



## 1.4.3 Frequently Used Screens

The screens you most frequently use depend on your **User Role**. Below are descriptions of the five main screens in OpenClinica: **Participant Matrix**, **Participant Details**, **Form Data Entry**, **Queries**, **Source Data Verification**. **Participant Matrix**: This screen displays a list of participant IDs, events, and event statuses. From this screen, you can view participant details, schedule events, remove/restore participants, and reassign participants to another site, depending on access.

- The Participant Matrix lists visit-based events across the top of the screen and participant IDs down the side.
- Each icon represents the status of the participant/event combination.
- A legend of the icons is listed on the left side of the screen.
- Hover over the icons in the Participant Matrix to see more details about the participant event.
- Click an icon for options to view and/or edit data, depending on your access.
- You can filter events by status.

**Participant Matrix for Severe Headache Study**

Navigation: [Home] [Back] [Forward] [Refresh] | 50 | Show More | Select An Event | Add New Participant

| Participant ID | Eligibility & Consent | Exam | Check In | Actions                   |
|----------------|-----------------------|------|----------|---------------------------|
|                |                       |      |          | Apply Filter Clear Filter |
| 001            |                       |      |          |                           |
| 002            |                       |      |          |                           |
| 003            |                       |      |          |                           |
| 004            |                       |      | x3       |                           |
| 005            |                       |      |          |                           |
| 006            |                       |      |          |                           |
| 007            |                       |      | x2       |                           |
| 008            |                       |      | x2       |                           |
| 009            |                       |      |          |                           |
| 10             |                       |      | x2       |                           |

Results 1 - 10 of 10.

**Participant Details**: This screen displays the participant's general information, events, and forms. From here you can view Forms, enter data into forms, edit form data, lock events, remove/restore events, clear forms, and reassign a form to another version (depending on access). The Participant Details screen is divided into the following sections:

- General Information
- Visits
- Common Events

- Casebook

Participant AAA123 Custom View On AAA123 Audit Log | Showing Active Records

Expand All | Collapse All

### General Information

Edit

|                |              |           |           |
|----------------|--------------|-----------|-----------|
| Participant ID | AAA123       | Status    | Available |
| Study Name     | PDP UX Study | Site Name |           |

### Visits

Sort by Date Search form or visit name Add New

|   |                                      |                                |   |                |           |      |
|---|--------------------------------------|--------------------------------|---|----------------|-----------|------|
| <b>Follow-Up</b><br>03-Nov-2021                     | Screening Form<br>Default version: 2 | Follow-Up                      | Vitals                                      | Labs           |           |      |
| <b>Treatment (1)</b><br>03-Nov-2021                 | *Pre-Treatment Evaluation            | *Treatment Administration      | *Post Treatment Evaluation                  | Vitals         | Pathology | Labs |
| <b>Daily (1)</b><br>03-Nov-2021                     | Daily Data<br>Default version: 7.8e  |                                |   |                |           |      |
| <b>Screening (1)</b><br>03-Nov-2021                 | Screening Form<br>Default version: 2 |                                |   |                |           |      |
| <b>Eligibility and Randomization</b><br>01-Nov-2021 | Inclusion and Exclusion Crite...     | *Eligibility and Randomization | Randomization Result<br>Default version: 14 | Health History |           |      |

### Adverse Events

Adverse Event Add New Search here

| Actions                   | Adverse Event | Event onset date | Form Status | Last Update | Updated By |
|---------------------------|---------------|------------------|-------------|-------------|------------|
| No matching records found |               |                  |             |             |            |

Result 0-0 of 0 Show 10 per page < 1 >

Labs from EHR

Meds from EHR

Ad-hoc Forms

Casebook ?

