InForm 4.6 for CTC Studies

InForm™ Training Exercises For Data Managers

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PHASE•FORWARD.

NHMRC Clinical Trials Centre
InForm Training Exercises for Data Managers

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Exercise 1 - Logging on

Steps:
1. Go to the CTC website: http://www.ctc.usyd.edu.au
2. Click ‘Our Research’ at the top of the screen
3. Click ‘Trial Data Systems’ at the left of the screen
4. From the dropdown list, scroll to the bottom and select ‘InForm’
5. Click ‘InForm 4.6 Training’

The InForm Login Screen will be displayed.
6. Enter your User Name: (provided via email from the Coordinating Centre)
7. Enter your Password: (provided via email from the Coordinating Centre).
8. Click Log In

A warning will tell you that your password has expired, and the Change Password Options will be displayed.
9. Enter data as follows:
   - **User Name:** this field will be automatically completed – it will contain your username (provided via email from the Coordinating Centre)
   - **Old Password:** enter your password (provided via email from the Coordinating Centre)
   - **New Password:** enter a new password that you have chosen yourself – you will need to remember this password for all future logins
   - **Confirm Password:** enter again the new password that you have chosen yourself
   - **Email Address:** enter your own personal email address – this will be used to send you a temporary password if you forget your password later
   - **Question:** enter a question that only you will know the answer to, e.g. Mother’s maiden name
   - **Response:** enter the answer to the question – please be very careful: if you ever forget your password, you will need to enter this response exactly as it is typed, including capitals/lower case/punctuation etc.
10. Click Submit

The InForm trial home page will be displayed
Exercise 2 - Navigating in InForm

In this exercise, you will learn some InForm buttons that can be used for navigation.

1. In the navigation bar on the left of the screen, click Patients to display the list of Patient Case Books.
2. From the ‘Case Books for Site:’ dropdown list, choose site ‘99901 – Training Site 1 99901’.
3. In the Case Book list, click the patient number and initials for the first patient in the list: 001 (AAA).

You will see the Time and Events Schedule for the patient.

4. Click on the traffic light for the PTDATA eCRF in the BASE event.

You will see this eCRF.

5. Click Return to get ‘back’ to the previous screen.
6. Again, click on the traffic light for the PTDATA form in the BASE event.

7. This time, click the yellow arrow to go ‘up’ one level (i.e. to a lesser level of detail).

This will take you ‘up’ to the Time and Event Schedule.

8. Click ‘Home’ to navigate to the study home screen.

This will take you back to the study home screen where you started.

9. Alternately, click from any screen to display the list of Patient Case Books again.

*For details on how to print an InForm eCRF, see exercise 4.*
Exercise 3 – Enrolling a patient

Most CTC InForm studies enrol patients using the ‘Enroll’ function in InForm. However, some CTC studies may use an IVRS (phone-based voice recognition system) or other enrolment method, in which case this step will be skipped and you should refer to the Study Manual for study-specific enrolment instructions.

For the purpose of this training, we will enrol patients via the InForm ‘Enroll’ function.

Please enter the data values indicated in the exercises, e.g. date values, as they have been designed to demonstrate particular features of InForm. If you don’t enter the data values indicated, the next steps of the exercise may not work as described.

1. To start enrolling a patient, click on the ‘Enroll’ button in the navigation bar at the left of the screen.
   You will see the Screening Log.

2. Because you have access to more than one site in the training database, a dropdown list will appear at the top right corner of the screen. Choose the relevant site (the relevant site name will be provided in the email with your training logon). It is very important that the correct site is chosen before proceeding, as this mistake cannot be rectified once ‘Add Candidate’ has been clicked.
   If you have access to only one site in the live study database, the site name would be displayed in the top right corner of the screen instead of a dropdown list, and this step could be skipped.

3. Click ‘Add candidate’ at the bottom right of the screen

![Step 2: Select Site (provided in the email with your training logon)](image)

![Step 3: Click ‘Add Candidate’](image)
You will see the Screening eCRF.

**Note:** All eCRFs in this training study have intentionally been kept short and generic. In a real study database, considerably more data would normally be collected.

4. Type or select in the appropriate fields according to the following directions:

   a) Enter your own initials and gender (to help us identify your patient for checking purposes). The initials should be in the format ‘first, middle, last’ (AAA), or use a hyphen if there is no middle initial (A-A), e.g.

