

## 1.4.2 The Participant Matrix

The Participant Matrix displays Participants in the study. This screen is central to the system.

### Use the Participant Matrix to:

- Manage Participants:
  - Edit Participant Data
  - Add a Participant
  - Remove a Participant
  - Restore a Participant
  - Sign a Participant Record (Investigators and Data Specialists Only)
  - Reassign a Participant to Another Site (Data Managers Only)
- Schedule Events
- View Participant Details
- View, Enter, or Edit Data (depending on access)

### Participant Matrix for Severe Headache Study

⏪ ⏩ ⏴ ⏵ | 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.

The **Participant Matrix** lists **Visit-Based Events** across the top of the matrix 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 Event.

## Filters

You can filter Events by the data in any column with a gray box under the header.

- Use the drop-down menu at the top of the **Participant Matrix** to view Participants by Event.
- Click the gray box in the **Status** column (which appears only if you click **Show More**) to view Participants by status, including the independent statuses of **Locked** and **Signed**. You can also filter Events with **Not Locked** and **Not Signed**.

## View and Enter Data

Click the **View** button in the **Actions** column that corresponds to the Participant/Event to view the **Participant Details** screen.

### Participant Matrix for Severe Headache Study

Participant ID	Eligibility & Consent	Exam	Check In	Actions
001				
002				

Click the icon for a **scheduled**, **data entry started**, or **completed** Event and select **View/Enter** to view the **Participant Details** screen.

# Participant Matrix for Severe Headache Study

50 Show More Select An Event Add New Participant

Participant ID	Eligibility & Consent	Exam	Check In	Actions
001				
002				
003				
004			x3	
005				
006				
007				
008				
009				
10				

Participant: 004  
Event: Exam  
28-Aug-2020  
data entry started

- View/Enter Data
- Edit
- Remove
- Reassign

Results 1 - 10 of 10.

## Edit Event

Click the icon for a **scheduled** or **data entry started** Event to edit the **Event**.

# Participant Matrix for Severe Headache Study

50 Show More Select An Event Add New Participant

Participant ID	Eligibility & Consent	Exam	Check In	Actions
001				
002				
003				
004			x3	
005				
006				
007				
008				
009				
10				

Participant: 004  
Event: Exam  
**28-Aug-2020  
data entry started**

- View/Enter Data
- Edit**
- Remove
- Reassign

Results 1 - 10 of 10.

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