**Form Data Entry:** When you open a form, you can view, enter data, edit data, add queries or annotations, close, and complete forms. If a user makes a change to the data after the form has been completed, they must enter a Reason for Change. Some features include:

- auto-save
- conditional fields
- calculations and edit checks
- concurrency locking

## 010: Demographic Information

\* **Date of Visit** 

yyyy-mm-dd 

\* **Age at Screening** 

\* **Gender** 

- Male  
 Female

\* **Ethnicity** 

- Hispanic/Latino  
 Not Hispanic/Latino

\* **Race** 

- White  
 Black/African American  
 Asian  
 Native Hawaiian/Other Pacific Islander  
 Other

**Queries:** This screen displays all queries in the study environment. On this screen, you can view, add, update, and close queries, depending on access. Queries are usually added while reviewing forms from the Participant Details screen, but you can also add them when reviewing forms here.

**Queries**

Summary count by status (based on table filters)

|                        |   |    |
|------------------------|---|----|
| <b>New</b>             |  | 1  |
| <b>Updated</b>         |  | -- |
| <b>Closed</b>          |  | -- |
| <b>Not Applicable</b>  |  | -- |
| <b>Closed Modified</b> |  | 2  |
| <b>Total</b>           |   | 3  |

50 Show More  

| Query ID | Participant ID | Site ID       | Type  | Resolution Status   | Days Open | Days Since Updated | Event Name            | CRF         | Item Name                               | Item Value | Detailed Notes   | Assigned User              | Actions   |
|----------|----------------|---------------|-------|---|-----------|--------------------|-----------------------|-------------|---|------------|--|----------------------------|---|
| 3        | 004            | 1234567       | Query |  New             | 32        | 32                 | Eligibility & Consent | Eligibility | participant_is_18_years_of_age_or_older | yes        | Check this   | Kerry Tamm (ktamminvadmin) |   |
| 1        | 002            | 1234567       | Query |  Closed Modified |           |                    | Eligibility & Consent | Eligibility | participant_is_18_years_of_age_or_older | yes        | The item has been removed, this Query has been Closed. | Kerry Tamm (ktamminvadmin) |   |
| 2        | 007            | HEADACHESTUDY | Query |  Closed Modified |           |                    | Eligibility & Consent | Eligibility | participant_is_18_years_of_age_or_older | no         | The item has been removed, this Query has been Closed. | Kerry Tamm (ktamm)         |   |

Results 1 - 3 of 3.

**Source Data Verification:** On this screen, you can view forms, view item data, and verify/unverify

forms.

### 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="button" value="⬇️"/> | <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="button" value="⬇️"/> | <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.

### Item-Level SDV Screen:

|  |   |
|--|---|
| Participant ID: <b>a1234</b>               | Event Name: <b>Treatment</b>            |
| Site ID: <b>1</b>                          | Event Start Date: <b>02-Nov-2021</b>    |
| Form Name: <b>Pre-Treatment Evaluation</b> | SDV Form Requirement: <b>Item Level</b> |
| Form Status: <b>data entry complete</b>    | SDV Form Status: <b>Ready to verify</b> |

Show all items   
 Show all SDV items   
 Show items needing verification

| <input type="checkbox"/>            | Brief Description (Item Name)                    | Value | SDV Requirement | Last Verified (UTC) | Open Queries | Last Modified (UTC) | Modified By       | Actions                          |
|-------------------------------------|--|-------|-----------------|---------------------|--------------|---------------------|-------------------|----------------------------------|
| <input type="checkbox"/>            | 1. Age ≥ 18 years. (AGE)                         | No    | Optional        | Never               | 0            | 18-Nov-2021 21:06   | Riley Bianchi-Mon | <input type="button" value="Ⓞ"/> |
| <input checked="" type="checkbox"/> | 3. Child-Pugh Score A (5-6) (Appendix 1). (PUGH) | No    | Required        | Never               | 0            | 18-Nov-2021 21:06   | Riley Bianchi-Mon | <input type="button" value="Ⓞ"/> |

Functional approval by Riley Bianchi. Signed on 2021-12-21 11:04AM

Approved for publication by Paul Bowen. Signed on 2021-12-21 11:01PM

Not valid unless obtained from the OpenClinica document management system on the day of use.