

- APPLICABLE TO:
- ☒ Admin

☒ Manager

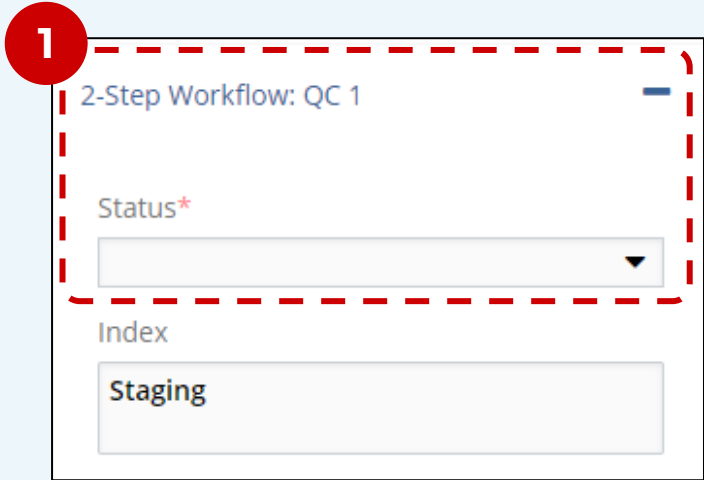
☒ Editor

☐ Reader

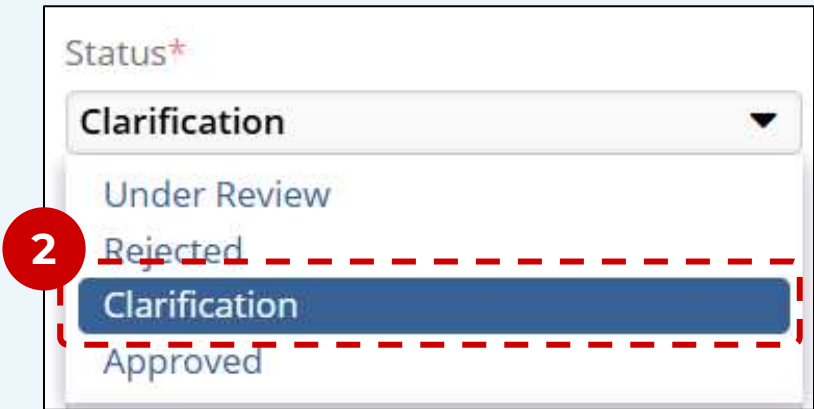
☒ eTMF

This document details step only applicable to users assigned to QC groups and performing a review on a document. For more information see also related job aid: **How to QC a Document.**

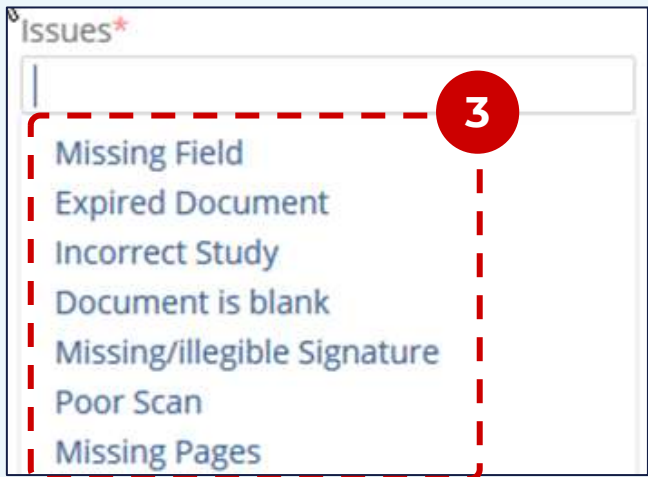
1 After performing Quality Check (QC) of a document where a need for clarification is determined, scroll down within the Metadata pane on the right to find **Status**.



2 Under Status, select **Clarification**.



3 An **Issues** field appears. This is required. Select all applicable.



4 Enter any relevant **Comments**.

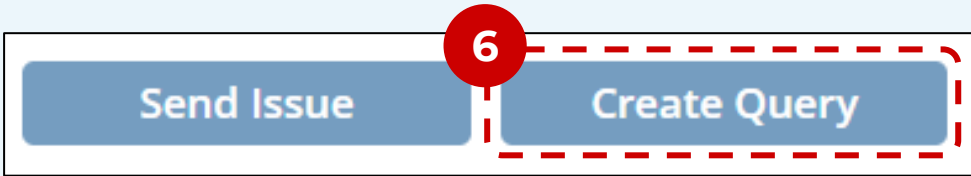
 These are classified as Reviewer comments, which are workflow-specific and separate from the general *Comments* metadata field.



5 **Save** the changes made so far.



