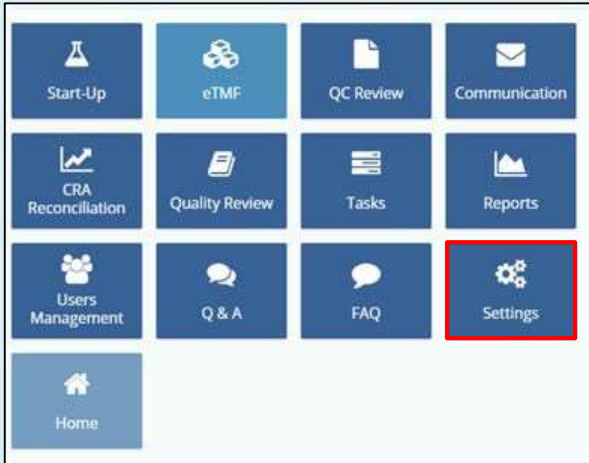
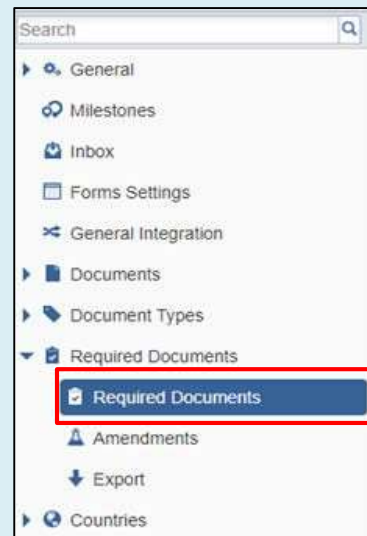


APPLICABLE TO:

- Administrators
- eTMF
- Room Managers
- Editors
- StudyStart-Up
- Readers
- myTI

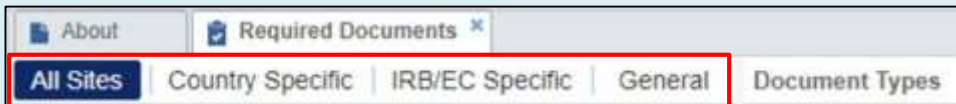


1. Go to the **Settings** menu in the Navigation Grid.



2. Expand the **Required Documents** menu and choose the **Required Documents** sub-menu.

3. Choose a category of documents in order to add to, or edit, the list of Required Documents.



4. In the **Document Types** panel to the right, click **Add**



5. Select the document type by drilling down in the folder structure and checking the appropriate box



Expand folders to view document types. You can use the **Search** box to find a document type.

6. Select from the **Required For** options: eTMF and/or Site Activation



At least one must be selected before saving.

To be submitted by:

- Former Principal Investigator
- Investigator
- IT Contact
- Laboratory Contact
- Pharmacist
- Pharmacy Contact

8. Click **Save** (to continue adding document types) or **Save & Close**.



The document type will now be included in the **eTMF Health** dashlet and eTMF completeness reports.

Required Documents

Documents to be submitted by selected IRB/EC

Provided By: Investigative Site Study

Search

- ▾ All Document Types
- ▾ Site
 - ▶ 01 Trial Management
 - ▶ 02 Central Trial Documents
 - ▶ 03 Regulatory
 - ▶ 04 IRB or IEC and Other Approvals
 - ▶ 05 Site Management
 - ▶ 06 IP and Trial Supplies

Required For:

Site Activation

eTMF

Trigger Criteria:

To be submitted by:

Languages:

Save Save & Close Close

7. Choose who will be submitting the document, using the **To be submitted by** drop-down menu



To be submitted by is optional, unless **contact type** is a required metadata field for the chosen document type.

Save Save & Close