

## 3.4 Create and Modify Case Report Forms (CRFs)

This set of topics explains how you define (create) Case Report Forms (CRFs) and make changes to the defined forms. You define the form in an Excel spreadsheet file for use with Study Events in your OpenClinica system. OpenClinica presents the defined CRF in the web interface for users to collect Study Event data for a Subject.

To create and modify defined CRFs, your [User Role or User Type requires appropriate permission](#).

Because defined CRFs are available for use across all Studies in OpenClinica, it does not matter what the current Study is when you create and modify them, but you must be at the Study level.

(If instead you want to enter or modify Event data for Subjects in CRFs, see [View and Enter Event Data using the Subject Matrix](#).)

Approved for publication by Ben Baumann. Signed on 2014-03-24 8:39AM

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

### 3.4.1 About CRFs in OpenClinica

A good way to familiarize yourself with a defined CRF is to look at its existing CRF .xls file and at the way OpenClinica presents it in the web interface:

1. [Click here](#) to download a sample CRF defined for a Physical Examination, SAMPLE\_PHYSICALEXAM\_ENGLISH.xls. Save the file to your computer.
2. Upload the defined CRF to your OpenClinica system.
  1. Set the current Study to the Study level.
  2. From the Tasks menu, in the Monitor and Manage Data module, select CRFs. The Manage Case Report Forms page opens.
  3. Click Create a New CRF. The Create a New Case Report Form page opens.
  4. In the MS Excel File to Upload field, click Browse, then navigate to the file you downloaded in step 1, SAMPLE\_PHYSICALEXAM\_ENGLISH.xls. Select the file, then click Open. The path to the filename is shown in the MS Excel File to Upload field.
  5. Click Preview CRF Version. The Check CRF Version Data page opens, showing the CRF in the web interface format.
  6. Click Continue. The Create a New CRF Version - Data Committed Successfully page opens.
3. View the defined CRF in OpenClinica:
  1. From the Tasks menu, in the Monitor and Manage Data module, select CRFs.

The Manage Case Report Forms page opens.

2. For Sample Physical Exam - English Version, click the View icon.

The defined CRF displays in the web interface format.

4. In Excel, open the CRF file you downloaded, SAMPLE\_PHYSICALEXAM\_ENGLISH.xls.

5. Compare the CRF when viewed in the web interface format to the defined CRF when opened in Excel.

*A Sample Defined CRF when Viewed in the Web Interface:*

**Sample Physical Exam English**

▼ CRF Header Info

Click the flag icon next to an input to enter/view discrepancy notes. Please note that you can only save the notes if CRF data entry has already started.

Exit

◀ I Basic (0/9) II Body...(0/35) III Oth...(0/3) ▶ -- Select to Jump --

**Title: Basic Information**

**Visit Information:**

1 Date of Physical Examination:  2 Time of Physical Examination:  (HH:MM)

**Physical Exam Information:**

3 Height:  (in) 4 Weight:  (lb)

5 Temperature:  (F) 6 Pulse Rate:  (per min)

7 Respiration Rate:  (per min)

**Blood pressure:**

8 Systolic:  (mm) Diastolic:  (Hg)

*Note that when the CRF is previewed after upload, or viewed through 'Manage CRFs', any hidden fields in the CRF are visible.*

*The Same CRF when Opened in Excel, Showing the Items Tab:*

ITEM_NAME	DESCRIPTION_LABEL	LEFT_ITEM_TEXT	UNITS	RIGHT_ITEM_TEXT
PEDAT	Date of Physical Exam	Date of Physical Examination:		
PETIM	Time of Physical Exam	Time of Physical Examination:	HH:MM	
HEIGHT	Height	Height:	in	
WEIGHT	Weight	Weight:	lb	
TEMPERATURE	Temperature	Temperature:	F	
PULSE	Pulse Rate	Pulse Rate:	per min	
RESPIRATION	Respiration Rate	Respiration Rate:	per min	
SYSTOLIC	Systolic	Systolic:	mm	
DIASTOLIC	Diastolic	Diastolic:	Hg	
BMI	Body Mass Index	Body Mass Index:		
APPEARANCE	Appearance	Appearance		
APPEARANCE_COMMENTS	Appearance Comments	Comments:(Required if Abnormal)		
SKIN	Skin	Skin		
SKIN_COMMENTS	Skin Comments	Comments:(Required if Abnormal)		
HEENT	H/E/E/N/T	H/E/E/N/T		
HEENT_COMMENTS	H/E/E/N/T Comments	Comments:(Required if Abnormal)		

## 3.4.2 OpenClinica eCRF Specifications

OpenClinica provides a template to users for CRF design. This section explains each of the fields in the template and how those fields are either dependent or independent of each other. Best practices are provided as well as some examples of how the CRF Template can be used effectively.

### Definitions and acronyms

- CRF Case Report Form, created in OpenClinica by uploading a CRF definition based on the CRF Template Excel file.
- Dynamics Skip Patterns/Skip Logic created using Rules and based on variables in the CRF template.
- Group - A mechanism for logically associating items within a CRF. Items within the same group may repeat together within a CRF.
- Item A variable within a CRF.
- OIDs Object Identifiers uniquely identify a study object such as a CRF, CRF Version, Item Group, or Item and are used to link objects to one another. OIDs for a given class of object are unique within an instance of OpenClinica, with the exception of Rule OIDs, which are only guaranteed to be unique within a study.
- Rules OpenClinica's mechanism to carry out cross form or cross field edit checks, skip logic and inserting data across CRFs. Rules are declared in XML and executed by the OpenClinica Rules Engine. Rules are declared external to the CRF Template but dependent on the variables defined in one or more CRFs.
- SCD Simple Conditional Display. A way of defining skip logic within the CRF Template, without the use of Rules.
- Section A mechanism for organizing items within a CRF for layout purposes. All items in a given section appear on the same page in a CRF. Multiple sections are displayed as tabs within the CRF.
- Tokens A means of displaying a Study Object value for use in a URL (e.g. in a parameterized link) or for use in other scripts (e.g. jquery). Tokens can also be used in Left Item Text, Right Item Text, Header, and/or Subheader to pass item values. The supported tokens are:

`${studySubject}` - Passes the current Subject ID

`${studySubjectOID}` - Passes the OID for the current Subject

`${studyName}` - Passes the current Study Name

`${eventName}` - Passes the current Event Name

`${eventOrdinal}` - For repeating Events, passes the Event repeat number (e.g., 2 for the second repeat)

`${crfName}` - Passes the CRF Name

`${crfVersion}` - Passes the CRF Version

`${item[item_name]}` - Passes the Item value

## 3.4.2.1 CRF Template - General Constraints

The OpenClinica CRF Template can only be edited and saved as a Microsoft Excel 2003.xls file. OpenOffice spreadsheets and later versions of Microsoft Excel can not be used reliably and may not be successful when uploaded to OpenClinica version 3.1.X.