<table>
<thead>
<tr>
<th>1st</th>
<th>2nd</th>
<th>3rd</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAA</td>
<td>AAA</td>
<td>AAA</td>
</tr>
</tbody>
</table>

   e.g.

   b) Enter the following date of birth by clicking the drop down arrows next to date, month and year, and selecting the appropriate values

<table>
<thead>
<tr>
<th>Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 Aug 1958</td>
</tr>
</tbody>
</table>

   c) Enter the site code provided in the email with your training logon, e.g.

<table>
<thead>
<tr>
<th>Institution code</th>
</tr>
</thead>
<tbody>
<tr>
<td>99901</td>
</tr>
</tbody>
</table>

   d) Select the following radio button

<table>
<thead>
<tr>
<th>Inclusion Criteria: Age 18 years or over</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] No</td>
</tr>
</tbody>
</table>

   e) Enter the following date of consent by clicking the date selector then select the following date from the calendar

<table>
<thead>
<tr>
<th>Date written informed consent for study signed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Jan 2013</td>
</tr>
</tbody>
</table>

   f) Select the following radio buttons

<table>
<thead>
<tr>
<th>Exclusion Criteria: Current serious uncontrolled medical condition/s</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Exclusion Criteria: Pregnancy, lactation, or inadequate contraception</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] No</td>
</tr>
</tbody>
</table>

   g) Enter the planned treatment date by typing the day, then tab to the month and type the first letter of the month until the correct month appears, then tab to the year and type the year. **Hint:** typing the day and year will only work when typed quite quickly – if there is a delay between typing digits, typing may fail, in which case the selector or drop down should be used instead.

<table>
<thead>
<tr>
<th>Treatment Plan: Date planned to start treatment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Jan 2013</td>
</tr>
</tbody>
</table>

   h) (Just for practice) use the eraser to reset the initials to blank, then re-enter your initials again

5. Once all the data is entered, please ensure that you check all data is correct

6. Click at the bottom right of the screen to save the data
Data Entry Tips

All date items in the training study have been set up to require an answer to each component of the date. If you try to proceed without a required date component, an error message is given:

- If you have started entering a date, but then want to remove the date, use the eraser to clear the date field

You will see the Screening Log.

7. If there are any issues with the data entered on the previous screen, you will see comments in the ‘Screening Failure’ column, in the row that corresponds to the patient that you have entered.

To address each comment, click on the patient’s screening number in the first column, which will take you back to the previous screen. All screening failure comments must be addressed before you can progress with the enrolment.

The screening failure comment in this case is “Exclusion (row 7) = Yes”. You will need this information when you go back to the screening eCRF, so take note of this information.

8. Click on the Screening Number for your patient to go back to the screening eCRF.

You will see that question 7 has been entered as Yes, as indicated by the screening failure comment.
To revise this item from Yes to No:

9. Click on the response for question 7 (near Yes or No).
10. This will take you to the Data Value(s) tab for the item.
   a) Enter the New Value (click No)
   b) Select a Reason for Change (select Transcription Error)
   c) Click Submit

11. You will be returned to the screening eCRF, and will see that the value is corrected and the audit trail icon is yellow to indicate that the value has been changed.

12. Click Submit on the Screening eCRF again - this will make the system re-check the Screening eCRF. The system will return to the Screening Log page.
    Because all data on the screening eCRF now meets the requirements, you will see the word ‘Enroll’ appear in the last column, and you can proceed with the enrolment.

13. To continue, click on ‘Enroll’ in the last column of the row that corresponds to the patient that you have entered.

You will see the Authorisation screen.

14. For the purposes of this training, enter Dr Peter Parker. Please remember, in the live study, this clinician must be listed on the Site Delegation Log.

15. Click Submit
    You will see the Enrolment page.
16. Click ‘Enroll’ at the bottom right of the screen.
17. Click ‘Go to First Visit’ at the bottom of the screen.

   You will see this page.

18. **Make a note of the patient number displayed at the top right of the screen – you will need this number to locate your training patient in the database later.**

19. Enter the Date item as 2 Jan 2013
20. Click Submit. This will transfer all data previously entered on the screening eCRF.
21. Review the data to make sure everything is correct, and check that no queries have fired.

   *In the live study database, if any queries are visible, or any data is incorrect, do not proceed. Instead, please advise the Coordinating Centre.*
Exercise 4 – Randomising a patient

A new tab called ‘RANDDETAILS’ will appear once the date is submitted on the SCR&ENROL DETAILS tab.

If your study is non-randomised (i.e. registration only), this step will be skipped. For the purposes of this training, we will assume that the study is randomised.

