

Applicable to:  Administrators  Editors  eTMF

**Note:** The following steps assume the user is familiar with Workflow review and added to a Workflow group; see related job aid: How to QC a Document

1. After performing a Quality Check (QC) of a workflow document, scroll down within the Metadata pane



Document Metadata

2 step QC - revised: Approval stage 1

Status\*  
Clarification

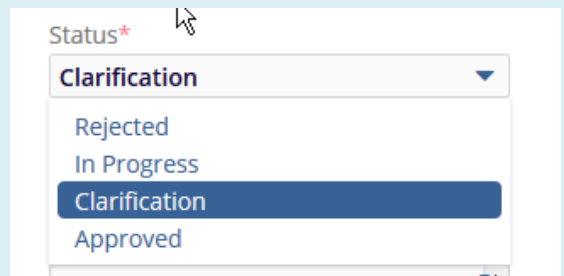
Issues\*

Index  
03 Regulatory\03.04 General\03.04.02 Tracking Information

Comments

Send Issue Create Query

2. Under **Status**, select Clarification (system status; the display name may be different)



Status\*

Clarification

Rejected

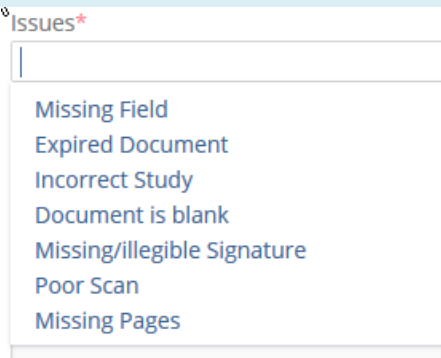
In Progress

Clarification

Approved

3. Under **Issues**, select all that are applicable

Click anywhere outside the drop down menu to collapse it



Issues\*

Missing Field

Expired Document

Incorrect Study

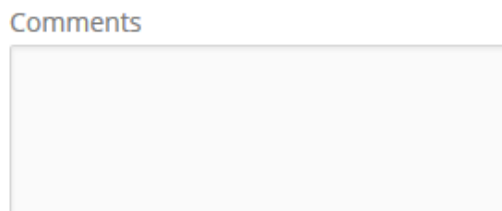
Document is blank

Missing/illegible Signature

Poor Scan

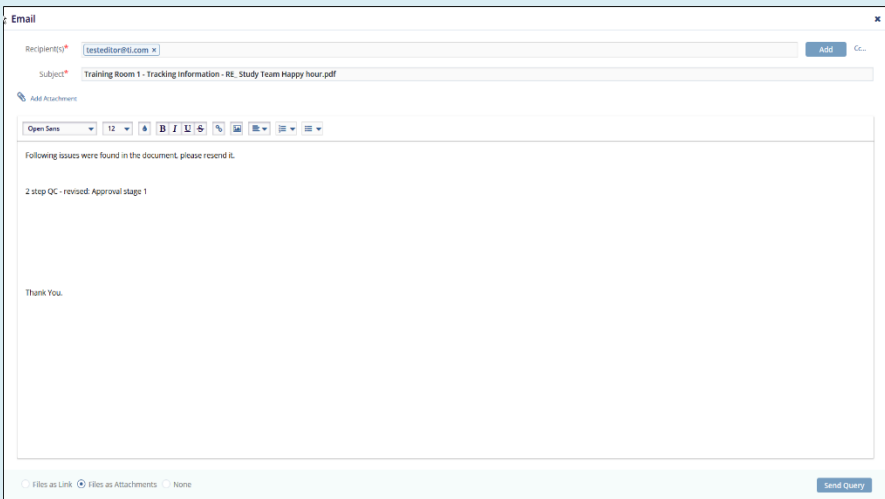
Missing Pages

4. Enter any relevant **Comments** (these are reviewer Comments which are not the same as the general Comments field)



Comments

5. Initiate an email Query by clicking on the **Create Query** button as shown above



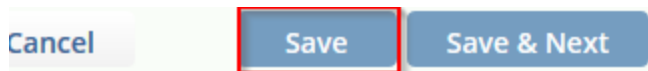
6. The Query email auto-populates. Click **Add** or **CC** to update recipients.

Do **not** change the **Subject**

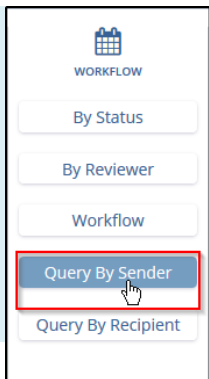
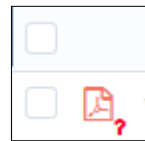
Update the email body as necessary

Click **Send Query**

7. Click **Save** to update the document status



The document icon in the grid updates with a “?”



8. View a **Query** by changing the document view to **Query By Sender**

See related guide:  
How to Resolve a Workflow Query

For any additional assistance, click ...