The CRF Template is used to define the CRF on a client machine with MS Excel. Once the required information has been provided in the template, it must be uploaded to OpenClinica through the Add CRF page. Only certain privileged users are allowed access to this page.

During the upload process, a validation of the CRF design is performed. Errors that are caught at this stage will trigger messages to the user informing him of the error and changes necessary to fix the error.

## 3.4.2.2 Scope of CRFs and Items

A CRF (with its associated versions, groups, and items) is defined globally within an instance of OpenClinica and may be used in one or more studies. The groups and items defined within a particular CRF exist within the scope of the CRF only (though they will have globally unique OIDs). The CRF Physical Exam may have an item with ITEM\_NAME blood\_pressure and the CRF Vital Signs can have an item also named blood\_pressure. OpenClinica treats these items as separate entities and they will have separate OIDs. Response sets also exist within the scope of the CRF only.

A CRF definition may be shared across OpenClinica instances by loading the CRF template spreadsheet into each instance. Each instance of OpenClinica generates OIDs at CRF upload time and those OIDs must be unique within that instance. Therefore the OIDs for the same CRF and items may be different across OpenClinica instances.

## 3.4.2.3 CRF Versioning

OpenClinica supports multiple CRF versions being in use at the same time. To create a new version, a user must keep the CRF\_NAME field the same as the original, but update the CRF\_VERSION field with a new value. This new version is uploaded by selecting the Create New CRF Version icon instead of adding a CRF through the Build Study module. The user does have the ability to overwrite a CRF Version if needed, however the CRF Version cannot have been assigned or used in any event definitions prior to the attempt to remove it.

When a new CRF Version is added, any item with the same ITEM\_NAME as an item in a previous version of the CRF is treated as the same variable and will have the same OID, DESCRIPTION, and DATA\_TYPE. The value of ITEM\_NAME is case-sensitive, so items with ITEM\_NAMES 'ItemA' and 'itema' will be considered as different items by OpenClinica.

### **For Enterprise customers interested in using Datamart:**

Please note that Datamart treats items in case-insensitive manner. Please make all ITEM\_NAMES case-insensitive if you plan to use Datamart. Special characters and [Postgres reserved words](#) should not be used as item names.

New items that did not exist in prior CRF versions will be added and an appropriate OID generated.

#### *Item metadata vs Item form metadata*

Items in a CRF have two types of attributes. Item metadata attributes describe core intrinsic properties of the item. These properties are independent of the CRF Version and cannot change across CRF Versions. These properties include:

ITEM\_NAME

DESCRIPTION

DATA\_TYPE

GROUP\_LABEL

Response Sets (see discussion below)

The properties ITEM\_NAME, DATA\_TYPE, and RESPONSE\_LABEL cannot be changed after the CRF is created.

Item form metadata attributes describe the items representation or behavior on a CRF and may have a different value in each version of a CRF. Most of the attributes in the Items Worksheet in the CRF Template fall into this category.

#### *Response sets*

The item properties beginning with RESPONSE\_ on the Items worksheet together define a response set in a CRF. The response set is a coded list of allowable values for the item. The response set is given a name (RESPONSE\_LABEL) that allows it to be re-used within the CRF if desired, and the set itself is made up of a list of coded values (RESPONSE\_VALUES\_OR\_CALCULATIONS) with

corresponding text labels (RESPONSE\_OPTIONS\_TEXT). Each item in the list of coded values should meet the constraints defined by the item DATA\_TYPE and WIDTH\_DECIMAL.

Response sets are intended for use in items that utilize a form input control (INPUT\_TYPE) that allows the user to select from a constrained list.

\* Note that the RESPONSE\_VALUES\_OR\_CALCULATIONS attribute can also be used in a separate context to create calculated/derived items.

Versioning of response sets should not change the mapping RESPONSE\_OPTIONS\_TEXT - RESPONSE\_VALUES\_OR\_CALCULATIONS, but it can delete or add new ( \_OPTIONS\_TEXT - RESPONSE\_VALUES\_OR\_CALCULATIONS ) pair to existing set of values. For example, an item is a single-select and its RESPONSE\_OPTIONS\_TEXT defined as Absent,Mild,Moderate,Severe,Life-threatening while

RESPONSE\_VALUES\_OR\_CALCULATIONS defined as 1,2,3,4,5. In another version of CRF it is possible to drop or add several values, but you cannot redefine mapping by setting Absent to have value other than 1.

## 3.4.2.4 CRF Template Properties

The CRF Template contains five worksheets. Four of the worksheets are intended for input by the user creating the CRF while the fifth worksheet provides instructions about each of the fields of the Template. When a user selects a cell in a column, a tooltip will popup explaining whether the field is Required or not, and other useful instructive text to help the user understand what the field is for.

In some cases HTML elements like Bold (<b>), Italics (<i>), Line Breaks (<br>), etc. can be used. In the cases where HTML elements are supported, they are designated as such in [CRF Template Elements](#).

In OpenClinica 3.3, Tokens, were introduced. These are available for use in Left or Right Item Text, Header, or Subheader. They can be used to display the Study Object value for use in a URL (as in a Parameterized Link) or for use in other scripts (e.g., jquery). The supported tokens are:

`${studySubject}`

`${studyName}`

`${eventName}`

`${eventOrdinal}`

`${crfName}`

`${crfVersion}`

`${item[item_name]}`

Following is an example of a CRF that passes these tokens to a URL to bring up an image:

When the user clicks on the "Click here to open image" link, based on the following Right Item Text the CRF template, the imaging system (in this case [www.example.com](http://www.example.com)) is accessed and passes the values for studyName, eventName, crfName, and the SCAN\_DATE item for the current Study, Event, and CRF.

### Right Item Text:

```
<a
href="http://www.example.com/${studyName}/${eventName}/${crfName}/${item['SCAN_DATE']}"
target="_blank">Click here to open image</a>
```

## 3.4.2.5 CRF Template Elements

### Definitions, restrictions and when to use the OpenClinica CRF Template Elements

- [CRF Worksheet](#)
- [Sections Worksheet](#)
- [Groups Worksheet](#)
- [Items Worksheet](#)







## 3.4.3 Overview of Creating and Modifying CRFs

Before defining the CRF, design it by identifying all the Items that will be on it, the parameters for each Item, and how they will be organized on the form. For guidelines, see [Designing a CRF](#).

This is the overall process for defining a Case Report Form (CRF) for use in your OpenClinica system:

1. Download the CRF template or an existing, defined CRF. For detailed instructions, see [Create a CRF](#).
2. Modify the Items and other content in the defined CRF using Microsoft Excel. See [Providing Content for a Defined CRF](#).
3. [Upload the defined CRF](#) to your OpenClinica system, then identify and correct any errors.
4. [Assign the defined CRF to an Event Definition in a Study](#) as part of the Build Study process. Review the Event Definitions for the Sites in the Study, and if necessary, modify the parameters for the defined CRF at the Sites in the Study.

