How to Run a TMF Reconciliation Report

TI version 10.7

TRIAL INTERACTIVE

APPLICABLE TO:

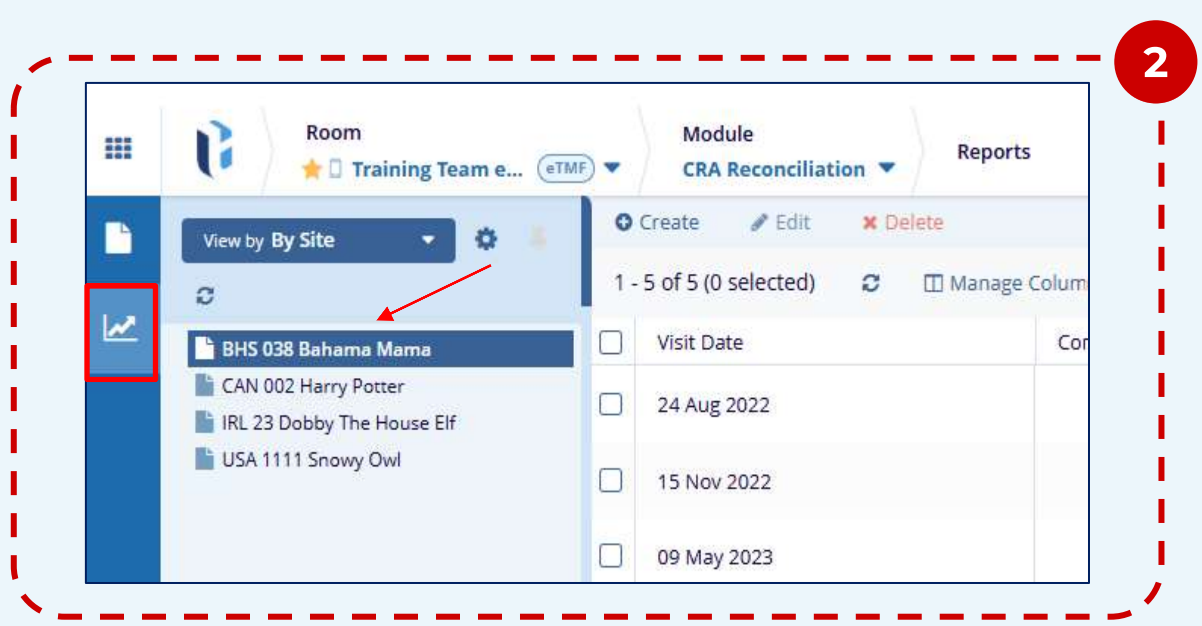
- ○ Admin
- ● Manager
- ● Editor
- ● Reader

- ● eTMF
- ● Study Start-Up

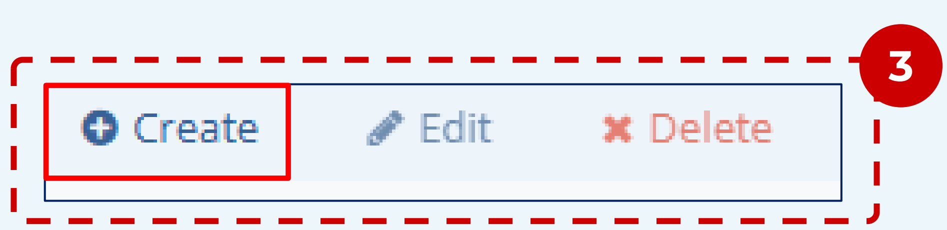
This job aid assumes that site reconciliation has been performed.
See related job aid – How to Use CRA TMF Reconciliation.
Admins cannot be CRAs in the eTMF, therefore, they cannot perform this task.

