

How to Audit a Document

TI version 10.8



- APPLICABLE TO:
- Admin

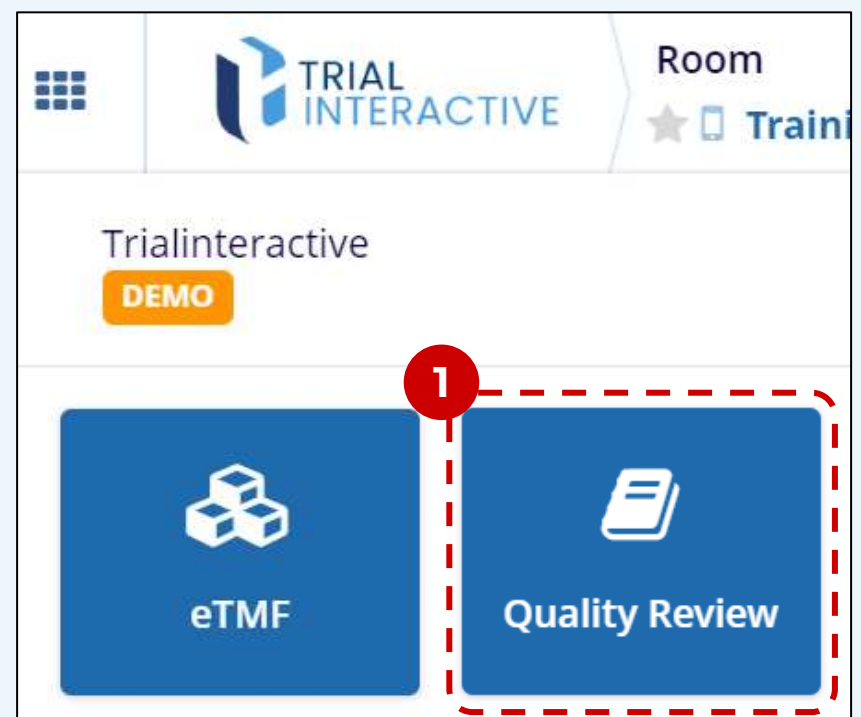
Manager

Editor

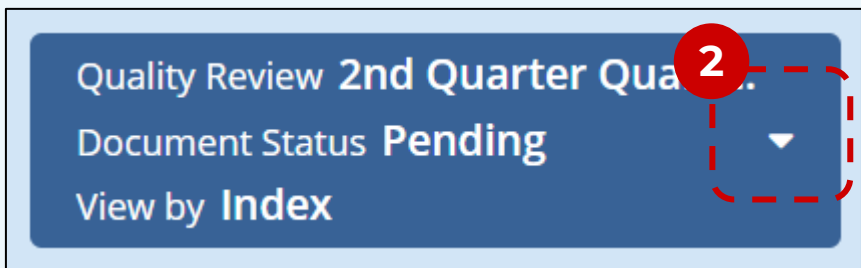
Reader
- eTMF

Collaborate

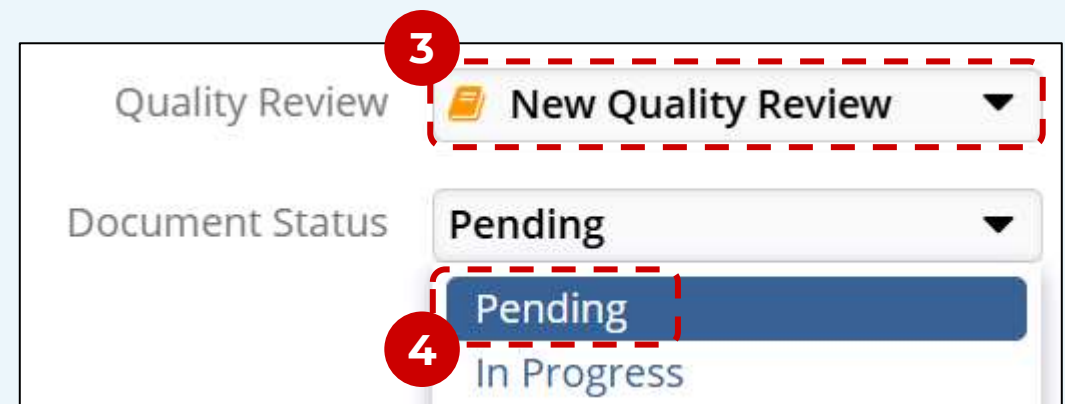
1 Access the **Quality Review** module in the chosen room.



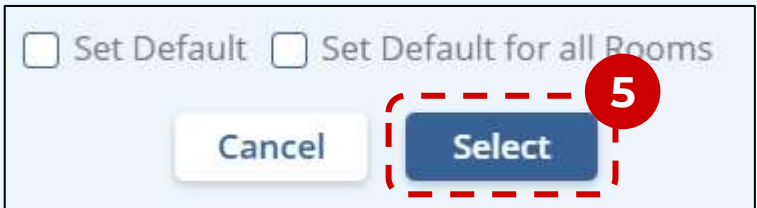
2 Enter the view selector to pick an **Audit** (names shown are examples).



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



4 Select Document Status: **Pending**.

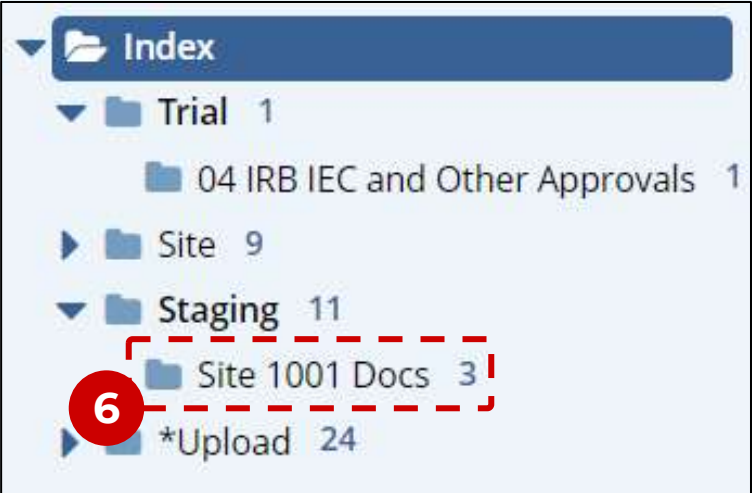


5 Confirm your choice by clicking **Select**.

- 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).

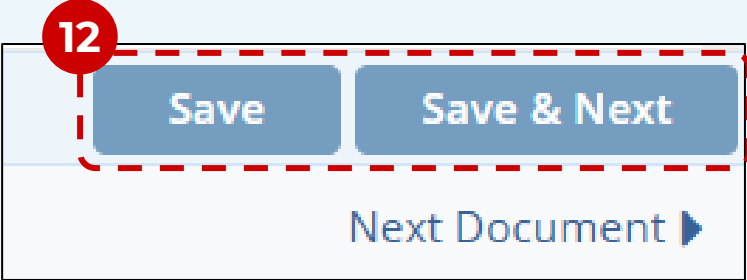
- 11

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”.