### 3.4.3.1 About CRF Versions

You can use a defined CRF in multiple Event Definitions and in multiple Studies in OpenClinica. You can also [create different versions of the defined CRF](#). When you assign a CRF to a Study Event, you can specify which versions of the CRF are available to that Event and can specify the default version to be used. For example, you can create a defined CRF in English and create another version in Spanish; then, when a user completes the CRF for a Study Subject, the user can choose the version of the CRF based on the language they prefer to work with.

When you define a CRF, OpenClinica creates a parent record (called the "original"), and a version that can be used to collect data. When you create a new version of the CRF, it has the same name as the "original," but has a different version label assigned to it. When you make a change to a defined CRF, if there are other versions of the defined CRF that the change applies to, you will need to make the change to each version of the defined CRF.

## 3.4.4 Designing CRFs

When you design a CRF in OpenClinica, you can base it on an existing form you use (for example, a paper version), if you have one. But you will need to modify the form design so it works well in the OpenClinica web interface and takes advantage of OpenClinica's features. Whether or not you have an existing form, you can benefit from these guidelines for designing the form before you create the defined CRF:

1. List all the information (Items) you need to collect and record the parameters for each Item. For example, if you need to capture the Subjects temperature, the Item is Temperature, it is

required, and the parameters are any number between 95.0 and 103.9, with up to one decimal place, in degrees Fahrenheit. You specify the range so that when a user enters data into the form, OpenClinica flags a value outside the acceptable range for further action.

2. Determine if you will put all of the Items in one CRF or in multiple CRFs:
  - If a portion of the CRF can be used for other Events or other Studies, you might want to define a CRF for just that portion so you can reuse it, and define a different CRF for the rest of the Items.
  - If the information will be collected at different times during the Event, or at different physical locations (even within a Site), consider defining separate CRFs for each, or separate sections within the CRF for logistical convenience.
3. Determine the sections in the CRF and what Items to put in each section. When you enter data into a CRF, you save one section at a time, so fewer Items in a section minimizes the risk you will lose data if you accidentally close a CRF without first saving it. Fewer Items in a section also means the page opens quicker, makes it easier to locate an Item, and minimizes the need to scroll.

## 3.4.5 Create a CRF


Before defining a CRF, you need to create the CRF you will use as a basis:

1. From the Tasks menu, in the Study Setup module, select Build Study.

*The Build Study page displays.*

2. For the Create CRF task, click the View icon.

*The Manage Case Report Forms (CRFs) page opens.*

Manage Case Report Forms (CRFs) 


































































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Find

Blank CRF Template

OpenClinica CRF Library

Create a New CRF

CRF Name 	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available		   
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available		   
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available		   
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available		   
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available		   
Physical Exam	05-Jul-2011	agoodwin	F_PHYSICALEXAM	(original)		05-Jul-2011	agoodwin	available		   
				English	F_PHYSICALEXAM_ENGLISH	05-Jul-2011	agoodwin	available		   
				Español	F_PHYSICALEXAM_ESPAOL	05-Jul-2011	agoodwin	available		   
Verification of Informed Consent	05-Jul-2011	agoodwin	F_VERIFICATION	(original)		05-Jul-2011	agoodwin	available		   
				v2.0	F_VERIFICATION_V20	05-Jul-2011	agoodwin	available		   

3. From the Manage Case Report Forms page, download the CRF you will use as a basis for defining the CRF.

Note that when you save the Excel file in this process, the Excel filename (the name that precedes .xls) is not used by OpenClinica in any way.

Choose one of the following options to download the CRF you will use as a basis:

- **Download an Existing Defined CRF:** When you want to define a CRF to be similar to one already in your OpenClinica system, download the existing defined CRF to use as a basis.
  1. From the Manage Case Report Forms page, click the Download icon in the Actions column for the version of the CRF you want to download.
  2. Save the file to your computer using a unique, descriptive name.

(Note that this is not the same as [Creating a New Version of an Existing CRF](#))

- **Download a Defined CRF from the CRF Library:** You can use a defined CRF from the OpenClinica library as a basis for the CRF you are defining. The library includes CRFs for common types of clinical forms that were defined by OpenClinica experts and are aligned with [CDISC Clinical Data Acquisition Standards Harmonization \(CDASH\) standards](#), as well as CRFs defined by the OpenClinica community.
  1. Go to the [CRF Library](#) page of the OpenClinica documentation site.
  2. Click Login, then log in using your OpenClinica username and password.  
*The CRF Library page displays.*

CRF Library

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This library provides example OpenClinica forms that you can use and adapt for your OpenClinica studies. Many of these forms are aligned with standards such as [CDISC CDASH](#) and [PROMIS](#). The library also includes some proprietary validated instruments that are available for use with the appropriate licenses. If there are additional forms you would like to see here, please [let us know](#).

[1 OC3 eCRFs](#)  
[2 OC4 eCRFs](#)

3. Select the link for the version of OpenClinica that you are using.  
*The list of available eCRFs displays:*

1 OC3 eCRFs

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[1.1 Adverse Events](#)  
[1.2 Completion/Discontinuation](#)  
[1.3 Concomitant Medications](#)  
[1.4 Demographics](#)  
[1.5 Drug Accountability](#)  
[1.6 ECG Test Results](#)  
[1.7 Inclusion/Exclusion](#)  
[1.8 Informed Consent](#)  
[1.9 Labs](#)  
[1.10 Medical History](#)  
[1.11 Participant Diaries](#)  
[1.12 Patient Reported Outcomes \(PROs\)](#)  
[1.13 Physical Exam](#)  
[1.14 Protocol Deviations](#)  
[1.15 Treatment](#)  
[1.16 Vital Signs](#)  
[1.17 Randomization](#)  
[1.18 Other](#)

4. Click the link for the domain you are interested in. For example, Adverse Events.  
*The domain page displays and may include multiple versions of forms.*

### CDASH Adverse Event - AE (Events)

This CRF can be downloaded [here](#).

\*Rules associated with this CRF can be downloaded [here](#).

This domain is recommended for non-solicited or pre-specified adverse events. Sponsors can add other data variables as needed to this form to meet the needs of their specific protocol requirements. It is under the discretion of sponsors to determine the collection period for adverse events.

### Generic Adverse Event Form

This CRF can be downloaded [here](#).

\*Rules associated with this CRF can be downloaded [here](#).

### Generic Serious Adverse Event Form

This CRF can be downloaded [here](#).

\*Rules associated with this CRF can be downloaded [here](#).