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

2 Click on the **Reports** module, and select a site. The grid displays existing reports.



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



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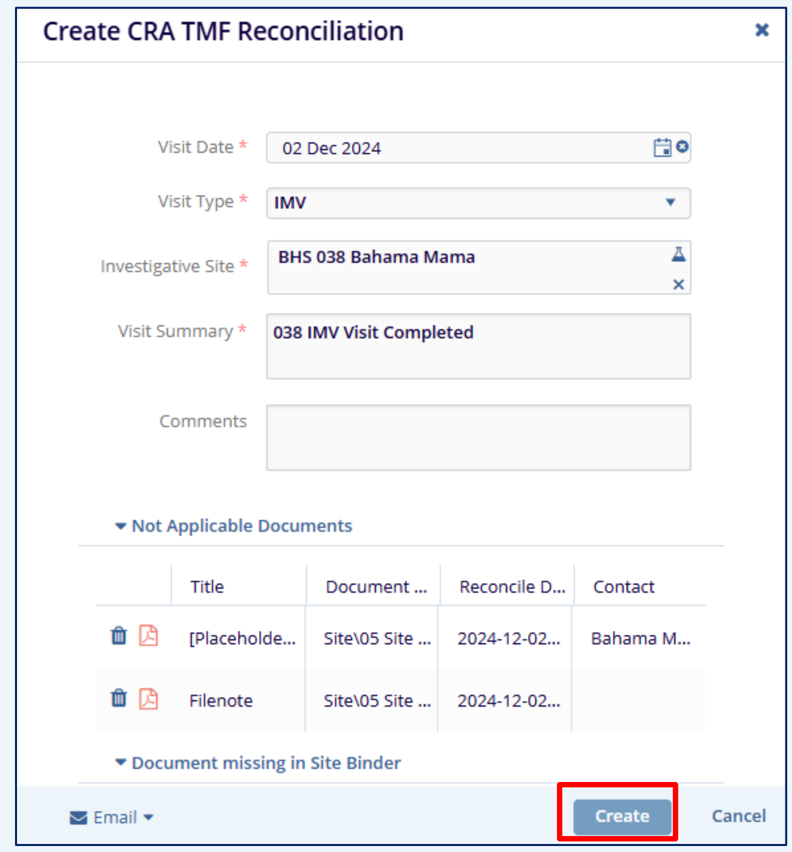
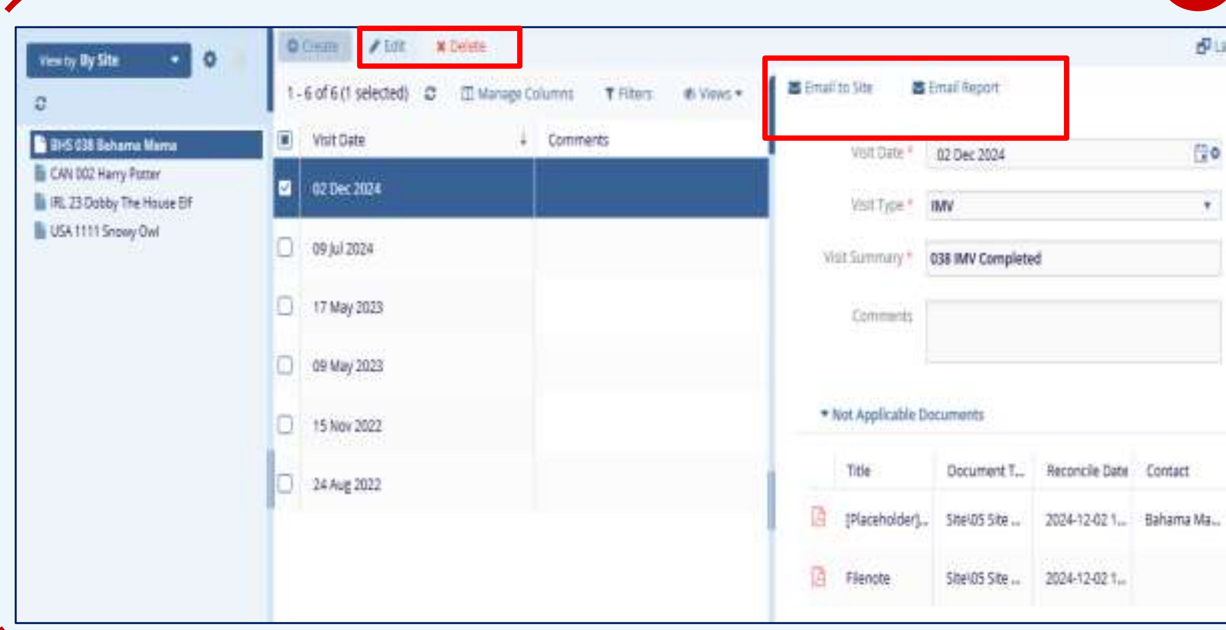
4 The report creation dialog will populate with documents from the latest reconciliation actions as long as an Investigative Site is selected



5 Click **Create** to issue the reconciliation report

Under **Email** you can send partial 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

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



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