Participant Details Page (PDP): the display you see after opening a participant from the Participant Matrix or searching by participant ID.

🤣 OpenC	OpenClinica RGB (RGB) Test Environment Change Design Share Settings rbianchi (Data Manager) *										
Enter Particip	ant ID	View	1				Home	Participant Matrix Que	eries Study Audit Log	Tasks 🝷	
Alerts & Message	Alerts & Messages Participant Matrix for RGB										
Quick Access - My Queries		Rarticipant ID	₩ 50 ¥	Show More	Select An Ev	ent V Add Ne	w Participant	Actions			
		r articipant iD	Dasenne	LXdiff	meatment	l ollow up		Apply Filter Clear Filter			
Instructions	•	123		Q x3	S x2	Q x3	0	Q 🗙 🗄			
Other Info Study:	*	1234		0 x5	0 x2	0 x3	0	Q X 🗄			
RGB		12345	X	Q x4	0	0	0	Q × 🖻			

The redesigned Participant Details Page (PDP) provides a more modern, streamlined view allowing more actions within the page and less loading times. This feature change encompasses the following benefits:

- Closing a form brings you back to the event from which you started without reloading
- Updated Visits section to respect the behavior of the active/removed filter
- Events can be scheduled directly from the PDP page (no more reloading)
- Now hides visit event forms that don't have permission tags for the current user
- Forms remain in the study definition order within each visit even as forms are started

Vi	Visits										
	Page 1 of 1 Enter Event Name				Find	Add New					
	Event (Occurrent) Number)		Status	Even	t Acti	ons	CRFs				
3	Exam (1)	01-Nov-	scheduled	Q	G AN	A ×	Name	Version	Status	Update	Actions
		2021				4	Exam	1.2 🗸			Ø Q
							Vitals	1			Q

Previous View:

New view:

	Visits								•
1	J <i>≡</i> Sort by Date				2	Search form c	or visit name	Q	Add New
3	Exam (1) 01-Nov-2021	4	Exam	ß	Vitals				
			Default version: 1.2	* *	Default version: 1	* * *			

1. Sort by Date will sort by Start Date of event (not individual forms or the date the visit was added). The older version defaults to showing the latest date (top of the list), but the newer version will default to showing the earliest, non-completed event.

- 2. The Visit search bar has been updated to allow searching by form name in addition to visit name. Type the visit or form name and press Enter to search, then click the X to reset the search.
- 3. The Visits table and subtable of forms are replaced with a streamlined look using the visit event (3) and associated form cards (4) going across, allowing easier navigation.
- 4. Within the new form cards, the information that was previously in the table columns (statuses and versions) is now displayed on the form card or available in the vertical ellipsis dropdown (actions).
 - a. Hover over the form card to display the default action for the form, or click to open the form using the default action.



b. Click the vertical ellipsis to display the list of all actions available for the visit or form. These actions vary by your role/access and the status of the form or visit.

Baseline	Exam	Vitals	
01-Nov-2021	on 01-Nov-21 by rbianch	i on 01-Nov-21 by rbianchi (1	
Screening call			Q View
Adverse Event			💉 Edit
			× Remove
Casebook			🛍 Clear
Baseline	Exam	Vitals	
01-Nov-2021		on 01-Nov-21	ov rbianchi (1)
			-)
	Q View		•
Screening call	Q View ♂ Edit		
Screening call Adverse Event	Q View		

c. If multiple versions of the form are available and the form has not yet been started, the actions menu will display the different versions to use. The default version is also displayed on the form card when there are multiple versions.

isits					
<i>↓≡</i> Sort by Date				Search form or visit name	Q Add New
Exam (1) 01-Nov-2021	() :	Exam	Vitals		
		Default version: 1.2	E		
Baseline		Exam	Q View	.	
01-Nov-2021	:		Edit version:		
		01-Nov-21 by rbianchi (1.2)	Version: 1.2 (default)	:	
creening call			Version: 1		
dverse Event					

d. If the form has not been started and only has one version available, it will not display the version on the card and the actions menu will display View and Edit.

Exam (3) 04-Nov-2021	C :	Exam		Vitals	6
		Default version: 1.2	:		:
Follow up (1)		Follow Up			Q View
03-Nov-2021	* * *	05-Nov-21 by rbianchi (1)	0 0 0		🖋 Edit

e. Once the form has been started, it will display the last updated date, user name who did the updates, and the form version number that was used.



Additional new features available in the Visits section:

1. Status flags for Locked, Archived, or Signed are now displayed in the form cards (2) in addition to the visit (1). The Archived icon will display at the bottom of the form card (3) if an archived form version was used.

<u>+</u>	Signed	Daily (1)		Daily Data
	Locked	15-Aug-2021	2	<u>1</u> 🔒 🔍
T	Archived	13-Aug-2021	3	回 01-Nov-21 by.
X	Removed	Screening (2)	~	Version 7.5e (archived) updated on 01- Nov-2021 by pbowenadm

2. Visits section is infinitely scrollable (continues to load more visits when scrolling), eliminating the need for individual pages and long loading times.

Vi	sits					
	Page 1 of 6	► H		Enter Event	Name Find	
4	Event (Occurrence Number)	Start Date	Status	Event Actions	CRFs	
	Daily, Short Form (20)	27-Aug-	scheduled	Q	Name	Version
		2021			Daily Data, Day 29 Onward	DDP28_19

- 3. There is no longer a limit of adding five events at a time when scheduling events.
- 4. When a non-repeating event has been scheduled, it will no longer display in the dropdown menu when scheduling a new event.

