Overview

For CTMS-to-PhlexTMF integrations to execute correctly, the following processes MUST be followed for the Trip Report's Confirmation and Follow-up Letters.

Background: CTMS-to-Phlex Sync Issues when Incorrect Steps are Followed

CTMS Support has identified two *incorrect* procedures that have been noted to cause problems with the CTMS-to-PhlexTMF integration, resulting in the letters *not* transferring properly to PhlexTMF:

1 Letters signed *manually* (not electronically through the CTMS **Sign** process) and then uploaded to CTMS.
2 Trip Reports and Letters *renamed* following an alternative process. Instead, follow the steps outlined in this document.
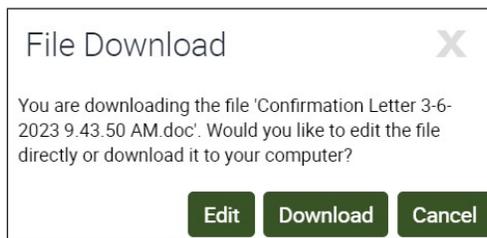
Correct Procedure for Processing Trip Report Letters

Follow the steps below to properly process Trip Report letters for CTMS-to-PhlexTMF integrations:

1 Generate the letters using the **Attach Confirmation/Follow Up Letter** buttons.

2 On the Trip Report's **Attachments** tab, click on the letter's hyperlink, and then select **Edit** or **Download** to make necessary changes.

> **Important!** If you *download* the file to make edits in Microsoft Word, select **Save As** and change the **Save as type** value from *Word 97-2003 Template* (.dot) to *Word 97-2003 Document* (.doc) so that it matches the original file type.

3 **Upload** or **Save** the edited file with its *original* name.

> **Warning!** Do not change the name of the file. Changing the name will result in a CTMS-to-PhlexTMF failure.

4 **Sign** the uploaded/edited file (must be the same file you downloaded) using the **Sign** button

Important! Letters *must* be signed *electronically in CTMS* using the **Sign** button, *not* manually.

5 Complete the following Trip Report *Approval* steps:

  a The CRA submits the Trip Report to the Trip Report Approver.

  b The Trip Report Approver works with the CRA to edit/correct the Trip Report, as needed.

  c The Trip Report Approver clicks the **Approve & Attach** button to *approve* the Trip Report.

  d The Approver changes the **Report Status** to *Sent To Sponsor*.

> When the **Report Status** is changed to *Sent to Sponsor*, letter file names will be automatically changed to the established format and, if eTMF syncing is turned on, automatically transferred to PhlexTMF:
>
> *<Site #>_<PI Last Name>_<Visit Type Abbrev>_<Doc Type Abbrev>_<UB>_<Formatted Visit Start Date>*

Note: Deviation from this established process requires *manual* uploading of the letter to PhlexTMF and *manual* adjustments for transfers to sponsors.

Reminders & Helpful Tips

- If desired, on the Trip Report's **Attachments** tab, check the box in the **Show on Trip Report** column for the *signed PDF* letter.
- *Do not rename* the *signed* letter or *approved* Trip Report document on the Trip Report's **Attachments** tab:

- Remove any previous or draft versions of the letters or Trip Reports before submitting for approval.
- When the Trip Report reviewer changes the Trip Report **Status** to *Sent To Sponsor*, letter file names will be changed to the established format: *<Site #>_<PI Last Name>_<Visit Type Abbrev>_<Doc Type Abbrev>_<UB>_<Formatted Visit Start Date>*:

- If the study is synced with PhlexTMF, the **Phlex Document ID** field will be automatically populated for each successfully transferred document.

To easily track **CTMS-to-Phlex syncing**, add all of the related columns to the Trip Report's **Attachments** tab:

1 Click on the **Menu** ("cog") icon and then click **Columns Displayed**.

2 Click on the *double right arrow* to move all **Available Columns** to the **Selected Columns**.

3 Click **Save**.

Getting Help

If you have questions or comments about the content of this QRC, please email Technology Training [dcriittrain@dm.duke.edu].

If you experience any technical problems working with Trip Report Letters that you are unable to resolve, submit a *Request for CTMS* form via ServiceNow.

For help with other CTMS topics, please visit the CTMS Learning Center [https://dcri.org/ctms-learning-center/].