How to Audit a Document

TI version 10.8

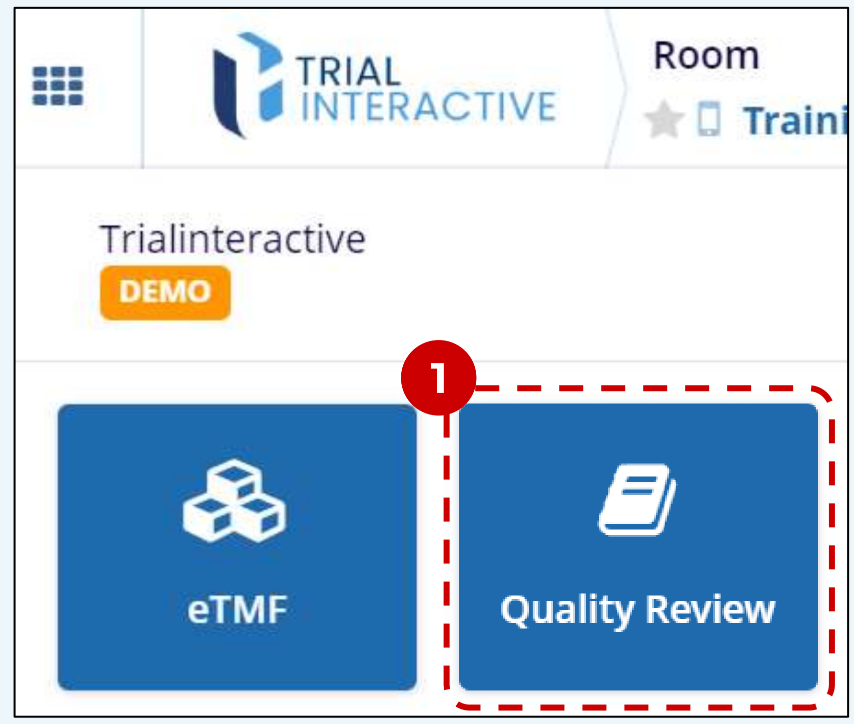
TRIAL INTERACTIVE

APPLICABLE TO:

