

APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- eTMF
- eISF

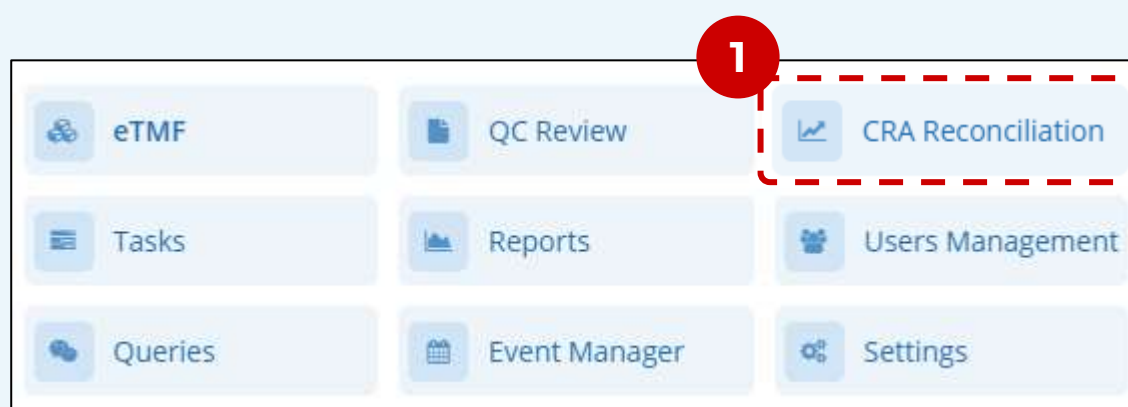
This job aid guides CRA users in how to mark documents as **Verified**, **Not Required**, or **Missing in Investigator Site File (ISF)** while they carry out site monitoring tasks (“Visit”).

Users can accomplish this action only when their setup fulfills two conditions:

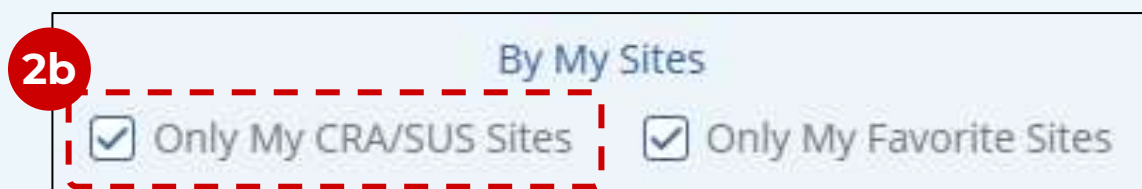
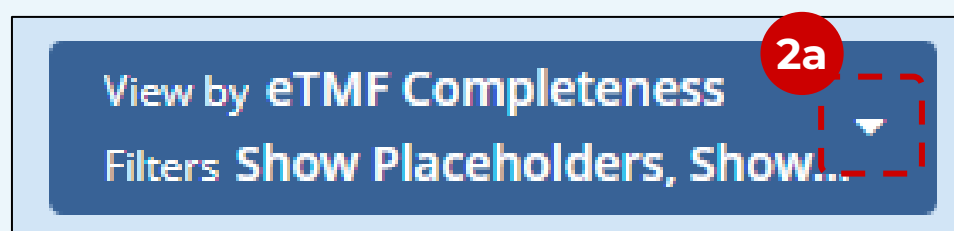
1. the user is present in the CRA field within Site Details.
2. the user has been endowed with the **CRA Reconciliation** action.

Admins and Managers are not eligible for the CRA condition in site details.

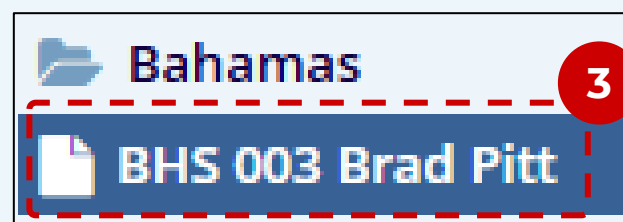
1 Access the **CRA Reconciliation** module.