1. Click on the new tab labeled ‘RANDDETAILS’.

   ![Image of RANDDETAILS tab]

   You will see this page.

2. Select ‘Yes’ for item 4: ‘Ready for automated randomisation’

3. Click Submit

   ![Image of Randomisation Details]

   The Randomisation Message, Date and time of randomisation, and Allocated treatment will appear.

   This is the randomisation confirmation. Practice printing this page as follows.
**Printing an InForm eCRF**

4. To print, go to the [Select Action] dropdown list at the bottom of the screen and select ‘Print Preview’, then click **Apply**.

You will see that the patient initials and subject number have been added to the eCRF in preparation for printing – these will appear on each page - this is why it is important to always print via the ‘Print Preview’ action.

5. Click **Print** at the bottom right of the screen.
6. After printing, click at the bottom right of the screen to return to the ‘Rand Details’ screen.

You will see that the subsequent visits for the patient have appeared at the top of the screen: BASE, TREAT, END, SIGN. These were triggered by the randomisation – these are examples of dynamic events, i.e. events that are triggered by data entry or certain conditions being met. We will look at these in more detail later.
Exercise 5 - Entering Data for a Regular eCRF

In this exercise we will use the PTDATA regular eCRF.

1. In the navigation bar on the left of the screen, click ‘Home’ to navigate to the home page
2. In the navigation bar on the left of the screen, click to display the list of Patient Case Books.
3. In the Case Book list:
   a. first select your assigned Site from the pull down list
   b. then click the traffic light for the Baseline visit for the patient you created in the previous exercises.
4. In the BASE visit, enter data in the PTDATA tab as follows:

Exercise 5 Example Data – PTDATA eCRF

![PTDATA Example Data Image]

**Note:** The last 2 items should be left blank. Don’t worry about them for now; we will look at missing data later.

5. Click Submit

**Note:** Some of these item values will create queries because they are out of range. Don’t worry about them for now; we will look at queries later.

**Note:** The BSA item is automatically calculated, and is therefore greyed out, i.e. this item is ‘read only’, and so no data entry is required for this item.

6. Click the tab for the Medical History eCRF (MEDHIST) and enter the following data
7. Enter data only up until (and including) question 4 and Click **Submit**
Exercise 6 – Entering Data for a Repeating Section

In this training trial, Data on Previous Diagnoses is collected on the MEDHIST eCRF using a repeating section.

1. Click Add Entry
2. Enter data as follows

Exercise 6 Example Data – Previous Diagnosis 1

Note: Most date items require the full date, i.e. day, month and year. However some date fields may also include UNK in the dropdown list for day or month, so that partial dates can be entered.

3. Click Submit

You will see the data displayed as a row

To enter a second previous diagnosis, repeat the process:

4. Click Add Entry
5. Enter data as follows

Exercise 6 Example Data – Previous Diagnosis 2

6. Click Submit

You will see the data displayed as a second row
Exercise 7 - Deleting a Repeating Section

A row of data can be deleted from a repeating section as follows:

1) Click on the # for the row to be deleted (e.g. 5.b)

2) Choose the reason for change (transcription error)

3) Click Delete

You will see this pop up box

4) Click OK to confirm that you wish to delete the row

The row is now deleted and is shown by a line through the data.
5) **To reverse the deletion of a repeating section:**
   a) Click on the # for the row to be undeleted (e.g. 5.b)
   b) Provide reason for change (e.g. transcription error)
   c) Click **Undelete**
   d) Click **OK** to confirm that you wish to undelete the row

The deletion and undeletion are logged in the audit trail for the row:

Click **Return** to ‘return’ from the Audit Trail to the eCRF.

Click **Return** to ‘return’ from the Audit Trail to the eCRF.
Exercise 8 – Entering Data for a Repeating eCRF

On the MEDHIST eCRF, you entered data in a repeating section. Now we will look at a repeating eCRF, for which InForm uses different screens / buttons.

1. In the Baseline visit, click on the tab for the Concomitant Medication eCRF (CONMED)
2. Click to create a blank eCRF.

3. Enter the following data for the first drug

**Exercise 8 Example Data – Concomitant Medication 1**

4. Click Submit

*To enter a second concomitant medication:*

5. Click New to create another blank eCRF.

6. Enter the following data for the second concomitant medication.
Exercise 8 Example Data – Concomitant Medication 2

7. Click **Submit**
**Viewing Data for a Repeating eCRF**

There are two different ways you can view data entered on repeating eCRFs; the CRF View and the Summary View.

