



## 2.4.7.1 Basic Calendaring

Basic Calendaring provides a simple user interface to automatically schedule events, close them when overdue, and send notifications to participants or study team members.


### □ Important Notes:

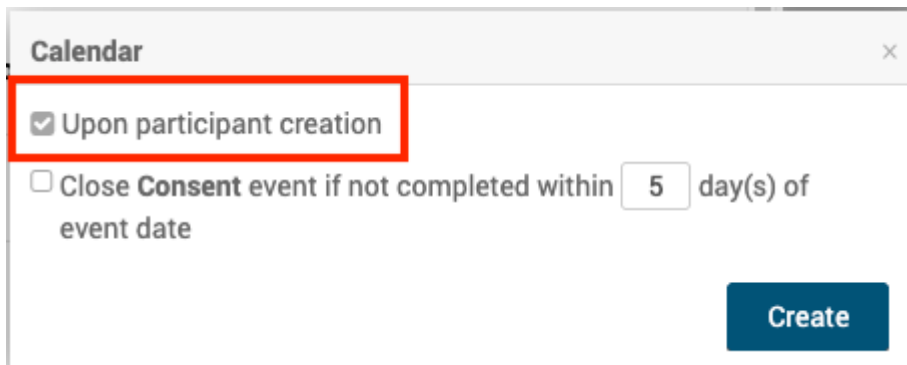
- Supports **visit-based, non-repeating events** only.
- Applies to **site-level participants** only.
- Each event can have **one scheduling rule** and **one auto-close rule**.
- If events are reordered, review the calendar to confirm the intended schedule.

## Schedule the First Event

The first event in a study can be scheduled automatically when a participant record is created.

### To schedule the first event:

- Click on the **Event** name.
- Expand **Calendar** by clicking 
- Select **Upon participant creation**.
- Click **Create**.



Calendar ×

Upon participant creation

Close **Consent** event if not completed within  day(s) of event date


**Create**

## Schedule Subsequent Events

Subsequent events are scheduled relative to a prior event.

**The events can be scheduled in two ways:** On-demand or based on a specific date. Each event can only have one scheduling rule.

### To configure scheduling:

- Click on the Event name
- Expand **Calendar** by clicking 

- **Select the event** you want to base the schedule on from the dropdown (triggering event).
- Choose one of the following scheduling options:
  1. **Define scheduling by status (On-demand)** - Schedule the new event when the triggering event reaches a specific status (Scheduled, Data Entry Started, or Completed).
    - *Example:* An Eligibility event will be created as soon as the Consent event reaches the status of "Scheduled."
  2. **Define scheduling by date** - Schedule the new event a specific number of days before or after the triggering event's date. **This rule runs nightly at 12:00 a.m. in the site's time zone.**
    - *Example (after):* Baseline Visit event record should be available for data entry 7 days after Screening Visit.
    - *Example (before):* Baseline Visit event record should be available for data entry 3 days before Baseline Visit.
- Click **Create**

□ **Note:** Each event can have only one scheduling rule.

**Calendar**
×

Occurs  day(s) after Consent

Create **Eligibility** event record when:

 Consent has reached Scheduled
  day(s) prior to event date

Close **Eligibility** event if not completed within  day(s) of event date

Create

## Automatically Close Events

You can configure events to close automatically if not completed on time. The scheduling rule runs at **11:00 p.m. in the site's time zone.**

### To auto-close an event:

- Click on the Event name
- Expand **Calendar** by clicking +
- Select **Close if not completed within X days.**
- Click **Create**

If an event has existed for [x] number of days, its status is updated automatically:

- **Complete** - The event moves to **Complete** if all required forms have a status of **Complete** and no forms have a status of **Data Entry Started**.
- **Stopped** - The event moves to **Stopped** if any required form has a non-complete status or if any form has a status of **Data Entry Started**.

- **Skipped** - If the event is still in **Scheduled** status, it moves to **Skipped**

□ **Note:** These statuses can be manually changed back if needed.


## Notifications Based on Events

You can configure automated notifications by email or SMS for participants and study team members. Each event can include multiple notification rules.

- **Notifications** can be triggered upon Event creation, at specific time intervals, or upon completion.
- You can configure multiple notification rules for a single event (e.g., at different times or to different recipients)

□ **Limitation:** Calendaring notifications cannot be used alongside legacy OC4 rules in the same study.

### To configure notifications:

- Click on the Event name
- Expand **Notifications** by clicking 
- **Select the trigger** you want to base the notification on.
  - **Upon event creation**
  - **X days before the event date** - Send the notification a set number of days before the event. You can define the time of day the notification is sent. Delivery is based on the participant site's time zone.
  - **X days after the event date** - Send the notification a set number of days after the event. You can define the time of day the notification is sent. Delivery is based on the participant site's time zone.
  - **When the event is completed**
- Enter Recipients
  - One or more email addresses
  - **`\${participant}`** (if the Participate module is enabled)
    - Participants with both email and phone receive the notification through both channels.
- Enter **Subject** - Used for email notifications only. You can customize the subject line with variables.
- Enter **Message** - Used for the body of email or text notifications. You can customize the content with variables.

**Send an Email/Text:** ×

When : Upon creation of this event ▼

To: test@example.com, \${participant}

Subject: In emails only

Message: 

Enter your email or text message body here

Variables: \${participant} \${participant.firstname} \${participant.id}  
\${participant.url} \${participant.accesscode} \${participant.loginurl}  
\${study.name} \${site.name} \${event.name}  
\${study.id} \${site.id}

## Supported Variables

The following **Variables** refer to specific study data and can be inserted into Subject and Message to customize the message.

Parameter	Description	To	Message	Subject
<code>\${participant.firstname}</code>	Participant First Name		X	
<code>\${participant.loginurl}</code>	Participant URL with Automatic Login		X	
<code>\${participant.url}</code>	Participant URL without Automatic Login		X	
<code>\${study.name}</code>	Name of the Study, as Defined in OpenClinica		X	X
<code>\${participant.accesscode}</code>	Single-Use Code the Participant must use to access OpenClinica Participate		X	
<code>\${event.name}</code>	Name of the Event, as specified in OpenClinica		X	X
<code>\${participant}</code>	Participant Contact Information, as provided when the Participant was connected to the Study. (This could be a mobile number for SMS notification, an email address, or both); OpenClinica automatically sends the notification.	X		
<code>\${participant.id}</code>	Participant ID		X	X
<code>\${site.id}</code>	Site ID		X	X
<code>\${site.name}</code>	Site Name		X	X
<code>\${study.id}</code>	Study ID		X	X

## Reordering Events

If you reorder Events:

- Extended options applied to later Events are preserved.
- Moving an Event to the first position displays only limited options.
- If moved back, the saved extended options are restored.

□ Always review **Calendar** after reordering Events to ensure it reflects your intended schedule.

Functional approval by Kate Lambert. Signed on 2025-09-25 1:33PM

Approved for publication by Paul Bowen. Signed on 2026-02-10 11:25AM

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