5. Select the link for the form that best meets your needs.  
*If applicable, Rules associated with the form are available and should be downloaded in addition to downloading the form.*
6. Save the CRF and associated Rules to your computer using unique, descriptive names.

- **Download a Blank CRF Template:** If you have experience defining CRFs or there are no existing CRFs that are similar to what you need, use a blank template:

1. From the Manage Case Report Forms page, click Blank CRF Template.
2. Save the template to your computer using a unique, descriptive name.

After creating the CRF, [provide content for it using Excel](#), then [upload the defined CRF](#) to OpenClinica.

## 3.4.6 Providing Content for a Defined CRF

When you define a CRF for use in OpenClinica, you use Excel (1997 to 2003 version) to provide the content in these four tabs (sheets) of the CRF .xls file:

- CRF
- Sections
- Groups
- Items

Each tab contains column headers that specify what belongs in that column; do not modify the column headers.

The fifth tab contains complete instructions for providing content for the CRF. You can also access instructions when you are providing content in the other tabs: click a column header and detailed instructions for that column display in a pop-up window.

To familiarize yourself with how the defined CRF in Excel relates to the presentation of that CRF in the OpenClinica web interface, see [About CRFs in OpenClinica](#).

When you are first learning to provide content for defined CRFs for OpenClinica, work on only one or two Items at a time.

For more information, see [OpenClinica eCRF Specifications](#) in the OpenClinica Technical Documentation.

*Instructions Tab in the Defined CRF:*

	A	B	C	D	E
1	OpenClinica CRF Design Template				
2	Version: 3.1				
3					
4	Worksheet	Field	Field Description and Instructions	Allowable Values	Required
5					
6	CRF				
7		CRF_NAME	Enter the name of your case report form (CRF) here. It must be between 1 and 255 characters long. This is a required field.	Text	Y
8		VERSION	Enter the name of this version of the case report form (CRF) here. It must be between 1 and 255 characters long. This is a required field.	Text	Y
9		VERSION_DESCRIPTION	Enter a description of this version of the case report form (CRF) here. It must be between 1 and 3999 characters long.	Text	Y
10		REVISION_NOTES	Enter revision notes for this version of the case report form (CRF) here. The revision notes must be between 1 and 255 characters long.	Text	Y
11					
12	Sections				
13		SECTION_LABEL	Enter a label for each section of the CRF. It must be between 1 and 255 characters long, and can have spaces. Each section must have a valid section_label, and the CRF must have at least one section. Each item in the CRF must be assigned to a section.	Alphanumeric text, no spaces	Y
14		SECTION_TITLE	Enter a name for each section of your case report form (CRF) here. It must be between 1 and 2000 characters long. This is a required field.	Text	Y
15		SUBTITLE	Enter a subtitle and/or header text that should be shown at the top of the section. It must be between 1 and 2000 characters long. This field is optional.	Text	N
			In addition to a subtitle for the section, you may add instructions to show at the top of the section. The instructions	Text	

*Clicking a Column Header in the Defined CRF Displays Instructions for that Column in a Pop-Up Window:*

A1				CRF_NAME
1	CRF_NAME	VERSION	VERSION_DESCRIPTION	REVISION_NOTES
2	Sample Physical Exam		Sample Physical Exam	04-09-2012 by dmanagone
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				

## 3.4.7 Upload a Defined CRF

After using Excel to provide content for a defined CRF, upload the CRF to OpenClinica:

1. From the Tasks menu, in the Study Setup module, select Build Study.  
The Build Study page opens.
2. For the Create CRF task, click the View icon.  
The Manage Case Report Forms page opens.
3. Click Create a New CRF.  
The Create a New Case Report Form page opens.

here.' and 'OpenClinica is tested and supported with the use of Microsoft Excel 97-2003. If you are using a more recent version of Excel, please use the options to "save as 97-2003 version".' There is a text input field labeled 'MS Excel File To Upload:' with a 'Browse...' button next to it. At the bottom, there are two buttons: 'Preview CRF Version' and 'Exit'." data-bbox="117 252 921 415"/>

4. Click Browse, then navigate to the defined CRF you want to upload. Select the file and click Open.
5. In the Create a New Case Report Form page, click Preview CRF Version.  
The Check CRF Version Data page opens.
6. If there are any errors, OpenClinica reports them at the top of the page and provides details for the cells containing the errors below that. Click Go Back, [correct the errors in the defined CRF using Excel](#), and repeat steps 4 through 6.

*Example of an Error Message for a Defined CRF:*

### Check CRF Version Data

There were several invalid fields in your spreadsheet. Please take a look at the data below,

click [Go Back](#) to go back and upload your corrected spreadsheet for the CRF.

**There are an incomplete number of option-value pairs in RESPONSE\_OPTIONS column and Response values column at row 11, Items worksheet.**

*Example Showing Details for the Errors that are in the Defined CRF:*

9.0	single-select	N_AB_NE	Normal, Abnormal, Not Examined,\\ but <b>NUMBER OF OPTIONS DOES NOT MATCH</b>	1,2,99 <b>NUMBER OF VALUES DOES NOT MATCH</b>
-----	---------------	---------	---	---

7. When the defined CRF you uploaded is free of errors, OpenClinica displays a preview of the web interface for the CRF, and the Alerts & Messages sidebar panel displays a success message. Review each section of the CRF in the web interface preview (click the tab for a section to show it), viewing drop-down lists, checking wording and arrangement of Items, and so on. Make notes of anything you want to change. To make changes, click Cancel, [make](#)



[changes using Excel](#) and save the file, then repeat steps 4 through 6. (Note: do not click Continue while you are still changing the content of the defined CRF. If you do click Continue but still want to make changes, you will need to [replace the existing CRF or create a new version of it.](#))

*Preview a CRF:*

**Alerts & Messages**  
Congratulations! Your spreadsheet generated no errors. Please review it. You can save it to database by clicking "Continue".

**Check CRF Version Data**

Continue Cancel

I Basic (0/9) II Body...(0/35) III Oth...(0/3) -- Select to Jump --

**Visit Information:**

1 Date of Physical Examination: [ ] [ ] 2 Time of Physical Examination: [ ] (HH:MM)

**Physical Exam Information:**

3 Height: [ ] (in) 4 Weight: [ ] (lb)

5 Temperature: [ ] (F) 6 Pulse Rate: [ ] (per min)

7 Respiration Rate: [ ] (per min)

**Blood pressure:**

8 Systolic: [ ] (mm) Diastolic: [ ] (Hg)

Continue Cancel

8. After previewing the defined CRF and completing any changes, click Continue.

The Create a New CRF - Data Committed Successfully page opens.

**Create a New CRF Version - Data Committed Successfully**

The new CRF version was committed into the database successfully.

► Go back to the CRF List

► View CRF Version Data Entry

► Go back to the Build Study page

► CRF Version Metadata

9. Review the defined CRF:

1. Click Go back to the CRF List.

The Manage CRFs page opens.

