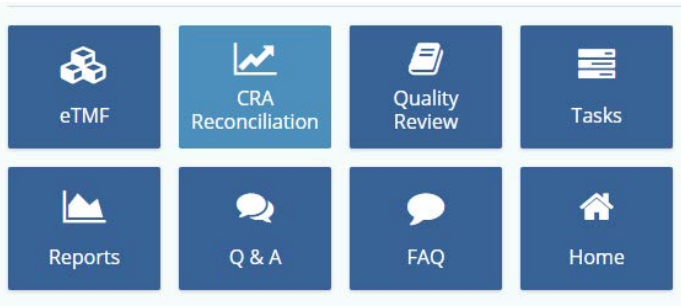**APPLICABLE TO:** ☐ Administrators ☑ Editors ☑ Readers

💡 This job aid assumes that site reconciliation has been performed. See related job aid – **How to Use CRA TMF Reconciliation**
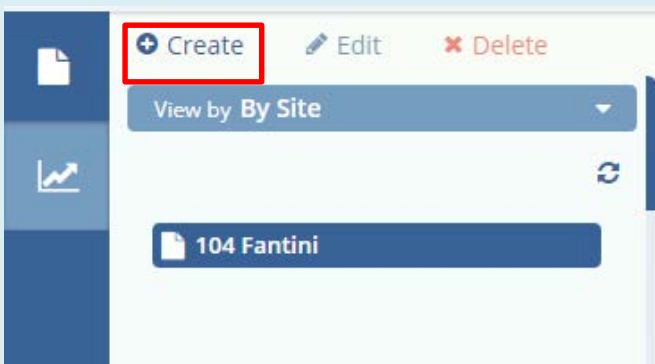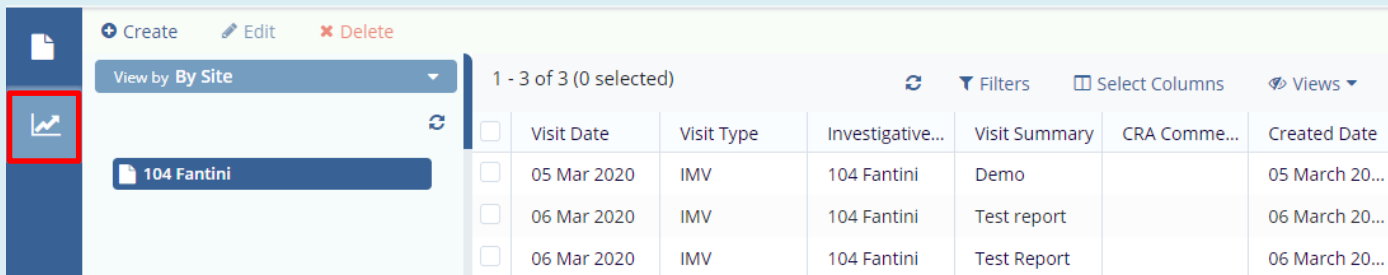
⚠️ Admins cannot be CRAs in the eTMF. Therefore, they cannot perform this task.

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

2. Click the **Reports** module, and select a site. Previous reports will populate in the grid.

Visit Date	Visit Type	Investigative...	Visit Summary	CRA Comme...	Created Date
05 Mar 2020	IMV	104 Fantini	Demo		05 March 20...
06 Mar 2020	IMV	104 Fantini	Test report		06 March 20...
06 Mar 2020	IMV	104 Fantini	Test Report		06 March 20...

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

Create CRA TMF Reconciliation   ✕

Visit Date *	09 Mar 2020	📅
Visit Type		▼
Investigative Site *	104 Fantini	⚲ ✕
Visit Summary *		
	This field is required	
CRA Comments		

Document missing in the eTMF   ▬

	Title	Document Type	Reconcile Date
🗑 ❶	63719097450522...	Investigative Site...	03/09/2020

Document missing in Site Binder   ▬

	Title	Document Type	Reconcile Date
🗑 📄	104_ML_Fantini_...	Investigative Site...	03/09/2020

Verified Documents   ▬

✉ Email ▾   **Create**   Cancel

✉ Email ISF missing documents
✉ Email Reconciliation report

4. The window will populate with documents from the latest reconciliation.

Complete all required fields.

Click **Create.**

💡 Click **Email** for options to send missing documents to the site or to send the reconciliation report to a required individual. Recipients can include any site contact or eTMF user with access to this study room. Email options are also available from the Grid. (See below)

5. The new report now appears in the grid. Choose any report to **Edit** or **Delete.**

⊕ Create   ✏ Edit   ✕ Delete   🖽 Layout ▾

View by **By Site** ▾   1 - 4 of 4 (1 selected)   ⟳   ⊤ Filters   ☐ Select Columns   👁 Views ▾   ↗ Expand   ✉ Email ISF   ✉ Email Report

	Visit Date	Visit Type	Investigative...	Visit Summary	CRA Comme...	Created Date
☐	05 Mar 2020	IMV	104 Fantini	Demo		05 March 20...
☐	06 Mar 2020	IMV	104 Fantini	Test report		06 March 20...
☐	06 Mar 2020	IMV	104 Fantini	Test Report		06 March 20...
☑	09 Mar 2020		104 Fantini	Test		09 March 20...

📄 104 Fantini

Visit Date *
09 Mar 2020   📅

Visit Type
▼

Investigative Site Name
104 Fantini

Visit Summary *
Test

CRA Comments

Document missing in the eTMF   ▬

	Title	Document Type	Reconcile Date
❶	637190974505...	Investigative Si...	03/09/2020

Document missing in Site Binder   ▬

	Title	Document Type	Reconcile Date
📄	104_ML_Fantini	Investigative Si...	03/09/2020

Cancel   Save   Save & Next

◀ Previous 1 of 1 Next ▶   ◀ Previous Report   Next Report ▶

6. If **Edit** was selected, make any changes and click **Save** when finished.

Change the view to sort reports by other criteria than By Site.