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 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

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)

New	💬	1
Updated	💬	--
Closed	💬	--
Not Applicable	💬	--
Closed Modified	💬	2
Total		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
			Query										Apply Filter Clear Filter
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		
									Apply Filter	Clear Filter	
☐	a123	1	0	Exam (1)	01-Nov-2021	Eligibility	Item Level	☑	🔍	Data	Verify
☐	a123	1	0	Exam (1)	01-Nov-2021	Consent	Item Level	☑	🔍	Data	Verify
☒	a1234	1	0	Exam (1)	01-Nov-2021	Eligibility	Item Level	☑ ⬇	🔍	Data	
☒	a1234	1	0	Exam (1)	01-Nov-2021	Consent	Item Level	☑ ⬇	🔍	Data	
☐	a1234	1	0	Treatment (1)	02-Nov-2021	Pre-Treatment Evaluation	Item Level	☑	🔍	Data	Verify

Results 1 - 5 of 5.

Verify All Checked

Item-Level SDV Screen:

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

○ Show all items   ● Show all SDV items   ○ Show items needing verification

☐	Brief Description (Item Name)	Value	SDV Requirement	Last Verified (UTC)	Open Queries	Last Modified (UTC)	Modified By	Actions
☐	1. Age ≥ 18 years. (AGE)	No	Optional	Never	0	18-Nov-2021 21:06	Riley Bianchi-Mon	📄
☑	3. Child-Pugh Score A (5-6) (Appendix 1). (PUGH)	No	Required	Never	0	18-Nov-2021 21:06	Riley Bianchi-Mon	📄

Verify All Checked   **Close**

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

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