The **CRF View** is the layout used to enter the data for a CONMED, where you can see all the fields for a single CONMED – like this:

![CRF View](image)

From the CRF view, select [Summary] from the drop down list to view all the concomitant medications entered for this patient. The **Summary View** looks like this:

![Summary View](image)

To navigate to a specific drug from the summary view click on the # number or traffic light for the drug, or select the relevant number from the drop down list. This will take you to the **CRF view** for that medication.
Exercise 9 - Deleting a Repeating eCRF

Note: In concept, this is similar to deleting a repeating Section - the deleted data is still visible in InForm but has a strikethrough line – but the way you delete and undelete is different.

1) Choose [Summary] from the drop down list to see the summary view of the CONMED eCRF.
2) From the [Select Action] dropdown list at the bottom left of the screen, select “Delete” and then click Apply.

You will see this page.

3) Check the instance to be deleted
4) Enter a reason for the deletion (e.g. transcription error)
5) Click Delete

The deleted instance of the CONMED eCRF is shown by a line through the data.
6) **To reverse the deletion of a repeating eCRF**
   a) From the [Select Action] list at the bottom left of the screen, select “Undelete” and then click **Apply**.
   b) Check the instance to be undeleted
   c) Provide reason for change
   d) Click **Undelete**.

   The deletion and undeletion are logged in the audit trail for the repeating eCRF.

   ![Audit trail](image)

   Click **Return** to ‘return’ from the Audit Trail to the eCRF.
Exercise 10 - Entering Data for a Repeating Visit

In this exercise, we will explore how to create and enter data for repeating visits in InForm, specifically the Treatment visit.

**Note:** This training study uses a repeating treatment event (i.e. an unlimited number of treatment events can be entered). Some studies use a fixed event structure (i.e. limited to pre-specified event names and structure).

1. In the visit ribbon, select the TREAT visit
2. Enter the following data

**Exercise 10 Example Data – Treatment Week – Week 1**

![Example Data - Treatment Week - Week 1](image)

3. Click Submit
4. Click on the TREATDET eCRF
5. Enter the following data

**Exercise 10 Example Data – Treatment Details - Week 1**

![Example Data - Treatment Details - Week 1](image)

6. Click Submit

*To enter a second treatment visit:*

7. Click New at the bottom left to create another visit
8. Enter the following data

**Exercise 10 Example Data – Treatment Week – Week 2**

![Example Data - Treatment Week - Week 2](image)

9. Click Submit
10. Click on the TREATDET eCRF
11. Enter the following data

Exercise 10 Example Data – Treatment Details - Week 2

12. Click **Submit**

**Viewing Data For A Repeating Visit**

To view data for a repeating visit, use the visit selector to select the relevant visit.

*Note:* Regardless of the order in which data is entered, visits will always appear in chronological order (from newest to oldest) according to the date of visit entered (the first item on the first eCRF in the visit).
Exercise 11 - Triggering a Dynamic Visit

In this exercise we will look at triggering a dynamic visit, specifically the Follow Up ("FUP") visit of the training study.

1. In the visit ribbon, select the END visit
2. Enter the following data

Exercise 11 Example Data – End of Treatment

![Image of InForm interface showing data entry]

3. Click Submit

When you submit this data, InForm creates a new visit that previously did not exist. This new dynamic visit FUP is used to record Follow Up data.

![Image of InForm interface showing submitted data]

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Exercise 12 - Triggering a Dynamic eCRF

Following on from the previous exercise where we triggered the FUP visit, we will now complete that visit and look at triggering a dynamic eCRF, specifically the DTH eCRF.

First enter an example where the dynamic DTH eCRF is not triggered:

1. In the visit ribbon, select the FUP visit
2. Enter the following data

Exercise 12 Example Data – Follow Up 1 – Date

3. Click Submit

Submitting the date of visit triggers the regular eCRFs for the visit (eCRF STAT).

4. Click on eCRF STAT
5. Enter the following data

Exercise 12 Example Data – Follow Up 1 – Status

6. Click Submit

When you submit this data, the DTH eCRF is not created, because ‘Is the patient alive?’ is reported as Yes.

Now enter an example where the dynamic DTH eCRF is triggered:

7. Click New to create a new follow-up visit (because FUP is a repeating visit)
8. Enter the following data

Exercise 12 Example Data – Follow Up 2 – Date

9. Click Submit
Submitting the date of visit triggers the regular eCRFs for the visit (CRF eSTAT).

10. Click on eCRF STAT
11. Enter the following data

Exercise 12 Example Data – Follow Up 2 – Status

![Image of eCRF STAT]

12. Click **Submit**

When you submit this data, the DTH eCRF is created, because ‘Is the patient alive?’ is reported as No.

