7. The Visit Plan – How to set up & edit visits

- With the exception of the registration visit, which already comes with a newly generated patient, all visits need to be set up via the **Next Visit button.**

- A **Planned Visit Date** can be modified and with it the **order of the** (unscheduled) **visits** displayed on a patient's Visit Plan.

- As long as no form within a visit was saved, the visit can be **deleted**.

- In new trials (start in 2021) visits can be **hidden**.

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7a. Video - How to set up and edit visits

7. Editing planned visit dates & deleting visits

- Planned Visit Dates are not part of a patient's data set.

- Modifying them usually only changes where a visit appears on the Visit Plan.

- The order of scheduled visits cannot be changed.

- Placing unscheduled visits incorrectly, might trigger Warnings on date fields within these and surrounding forms.

- A visit can only be deleted as long as none of its forms are saved.

- Deleted visits are just deleted from the patient's Visit Plan, but still available to be set up later again.

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7. Hiding visits

- If visits cannot be deleted anymore, they can be hidden in new trials.
  - Missed out visits that actually should have been performed need to be completed as **'Not Performed'.** Do not hide them!
- Hidden visits are no longer part of the patient's data set and will not be analyzed or validated anymore.
  - Hide only visits not needed within the dataset!
- Hidden visits and their data can be viewed but not modified anymore.
  - Therefore, make sure to resolve all queries prior to hiding a visit!
- Hiding is reversible!
  - Nonetheless, hide with caution, as erroneously hidden visits lead to data loss when not discovered prior to analysis and a late reverse might result in unclean data!

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