



8.3 Source Data Verification

Definition: Source Data Verification (SDV) is the process of reviewing and verifying data against source records to ensure accuracy.

The Source Data Verification screen is the Monitor's **Home** screen where they perform Source Data Verification (SDV).

To Access the Source Data Verification screen:

Click **Tasks** in the header bar of Study Runner, and select **Source Data Verification**.

The SDV Table

The **Source Data Verification** table displays the **SDV Status**, **Open Queries**, **SDV Requirements**, **CRF Status**, etc.

Source Data Verification for New Test Site

50 | Show More

Select: All Shown None

SDV Status	Participant ID	Site ID	Open Queries	Event Name	Event Date	CRF Name	SDV Requirement	CRF Status	Actions
<input type="checkbox"/>	a123	1	0	Exam (1)	01-Nov-2021	Eligibility	Item Level	<input checked="" type="checkbox"/>	<input type="text"/> <input type="button" value="Data"/> <input type="button" value="Verify"/>
<input type="checkbox"/>	a123	1	0	Exam (1)	01-Nov-2021	Consent	Item Level	<input checked="" type="checkbox"/>	<input type="text"/> <input type="button" value="Data"/> <input type="button" value="Verify"/>
<input checked="" type="checkbox"/>	a1234	1	0	Exam (1)	01-Nov-2021	Eligibility	Item Level	<input checked="" type="checkbox"/> <input type="text"/>	<input type="text"/> <input type="button" value="Data"/>
<input checked="" type="checkbox"/>	a1234	1	0	Exam (1)	01-Nov-2021	Consent	Item Level	<input checked="" type="checkbox"/> <input type="text"/>	<input type="text"/> <input type="button" value="Data"/>
<input type="checkbox"/>	a1234	1	0	Treatment (1)	02-Nov-2021	Pre-Treatment Evaluation	Item Level	<input checked="" type="checkbox"/>	<input type="text"/> <input type="button" value="Data"/> <input type="button" value="Verify"/>






Results 1 - 5 of 5.

Note: Only forms the user has access to will appear in the Source Data Verification page.

SDV Requirements

SDV requirements are defined by your study protocol. Data Managers and Administrators can specify the level of SDV requirement for each item on a form in Study Designer. Below is a table that displays basic definitions of each SDV Requirement.

Icon	SDV Requirement	Description
(No Icon)	Not Applicable (Default)	SDV is not applicable for this form.

Icon	SDV Requirement	Description
	Not Required	SDV is not required for the form, but you can still perform SDV if you want. This is often used when 10% of Forms need to be SDVed. Each form record is verified or unverified all together, rather than item-by-item
	Partial Required	Some fields on the form must be verified. Each form record is verified or unverified all together, rather than item-by-item
	100% Required	Every field in the form must be verified. Each form record is verified or unverified all together, rather than item-by-item
	Item-Level	Item-Level SDV allows you to choose which items will be part of SDV by selecting Required, Optional, or Not Applicable for each individual item on a form. Item records will then be marked as Verified or Not Verified independently and will become unverified independently if their data changes on the form.
	Item-Level (To be configured)	This indicates Item-Level SDV was selected, but is not configured validly since all items are set to Not Applicable. Use the Configure SDV link on the Form card in Study Designer to set each item to Required, Optional, or Not Applicable. At least one item needs to be Required or Optional, otherwise change the form's SDV Requirement to Not Applicable.

Not all forms will have all SDV Requirement options available. The SDV options are related to when the form was created and when it was published to Production in relation to the Stack 15 release (December 20th, 2021). The SDV options on forms are as follows:

- Form first published to Production prior to Stack 15 release: *Not Applicable, Not Required, Partial Required, 100% Required*
- Form created prior to Stack 15 release, but not yet published to Production: *Not Applicable, Not Required, Partial Required, 100% Required, Item-Level*
- Form first published to Production after Stack 15 release with one of the following statuses - Not Required, Partial Required, 100% Required: *Not Applicable, Not Required, Partial Required, 100% Required*
- Form first published to Production after Stack 15 release with one of the following statuses - Not Applicable, Item-Level: *Not Applicable, Item-Level*
- Form created after Stack 15 release: *Not Applicable, Item-Level*
 - Individual items have the following SDV Requirement options: *Required, Optional, or Not Applicable*
 - When first selecting Item-Level on a form, the item is set to Optional by default. Additional items that are added will default to Not Applicable.

Item-Level SDV Requirements:

- **Not Applicable:** items cannot be verified
- **Optional:** items can be verified
- **Required:** items must be verified for the form to be fully verified and get Verified status




The Source Data Verification table only displays completed forms with an SDV requirement other than **Not Applicable**.

You can click **Show More** to show more rows or filter a column by clicking the gray box below the column header.

Forms can have a status of **Ready to verify**, **Changed since verified**, or **Verified**.

Items can have a status of **Not Verified**, and **Verified**.

SDV Form Statuses are as follows:

Icon	Status
	Ready to verify
	Changed since verified
	Verified

You can sort the columns, such as **Event Date** by clicking the column header.

The **Open Queries** column displays the number of queries that are open (**New** or **Updated**) for a specific CRF. This is a good way to keep track of which CRFs are likely to change due to outstanding queries.

If the number of queries is **0**, the number appears as plain text. If the number of queries is greater than **0**, it appears as a link. If you click the link, it takes you to the **Queries** screen, which is filtered to the Participant, Form, and Event that the row in the **SDV** table corresponds to.

The **CRF Status** column displays the status of the form as well as whether it is **Locked**, **Signed**, etc.

Click the **View CRF** (magnifying glass) button in the **Actions** column to open the form in Review-Only mode (unless the form is in a status of **Locked**, in which case, the form opens in Read-Only mode).

Click **Data** to view form information and review the items individually. Use the radio buttons in the upper-right corner to view only the specific data you want to review on the form:

Form Level:

- **Show all items:** displays all items on the form
- **Show only changed since last Verified:** displays items that have had a value changed since the form was verified

Item-Level:

- **Show all items:** Shows all items on the form regardless of SDV requirement or status

*not verified after it was verified, this does not reset the status for all items on the form. Use the **Data** button to update the SDV status for individual forms as needed.*

Changes Made After Verification

Form-Level:

If a value on a verified form was changed, the status of the form will become **Changed since verified**, and the form must be verified again.

Item-Level:

If the value of a verified item (Required or Optional) was changed:

- If the form was verified, the form becomes **Changed since verified** and the item becomes **Not Verified**
- If the form was not verified, the status of the form does not change, and the item becomes **Not Verified**

If the value of an unverified SDV Optional item changed after the form was verified, the form status will remain **Verified**. If an additional repeating group occurrence containing a Required item was added to the form:

- If the form was verified, the form becomes **Changed since verified** and the Required item remains **Not Verified**.
- If the form was not verified, the status of the form does not change and the Required item remains **Not Verified**.

Approved for publication by Kate Lambert. Signed on 2025-11-24 9:26AM

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