How to Run a TMF Reconciliation Report
TI v10.5

APPLICABLE TO:

- ○ Administrators
- ● Managers
- ● Editors
- ● Readers

- ● eTMF
- ● Study Start-Up
- ● myTI

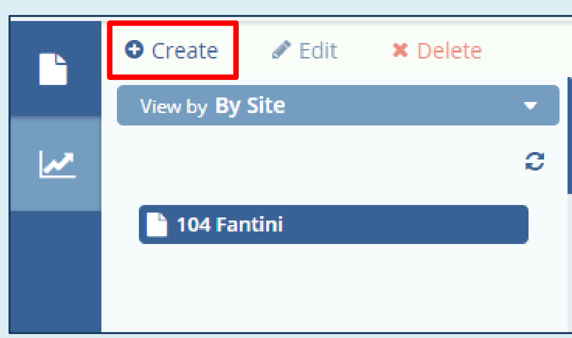
This job aid assumes that site reconciliation has been performed. See related job aid – **How to Use CRA TMF Reconciliation.**

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

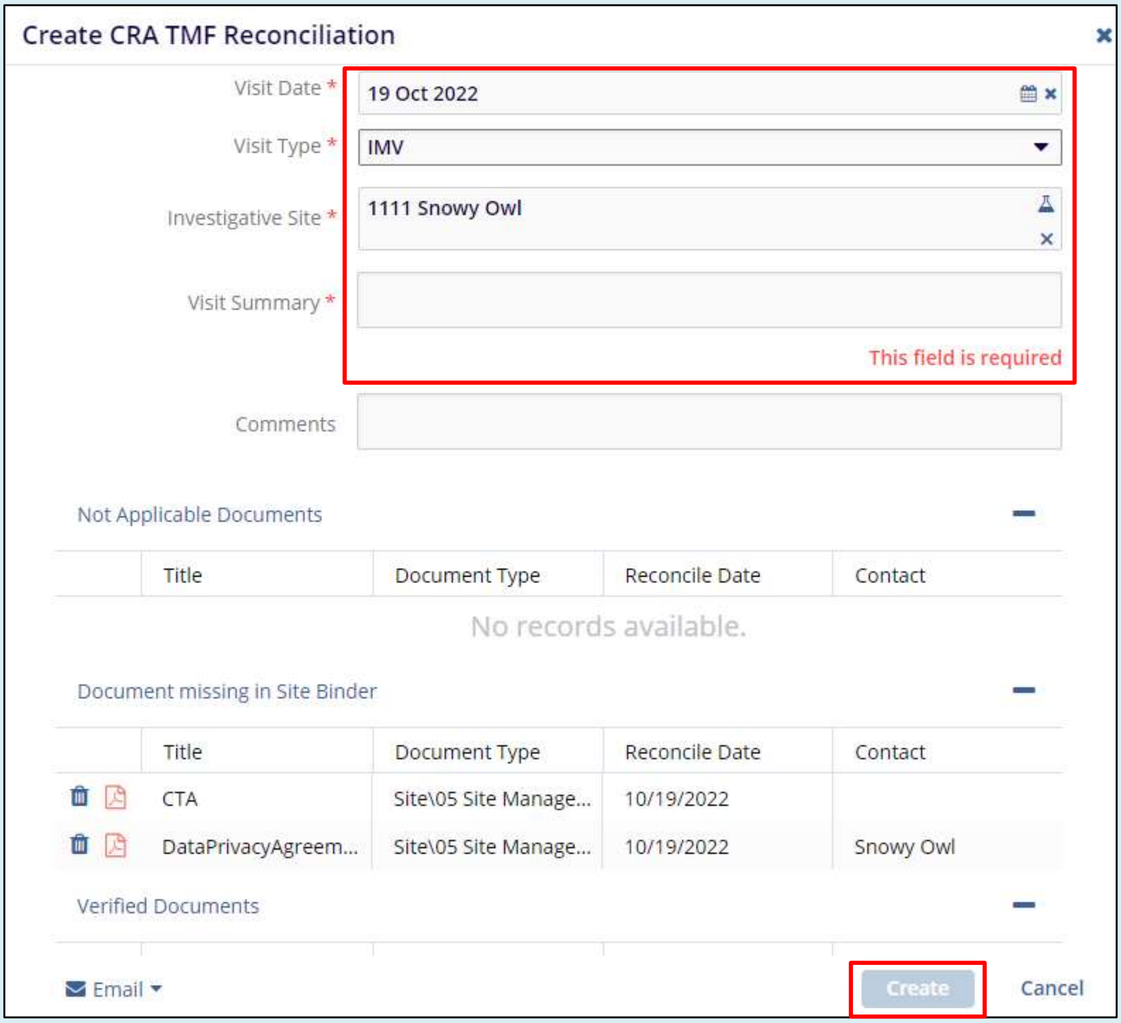
1. Navigate to the **CRA Reconciliation** module in the Navigation Grid.

