TRIAL INTERACTIVE

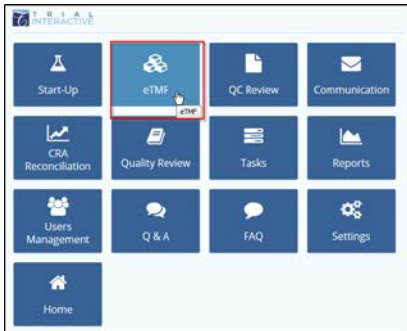# Workflow: How to Reassign the Reviewer

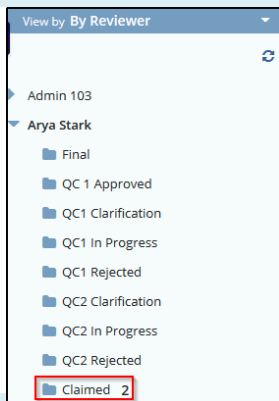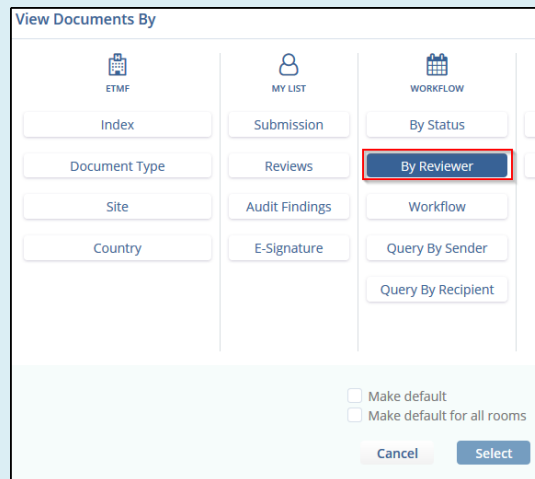Applicable to: ☑ Administrators ☐ Editors ☐ Readers ☑ eTMF ☐ Study Start-up

1. From the **eTMF** application, navigate to **Documents**

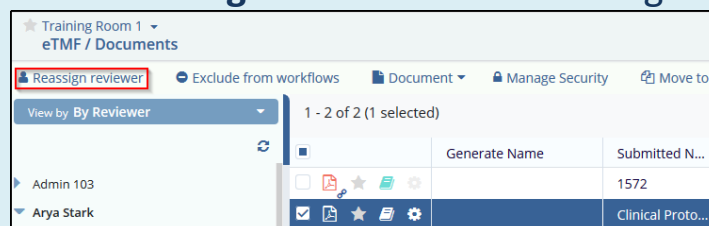Users must *first* be added to the Workflow group(s) by the room Administrator

2. Select view of **By Reviewer**

View Documents By

ETMF	MY LIST	WORKFLOW
Index	Submission	By Status
Document Type	Reviews	By Reviewer
Site	Audit Findings	Workflow
Country	E-Signature	Query By Sender
		Query By Recipient

☐ Make default
☐ Make default for all rooms

Cancel Select

3. Open/expand the folder of the reviewer whose claimed documents are to be reassigned
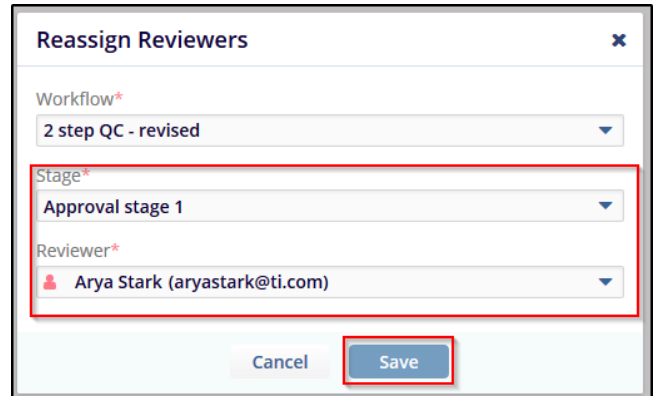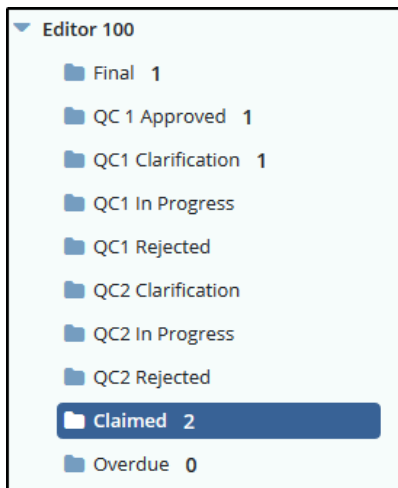
Click the **Claimed** folder

View by **By Reviewer**

- Admin 103
- Arya Stark
  - Final
  - QC 1 Approved
  - QC1 Clarification
  - QC1 In Progress
  - QC1 Rejected
  - QC2 Clarification
  - QC2 In Progress
  - QC2 Rejected
  - Claimed 2

4. Select the document(s) to reassign.

Click **Reassign reviewers** above the grid

Training Room 1
eTMF / Documents

👤 Reassign reviewer ⊖ Exclude from workflows 📄 Document ▾ 🔒 Manage Security 📁 Move to S

View by **By Reviewer**   1 - 2 of 2 (1 selected)

☐	Generate Name	Submitted N...
▸ Admin 103		1572
▾ Arya Stark		Clinical Proto...

T R I A L INTERACTIVE

5. Choose the **Stage** for the document(s).

Select from a **Reviewer** list of those added to the Workflow group. Click **Save**

Reassign Reviewers ✕

Workflow*
2 step QC - revised ▼

Stage*
Approval stage 1 ▼

Reviewer*
👤 Arya Stark (aryastark@ti.com) ▼

Cancel   Save

▼ Editor 100
  📁 Final 1
  📁 QC 1 Approved 1
  📁 QC1 Clarification 1
  📁 QC1 In Progress
  📁 QC1 Rejected
  📁 QC2 Clarification
  📁 QC2 In Progress
  📁 QC2 Rejected
  📁 Claimed 2
  📁 Overdue 0

The reassigned documents are added to the Reviewer's **Claimed** folder.

There is no auto-notification to the old or new reviewer.

If needed, refer users to related job aid: How to QC a Document

For any additional assistance, click ...   ❓ Help   📖 Guide

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