

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.

Attach Confirmation Letter

Attach Follow Up Letter

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

Attachments					
New File Sign Email All Attachments					
Attachment Name	Type	Modified	Comments	Show on Trip Rep	
Confirmation Letter 7-31-2024 11.42.57 AM	doc	7/31/2024 1...			
Follow Up Letter 7-31-2024 11.46.44 AM	doc	7/31/2024 1...			

File Download

You are downloading the file 'Confirmation Letter 7-31-2024 11.42.57 AM.doc'. Would you like to edit the file directly or download it to your computer?

Edit button is disabled as Siebel was not able to connect to Desktop Integration Siebel Agent.

Edit

Download

Cancel

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.

Attachments

New File

Sign

Email All Attachments

Attachment Name	Type
Confirmation Letter 7-31-2024 11.42.57 AM	doc

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:

Attachment Name
Confirmation Letter 7-31-2024 11.42.57 AM - Signed 7-31-2024 12.12.47 PM

Show on Trip Report
☒

- 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>:

Attachment Name
99_Baker_PMV_CL_2024-07-31

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

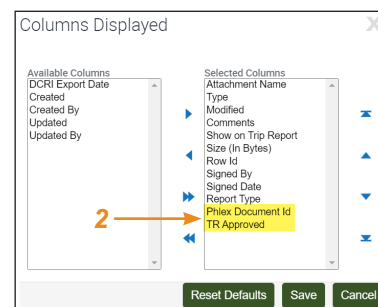
Phlex Document Id
185942

► 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/].