2. For the CRF you want to review, click the View icon in the Actions column for the version you defined (do not click the View icon in the row that is marked "original" version).

3. Review each section of the defined CRF (click the tab for a section to show it), viewing drop-down lists, checking wording and arrangement of Items, and so on. Make notes of anything you want to change. If you need to make changes to the name or description, see [Edit a Defined CRF](#). If you want to, you can instead, [Replace the Defined CRF](#).

After completing all changes to a defined CRF, [assign the CRF to an Event Definition](#) for any of your



Studies.

## 3.4.8 Table of CRFs

The table of CRFs lists all versions of all defined CRFs in your OpenClinica system and provides access to features for managing the defined CRFs. The available features in the table depend on your User Role and User Type. To access the table of CRFs:

1. From the Tasks menu, in the Study Setup module, select Build Study.  
The Build Study page opens.
2. For the Create CRF task, click the View icon.  
The Manage Case Report Forms page opens.

Manage Case Report Forms (CRFs) ⓘ											
Page 1 of 1		<input type="text"/>		Find		Blank CRF Template		OpenClinica CRF Library		Create a New CRF	
CRF Name	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions	
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available			
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available			
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available			
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available			
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available			
Physical Exam	05-Jul-2011	agoodwin	F_PHYSICALEXAM	(original)		05-Jul-2011	agoodwin	available			
				English	F_PHYSICALEXAM_ENGLISH	05-Jul-2011	agoodwin	available			
				Español	F_PHYSICALEXAM_ESPAOL	05-Jul-2011	agoodwin	available			
Verification of Informed Consent	05-Jul-2011	agoodwin	F_VERIFICATION	(original)		05-Jul-2011	agoodwin	available			
				v2.0	F_VERIFICATION_V20	05-Jul-2011	agoodwin	available			

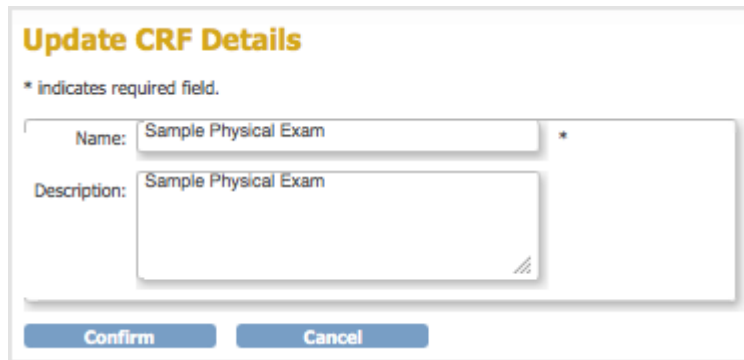
The CRFs table is the same table you can access from the Monitor and Manage Data module. In addition to using this table to create, modify, and remove defined CRFs as described in other topics on this page, you can use this table to:

- [View information about an original CRF and the details for each version](#)
- [Find and organize CRFs](#)

## 3.4.9 Edit the Defined CRF Name and Description

After adding a defined CRF to OpenClinica, you can change the Name and Description shown in OpenClinica for that CRF:

1. Access the [Table of CRFs](#).
2. For the CRF whose Name and/or Description you want to change, click the Edit icon in the Actions column.  
The Update CRF Details page opens.



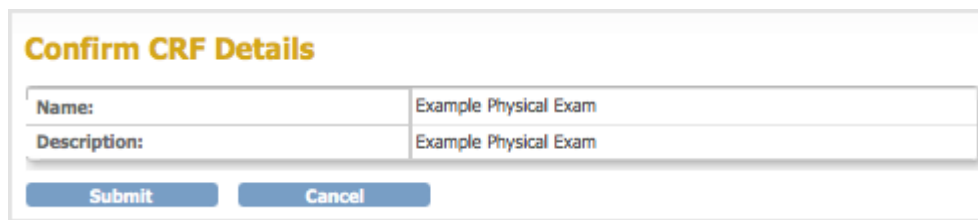
**Update CRF Details**

\* indicates required field.

Name:  \*

Description:

3. Change the Name and Description, then click Confirm.  
The Confirm CRF Details page opens.



**Confirm CRF Details**

Name:	Example Physical Exam
Description:	Example Physical Exam

4. Click Submit.  
The Table of CRFs page opens and shows the updated name for the CRF.

## 3.4.10 Create a New Version of a Defined CRF

You can make changes to a defined CRF that is already in your OpenClinica system.

Start by downloading the existing defined CRF from OpenClinica: see [Download an Existing Defined CRF](#) in [Create a CRF](#). Then make changes to defined CRF using Excel: see [Providing Content for a Defined CRF](#). Finally, upload the new version to OpenClinica. When you upload it, you can either:

- [Replace the existing version](#) (under certain conditions), or
- [Add the modified CRF as a new version](#)

### 3.4.10.1 Replace a Defined CRF

You can replace an existing version of a defined CRF under the following conditions:

- You must be the CRF's Owner, as listed in the Table of CRFs. The Owner is the user who uploaded the CRF you are replacing.
- The CRF cannot be assigned to any Event Definitions in any Studies.
- The values for CRF\_NAME and VERSION for the CRF already in OpenClinica and the CRF you are replacing it with must match exactly.

If these conditions are not met, OpenClinica prevents you from replacing the CRF, but you can instead [Add it as a New Version of the CRF](#).

To replace a CRF:

1. Access the [Table of CRFs](#).

Manage Case Report Forms (CRFs)										
Page 1 of 2		<input type="text"/>		<b>Find</b>		<a href="#">Blank CRF Template</a>		<a href="#">OpenClinica CRF Library</a>		<a href="#">Create a New CRF</a>
CRF Name	Date Updated	Last Updated hv	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available		
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available		
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available		
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available		
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available		
Initial Treatment	13-Apr-2012	agoodwin	F_INITIALTREAT	(original)		13-Apr-2012	agoodwin	available		
				v1.0	F_INITIALTREAT_V10	13-Apr-2012	agoodwin	available		

- For the CRF you are replacing, click the Create New Version icon . The Create a CRF Version for ... page opens. In the example shown here, the CRF being replaced is Initial Treatment.

### Create a CRF Version for Initial Treatment

You can download a blank OpenClinica CRF Excel spreadsheet template [here](#).

OpenClinica is tested and supported with the use of Microsoft Excel 97-2003. If you are using a more recent version of Excel, please use the options to "save as 97-2003 version".

MS Excel File To Upload:  **Browse...**

**Preview CRF Version** **Exit**

- Click Browse, then navigate to the CRF you want to upload. Select the file and click Open.
- Click Preview CRF Version.

The Create a New CRF Version - Confirm Delete Previous Same Version page opens. In the example, the v1.0 version of the Initial Treatment CRF is being replaced: the CRF you are uploading has the value v1.0 for VERSION, and Initial Treatment for CRF\_NAME.