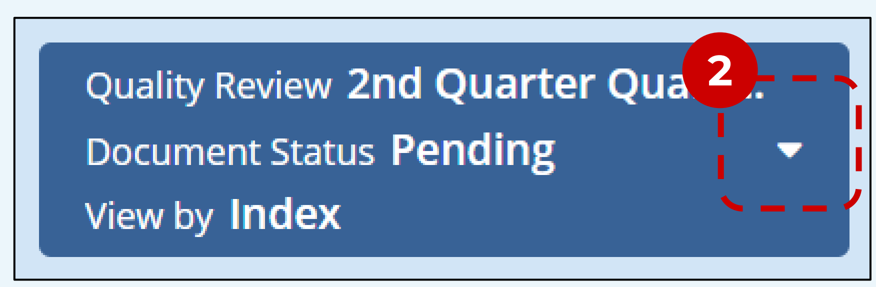
- Admin
- Manager
- Editor
- Reader

- eTMF
- Collaborate

1 Access the **Quality Review** module in the chosen room.

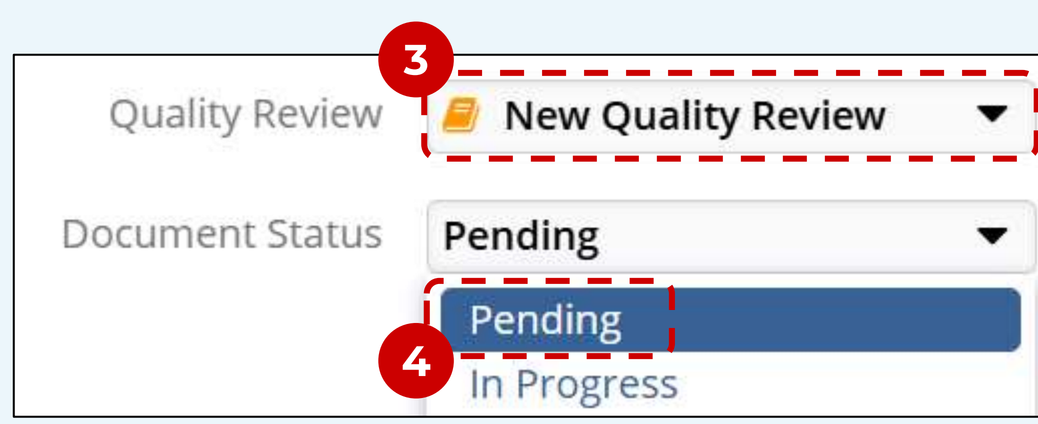


2 Enter the view selector to pick an **Audit** (names shown are examples).

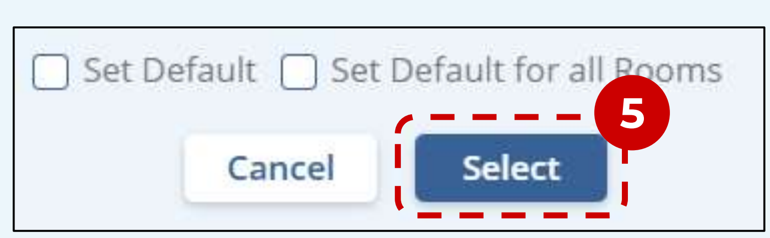


3 Select the intended audit (**Quality Review**).

4 Select Document Status: **Pending**.



5 Confirm your choice by clicking **Select**.



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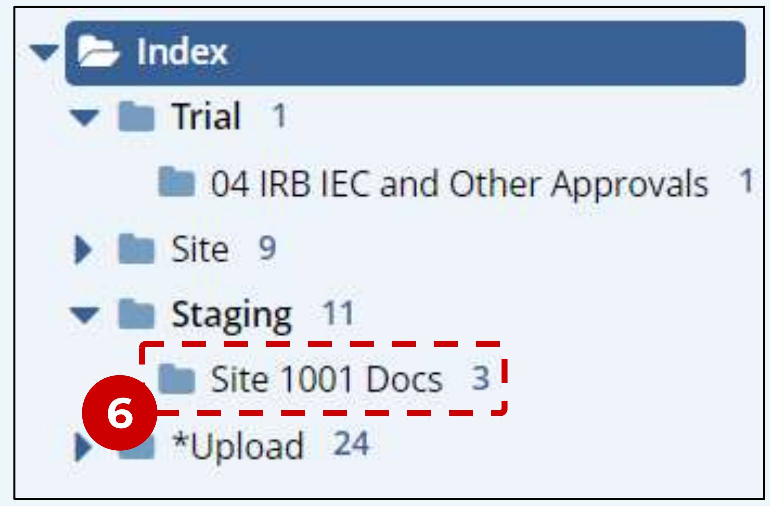
6 Select a **folder** to view documents awaiting review.