13. Click on the DTH eCRF
14. Enter the following data

Exercise 12 Example Data – Death

![Image of DTH eCRF]

15. Click **Submit**
Exercise 13 - Entering Data for items marked as Missing

Missing data will appear differently, depending on whether the eCRF has been started or not.

**Missing data on Started eCRFs**

1. In the navigation bar click then click the traffic light for the Baseline visit for your patient.
   You will be taken to the first eCRF in the visit, the PTDATA eCRF.
   There are 2 items with missing data highlighted in yellow on this eCRF: Blood pressure and Temperature.

2. Enter the blood pressure as 110/70

3. Click Blood pressure is no longer highlighted as missing.

**Missing data on Unstarted eCRFs**

4. Click on the HEALTHEC eCRF in the BASE visit for your patient
   You should see that all the items are empty, but not marked as ‘missing’, i.e. not highlighted in yellow. This is because this eCRF has not been started yet.

5. Click to navigate to the Case Book list, and find the red and yellow traffic light for the BASE event for your patient (red and yellow traffic light = missing data and queries).

6. Click on the initials and patient number for your patient, to navigate to the Time and Events Schedule, and find the grey traffic light for the HEALTHEC eCRF in the BASE event (no lights = not started).

7. Click on the traffic light for the HEALTHEC eCRF in the BASE event

8. Enter the following data

9. Click The data is no longer missing.

Exercise 13 Example Data – Health Economics

![Image of Health Economics data entry interface]
Exercise 14 - Editing Data

1. Click on the PTDATA eCRF in the BASE visit for your patient

2. For the Pulse, click on the data value (currently 62)

3. This will take you to the Data Value(s) tab for the item.
   a) Enter the New Value (65)
   b) Select a Reason for Change (Transcription Error)
   c) Click Submit

You will be returned to the eCRF, and will see that the value is corrected and the audit trail icon is yellow to indicate that the value has been changed.

- Refresh error
  - Sometimes new data does not display immediately due to a refresh error in the InForm software. To fix this, click away from the eCRF (onto another eCRF) and then back again.
Exercise 15 – Clearing all data on a Regular eCRF

If an eCRF is entered in error, e.g. for the wrong patient, all data on the eCRF can be cleared in a single step (rather than deleting each item separately).

1. Click on the HEALTHEC eCRF in the BASE visit for your patient
2. In the [Select Action] dropdown list at the bottom left of the screen, select “Clear CRF” and then click Apply.

You will see this page.

3. Enter a reason for the deletion, e.g. transcription error

4. Click Submit

All data in the eCRF will be removed, so that the items are now blank. Required data will be marked as missing (highlighted in yellow). Both the original data, and the clearance, will be tracked in the audit trail.

Only regular eCRFs can be cleared in this way – other eCRF types will not have a ‘Clear CRF’ option, e.g. repeating eCRFs have a ‘Delete’ option as shown in exercise 10.
Exercise 16 - Entering a Predefined Comment

Recording an item as Not Applicable, Not Done, or Unknown

1) Click on the PTDATA eCRF in the BASE visit for your patient

   The temperature is currently marked as missing data.

2) Click on the comment icon next to the temperature.

3) This will take you to the Comment tab for the item.
   a) Select the predefined comment of ‘Not Done’.
   b) Click Submit

   You will see this notification popup.

4) Click OK

   Comment has been updated.

5) Click Return to return to the eCRF.

   You will see that the temperature value appears as ‘Not Done’ and the item is no longer marked as missing data.
Recording an entire eCRF as Not Applicable, Not Done, or Unknown

6) Click on the HEALTHEC eCRF in the BASE visit for your patient
   All data on the eCRF is currently marked as missing data.
7) Click on the comment icon at the top right of the screen.

8) This will take you to the Comment tab for the eCRF.
   a) Select the predefined comment of ‘Unknown’.
   b) Click Submit

You will see this notification popup.

9) Click OK

10) Click Return to return to the eCRF.
    You will see that all values on the eCRF appear as ‘Unknown’ and the items are no longer marked as missing data.
Exercise 17 - Entering a text Comment

1) Click on the PTDATA eCRF in the BASE visit for your patient.

2) Click on the comment icon next to the pulse.

