

**Overview**

For CTMS-to-PhlexTMF integrations to execute correctly, automatically transferring essential CTMS Trip Report documentation (Trip Report, Confirmation Letter, and Follow-Up Letter) to PhlexTMF, the following processes **MUST** be followed.

**Site Status Must Not be Closed or Interested Stop**


Before changing the **Trip Report Status** to *Sent to Sponsor* (which triggers the automatic transfer of essential documentation to PhlexTMF), the **Site's Status** must NOT be *Closed* or *Interested Stop*.

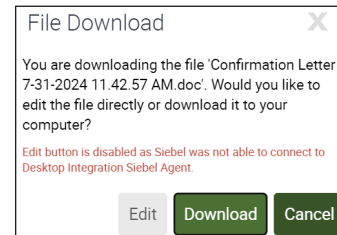
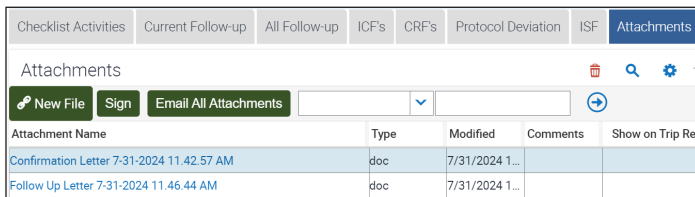
If the **Site's Status** is *Closed* or *Interested Stop*, changing the **Trip Report Status** to *Sent to Sponsor* will **not automatically transfer** the essential documentation to PhlexTMF. If this occurs, follow these steps **in CTMS** to correct the problem:

- 1 Change the **Site Status** to *Interested* (this will move the Site Status in PhlexTMF back to *Active*).
- 2 Make sure the Trip Report process is complete and ready to integrate with PhlexTMF (following the steps outlined in this QRC).
- 3 Change the **Trip Report Status** to *Sent to Sponsor* to transfer the essential documentation to PhlexTMF.  
 The **PhlexID** field on the CTMS Trip Report **Attachments** tab will populate, indicating the integration was successful.
- 4 Change the **Site Status** back to *Interested Stopped* or *Closed*. (This will change the Site Status in PhlexTMF to *Closed*)

**Correct Procedure for Processing Trip Report Letters**

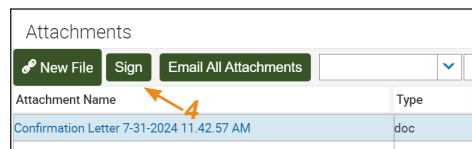
Follow the steps below to properly process Trip Report letters for CTMS-to-PhlexTMF integrations:

- 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.

## Complete the Trip Report Approval Steps Correctly

Complete the following Trip Report *Approval* steps:

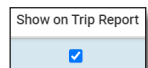
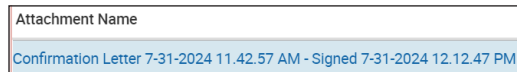
- 1 The CRA submits the Trip Report to the Trip Report Approver.
- 2 The Trip Report Approver works with the CRA to edit/correct the Trip Report, as needed.
- 3 The Trip Report Approver clicks the **Approve & Attach** button to approve the Trip Report.
- 4 The Approver changes the **Report Status** to *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>**

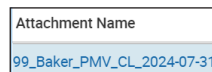
**Note:** Deviation from this established process requires manual uploading of the letter to PhlexTMF and *manual* adjustments for transfers to sponsors.

## Reminders & Helpful Tips

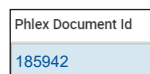
- If desired, on the Trip Report’s **Attachments** tab, check the box in the **Show on Trip Report** column for the *signed PDF* letter.
- **Do not rename** the *signed* letter or *approved* Trip Report document on the Trip Report’s **Attachments** tab:



- Delete 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:

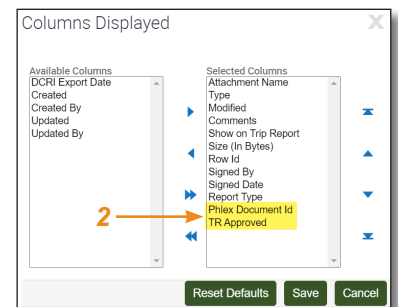


### ▶ Tracking CTMS-to-PhlexTMF Syncing

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 Add **Phlex Document ID** and **TR Approved** from **Available Columns** to **Selected Columns**.
- 3 Click **Save**.

**Note:** You might need to *refresh* your window to see the new columns (click the browser’s **Refresh** button or click on a different tab and then back on the **Attachments** tab).



## Getting Help

If you have questions or comments about the content of this QRC, please email [Technology Training](mailto:dcrittrain@dm.duke.edu) [dcrittrain@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/) [https://dcri.org/ctms-learning-center/].