### Create a New CRF Version - Confirm Delete Previous Same Version

The CRF version you try to upload already exists in the DB, are you sure you want to remove the previous one and upload it again?

[No, Go Back](#)  
[Yes, Remove Previous Version](#)

Or you can change the version name and upload a different version of the CRF.

- Click Yes, Remove Previous Version. The Check CRF Version Data page opens, presenting a preview of the CRF in the OpenClinica web interface.
- Correct any errors as described in [Upload a Defined CRF](#) (step 6).
- After previewing the CRF and completing any changes, click Continue. The Create a New CRF Version - Data Committed Successfully page opens.
- Click Go back to the CRF List. The Manage CRFs page opens.

- There will be a new value for Date Updated if you the version you replaced was last uploaded on a previous date.
- There is a new Version\_OID for the CRF you replaced. This is not the same as the value you specified for VERSION for the CRF, but is an internal identifier that OpenClinica uses to manage CRF versions.

Manage Case Report Forms (CRFs)										
Page 1 of 2 >>		<input type="text"/>		<input type="button" value="Find"/>		<a href="#">Blank CRF Template</a>		<a href="#">OpenClinica CRF Library</a>		<a href="#">Create a New CRF</a>
CRF Name	Date Updated	Last Updated hv	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available		
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available		
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available		
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available		
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available		
Initial Treatment	13-Apr-2012	agoodwin	F_INITIALTREAT	(original)		13-Apr-2012	agoodwin	available		
				v1.0	F_INITIALTREAT_V10_4122	13-Apr-2012	agoodwin	available		

## 3.4.10.2 Add a New Version of a Defined CRF

For background information, see [About CRF Versions](#).

You can add a new version of a CRF to OpenClinica under the following conditions:

- The CRF\_NAME in the new version of the defined CRF must match the CRF Name already in OpenClinica, but the value for VERSION must be different.
- For each ITEM\_NAME, the DESCRIPTION, GROUP LABEL, and DATA\_TYPE must exactly match the DESCRIPTION, GROUP LABEL, and DATA\_TYPE already in OpenClinica. Changes to response sets are limited.

For more information, see [CRF Versioning](#) in the OpenClinica Technical Documentation.

When you add a new version of a CRF, the version already in OpenClinica remains. If you want to, you can [remove the previous version](#) from OpenClinica after adding the new version, or you can keep the previous version if you want users to be able to complete either versions going forward.

To add a new version:

1. Access the [Table of CRFs](#).

Manage Case Report Forms (CRFs)											
Page 1 of 1					<input type="text"/> <b>Find</b>		<a href="#">Blank CRF Template</a>		<a href="#">OpenClinica CRF Library</a>		<a href="#">Create a New CRF</a>
CRF Name	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions	
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available			
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available			
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available			
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available			
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available			
Last Treatment	15-Apr-2012	agoodwin	F_LASTTREATMEN	(original)		15-Apr-2012	agoodwin	available			
				English	F_LASTTREATMEN_ENGLISH	15-Apr-2012	agoodwin	available			

- For the CRF to which you are adding a new version, click the Create New Version icon . The Create a CRF Version for ... page opens. In the example shown here, a new version (Espanol) is being added for the Last Treatment CRF.

### Create a CRF Version for Last Treatment

You can download a blank OpenClinica CRF Excel spreadsheet template [here](#).

OpenClinica is tested and supported with the use of Microsoft Excel 97-2003. If you are using a more recent version of Excel, please use the options to "save as 97-2003 version".

MS Excel File To Upload:  **Browse...**

[Preview CRF Version](#)
[Exit](#)

- Click Browse, then navigate to the CRF you want to upload. Select the file and click Open.
- Click Preview CRF Version.  
The Check CRF Version Data page opens, presenting a preview of the defined CRF in the OpenClinica web interface.
- Correct any errors as described in [Upload a Defined CRF](#) (step 6).
- After previewing the CRF and making changes, click Continue.  
The Create a New CRF Version - Data Committed Successfully page opens.
- Click Go back to the CRF List.  
The Manage CRFs page opens. The version of the CRF you added is listed in the table.

Manage Case Report Forms (CRFs)											
Page 1 of 1		<input type="text"/>		<a href="#">Find</a>		<a href="#">Blank CRF Template</a>		<a href="#">OpenClinica CRF Library</a>		<a href="#">Create a New CRF</a>	
CRF Name	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions	
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available			
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available			
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available			
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available			
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available			
Last Treatment	15-Apr-2012	agoodwin	F_LASTTREATMEN	(original)		15-Apr-2012	agoodwin	available			
				English	F_LASTTREATMEN_ENGLISH	15-Apr-2012	agoodwin	available			
				Espanol	F_LASTTREATMEN_ESPANOL	15-Apr-2012	agoodwin	available			

Now, when a user [enters Event Data for a Subject](#), they can choose which version of the defined CRF to use. For the example, Last Treatment, the user can choose the English or Espanol version.

### Enter or Validate Data for CRFs in Follow-up Treatment

Edit Study Event

Study Subject ID	SMC101
Study Event	Follow-up Treatment
Location	N/A
Study Subject OID	SS_SMC101
Start Date	27-Jul-2011
End Date/Time	
Subject Event Status	scheduled
Last Updated by	()

CRFs in this Study Event:

CRF Name	Version	Status	Initial Data Entry	Double Data Entry	Actions
Agent Administration	v1.0				
Concomitant Medications	v1.0				
Physical Exam	English				
Last Treatment	English				

English  
Espanol

[View this Subject's Record](#)
[Exit](#)

## 3.4.11 Remove, Restore, and Delete Defined CRFs

If your [User Type has appropriate permission](#), you can perform the following actions on defined CRFs or versions you no longer want to use:

- Delete a version of a CRF if it has not been used for data entry for any Subjects and you no longer want the CRF in your OpenClinica system for potential use in any Studies. You cannot recover the CRF after its been deleted.



- Remove a version of the CRF if it has been used for data entry for Subjects, to prevent its use going forward. Data captured using this version of the CRF is not included in data extracts whose definition specifies that CRF. You can restore a version of the CRF that's been removed.
- Restore a version of the CRF that has previously been removed, which allows it to again be used for data entry for Subjects.
- Remove the "original" (parent) CRF to prevent any versions of that CRF to be used going forward, and to prevent the CRF from being assigned to any more Event Definitions. You can restore the parent CRF, and all versions, after it has been removed. Data captured using any versions of the CRF is not included in data extracts whose definition specifies that CRF.
- Restore an "original" CRF that has previously been removed, which allows any versions of that CRF to be used going forward, and allows the CRF to be assigned to Event Definitions.
- Archive a version of the CRF to prevent it from being added to any more Event Definitions. Data previously captured using that version of the CRF is included in data extracts whose definition specifies that CRF. Instructions to archive a CRF are in [Administer CRFs](#).

