

APPLICABLE TO:

- Administrators
- Room Managers
- Editors
- Readers
- eTMF

This job aid shows the CRA user how to mark documents as **Verified**, **Missing in eTMF**, or **Missing in Investigator Site File (ISF)**.

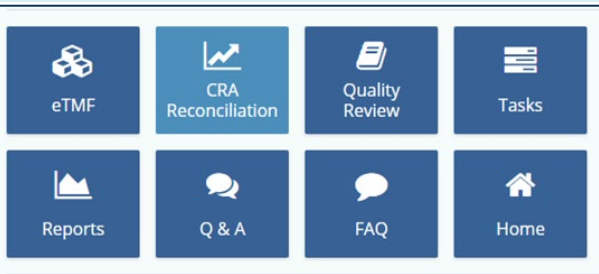


The user must first:

1. Be added within the **CRA** field under the site profile.
2. Have the **Action** enabled under their User Profile.



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

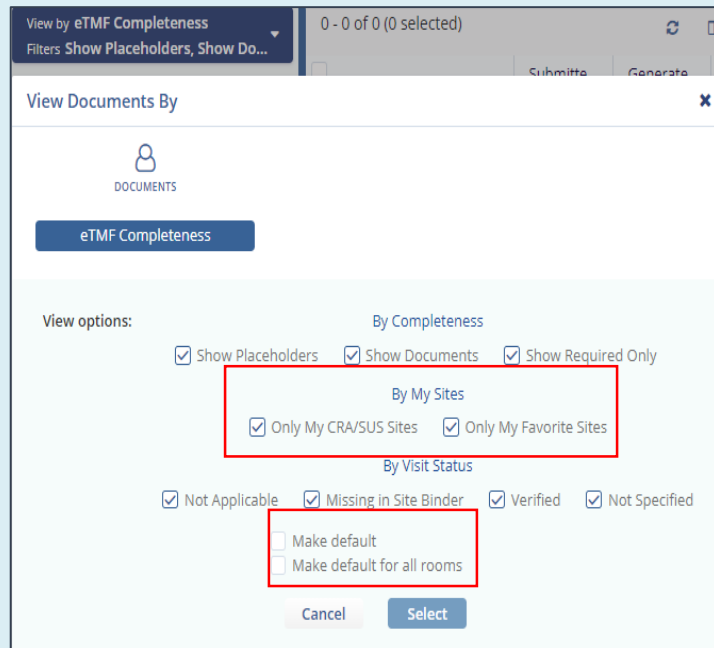


1. Navigate to the CRA Reconciliation module in the Navigation Grid.

2. By default, the user will see only those sites to which they have been added as a CRA. This default can be changed by the user.

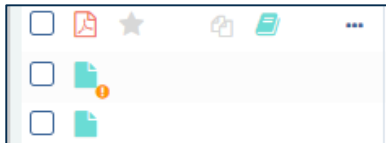
2a. Disable the “By My Sites” filters to see other sites.

2b. Enable the “Make default” or “Make default for all rooms” options to change the default view.





3. Select the site to reconcile with the ISF. The grid will populate with records.



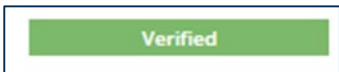
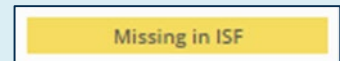
- **Missing Required Documents** are indicated by a blue document with an ! in an orange circle.
- **Placeholders** are indicated by a blue document icon.
- **Collected documents** are represented by a corresponding file-type icon.

When performing a reconciliation, each document will fall into 1 of 3 statuses.



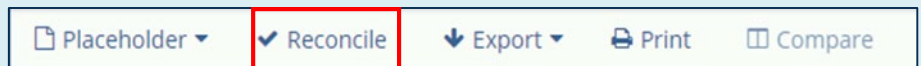
4a. A document that is in the ISF but not showing in the eTMF the status is “Missing in eTMF.”

4b. If a document is in the eTMF but not present in the ISF the status is “Missing in ISF.”

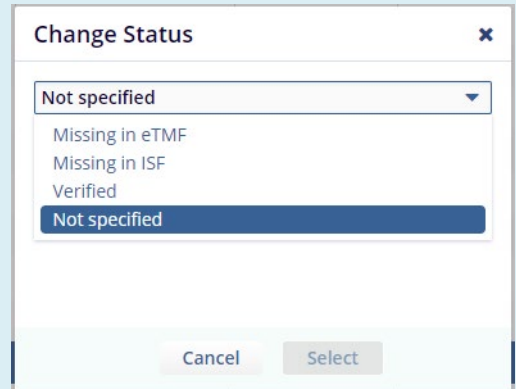


4c. When the document is in both the eTMF and the ISF the status is “Verified.”













5. Click Reconcile



6. In the popup window, choose the correct status for the document(s) and click **Select**.



7. Repeat steps for all documents included in this reconciliation.

<input type="checkbox"/>					PI Curriculum Vitae	Verified	Final
<input type="checkbox"/>					PI Medical License	Missing in ISF	Final
<input type="checkbox"/>					Protocol	Missing in eTMF	

 The document reconciliation status and date will update in the grid

* For additional assistance, please refer to the User Guide or to the related job aid **How to Run a TMF Reconciliation Report**.