
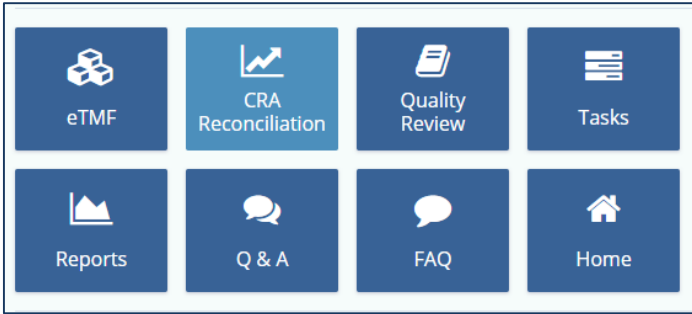


APPLICABLE TO: Administrators Room Managers Editors Readers

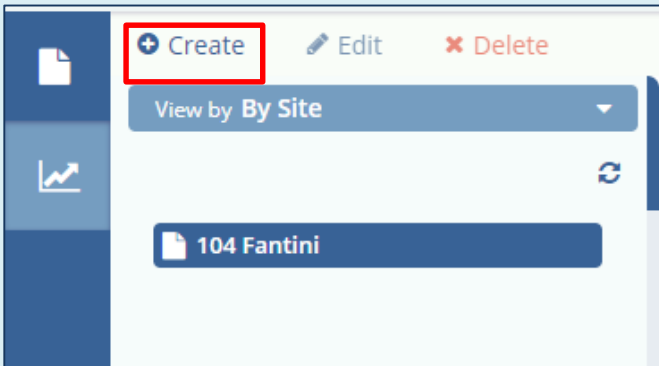
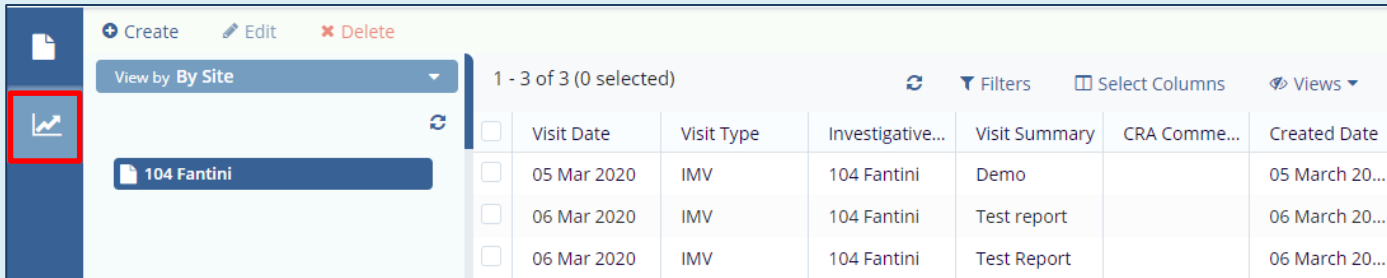
 This job aid assumes that site reconciliation has been performed. See related job aid – **How to Use CRA TMF Reconciliation**

 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.



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

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

Complete all required fields.

Click Create.

Create CRA TMF Reconciliation ✕

Visit Date *

Visit Type

Investigative Site *

Visit Summary *

This field is required

CRA Comments

Document missing in the eTMF

Title	Document Type	Reconcile Date
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

- ✉ Email ISF missing documents
- ✉ Email Reconciliation report

Create

Cancel



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

104 Fantini

1 - 4 of 4 (1 selected)

Visit Date	Visit Type	Investigative...	Visit Summary	CRA Comme...	Created Date
<input type="checkbox"/>	05 Mar 2020	IMV	104 Fantini	Demo	05 March 20...
<input type="checkbox"/>	06 Mar 2020	IMV	104 Fantini	Test report	06 March 20...
<input type="checkbox"/>	06 Mar 2020	IMV	104 Fantini	Test Report	06 March 20...
<input checked="" type="checkbox"/>	09 Mar 2020		104 Fantini	Test	09 March 20...

✉ Email ISF
✉ Email Report

Visit Date *

Visit Type

Investigative Site Name

Visit Summary *

CRA Comments

Document missing in the eTMF

Title	Document Type	Reconcile Date
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

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

Modify CRA TMF Reconciliation ✕

Visit Date *
 📅

Visit Type

Investigative Site Name

Visit Summary *

CRA Comments

Document missing in the eTMF -

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

Document missing in Site Binder -

Title	Document Type	Reconcile Date
104_ML_Fantini_2...	Investigative Site\...	03/09/2020



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

View by **By Site** ▼

View By ✕ ↻

Make default

Make default for all rooms