## Delete a CRF Version

Delete a version of a defined CRF if it has not been used for data entry for any Subjects. A deleted version of a CRF cannot be restored. To delete a version of a CRF:

1. Access the [Table of CRFs](#).

Page 1 of 1											
Find											
Blank CRF Template   OpenClinica CRF Library   Create a New CRF											
CRF Name	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions	
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available			
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available			
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available			
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available			
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available			
Last Treatment	15-Apr-2012	agoodwin	F_LASTTREATMEN	(original)		15-Apr-2012	agoodwin	available			
				English	F_LASTTREATMEN_ENGLISH	15-Apr-2012	agoodwin	available			
				Espanol	F_LASTTREATMEN_ESPANOL	15-Apr-2012	agoodwin	available			

2. For the version of the CRF you want to delete, click the Delete icon . For the example, the Espanol version of the Last Treatment CRF is being deleted. The Confirm Deletion of CRF Version page opens.


### Confirm Deletion of CRF Version

You choose to DELETE the following CRF Version permanently, please notice that it CANNOT be restored in the future

Name:	Espanol
Description:	Last Treatment, Spanish

Delete CRF Version
Cancel

- Click Delete CRF Version, then click OK in the confirmation dialog box.  
The Manage CRFs page opens. The version of the CRF you deleted no longer appears in the table.

Manage Case Report Forms (CRFs) 




















































Page 1 of 1

Find

Blank CRF Template

OpenClinica CRF Library

Create a New CRF

CRF Name 	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available		   
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available		   
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available		   
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available		   
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available		   
Last Treatment	15-Apr-2012	agoodwin	F_LASTTREATMEN	(original)		15-Apr-2012	agoodwin	available		   
				English	F_LASTTREATMEN_ENGLISH	15-Apr-2012	agoodwin	available		   

If you try to delete a version of a CRF that has already been used to enter Subject data, OpenClinica prevents you and displays the following:

[Home](#) | [Subject Matrix](#) | [Notes & Discrepancies](#) | [Study Audit Log](#) | [Tasks](#) | [Report Issue](#) | [Support](#)

**Alerts & Messages**  
This CRF version English has associated study event definitions and cannot be deleted.

**Instructions**  
**Info**

### Confirm Deletion of CRF Version

You choose to DELETE the following CRF Version permanently, please notice that it CANNOT be restored in the future

Name:	English
Description:	Last Treatment

#### Associated Event Definitions

Study Event	Study ID	Date Created	Owner
Follow-up Treatment	3	15-Apr-2012	agoodwin

[Go Back to CRF List](#)

## Remove a CRF Version

If a version of a defined CRF has been used for data entry for Subjects, you can prevent its use going forward by removing it. A version of a CRF that has been removed can be restored. To remove a version of the CRF:

- Access the [Table of CRFs](#).
- For the version of the CRF you want to remove, click the Remove icon . For the example shown here, the Last Treatment CRF, English version, is being removed.  
The Confirm Removal of CRF Version page opens. It lists the Event CRFs and Subjects who have had data entered using that version of the CRF.



## Confirm Removal of CRF Version


You choose to remove the following CRF Version:

Name:	English
Description:	Last Treatment

Associated Event CRFs

Study Subject Label	Study Event	Repeat Number	Date Interviewed
SCRC001	Follow-up Treatment	1	

Remove CRF Version Cancel

- Click Remove CRF Version, and then click OK in the confirmation dialog box. The Manage CRFs page opens. The version of the CRF you removed is listed, but with a Restore icon  instead of a Remove icon in the Actions column and a Status of "removed".

## Manage Case Report Forms (CRFs)



















































Page 1 of 1

Find

Blank CRF Template

OpenClinica CRF Library

Create a New CRF

CRF Name	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available		   
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available		   
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available		   
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available		   
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available		   
Last Treatment	15-Apr-2012	agoodwin	F_LASTTREATMEN	(original)		15-Apr-2012	agoodwin	available		   
				English	F_LASTTREATMEN_ENGLISH	15-Apr-2012	agoodwin	removed		   

After removing the version of the CRF, you can still view the CRF and can still view Subject data for that version of the CRF, as shown below, however you cannot change any of the data. The status of the CRF for the Subject is "locked":

**View Subject: SCRC001**

Study Subject Record  
Events

Page 1 of 1  **Find** [Schedule New Event](#)


Event (Occurrence Number)	Start Date	Location	Status	Actions	CRFs (Name, Version, Status, Updated, Actions)																				
Follow-up Treatment (1)	15-Apr-2012		data entry started	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	<table border="1"> <tr> <td>Agent Administration</td> <td>v1.0</td> <td></td> <td></td> <td> <a href="#">View</a>  <a href="#">Edit</a>  <a href="#">Delete</a> </td> </tr> <tr> <td>Concomitant Medications</td> <td>v1.0</td> <td></td> <td></td> <td> <a href="#">View</a>  <a href="#">Edit</a>  <a href="#">Delete</a> </td> </tr> <tr> <td>Physical Exam</td> <td>English</td> <td></td> <td></td> <td> <a href="#">View</a>  <a href="#">Edit</a>  <a href="#">Delete</a> </td> </tr> <tr> <td>Last Treatment</td> <td>English</td> <td></td> <td>15-Apr-2012 (agoodwin)</td> <td> <a href="#">View</a>  <a href="#">Edit</a>  <a href="#">Delete</a> </td> </tr> </table>	Agent Administration	v1.0			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	Concomitant Medications	v1.0			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	Physical Exam	English			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	Last Treatment	English		15-Apr-2012 (agoodwin)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Agent Administration	v1.0			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>																					
Concomitant Medications	v1.0			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>																					
Physical Exam	English			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>																					
Last Treatment	English		15-Apr-2012 (agoodwin)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>																					
Registration Visit	01-Jul-2011		signed	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	<table border="1"> <tr> <td>Eligibility</td> <td>v1.0</td> <td><input checked="" type="checkbox"/></td> <td>06-Jul-2011 (tkatz)</td> <td> <a href="#">View</a>  <a href="#">Edit</a>  <a href="#">Delete</a> </td> </tr> <tr> <td>Physical Exam</td> <td>English</td> <td><input checked="" type="checkbox"/></td> <td>06-Jul-2011 (tkatz)</td> <td> <a href="#">View</a>  <a href="#">Edit</a>  <a href="#">Delete</a> </td> </tr> <tr> <td>Verification of Informed Consent</td> <td>v2.0</td> <td><input checked="" type="checkbox"/></td> <td>06-Jul-2011 (tkatz)</td> <td> <a href="#">View</a>  <a href="#">Edit</a>  <a href="#">Delete</a> </td> </tr> </table>	Eligibility	v1.0	<input checked="" type="checkbox"/>	06-Jul-2011 (tkatz)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	Physical Exam	English	<input checked="" type="checkbox"/>	06-Jul-2011 (tkatz)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	Verification of Informed Consent	v2.0	<input checked="" type="checkbox"/>	06-Jul-2011 (tkatz)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>					
Eligibility	v1.0	<input checked="" type="checkbox"/>	06-Jul-2011 (tkatz)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>																					
Physical Exam	English	<input checked="" type="checkbox"/>	06-Jul-2011 (tkatz)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>																					
Verification of Informed Consent	v2.0	<input checked="" type="checkbox"/>	06-Jul-2011 (tkatz)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>																					
Initial Treatment	20-Jun-2011		data entry started	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	<table border="1"> <tr> <td>Concomitant Medications</td> <td>v1.0</td> <td></td> <td></td> <td> <a href="#">View</a>  <a href="#">Edit</a>  <a href="#">Delete</a> </td> </tr> <tr> <td>Physical Exam</td> <td>English</td> <td></td> <td></td> <td> <a href="#">View</a>  <a href="#">Edit</a>  <a href="#">Delete</a> </td> </tr> <tr> <td>Agent Administration</td> <td>v1.0</td> <td><input checked="" type="checkbox"/></td> <td>05-Jul-2011 (agoodwin)</td> <td> <a href="#">View</a>  <a href="#">Edit</a>  <a href="#">Delete</a> </td> </tr> </table>	Concomitant Medications	v1.0			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	Physical Exam	English			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>	Agent Administration	v1.0	<input checked="" type="checkbox"/>	05-Jul-2011 (agoodwin)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>					
Concomitant Medications	v1.0			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>																					
Physical Exam	English			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>																					
Agent Administration	v1.0	<input checked="" type="checkbox"/>	05-Jul-2011 (agoodwin)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>																					

