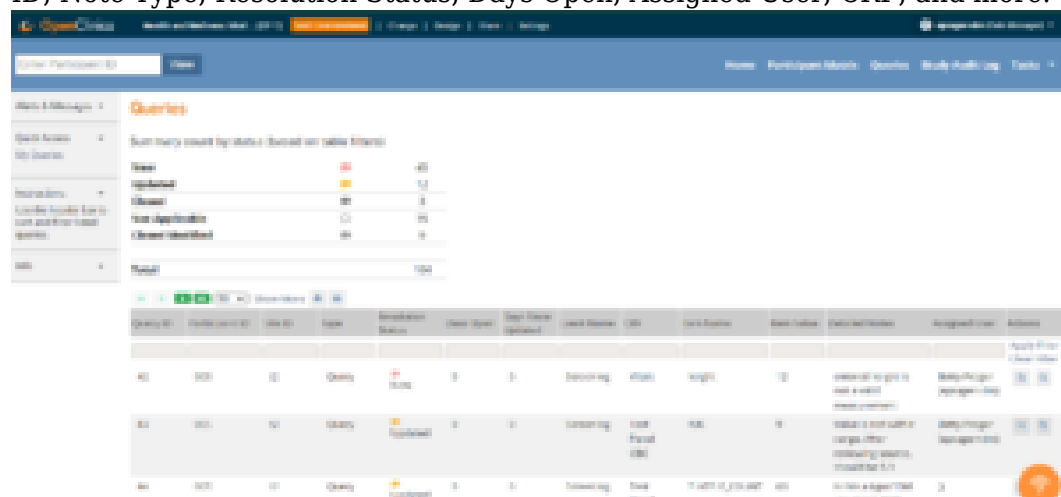


## 18.2.1.1 Queries

The Queries page is the central point for reviewing all notes (queries, annotations, and reasons for change) entered within a study or site. You can sort and filter these notes by Query ID, Participant ID, Note Type, Resolution Status, Days Open, Assigned User, CRF, and more.



Query ID	Participant ID	Site ID	Type	Resolution Status	Days Open	Days Since Opened	Current Status	CRF	Date Entered	Date Closed	Date Resolved	Assigned User	Actions
401	001	01	Query	Open	0	0	In Progress	Height	10/10/2017			Study Manager	View   Edit   Close
402	001	01	Query	In Progress	0	0	In Progress	Height	10/10/2017			Study Manager	View   Edit   Close
403	001	01	Query	Open	0	0	In Progress	Height	10/10/2017			Study Manager	View   Edit   Close

The following are definitions for the 3 types of notes found in Queries page:

### Definitions:

- **Queries** are inquiries or alerts about potential incorrect or missing data. Each query has a workflow status to ensure it is reviewed and acted on.
- **Annotations** are notes on a Form that do not contain clinical data and are usually used for keeping track of user workflow.
- **Reasons for Change** are notes added by a user when modifying data on a form that has already been marked as Complete. They explain why there was a data change.

How are queries created?

Queries can be created manually by a user when entering data within a form or automatically by the system due to a pre-configured edit check within a form.

How do I close a query?

A data manager or monitor user can close a query when updating the query note within the form.

This can be done by viewing the record as a whole or viewing only the query. If you are a Data Manager or Monitor you can find additional information about your role and queries below.

## The Summary Table

## Queries

Summary count by status (based on table filters)

1	New		45
2	Updated		12
3	Closed		3
4	Not Applicable		35
5	Closed Modified		9
6	Total		104

The summary table contains the types of query resolutions statuses and total of each resolution status shown in the Query table. These numbers reflect the breakdown of the total number of items on the current Queries table. Apply filters to the Queries table both the total number of rows and the Summary Table total will represent the filtered table view.

1: New - This status indicated that a query has been added by either a site user (e.g., a comment/annotation), data manager, or monitor, or was auto-generated by OpenClinica based on built-in edit checks. In the summary table this row represents the number of queries in the current queries table view that have the resolution status of new.

2: Updated - This status indicated that either a site user, data manager, or monitor has added information to the query. In the summary table this row represents the number of queries in the current queries table view that have the resolution status of updated.

3: Closed - This status indicated that the query is considered resolved by the data manager or monitor. In the summary table this row represents the number of queries in the current queries table view that have the resolution status of closed.

4: Not Applicable - This resolution status is given to Annotations and Reasons for Change. In the summary table this row represents the number of Annotations and/or Reason for Change shown in the current queries table view. Their resolution status is always Not Applicable and they have N/A in the Query ID column.

5: Closed Modified - This resolution status means the data was changed after the query was closed.

6: Total - The total number of New, Updated, Closed, Not Applicable, and Closed Modified Resolutions Statuses within the current queries table. In other words the total number of queries, annotations, and reason for change shown in the current queries table view.

## The Queries Table

The Queries table displays queries, annotations, and reasons for change. This table can be filtered to show only queries, only annotations, only reasons for change, and combinations of the 3 types. This table can also be printed or downloaded.



View Query  
Only

This option displays a mini version of the form contain only the item in question along with its queries and item history. You can add a query note, reassign the query, and you have the option of emailing the assigned user. All users with access to queries can update the query; but only Data Managers and Monitors have access to close the query. This option does not allow changing the item value.

View Query  
Within  
Record

This option displays the full form initially focused directly on the selected query. All users with access to queries can to update the query, but only Data Managers and Monitors have access to close the query. The rest of the form is also available for review. This provides reviewers with more context when reviewing specific item data issues. Note that for users with permission to edit the record, the form will be opened in edit mode allow any data value on the form to be updated.

You can click Show More at the top of the table to show more columns. The Show More text will then be replaced by Hide. If you click Hide the additional columns will be hidden from the table view and Show More will reappear.

Additional columns that will display when Show More is select are:

Date Created

Date Updated

Event Date

CRF Status

Item Type

# of Notes

Originator - This is where you can see if a user created the query or if it was auto generated by an edit check. If it was auto generated the Originator will be System.

The screenshot shows the OpenStack Horizon 'Queries' interface. At the top, there's a navigation bar with 'Queries' selected. Below it, a sidebar on the left contains 'Summary Querying status (based on active filters)' and a list of filters. The main area displays a table of queries. A red arrow points from the 'New Query' button in the top toolbar to the 'New Query' button in the bottom toolbar. The table has columns: Name, Type, Status, Date created, Date updated, Date expired, Date first updated, Date last updated, Name space, ID, Item name, Item value, Detailed name, Assigned user, and Actions. The table lists three queries: 'New Query', 'New Query', and 'New Query'. The bottom toolbar has buttons for 'New Query', 'Edit Query', 'Delete Query', and 'Refresh'.

If you would like to learn more about Oqueries and how they relate to a specific user type:

**Queries and Clinical Research Coordinators (CRC)**

## Queries and Data Managers (DMs)

## Queries and Monitors.

Approved for publication by Paul Bowen. Signed on 2023-12-13 1:47PM

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