

# How to Run a TMF Reconciliation Report

TI version 10.8

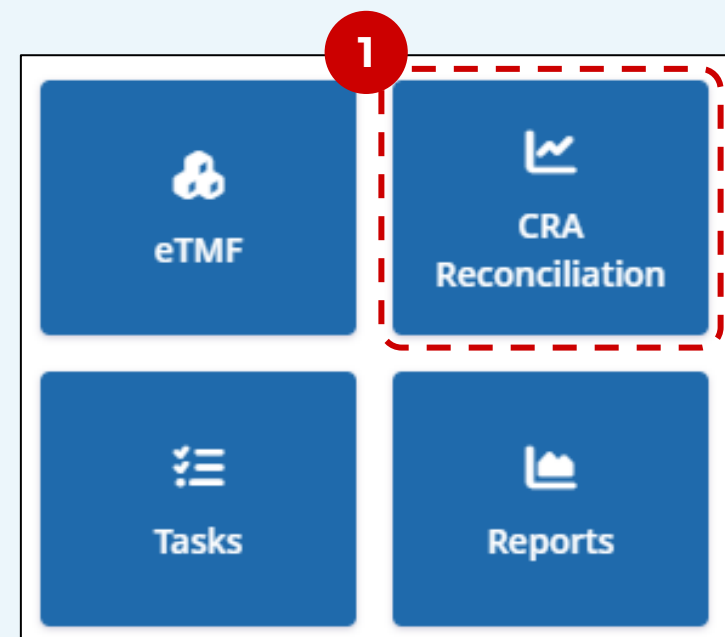
## APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- eTMF
- Study Start-Up

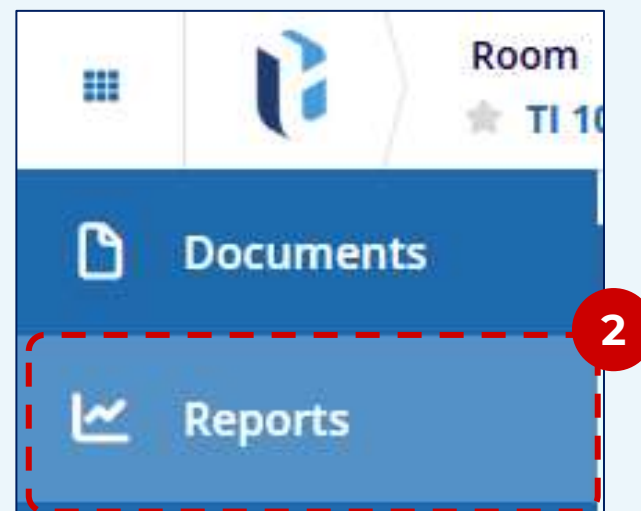
The feature described in this job aid automates and streamlines the task on reporting on visit reconciliation activities, taking the manual element out of the equation.

This job aid assumes that site/TMF reconciliation has been performed. For information about reconciling documents, see related job aid: “How to Use TMF CRA Reconciliation”.

- 1** Enter a room and navigate to the **CRA Reconciliation** module in the Navigation Grid.



- 2** Click on the **Reports** button in the navigation bar.



- 3** Select a **Site**.



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**4** To run a new report, click the **Create** button in the ribbon.



**5** The report creation dialog will populate with documents from the latest reconciliation actions, as long as an Investigative Site is selected.

Visit Date \* 05 Dec 2025

Visit Type \* IMV

Investigative Site 215 Wizarding Hospital

Visit Summary 215 IMV - Dec 2025  
Completed as expected

Comments

▼ Not Applicable Documents

	Title	Document ...	Reconcile D...	Contact
	[Placeholde...	Site\05 Site ...	2024-12-02...	Bahama M...
	Filenote	Site\05 Site ...	2024-12-02...	

▼ Document missing in Site Binder

Email ▼ **Create** Cancel

**6** Click **Create** to issue the reconciliation report.

Under **Email** you can send partial (missing docs) or full reports in the form of an email, even before report creation. Recipients can include any site contact or eTMF user with access to this study room.

**7** Use the document grid to review, **Edit**, or **Delete** reports. You can also issue emails from the right-side panel.

View by: By Site

1 - 6 of 6 (1 selected)

Visit Date	Comments
<input checked="" type="checkbox"/> 02 Dec 2024	
<input type="checkbox"/> 09 Jul 2024	
<input type="checkbox"/> 17 May 2023	
<input type="checkbox"/> 09 May 2023	
<input type="checkbox"/> 15 Nov 2022	
<input type="checkbox"/> 24 Aug 2022	

Visit Date \* 02 Dec 2024

Visit Type \* IMV

Visit Summary \* 038 IMV Completed

Comments

▼ Not Applicable Documents

Title	Document T...	Reconcile Date	Contact
[Placeholder]...	Site\05 Site ...	2024-12-02 1...	Bahama Ma...
Filenote	Site\05 Site ...	2024-12-02 1...	

**8** If **Edit** was selected, make changes then click **Save**.

