

3.4.6 Viewing and Entering Data on Forms

Next, let's explore how to view and enter data.

Features

The features of OC4 data entry include the following:

- **Participant Matrix:** Easily see the data entry status of participants.
- **Auto-save:** Automatically save during data entry.
- **Conditional field display:** Only see relevant fields during data entry.
- **Automatic calculations and edit checks:** Automatically use calculations and checks.
- **Queries:** Easily create or view queries.

Forms

Forms are a collection of data entry fields for an Event or multiple Events. For example, the **First Visit** Event might contain the **Eligibility**, **Consent**, and **Demographics** Forms.

Types

There are different types of fields, such as: **select one**, **select multiple**, **integer**, **date**, **image**, etc. Note that **All changes saved** appears at the bottom of the Form because all changes are saved automatically.

001: Demographic Information

* **Date of Visit** 



* **Age at Screening** 

* **Gender** 

- ☐ Male
☐ Female


* **Ethnicity** 

- ☐ Hispanic/Latino
☐ Not Hispanic/Latino


* **Race** 

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

All changes saved.

 Back

✓ Complete

Next 



Return to Beginning

Go to End






Layout

Forms can be simple (with one question per row) or grid (with one or multiple questions per box).

001: Medical History

2.2.1 Diabetes History


Date of diagnosis of diabetes:		Was the subject ever treated 
yyyy-mm-dd		with oral anti-hyperglycemic agent?
		<input type="radio"/> Yes <input type="radio"/> No

Close

Grid

001: Medical History

2.2.1 Diabetes History

Date of diagnosis of diabetes: 

yyyy-mm-dd

Close

Next 


Simple

Conditional Fields

Some fields only appear if you enter a specific response in another field. For example, if the response to **Do you smoke?** is **No**, no related fields appear. If the response to **Do you smoke?** is **Yes**, other fields such as **Packs per day** might appear.

Edit Checks

If you enter a value that is invalid due to a constraint or do not respond to a required field, a message appears on the Form.

How many times a month does the participant take an analgesic? 

Value not allowed

Closing or Marking a Form Complete

When you are finished entering data, you can close a Form and continue to enter data later or mark the Form **Complete**.

Before You Enter Data

1. Add a Participant
2. Schedule an Event

Entering Data

To Enter Data Directly into Visit Event Forms:

1. On the **Participant Details** screen, click the Form Card to open the form in its default mode or click the Actions menu (three dot menu in the lower right corner of the Form Card) to select from the available actions on the form.
 - a. The default mode for the Form Card will be based on the highest access mode available.
 - i. If the form is editable and you have edit permission for the form, the form will open in Edit mode. However, if the form is Completed, it will default to open in Review-only mode, but can still be opened in Edit mode by using the Actions menu.
 - ii. If you do not have edit permission, it will open in Review-only mode if you have query editing access, or read-only mode if you do not.
2. Enter information into each field and Submit when ready.

Enter Data Directly into Common Event Forms:

1. On the **Participant Details** screen, click the Common Event header to expand it.
2. Click the **Add New** button.
 - a. Or, to enter data in an existing Form, click the menu in the Actions column and select **Edit**.
3. Enter information into each field.

001: Demographic Information

Date of Visit 

2020-11-09



Age at Screening 

19

To Continue to the Next Page or Back to the Previous Page of the Form:

Click the **Next** button to proceed on the Form, and click the **Back** button to return to the previous page of the Form.

001: Medical History

2.2.1 Diabetes History

Was the subject ever treated with oral anti-hyperglycemic agent?



☐ Yes ☐ No

← Back

Close

Next →

To Close the Form and Continue Data Entry Later:

Click the **Close** button.

All changes saved.

Close

✓ Complete



Return to Beginning

Go to End



Mark Data Entry Complete:

Click the **Complete** button.

All changes saved.

Close

✓ Complete

Return to Beginning Go to End

Queries

Queries are inquiries or alerts about data that needs to be reviewed.

The system creates queries automatically if you close a Form that has unaddressed errors or you can manually create a query.

Another user can respond to it and/or change the response in the field. Only **Data Managers** and **Monitors** can close queries.

Add a Manual Query:

1. Click on the **Query Bubble** next to the field you want to inquire about.

001: Medical History

2.2.1 Diabetes History

Was the subject ever treated with oral anti-hyperglycemic agent?

☐ Yes ☐ No

Query Bubble

Back

Close

✓ Complete

2. Click **+New**.
3. Enter text in the **Add a New Query** text box.
4. (Optional) Select a user to assign the query to.
5. (Optional) Check the **Email?** box to send an email notification.

View All History

Queries

+ New

Why is this field empty?

Annotations

+ New

Add a new query

Please review

Assign to:

Kerry Tamm (ke

☒ Email?

Add Query

No History

Allow the System to Automatically Create a Query for the Value in Question:

1. Click the **Close** button on a Form.
2. Click the **Proceed** button.
3. The system auto-generates a query based on the default message text defined in the Form.

Alert

Some field values have errors. These must be addressed before the form is closed.

Click Cancel to return to the form to manually update the value or add a query for each field marked in red.

Click Proceed to continue closing the form now. A query will be automatically added for each field marked in red.

CANCEL

PROCEED

Functional approval by Riley Bianchi. Signed on 2022-11-21 10:14AM

Approved for publication by Paul Bowen. Signed on 2023-01-19 12:54AM

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