



1.4.12 Action Icons

The Participant Matrix and the Participant Details screen allow you to perform key actions on participants, events, and forms—depending on your role and the current view. These actions help you manage participant records, review visit progress, and update form data.

Available actions vary by context:

- **Participant-level actions**

Available for each participant on the **Participant Matrix** only.

- **Event-level actions**

Displayed in the **All Events View** of the Participant Matrix and on **event cards** in the Participant Details screen.






- **Form-level actions**

Displayed in the **Single Event View** of the Participant Matrix and on **form cards** in the Participant Details screen.

Your ability to perform these actions depends on your assigned **permissions**.

Participant-Level Actions

These actions allow you to manage participants directly from the matrix.








| Action | Description | Location |
|---|--|----------------------------|
|  View | Opens the Participant Details Page. | Clicking on Participant ID |
|  Remove | Opens the Remove Participant screen. Prompts for a reason for change. Participant remains visible on Participant Matrix. | Actions column |
|  Restore | Opens the Restore Participant screen. Prompts for a reason for change. Restores participant to Active status. | Actions column |
|  Reassign | Transfers participant to another site. The participant will then be associated with the new site. Note that only users with the appropriate role can perform a reassignment. | Actions column |
|  Sign | Opens the signature screen. For more information about Signing Participants, refer to Signing Participant Records | Actions column |

Event-Level Actions

Available in the **All Events View** of the Participant Matrix and on the **event card** in the Participant Details screen.

These actions allow you to manage visit-level information. Access them by clicking the **event icon** in the Participant Matrix or the **three-dot menu** on the event card in the Participant Details screen.

Status Description

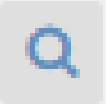


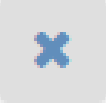

| | | |
|---|----------------|--|
|  | View | Opens the Participant Details Page to the selected visit. |
|  | Edit | Opens the Update Study Event page, where you can modify the details of the event. |
|  | Remove | Removes event from the Participant's record. |
|  | Restore | Restores previously removed event. |
|  | Sign | Opens the signature screen for the selected event. For more information about Signing Participants, refer to Signing Participant Records |
|  | Lock | Locks the selected event, preventing further changes. |
|  | Unlock | Unlocks the event, allowing data entry or corrections to resume. |

Form-Level Actions

Available in the **Single Event View** of the Participant Matrix and on the **form card** in the Participant Details screen.

These actions allow you to manage individual data collection forms within an event. Access them by clicking the **participant form icon** in the Participant Matrix or the **three-dot menu** on the event card in the Participant Details screen.

Status Description

| | | |
|---|----------------|---|
|  | View | Opens the Form in Read Only or Review mode, depending on user permissions. |
|  | Edit | Opens the Form in Edit mode. |
|  | Clear | Clears all data in the form, resetting its status to Not Started and closing all associated queries. The audit history is retained. |
|  | Remove | Removes form from the Participant's event. |
|  | Restore | Restores the removed form. |

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