



1.4.5 The Participant Matrix

The Participant Matrix provides a centralized view of participants enrolled in your study or site. It helps you track participant status, identify records that require action, and navigate directly to related tasks.

If accessed at the **study level**, the Participant Matrix displays all participants in the study. If accessed at the **site level**, it displays only participants at your assigned site.

There are two main views:

- **All Events View** - Columns represent **visit-based events** (e.g., Screening, Baseline, Follow-up)
- **Single Event View** - Columns represent **forms** within the **selected event**

Each row in either view represents a participant. You can hover over icons to see more details about event or form status. A legend appears on the left side of the screen as a quick reference for icon meanings.

□ Note: For more information, refer to [Status Icons](#).

Participant ID	eConsent	Randomization Status	Consent	Eligibility	Participant Baseline	Clinical Exam	Followup Visit	Participant Diary	End of Study	Actions
01-0001	Consent Signed		✓	⚠	⏸	⏸	⏸	⏸	⏸	🔍 ✕ 📄
01-0002	Consent Signed		✓	✓	⚠	⚠	⏸ x2	⏸ x3	⏸	🔍 ✕ 📄
01-001	Consent Not Signed		⚠	⚠	⚠	⏸	⏸	⏸	⏸	🔍 ✕ 📄
01-003	Consent Signed	Yes	✓	⚠	✓	✓	✓	✓	✓	🔍 ✕ 📄
01-004	Consent Signed	Yes	✓	✓	✓	✓	✓	✓	✓	🔍 ↻
01-008	Consent Signed	Yes	✓	✓	✓	✓	⏸	⏸	⏸	🔍 ✕ 📄
01-009	Consent Signed	Yes	✓	✓	✓	✓	⏸	⏸	✓	🔍 ✕ 📄
01-011	Consent Signed		✓	✓	⏸	⏸	⏸	⏸	⏸	🔍 ✕ 📄
01-012	Consent Not Signed		⏸	⏸	⏸	⏸	⏸	⏸	⏸	🔍 ✕ 📄
12001	Consent Not Signed		⏸	⏸	⏸	⏸	✓	⏸	⏸	🔍 ✕ 📄

Common Actions

You can use the Participant Matrix to:

Manage Participants:

- Add a participant (For more information, refer to [Adding a Participant](#))

- Edit participant data
- Remove a participant
- Restore a participant
- Sign a participant record (Investigators and data specialists only. For more information, refer to [Signing Participant Records.](#))
- Reassign a participant to another site (data managers only)

Manage Events and Forms:

- Schedule events
- View participant details
- View, enter, or edit forms (depending on access)

□ **Note:** For more information on actions that can be completed in the Participant Matrix, refer to [Action Icons.](#)

Matrix Layout

- In **All Events View**, the columns are the **visit-based events** defined in your study design.
 - In **Single Event View**, the columns are the **forms** within the selected visit-based event.
 - **Common Events** are not displayed in the matrix.
 - The **eConsent Status** column appears if the Consent module is enabled and configured.
 - Additional **custom columns** may be configured in the Study Designer. For more information on configuring Custom Column Headers, refer to *Defining Custom Column Headers on the Participant Matrix and Queries Table* within [Design a Study.](#)
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Filtering Participants

You can filter participants using:

- The **Select an Event** dropdown at the top of the matrix
- **Gray filter boxes** under each column header
 - **Participant ID:** Type partial or full ID
 - **Visit-Based Event Columns:** Filter by status
 - □ **Note:** If you filter Events with a status of **Not Started**, the **Participant Matrix** only includes Events that were previously started and then deleted, i.e. Events that have never been started are excluded.
 - **Custom Columns:** Filter options vary by data type
 - **Status Column:** (Visible when *Show More* is enabled) - View participants by overall status: *Available, Removed, Signed*, etc.

Participant Matrix for BOSH

[50] Show More Select An Event Add New Participant

Participant ID	eConsent	Randomization Status	Consent	Eligibility	Participant Baseline	Clinical Exam	Followup Visit	Participant Diary	End of Study	Actions
002	Consent Not Signed									
003	Consent Not Signed	No								
004	Consent Not Signed						x3			
008	Consent Signed	Yes					x2	x2		
010	Consent Not Signed						x2			
01-002	Consent Signed	Yes								
01-005	Consent Signed	Yes								
01-006	Consent Signed	Yes								
01-007	Consent Signed	Yes								
01-010	Consent Signed	Yes				Signed				
12003	Consent Not Signed									
12004	Consent Signed					Signed				

scheduled
data entry started
completed
stopped
skipped
signed
locked
not signed
not locked

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