

APPLICABLE TO:

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

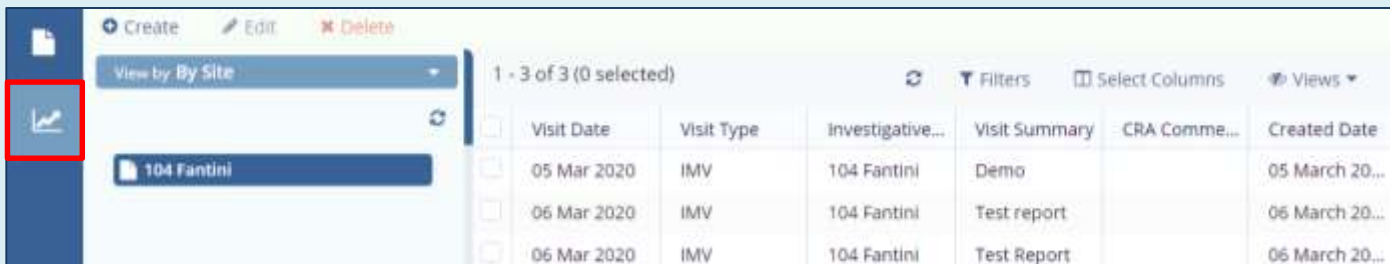
This job aid assumes that site reconciliation has been performed. See related job aid – **How to Use CRA TMF Reconciliation**.

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

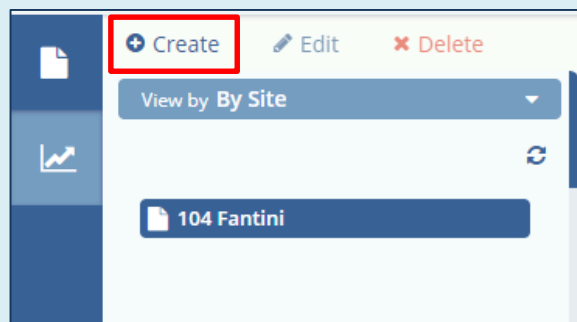


1. Navigate to the **CRA Reconciliation** module in the Navigation Grid.

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



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'. The main area is a table with columns: Visit Date, Visit Type, Investigati..., Visit Sum..., and Created By. The table contains 15 rows of visit data. The 11th row is selected. To the right of the table is a 'Details' panel for the selected visit. It includes a 'Visit Type' dropdown set to 'Site Initiation Visit', an 'Investigative Site Name' field with '1111 Snowy Owl', a 'Visit Summary' field with 'Training/Demo', and a 'Comments' field. Below these are sections for 'Not Applicable Documents' and 'Document missing in Site Binder'. At the bottom of the details panel, there are two tables: 'Document missing in Site Binder' and 'Verified Documents'. The 'Verified Documents' table has columns for Title, Document..., and Reconcile... and contains one row: '16_Feb M...' with 'Site\06 IP ...' and '06/23/2022'. At the bottom right of the details panel, there are 'Cancel', 'Save', and 'Save & Next' buttons.

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 is shown. It has a title bar 'View By' and a close button. Below the title bar are three buttons: 'By Site', 'By Visit Type', and 'By CRA'. The 'By Site' button is highlighted with a red box. Below these buttons are two checkboxes: 'Make default' and 'Make default for all rooms'. At the bottom of the dialog are 'Cancel' and 'Select' buttons.