



## 1.4.11 Status Icons






The Participant Matrix and Participant Details screen use icons to indicate the status of each event and form. These visual indicators help you quickly understand participant progress, identify items that require action, and recognize system-controlled restrictions such as locks or archival.

Each icon represents a specific state in the data-collection process. The icons you see depend on the screen and view you are working in:

- **Participant Matrix**
  - **All Events View:** Displays **event statuses**
  - **Single Event View:** Displays **form statuses**
- **Participant Details Screen**
  - **Event cards:** Display **event statuses**
  - **Form cards:** Display **form statuses**

---

## Event Statuses

Icon	Status	Description
	Not Scheduled	The Event has not been scheduled. Common Events, such as Adverse Events remain in this status throughout the study.
	Scheduled	The Event has been scheduled, but no data has been entered.
	Data Entry Started	A user has started to enter data, but not all of the Forms in the Event have a status of Completed.
	Completed	At least one Form in the Event has been completed. <input type="checkbox"/> <b>Note:</b> The Event status changes to Completed automatically when all Forms are complete. You can also manually set the Event to Completed if at least one Form is complete.
	Skipped	The Event will not be completed. You can select this status from the <b>Update Event</b> screen when the Event is <i>Scheduled</i> . Events cannot be skipped if data entry has started.



Stopped

The Participant has temporarily stopped participating in the Study. Entered data remains viewable and exportable. You can select this status from the **Update Event** screen when the Event is *Scheduled* or *Data Entry Started*.



Removed

The Event has been removed. Users can still view Forms. This will supersede any of the other statuses.

**Tip:** For repeating events, the least complete status is displayed. For example, if the first event is **data entry started** and the second event is **completed**, only the status of **data entry started** will display.

## Event Attributes

Event Attributes (Independent Status Attributes) can be used in addition to Event statuses.

Icon Status

Description



Signed

The Event has been signed. This icon appears in addition to the status.  
**Note:** If a signed Event changes in any of these ways, the signature is removed:  
• An item in a Form is changed.  
• The Event status changes from *Completed*, *Stopped*, *Skipped*, or *Not Scheduled*.  
• A Form is archived/unarchived (unless the Form status is *Not Started*).  
• A Form is removed.  
Multiple users can sign an Event. The most recent signature appears on the Form; previous signatures are recorded in the Audit Log.



Archived

The Event was archived in Study Designer. This icon appears in addition to the status.



Locked

A Data Manager locked the Event. No data can be added, and the Event cannot be removed. This icon appears in addition to the status.

## Form Statuses

Icon	Status	Module	Description
	SDV Verified	N/A	The Form has been Source Data Verified.
	SDV Required, Not Verified	N/A	The Form has at least one item requiring SDV that has not yet been verified.
	SDV Status Changed Since Verified	N/A	The Form was verified, but a change was made that requires re-verification.
	Query	N/A	There is at least one open query on the Form. <b>Note:</b> Users with review or edit permission to the form may add or update queries but cannot close them; Monitors and Data Managers with review or edit permission can also close queries; read-only users cannot create or update queries.
	Consent Not Signed	eConsent	The eConsent Form has not yet been signed by the Participant. The Form icon appears once the Event containing the eConsent Form is scheduled.
	Consent Signed	eConsent	The Participant has signed the eConsent Form. The Form is marked <i>Completed</i> . It must still be countersigned by a CRC or Investigator.



Consent  
Countersigned

The Participant has signed the eConsent Form, and it has been countersigned by a CRC or Investigator. The Form is marked *Completed*.



Requires  
Reconsent

The eConsent Form was signed, but an OpenClinica user (CRC or Investigator) clicked **Unconsent**. The Form is marked *Data Entry Started* and reappears on the Participant's dashboard for re-signing.

□ **Note:** A red asterisk (\*) on a form card indicates that the form is required.

For **Common Events** on the **Participant Details screen**, the Independent Attributes appear in the **Form Status** column. **Actions** are available within the menu in the first column in the table.

Functional approval by Kate Lambert. Signed on 2025-11-21 4:38PM

Approved for publication by Paul Bowen. Signed on 2026-02-10 11:48AM

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