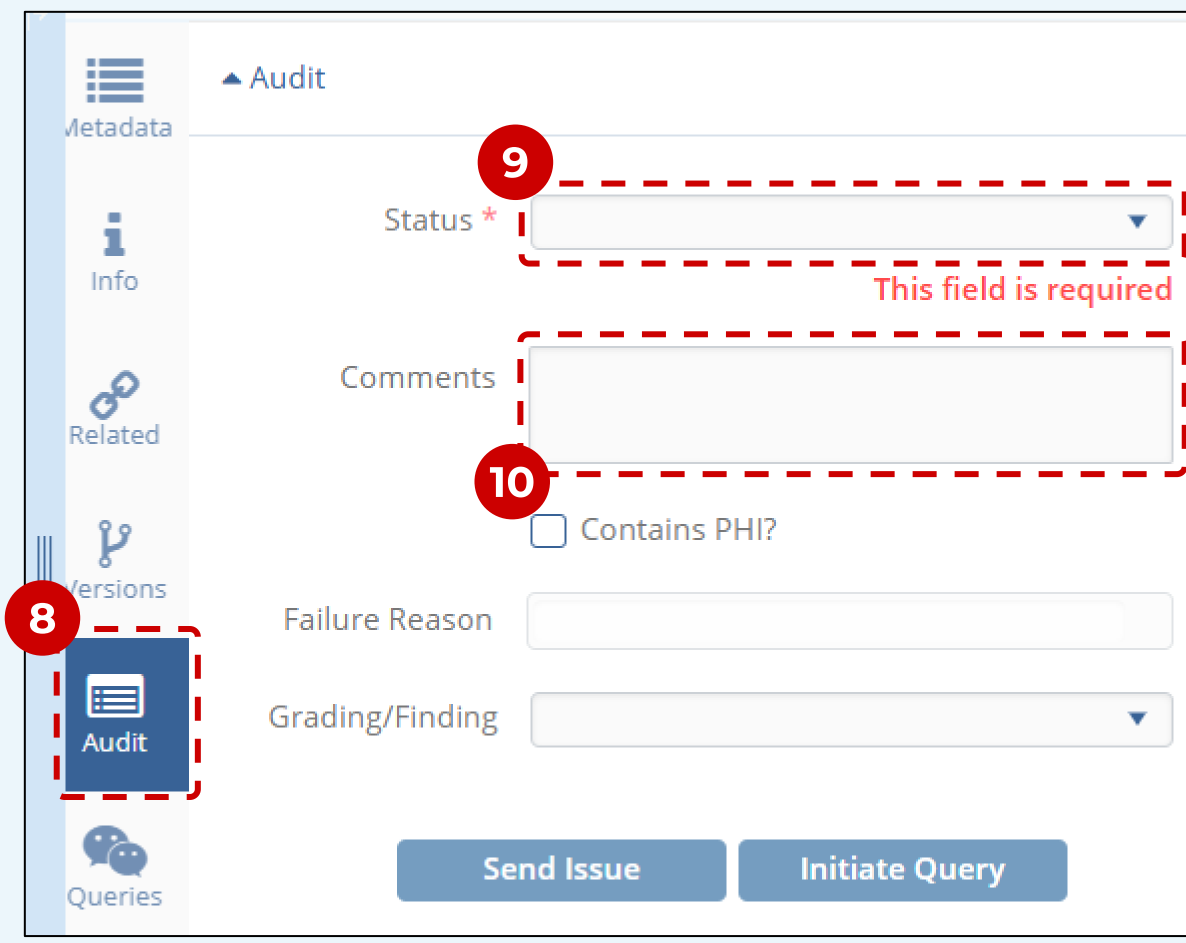


7 Choose a document and determine if it meets your passing criteria.

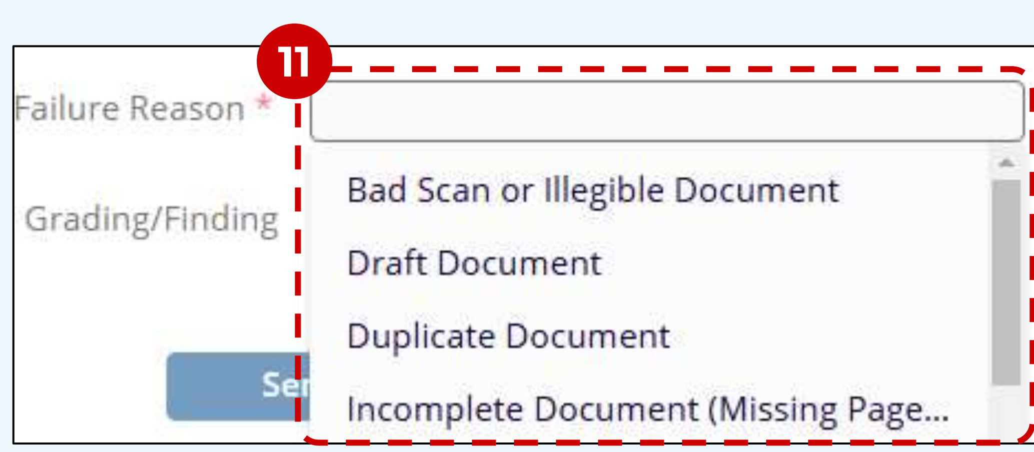
8 In the metadata panel, select the **Audit** tab.

9 Assign a **status**.

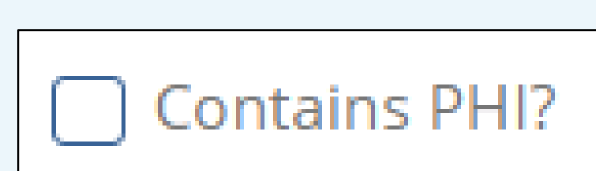
10 Add **comments** (recommended).



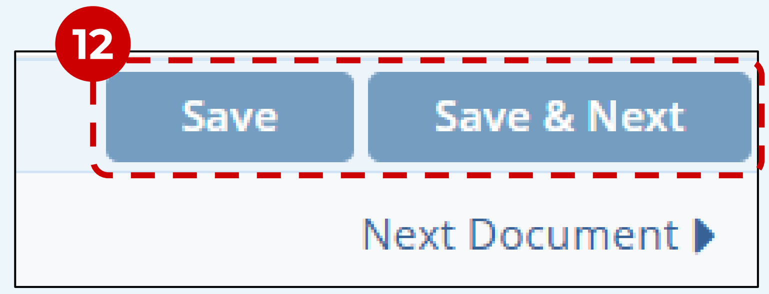
11 In case the status chosen is a fail, a **Failure Reason** must be indicated.



Some audits may display the **Contains Phi?** box. This can be used to immediately delete documents that contain personal data or similarly confidential information.



12 Use the **Save** or **Save & Next** button to finalize the review.



For more info on the audit process after this point, see job aid: “How to Respond to an Audit Finding”.