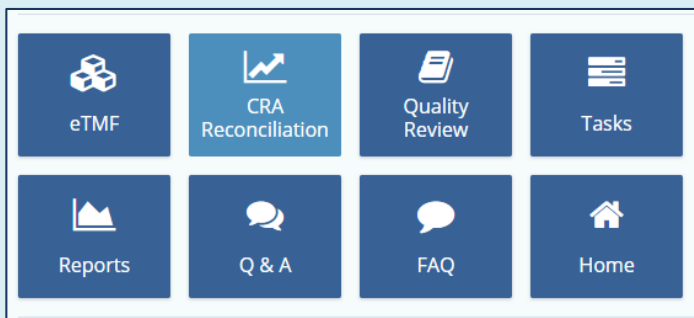


APPLICABLE TO:

- Administrators
- Managers
- eTMF
- Editors
- Study Start-Up
- Readers
- myTI

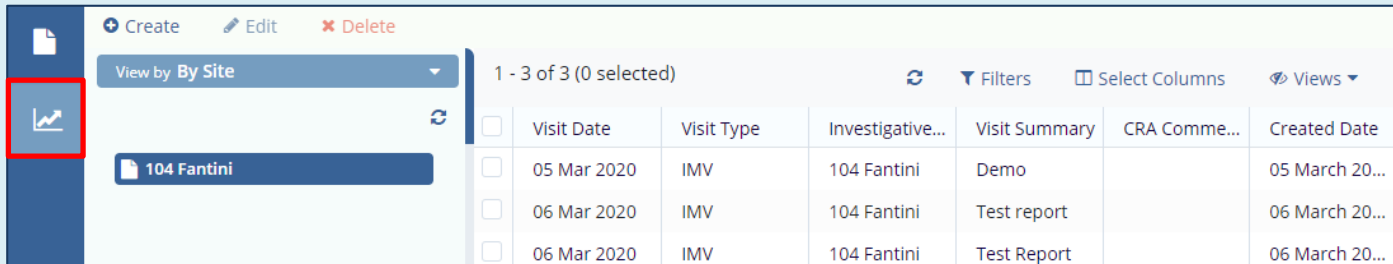
This job aid assumes that site reconciliation has been performed. See related job aid - **How to Use CRA TMF Reconciliation**.

Admins cannot be CRAs in the eTMF. Therefore, they cannot perform this task.



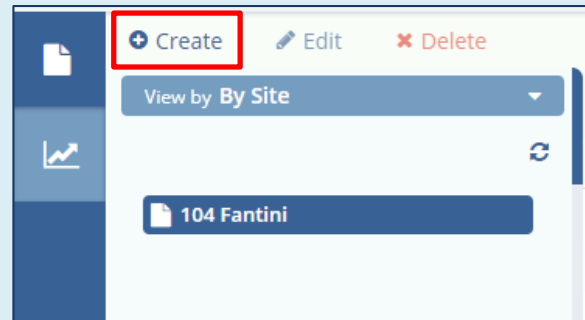
1. Navigate to the **CRA Reconciliation** module in the Navigation Grid.

2. Click on the **Reports** module, and select a site. The grid displays existing reports.



<input type="checkbox"/>	Visit Date	Visit Type	Investigative...	Visit Summary	CRA Comme...	Created Date
<input type="checkbox"/>	05 Mar 2020	IMV	104 Fantini	Demo		05 March 20...
<input type="checkbox"/>	06 Mar 2020	IMV	104 Fantini	Test report		06 March 20...
<input type="checkbox"/>	06 Mar 2020	IMV	104 Fantini	Test Report		06 March 20...

3. To run a new report, click **Create**.



4. The report creation dialog will populate with documents from the latest reconciliation actions as long as an **Investigative Site** is selected.

Create CRA TMF Reconciliation ✕

Visit Date * 📅 ✕

Visit Type * ▼

Investigative Site * 🏠 ✕

Visit Summary * This field is required

Comments

Not Applicable Documents —


	Title	Document Type	Reconcile Date	Contact
No records available.				

Document missing in Site Binder —

	Title	Document Type	Reconcile Date	Contact
🗑️ 📄	CTA	Site\05 Site Manage...	10/19/2022	
🗑️ 📄	DataPrivacyAgreem...	Site\05 Site Manage...	10/19/2022	Snowy Owl

Verified Documents —

✉️ Email ▼ Create Cancel

 Under **Email** you can send partial or full reports in the form of an email even before report creation. Recipients can include any site contact or eTMF user with access to this study room.

5. Click **Create** to issue the reconciliation report.

6. Use the document grid to review, **Edit**, or **Delete** reports. You can also issue emails from the right-side panel.

The screenshot shows the TMF Reconciliation Report interface. At the top, there are buttons for 'Create', 'Edit', and 'Delete'. Below this is a 'View by' selector set to 'By Site'. A list of sites is shown on the left: '1112 Muggle Institute' and '1111 Snowy Owl'. The main area is a table with columns: 'Visit Date', 'Visit Type', 'Investigati...', 'Visit Sum...', and 'Created By'. The table contains 15 rows of data. The row for '23 Jun 2022' is selected. On the right, there is a 'Expand' panel with buttons for 'Email to Site' and 'Email Report'. Below these are fields for 'Visit Type *' (set to 'Site Initiation Visit'), 'Investigative Site Name' (set to '1111 Snowy Owl'), 'Visit Summary *' (set to 'Training/Demo'), and 'Comments'. At the bottom right, there are 'Save' and 'Save & Next' buttons.

Visit Date	Visit Type	Investigati...	Visit Sum...	Created By
15 Oct 2021	IMV	1111 Sno...	Training	Editor 103
02 Nov 20...	IMV	1111 Sno...	training vi...	Editor 103
08 Dec 20...	IMV	1111 Sno...	IMV visit d...	Editor 103
06 Jan 2022	IMV	1111 Sno...	Training d...	Editor 103
04 Feb 2022	IMV	1111 Sno...	Training D...	Reader 102
22 Mar 20...	IMV	1111 Sno...	Test	Reader 102
26 Apr 2022	PSSV	1111 Sno...	Training vi...	Editor 103
26 May 20...	IMV	1111 Sno...	test	Reader 102
01 Jun 2022	IMV	1111 Sno...	test	Reader 102
10 Jun 2022	Site Initi...	1111 Sno...	Performe...	Editor 107
13 Jun 2022	PSSV	1111 Sno...	reviewed ...	Editor 107
23 Jun 2022	Site Initi...	1111 Sno...	Training/...	Editor 107
28 Jun 2022	Close O...	1111 Sno...	Close out ...	Editor 103
23 Aug 20...	IMV	1111 Sno...		Editor 103
28 Sep 2022	IMV	1111 Sno...		Editor 103

7. If **Edit** was selected, make changes then click **Save** or **Save & Next**.



You can select other view criteria in the View Selector.

The 'View By' selector dialog box shows three options: 'By Site', 'By Visit Type', and 'By CRA'. The 'By Site' option is selected and highlighted with a red box. Below the options are two checkboxes: 'Make default' and 'Make default for all rooms', both of which are unchecked. At the bottom, there are 'Cancel' and 'Select' buttons.