**For notes and comments on annotating validations see "Standard Development & Field Validations" in IOMWiki.**

---

**PtID**    PtID: tblPtRoster.PtID
**Namecode**    Namecode:  tblPtRoster.Namecode

---

**VISIT INFORMATION**

**InvID**    1.  Name of Investigator _____ *Required; if 'Other' selected, FormCmts is required.*
<mark>**BM1** If <u>other</u> is selected, please record name in COMMENTS</mark>

**VisitDt**    2. Visit Date:    _____    ☐ **Missed** *Data Entry Only*
**VisitMiss**
- *Missed, VisitMissReason and VisitMissReasonDs cannot be entered if current date is before display window close date or unspecified visit*
- *Missed must be selected if VisitDt (or current date if null) is after Display close date, unless MenuVisitOverride is set for patient* <u>*Data Entry Only*</u>
- *If Missed is checked then Reason Missed is required and Visit Date must be null*
- *If Missed not checked then Visit Date is required*
- *If Missed, then Out of Window section must not be entered.*
- *If visit date before window open date or after window close date, but before Display Close Date then Out of Window section is required.*    <u>*Data Entry Only*</u>
- *If visit date before window open date or after window close date, then Out of Window must be selected.*    <u>*Edit Only*</u>
- *If visit date between window open date and window close date then Out of Window must NOT be selected.*
- *Visit date must be >= enroll date if enroll date is not null*
- *If MenuVisitOverride has been set, then Visit Miss cannot be checked.* <u>*Data Entry Only*</u>

**VisitMissReason**    **If Missed, reason:**    _____
*If MenuVisitOverride has been set, then VisitMissReason cannot be entered.* <u>*Data Entry Only*</u>

*If Other selected from dropdown then description required*
*If <> Other then description must be null*

**VisitMissReasonDs**    **If <u>Other</u>, describe:**    _____

---

**OUT OF WINDOW**

**OutOfWin**    ☐ **Visit was completed out of window**
*If checked then 1 Is required*
*Out of window section cannot be entered if visit is unspecified*

**OutOfWinReason**    **1. Reason visit was completed out of window:**    _____
*If Other selected from dropdown then 1a required*
*If <> Other then 1a must be null*

**OutOfWinReasonDs**    **1a.  If 'Other' describe:** _____

**COMMENTS FormCmts**

|  |
|  |
|  |

**The phone call variation of the visit information form uses the same data fields and validations; only the text on the form differs to accommodate use for patient encounters made through a phone call and not an office visit.**

### Phone Call Information

| | |
|---|---|
| **PtID** | **PtID:** tblPtRoster.PtID |
| **Namecode** | **Namecode:** tblPtRoster.Namecode |

---

**PHONE CALL INFORMATION**

| | |
|---|---|
| **InvID** | 1. Name of Investigator _____ |
| | <mark>**BM1** If <u>other</u> is selected, please record name in COMMENTS</mark> |
| **VisitDt** | 2. Phone Call Date: _____ ☐     **Missed** |
| **VisitMiss** | |
| **VisitMissReason** | If Missed, reason: _____ |
| **VisitMissReasonDs** | If <u>Other</u>, describe: _____ |

---

**OUT OF WINDOW**

| | |
|---|---|
| **OutOfWin** | ☐ **Phone call was completed out of window** |
| **OutOfWinReason** | 1. Reason phone call was completed out of window: _____ |
| **OutOfWinReasonDs** | 1a. If 'Other' describe: _____ |

**COMMENTS FormCmts**

| |
|---|
| |
| |
| |

TaskName: RTSVisitInformation

**Created By:** R.Pritchard
**Developed By:** R.Pritchard

**Task Description:** Submit visit information section including missed visit and visit out of window.
*Note: The Visit Information form segment is always required for any visit related data entry.*

**Website Menu:** Clinical Sites Menu => Data Entry/Editing Menu => tblProtocol.Protocol -
tblProtocol.ProtocolDs =>Subject Menu => Enter Data=>  Visit Information

**Name/path of programs:**
$/VSS/studies.jaeb.org/ndocs/sysdev/JaebResource/CrfSection/RTSGlobal/VisitInformation/VisitInformation_MasterTemplate_[version number].ascx

$/VSS/studies.jaeb.org/ndocs/sysdev/JaebResource/CrfSection/RTSGlobal/VisitInformation/VisitInformation_[variation name]_V[version number].ascx

**Master Template Validations: (non-standard):**

1. If VisitMiss is checked and visit has any other segments that have been started, show warning message: "Visit has been started but was not completed. All previously entered visit data will be voided upon submission.  If the visit data needs to be retained please contact the Jaeb Center."

**Template Variations:**

| Variation Name | Form Eye | Description * | Validations that differ from Master | Date Added |
|---|---|---|---|---|
| VisitInformation_a | NA | Includes only invid & visitdt | Only Invid & visitdt required | 2/8/10 |
| VisitInformation_b | NA | Includes all questions | | 2/8/10 |
| VisitInformation_c | NA | Does not include visit miss questions | Does not include visit miss checks | 3/9/10 |
| VisitInformation_d | NA | Includes all questions with the term "visit" replaced with "phone call" | Validations are the same as variation "b"; only text differs to use the term "phone call" in lieu of "visit" | 7/19/10 |

**Variation B and D** – Includes Missed Visit, which means that a visit can be missed, therefore, this variation must only be used when a visit window display close date exists.  Note, that validations will not work properly if this form is used for visits that do not have a visit display close date.
**Variation C** – Does not include Missed visit, which means that a visit cannot be missed, therefore, this variation must only be used for open ended visits with no display close date.

**Template Revisions (Enter explanation when template filename changes)**

| Date Revised | Template File Name | Reason Revised |
|---|---|---|
| Initial | VisitInformation_a_01 | NA |
| Initial | VisitInformation_b_01 | NA |

| Initial | VisitInformation_c_01 | NA |
|---------|----------------------|-----|
| Initial | VisitInformation_d_v01 | NA |
| 09/10/13 | All | Added validation check: If InvID = "other", FormCmts is required. |
| | | |
| | | |

**Flow (Steps or flowchart)** (do not include processing handled by core code)**:**

Global
1. Form validation / submission using standard .NET CRF data entry. Reference wiki articles for specific visit information handling:
   http://jaebwiki/Dev/index.php/Crf_-_System_Specifications_for_Jaeb.Net#Visit_Miss_.2F_Out_of_Window

2. On visit submission, if VisitMiss = 1 :
   a. Update tblLogin,
      i. Visitmiss = 1
      ii. VisitMissReason,
      iii. VisitMissReasonDs
   b. Update tblLoginVisit,
      i. Visitmiss = 1
      ii. VisitMissReason,
      iii. VisitMissReasonDs

3. On visit submission if OutOfWin = 1:
   a. Update tblLoginVisit
      i. OutOfWin = 1
      ii. OutOfWinReason
      iii. OutOfWin ReasonDs

   Steps #2 and #3 are handled via the CrfSystem internal code as part of the FromDataEntryToFinal class. (See: http://jaebwiki/Dev/index.php/Crf_-_System_Specifications_for_Jaeb.Net#Finalize.aspx )


Project

Protocol


**Objects Used Directly** (does not include objects used by core code processing)**:**

| Table Name | Selects | Inserts | Updates |
|------------|---------|---------|---------|
| tbl<Protocol>VisitInfo | | ✔ | |
| tblLogin | | | ✔ |
| tblLoginVisit | | | ✔ |