[Group](#)  
[Global Subject Record](#)  
[Go Back to Subject List](#)

After removing a version of the CRF, it is no longer available for you to choose from when you enter data for any other Subjects for that CRF.

## Restore a CRF Version

After removing a version of a defined CRF, you can restore it to make it available for use for entering Subject data. To restore a version of the CRF:

1. Access the [Table of CRFs](#).
2. For the version of the CRF you want to restore, click the Restore icon . For the example shown here, the Last Treatment CRF, English version, is being restored. The Confirm Restore of CRF Version page opens. It lists the Event CRFs and Subjects who have had data entered using that version of the CRF.

**Confirm Restore of CRF Version**

You choose to restore the following CRF version:

Name:	English
Description:	Last Treatment

Associated Event CRFs

Study Event ID	Date Interviewed	Status
85		auto-removed

[Restore CRF Version](#)

- Click Restore CRF Version, then click OK in the confirmation dialog box.  
The Manage CRFs page opens. The CRF you restored is listed with a status of "available."

Manage Case Report Forms (CRFs)											
Page 1 of 1		<input type="text"/>		<input type="button" value="Find"/>		<a href="#">Blank CRF Template</a>		<a href="#">OpenClinica CRF Library</a>		<a href="#">Create a New CRF</a>	
CRF Name	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions	
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available			
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available			
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available			
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available			
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available			
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available			
Last Treatment	15-Apr-2012	agoodwin	F_LASTTREATMEN	(original)		15-Apr-2012	agoodwin	available			
				English	F_LASTTREATMEN_ENGLISH	15-Apr-2012	agoodwin	available			

## Remove the Original Version of a CRF

You can remove the original (parent) version of a defined CRF, which automatically removes all versions of the CRF. To remove the original version of a CRF:

- Access the [Table of CRFs](#).
- For the CRF you want to remove, click the Remove icon in the row for the version "original". For the example shown, the Last Treatment CRF is being removed.  
The Confirm Removal of CRF page opens. It lists all versions of that CRF and all Event Definitions to which the CRF has been assigned.

### Confirm Removal of CRF

You choose to remove the following CRF:

Name:	Last Treatment
Description:	Last Treatment

CRF Versions

CRF Name	Version Name	Description	Status	Revision Notes
Last Treatment	English	Last Treatment	available	

Event CRFs

Study Event	Date Interviewed	Status
Follow-up Treatment		available

- Click Remove CRF, then click OK in the confirmation dialog box.  
The Manage CRFs page opens. The CRF you removed is listed, but with a Restore icon instead of a Remove icon in the Actions column and a Status of "removed." All versions of the CRF are listed, but with a status of "auto-removed."

Manage Case Report Forms (CRFs)										
Page 1 of 1				<input type="text"/>		<input type="button" value="Find"/>	<a href="#">Blank CRF Template</a>		<a href="#">OpenClinica CRF Library</a>	<a href="#">Create a New CRF</a>
CRF Name	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available		
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available		
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available		
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available		
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available		
Last Treatment	15-Apr-2012	agoodwin	F_LASTTREATMEN	(original)		15-Apr-2012	agoodwin	available		
				English	F_LASTTREATMEN_ENGLISH	15-Apr-2012	agoodwin	removed		

After removing the original version of a defined CRF, any Event Definitions to which the CRF was assigned list the CRF, but show the status as auto-removed. When you are adding CRFs to Event Definitions, the removed CRF is not listed for you to choose from.

Note: you cannot delete the original version of a defined CRF.

## Restore the Original Version of a CRF

After removing the original version of a CRF, you can restore it. Restoring the original CRF restores all versions of it to all Event Definitions in all Studies to which the CRF was assigned. To restore the original version of a CRF:

1. Access the [Table of CRFs](#).
2. For the CRF you want to restore, click the Restore icon in the row for the version "original." For the example shown, the Last Treatment CRF is being restored. The Confirm Restore of CRF page opens. It lists CRF versions for that CRF and all Event Definitions to which the CRF has been assigned.

### Confirm Restore of CRF

You choose to restore the following CRF:

Name:	Last Treatment
Description:	Last Treatment

CRF Versions

Version Name	Description	Status	Revision Notes
English	Last Treatment	auto-removed	


Event CRFs

Study Event ID	Date Interviewed	Status
85		auto-removed

Restore CRF

3. Click Restore CRF, then click OK in the confirmation dialog box. The Manage CRFs page opens. It lists the CRF you restored and all versions of it with a status

of "available."

Manage Case Report Forms (CRFs) 










































Page 1 of 1

Find

Blank CRF Template

OpenClinica CRF Library

Create a New CRF

CRF Name 	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available		  
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available		  
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available		  
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available		  
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available		  
Last Treatment	15-Apr-2012	agoodwin	F_LASTTREATMEN	(original)		15-Apr-2012	agoodwin	available		   
				English	F_LASTTREATMEN_ENGLISH	15-Apr-2012	agoodwin	available	