click the **Run Report** button to view the **Site Visit Summary** Report.

My Sites:

2 Site Name:

Visit Type: Any

Visit Quarter: 4Q 2008

Visit Status: Any

To run the default report, click **Run Report**. Click [customize](#) to modify the report display fields.

Select the report display type: HTML Excel

Run Report 3

Figure 2: Site Visit Summary Report Search Parameters

4 The **Site Visit Summary** Report output displays. Click the **Visit ID** link to view the document library for the selected site visit.

Site Visit Summary										
Visit ID	Visit Dates	Site ID	Site Name	Visit Type	Primary Monitor	Visit Status	Was Report Notification Sent?	Was Report Acknowledged By DAIDS PO?	Was Report Acknowledged By Site?	Were Pharmacy report(s) acknowledged by DAIDS Pharmacist
4Q 2008 - V1 4	10-Nov-2008 - 14-Nov-2008	701	UCSD, AVRC CRS	Interim Site Monitoring Visit	Jamie S. Culp	Completed	No			Not Applicable

Figure 3: Site Visit Summary Report Output



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Q How do I access all site visit documents available for a site visit (Continued)?

5 The **Site Visit Documents** screen displays the documents available for the site visit, i.e., Pre-Visit Letter, Announced and/or Full Work Order, Site Monitoring Report, etc. Click on a document link in the **File Name** column to open and/or save the document.

Site ID: 701	Site Name: UCSD, AVRC CRS	Visit Type: Interim Site Monitoring Visit
Visit Status: Completed	Visit ID: 4Q 2008 - V1	Visit Date: 10-Nov-2008 to 14-Nov-2008
Primary Monitor: Jamie S. Culp	Co-Monitors:	

[View Templates and Guidelines](#)

Site Visit Documents:

Document Category	File Name
Announced Site Visit Work Order	4Q2008V1-701-AWO.pdf
Announced Site Visit Work Order	4Q2008V1-701-AWO.pdf
Full Site Work Order	4Q2008V1-701-FWO.pdf
Pre-Visit Letter	4Q2008V1-701-PVL.pdf

Figure 4: Site Visit Documents

Still Have Questions?

Submit a Help Ticket Online:
Point to Help on the top right menu bar;
Click DAIDS-ES Support.

Email: DAIDS-ESSupport@NIAID.NIH.gov
Phone: 1-866-DES-1605 (866-337-1605)
Fax: 1-866-DES-1606 (866-337-1606)

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