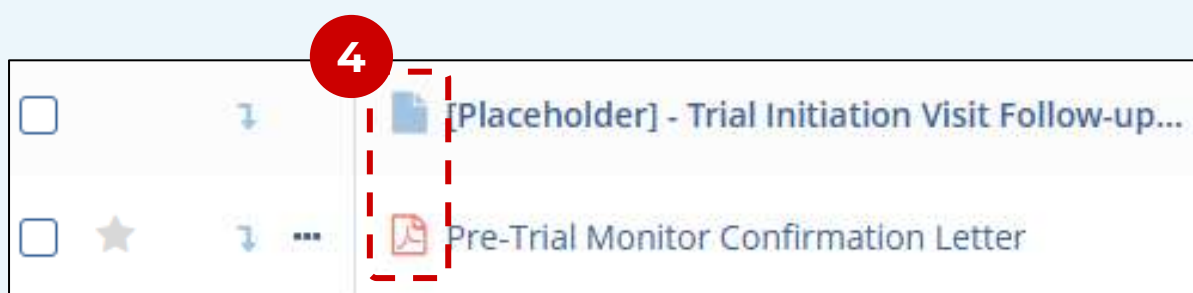
2 By default, the view is filtered for sites where the user is a CRA only. You may sometimes need to **lift** that restriction.



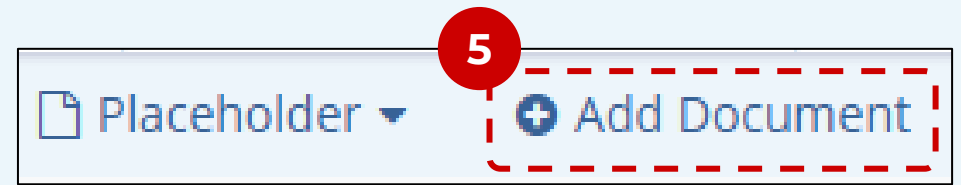
3 **Select** the site to review. The grid will populate with associated records.



4 Review the contents of the Site. This will likely include both documents and placeholders.



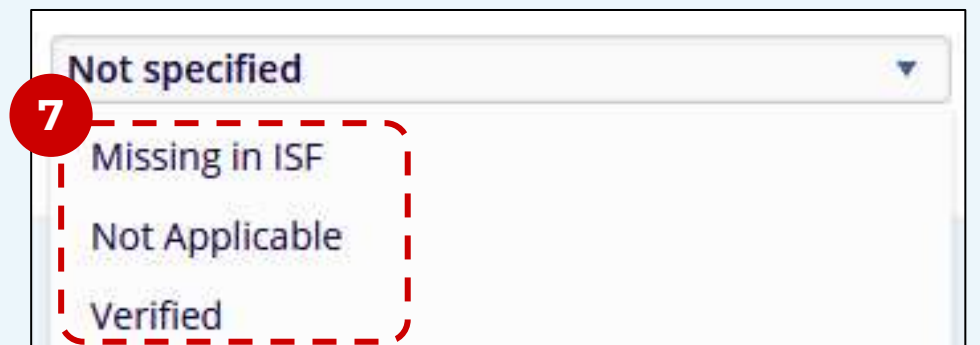
5 If you need to replace a placeholder with an available document, use **Add Document**.



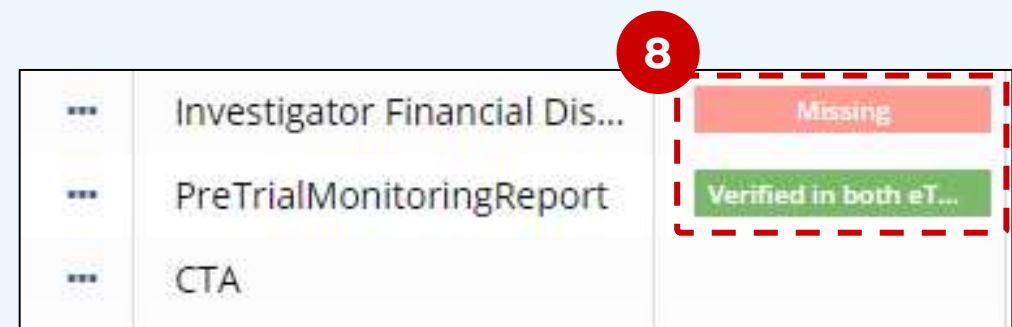
6 Once you have reviewed documents, select one or more documents that you determine are of the same status, and click **Reconcile**.



7 Set one of the statuses: **Verified**, **Not Applicable**, or **Missing**. (Small variations in the exact wording are common)



8 Assigned statuses are shown as labels in the column 'Visit Status'.



9 Repeat steps as needed to complete your visit.