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

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



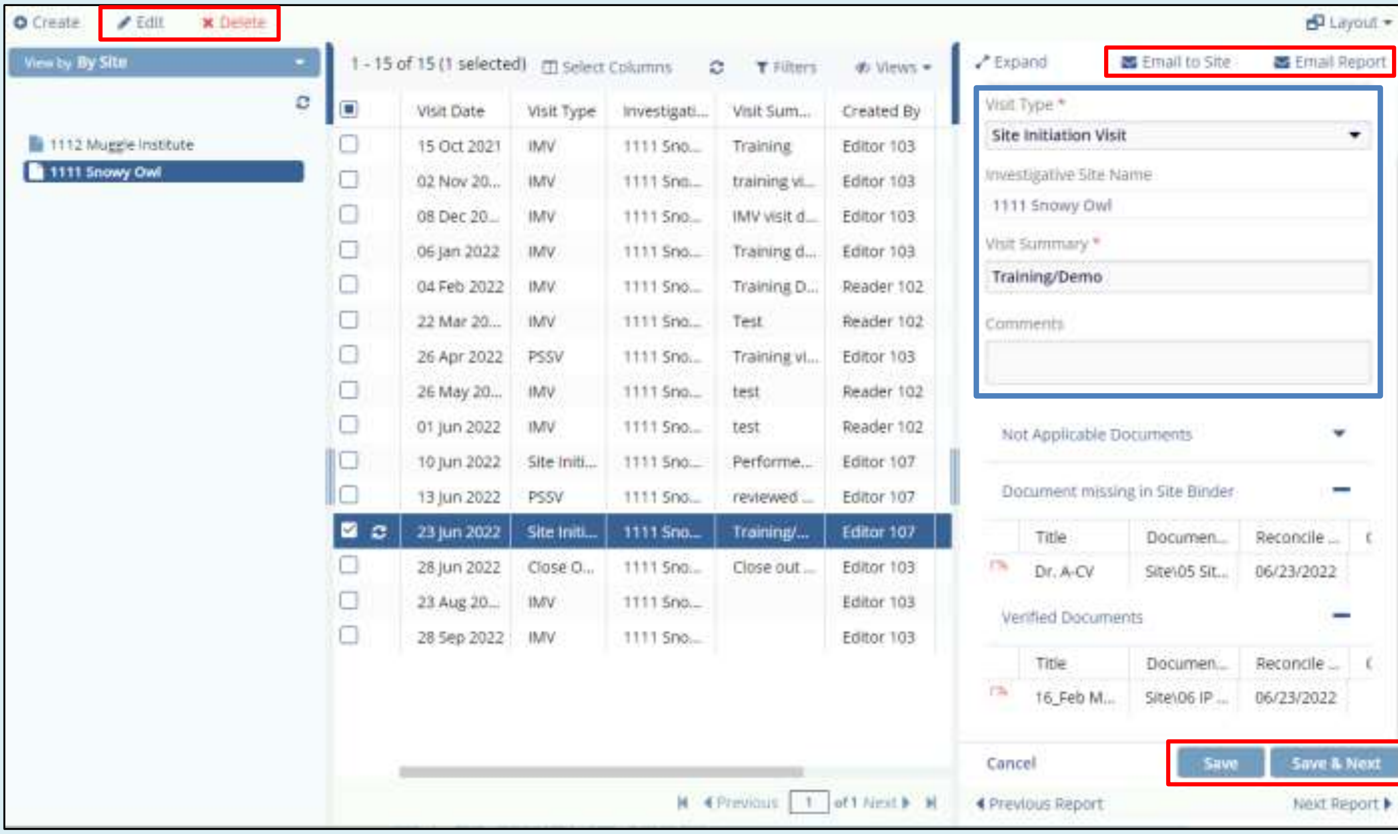
4. The report creation dialog will populate with documents from the latest reconciliation actions as long as an **Investigative Site** is selected.



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.



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

You can select other view criteria in the View Selector.