# Image: Second state sta

<u>Note</u>: The following steps assume the user is familiar with the QC Workflow and has been added to a Workflow group; see the related job aid: **How to QC a Document** 

iample CV	/			from Red Jobs org
	CURRICULUM Mary Ann Smith		PedJ	
			Date	of Preparation: 5/01/2005
				signature
	OFFICE ADDRESS			
	Children's Hospital	of California		
	1234 Doctor's Lane			
	Sunny, CA 00199			
	555/123-7777			
	PERSONAL DATA			
	Date of Birth	July 1, 1950		
	Place of Birth	Anchorage, AK		
	Citizenship	United States of America		
	Home Address	4456 Main Street Sunny, CA 00199		
	Telephone	555/123-0807		
	EDUCATION			
	Include school, dates	, and degrees. For example:		
	8/66-4/70 Ar	y Town College, Anchorage, AK	85	
		edical University, Honolulu, HI	MD	

1. After performing a Quality Check (QC) of a workflow document, scroll down within the Metadata pane on the right to find **Status**.

43	tep QC - revised: Approval stage 1		
	Status*		
	Clarification	•	
	Issues*		
	Index		
	03 Regulatory\03.04 General\03.04.02 Tracking Information	1 W .	
	Comments		

#### 2. Under Status, select Clarification.

Issues*	
Missing Field	
Expired Document	
Incorrect Study	
Document is blank	
Missing/illegible Signature	
Poor Scan	
Missing Pages	

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

# 4. Enter any relevant **Comments**.

(these are Reviewer comments which are not the same as the general comments field)

Clarification	-
Rejected	
In Progress	
Clarification	
Approved	

Comments		



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### How to Create a Document Query INTERACTIVE

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

Email	×
Recipients/* [testedRardBi.com x]	A55 (c.
Subject* Training Room 1 - Tracking Information - RE, Study Team Happy hour pdf	
All Alle Assessment	
0pm 5m v 0 v 6 8 7 2 6 6 8 8 v 1 v 1	
Following sauces were found in the document, please resend it.	
2 stop QC - revised: Approval stage 1	
Thurik Yeju.	
C Breathing & Breastandewers, O bree	Sectores
() His a Link ⊗ His a Atazhments () None	Send Query

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

Cancel		Save	Save & Next
	View Doc	uments By	
		ETMF	
		Index	
		Document Type	
		Site	
		Country	
		Tag	
	0	Query By Sende	r
	Q	uery By Recipier	nt

6. The Query email autopopulates. Click **Add** or **CC** to update recipients.

- > Do **not** change the **Subject**
- Update the email body as necessary
- Click Send Query



The document icon in the grid updates with a "?"

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