Add Visits		×
Participant ID: 1234		
* Visit Name -Select-	×	
Exam (Repeating) Baseline (Non-repeating)		
+ Add another visit		Add visits
Add Visits		×
Participant ID: 1234		
* Visit Name		
-Select-	~	
Exam (Repeating)	£m	
02-Nov-2021 Show advanced options		
+ Add another visit		Add visits

5. Clicking the form card will open it. The most recently opened form card will display with a yellow background, bookmarking where you left off. Note that only one form on the PDP will display the yellow background (Visit OR Common event, not both).

Exam (1)	0	Exam		Vitals	
01-Nov-2021	0 0	Default version: 1.2	* * *	Default version: 1	0 0 0
Baseline		Exam		Vitals	Ľ

6. A slight yellow border will display around the most recently added visit event (Exam 4).

Exam (4) 04-Nov-2021	S :	Exam	•	Vitals	•
Exam (3)	2	Exam		Vitals	
04-1100-2021		Default version: 1.2	• •	09-Nov-21 by rbianchi (1)	:

7. A red asterisk displays on the required forms (previously, there was no indicator).

Treatment (7) 20-Aug-2021	2	Pre-Treatment Evaluation	~	Treatment Administration	~	*Post Treatment Evaluation	
	•	on 26-Oct-21 by	:	on 26-Oct-21 by	:	on 19-Oct-21 by	:

Filters, views, and sorting:

 By default, Removed and Archived visits and forms are hidden from display. The orange text will display how many visits or forms are hidden from the default display. To see the removed records, use the Showing dropdown menu to change your view to All Records or Removed Records.



rticipant 123	45	Custom View On $$ $ imes$						12345 Audit Log Sh	owing All Rec
eneral Informa	ation								pand All
sits									
J <i>≣</i> Sort by Date							e Jar	ch form or visit name	Q
Exam (4)	x <	Exam	C	Vitals	D				
05-Nov-2021	:		:		:				
Exam (3)	O	Exam	ß	Vitals					
04-Nov-2021	:								
F uerry (0)	•	Default version: 1.2	:	Default weren: 1					
03-Nov-2021	:	Exam	x	Vitals	Ľ				
			:	Def a version: 1	:				
Exam (1)		Exam		Vitals					
02-Nov-2021	:	on 04 No. 11 by rhippohi	:	on 04 Nev 01 by rbinns	bi (1)				
Desellers		on of the program of	••••	on of noviel by round					
Daseline	X	Exam	x	Vitals	x				
01-1409-2021	•		:		:				

- 2. When changing the filter, view, and sort of the Visits section on a participant, the preferences selected now stick on that participant when leaving the page. *Note: this does not carry over between sessions and it is specific to the participant and user.
- 3. The form cards will consistently display in the same order as they are displayed in Study Designer. They are displayed from left to right and will continue to the next row as needed. The form's status no longer affects the order of the forms for the visit.

Treatment (2) 04-Nov-2021	Image: Second	*Pre-Treatment Evaluation		*Treatment Administration		*Post Treatment Evaluation		Vitals	
			:		:	09-Nov-21 by rbianchi (1.2)	:	09-Nov-21 by rbianchi (1)	:
		Pathology	D	Labs					
			0 0 0		• • •				



Treatment 🗰 🗗 🛛 🗏	
Pre-Treatment Evaluation	
Treatment Administration	
Post Treatment Evaluation	
Vitals	
Pathology	
Labs	

Additional PDP features:

1. The action buttons in the Common Event tables have moved from right to left. *Old view:*

dverse Events	5							
Adverse Event Add New Search:								
Adverse Event	Event onset date	Form Status	Last Updated	Updated By	Actions			
Anemia	14-Oct- 2021	data entry started	08-Nov- 2021	alex	🛛 Q 🗙 🔒			
Hemolysis	04-Oct- 2021	data entry started	08-Nov- 2021	pbowenadm	🛛 Q 🗙 🔒			
		data entry started	29-Sep- 2021	alex	₽ Q			
Hemolytic uremic syndrome		data entry started	14-Oct- 2021	alex	₽ Q			

New view:

Adverse Events											
Adverse Event Add New	Searc	ch here O	l								
Actions	Adverse Event ↑↓	Event onset date	Form Status ↑↓	Last Update ↑↓	Updated By $\uparrow\downarrow$						
/ Q × 🔒	Anemia	14-Oct-2021	data entry started	08-Nov-2021	alex						
0 X A	Hemolysis	04-Oct-2021	data entry started	08-Nov-2021	pbowenadm						
e Q			data entry started	29-Sep-2021	alex						
en Q	Hemolytic uremic syndrome		data entry started	14-Oct-2021	alex						

2. Casebook Format button order has changed so that PDF is the default and first option.

Casebook	
Format	
PDF	
○ CDISC ODM XML	
⊖ JSON	
Options	
🖉 Notes & Discrepancies 🖉 Audit Trail 🗆 Include metadata 🧧 Include archived and removed form data 🛛 🗾	
Get PDF ?	

A quick video overview of the PDP changes can be found <u>here</u>.