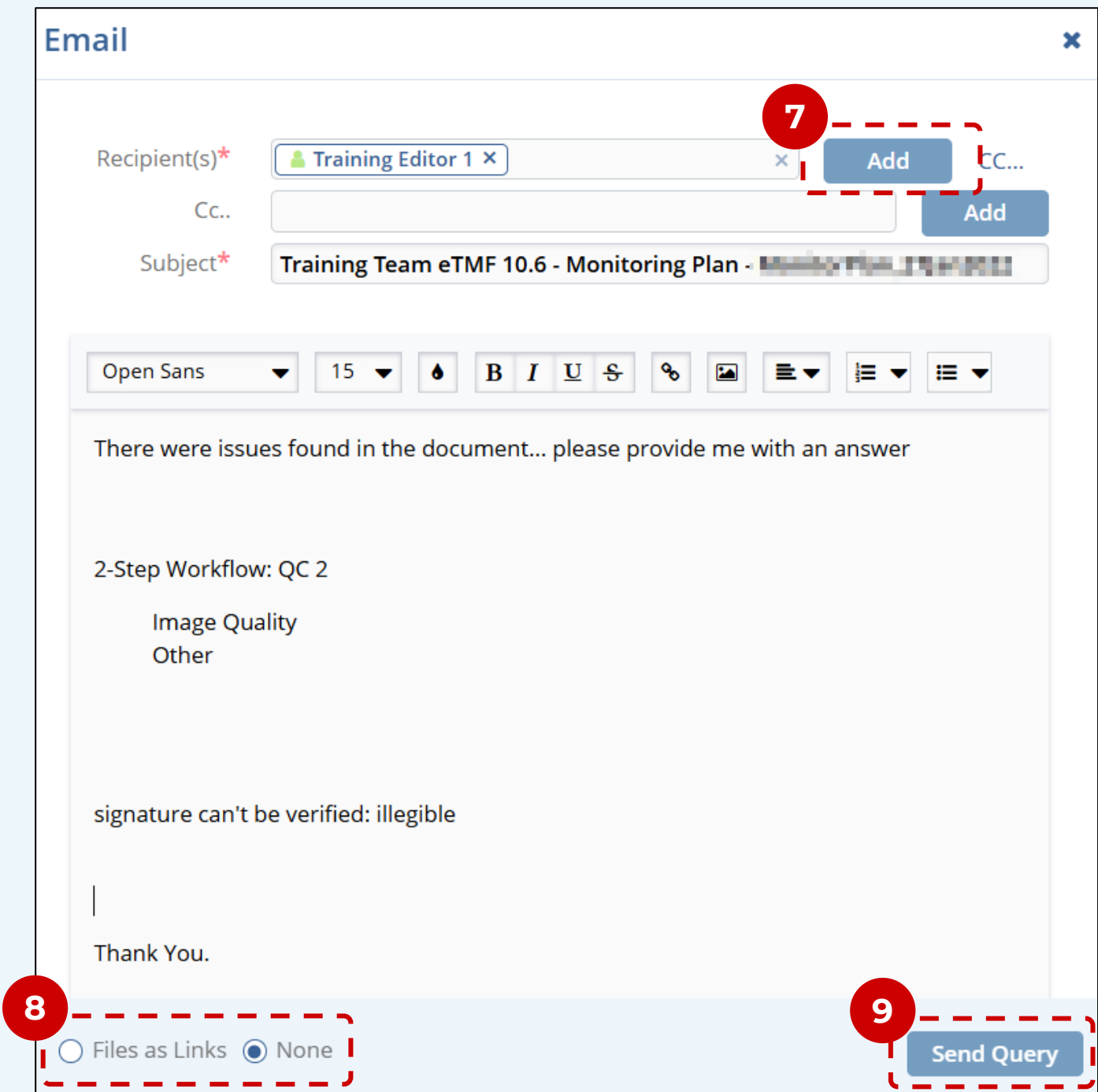
6 Click on the **Create Query** button.



7 A window opens where query text and recipient are pre-populated. Make changes as required (add recipients, rewrite text).

8 Some rooms may let you select how to deliver the document under query, if at all.

9 Click on the **Send Query** button.

A screenshot of an 'Email' form. The form has fields for 'Recipient(s)*', 'Cc..', and 'Subject*'. The 'Recipient(s)*' field contains 'Training Editor 1' with a close button. The 'Cc..' field is empty. The 'Subject*' field contains 'Training Team eTMF 10.6 - Monitoring Plan - [redacted]'. There are 'Add' and 'Cc...' buttons next to the recipient field. Below the fields is a rich text editor with a toolbar showing font settings (Open Sans, 15) and formatting options (bold, italic, underline, strikethrough, link, unlink, image, list, indent). The text in the editor reads: 'There were issues found in the document... please provide me with an answer', '2-Step Workflow: QC 2', 'Image Quality', 'Other', 'signature can't be verified: illegible', and 'Thank You.' At the bottom, there are radio buttons for 'Files as Links' and 'None', and a 'Send Query' button. The 'Send Query' button is highlighted with a red dashed border and a red circle with the number 9. The 'Files as Links' radio button is highlighted with a red dashed border and a red circle with the number 8.

10 You can review Queries issued by changing the document view to **Query by Sender**.



You can also easily identify any document that has an open query by looking for the “?” appearing next to the document icon.