3) This will take you to the Comment tab for the item.
   a) Type a comment: “After 5 minutes rest”
   b) Click Submit

4) Click OK to return to the eCRF.

5) Click Return to return to the eCRF.

   You will see that the pulse value has not changed, but the comment icon is now yellow.

Comment icon is yellow to indicate that a comment exists.
Exercise 18 - Answering a Query by changing the data value

There are two ways to navigate to a query.
   a) Via the Query Listing or
   b) Via the eCRF

Exercise 18 will use navigation via the Query Listing; and Exercise 19 will use navigation via the eCRF.

1. In the navigation bar, click Queries
   The Query listing will be displayed.

2. From the Query Filters at the top of the page, choose the relevant site and the patient that you have created, and choose the ‘Query Status’ of Opened

3. Click on the underlined message “Weight is outside the expected range. Please clarify/correct.” for your patient.
   The Queries screen will be displayed.

4. Select the Data Value(s) tab - because we want to change a data value

5. In the Data Value(s) screen:
   a. Change the answer to 60 kg
   b. Enter the Reason for Change as Transcription error
   c. Click Submit

6. Click Queries to review the updated query listing
   The answered query no longer appears in the list of Opened queries.
Exercise 19 - Answering a Query with answer text

This time, navigate to the query via the eCRF:

1. In the navigation bar click Patients, then click the red traffic light for Baseline visit for your patient.
2. Click on the underlined message “Height is outside the expected range. Please clarify/correct.” on the PTDATA eCRF. The Queries screen will be displayed.
3. Select the Reason as ‘Original value is correct’
4. Click Submit

The query no longer appears in the eCRF.
Exercise 20 - Signatures

1. Click on the SIGN visit in the visit ribbon.
2. Enter the following data

Exercise 20 Example Data– Casebook Signature

Note: In the live study database, the date entered would be ‘today’.

Completing these items indicates that you have verified all eCRFs are completed and all data is clean for this patient. This is recorded in the database as a precursor to being able to sign the eCRB.

3. Click

4. Click in the Navigation Bar

The Required Signature screen will appear.

Tip: If there is a long list, use the filters at the top of the screen to choose your site and patient

5. Note the signature icons indicating that the eCRF and eCRB for your patient have not been signed.

Note: Signatures can only be performed by accredited Investigators and Co-Investigators. A separate training exercise will be sent to Investigators to practice signing a different patient.

6. Now that you have completed all data entry, answered all queries and the eCRF and eCRB are ready for signatures, click

7. The row for your training patient should show only green traffic lights.

Note: A green light means the visit is complete, not that the data is clean and correct.

11. Reply to the email in which you received your training username and password, stating that you have completed the Exercises, and include the number of the training patient that you have created.

Your data will be checked by the CTC, and accreditation will be given subject to satisfactory completion.
Exercise 21 - Online Help

**CRF and Item Help**

Some items, sections and forms are programmed with specific help text. These will be underlined to indicate that help text is available.

1. Click **Patients** in the navigation bar.
2. Click the traffic light for the RAND visit for your patient.
3. On the SCR&ENROL DETAILS eCRF, click on the underlined question text for item 8 to view the help text for that item.

![Image of InForm software interface with highlighted elements: Patients tab, traffic light button, underlined text in CRF and Item Help section, and zoomed-in view of the CRF form with study guide and treatment plan sections.]
**InForm Help Menus**

1. Click **Help** then ‘InForm and Trial Reporting’ to access InForm Help menus

InForm Help menus appear

This is standard help on the InForm software and is NOT study specific, but it may be of interest.
View the Study Protocol and Study Documents

1. Click Home in the navigation bar
2. The Study Home Page contains hyperlinks to the Study Protocol and any other useful documents.
   This training study home page contains a link to this training Exercises document.

3. To return to the Home Page after opening a document, click Home again.
Exercise 22 – Changing Your Password

You can change your password at any time you are logged in to the system InForm will request you to change your password periodically, for security reasons. You **cannot** reuse old passwords.

1. From any screen, click on your name.

2. Change your password by completing the change password eCRF

   NB: When changing your password, it is not necessary to enter your email address, question and response again, unless you want to change them, or have not entered them previously.

3. Click **Submit**
**Exercise 23 - Logging Out**

1. When you have finished your InForm session logout of InForm by pressing \[Logout\].

You will see this popup notification

2. Confirm you wish to exit InForm by pressing \[OK\]

If you have any unsaved data, InForm will prompt you to save before exiting.