

Match to Document Type

The Match to Document Type screen can be accessed by selecting the TMF Master List hyperlink at the bottom of the [Match to Study Item](#) or Match Program/Enterprise Document screen.

How to Match a Document to a Document Type

The Match to Document Type screen will display all document types by default. The Document Types list can be updated to display only ad hoc document types by selecting the **Show Ad Hoc Only** check box on the left side of the screen.

From the Match to Document Type screen, select a document type from the list to propose a new study item. From the Propose Study Item window, review the details for each field. Fields that are gray may not be changed. Fields that are red are required. For a description of a field, select the “i” next to it.

***Note:** You will be proposing a new study item with these attributes which may be subject to approval.*

When you are satisfied with the information in the data fields, click **Save**. You are returned to the Match to Document Type screen, and the proposed study item is listed at the top.

To match to additional document types, select another type from the list and complete the fields in the Propose Study Item window as instructed above. To remove a proposed study item, select the X next to the proposed item in the grid above the list of document types.

To complete the matching, click **Save** on the Match to Document Type form.