

3.4.2 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.

Approved for publication by Pamela Bynum. Signed on 2021-03-02 12:44PM

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