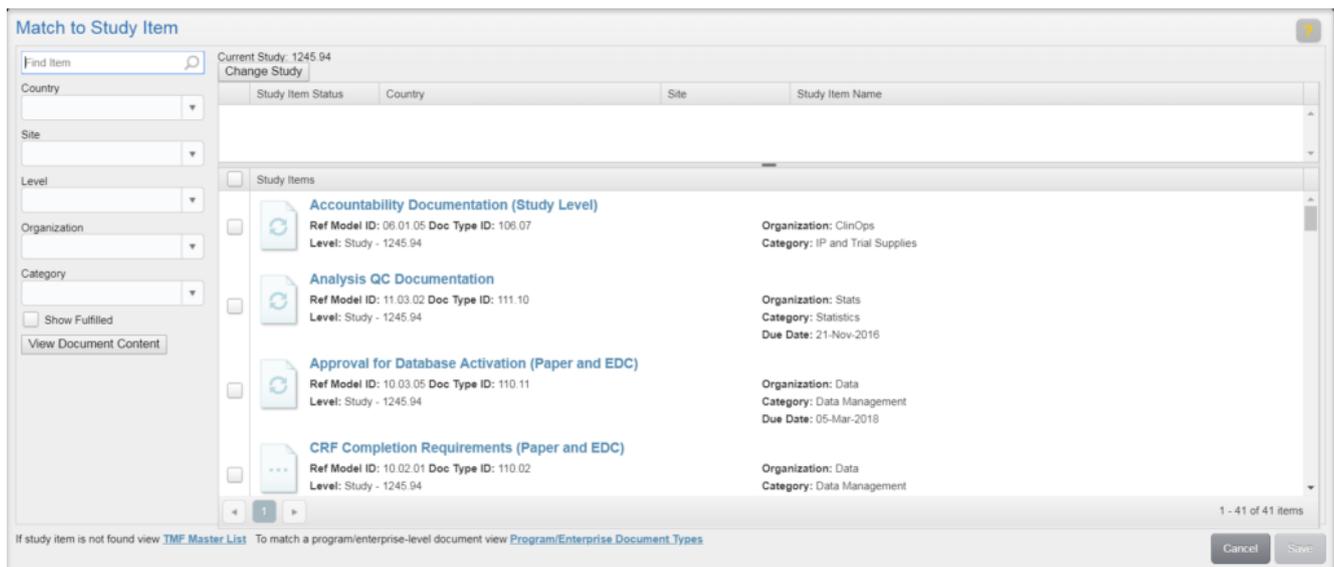


Match to Study Item

Use the **Match to Study Item** screen to match a document [Uploaded](#) to your [Work Area](#) with a specific [Study Item](#) in the eTMF. This step takes place after you have [uploaded the document](#) and before you submit the document to [Quality Control](#). The Match to Study Item Screen is also used when Authoring a document within the eTMF.



On the Match to Study Item screen, use the **Change Study** button at the top to select or change the study to which the document should be associated. If needed, select a **Country**, **Site**, **Level**, **Organization** and **Category** to filter the list of available Study Items. If you want to associate the document with a study item that is already indexed to a document and finalized, select the **Show Fulfilled** check box to display study items fulfilled with existing content. The new document will be treated as a new version.

If you are indexing uploaded content, you can click **View Document Content** to check the content against the study item without leaving the screen. The content of the document will display in place of the list. To return to the list, click **Show Search Results**.

Once you have found the appropriate study item(s), select the

corresponding check box and click **Save**.

If you select a [Study Item](#) that already has pending and/or final content, an informational message displays, stating that a new version will be created once the content is finalized. To ensure you are not creating a duplicate, do the following for the study item selected:

- Check the date (in the Study Item Name).
- View the content by clicking the Study Item Name hyperlink.
- To view earlier versions, click **View Versions**.

If creating a new version is not your intent, deselect the study item and locate the correct one.

Match to a Document Type

If your document does not match any existing study items, you can click **TMF Master List** in the bottom-left to [match to a document type](#). Select the document type, complete required fields on the Propose Study Item form, and click **Save**.

When you submit the study item to QC, it will first be sent to the Study Owner for approval to create a new study item. If approved, it will then be sent to QC. If not approved, it will be returned to you with the Study Owner's comments.

Match to a Program/Enterprise Document

To match to a [program](#) or [enterprise](#)-level document, click **Program/Enterprise Document Types**. Select the Document Type from the list, review and update fields on the New Program/Enterprise Document form as necessary, and click **Save**. When the document is finalized, Study Owners will receive an email notification so that they can associate the document with the appropriate studies.