

UNMC College of Nursing REDCap eConsent Training Manual

Sponsored by the Center for **C**hronic **I**llness
Self-**M**anagement and **P**revention (CRISP)

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Creating a REDCap Project

1. Go to <https://unmcredcap.unmc.edu> and login in with your UNMC credentials.
2. Click on + **New Project** button on the top bar menu.
3. Fill in the **Project Title**, select the **Purpose** of the project and choose “**empty project (blank slate)**” for the **Project creation option**.
4. Click “Create Project.”
5. Complete the UNMC REDCap Disclaimer questions and fill in secondary owner and department admin name and email (Enter the PI if you are a research assistant, Advisor if you are a student).
6. Click “Submit”.

Contact Information and Status Form

Create this form to collect participants' contact information and **enable** the electronic consent feature. Automatic triggers for longitudinal surveys can also be added here.

1. From Project Home and Design on the left side menu, click on the **Designer** button.

The screenshot shows the REDCap interface for the 'REDCap Training Project' (PID 6892) at the University of Nebraska Medical Center. The left sidebar shows the navigation menu with 'Designer' selected. The main content area displays the 'Main project settings' section, which is currently 'Not started'. The settings include three options, all of which are enabled: 'Use surveys in this project?', 'Use longitudinal data collection with defined events?', and 'Use the MyCap participant-facing mobile app?'. There is also a 'Modify project title, purpose, etc.' button.

2. Click the **+ Create** button in the gray **Data Collection Instruments** box in the center.
3. Click on the **+ Add instrument here** button.
4. Type instrument name (Example: Contact Information and Status) then click **create**. REDCap will refresh the page and there will be a link to the new instrument.
5. Next, click on the **Contact Information and Status** form

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Contact Information and Status	1		Enable	Choose action	

6. Click **Add Field**

Current instrument: **Contact Information and Status** Preview instrument

Variable: record_id

Record ID

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

****Note:** REDCap will automatically create a "Record ID" field as the first field of your first instrument/form.

7. You can add variables of your choice for the **Contact Information and Status** Form. Here are the steps to add "MRN".
 - a. For **Field Types**: Choose "Text Box (Short Text, Number, Date/Time ...)"
 - b. In the **Field Label**: Type "MRN"
 - c. In the **Variable Name**: Type: mrn

- d. Check “Yes” for **Required**
- e. Check “Yes” for **Identifier**
- f. Click “Save”

Note: Retyping the name into the **Variable Name box will enable the label to be transferred to SPSS when you download data. You can check the “Enable auto naming of variable based upon its field label?” box to the right of the **Variable Name** box to assist with this if desired but it may be long.

Add New Field
✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date/Time, ...)

Field Label Use the Rich Text Editor ?

MRN:

Action Tags / Field Annotation (optional)

Learn about: [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)

Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use: Smart Variables Piping Field Embedding

Validation? (optional) ---- None ----

- OR -

-- select ontology service --

Required?* No Yes
* Prompt if field is blank.

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV)

Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

Save
Cancel

8. Repeat step 7 to add **Contact Information** as a header:
 - a. Click **Add Field** above
 - b. For **Field Type**: Choose “Begin New Section (with optional text)”
 - c. In the **Field Label**: Type “Contact Information”
 - d. Click “Save”
 - e. This will create a section header before the variables you are wanting to collect. You can rename “contact information” to what is applicable for the project.
9. Repeat step 7 to add additional variables desired. It is important to add “first name” and “last name” fields if using REDCap’s eConsent option. (For example: **Field Label** “First Name:” and **Variable Name** “first_name”).
10. To add an **email** field (will need an email to be able to send invitations to complete surveys):
 - a. Click **Add Field** below “mrn” field. You can customize where your “email” field will be by selecting the **Add Field** below the variable you want the **email** field to follow.
 - b. For **Field Type**: Choose “Text Box (Short Text, Number, Date/Time, ...)”
 - c. In the **Variable Name**: Type “email”
 - d. In the **Field Label**: Type “Email:”
 - e. For **Validation**: Choose “Email”
 - f. Check “Yes” for **Required**
 - g. Check “Yes” for **Identifier**

h. Click “Save”.

Add New Field ✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date/Time, ...) Codebook

Field Label Use the Rich Text Editor ?

Email:

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)

email Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

Validation? (optional) Email ▼

– OR –

-- select ontology service -- ▼

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV) ▼
Align the position of the field on the page

Field Note (optional) ▼
Small reminder text displayed underneath field

11. To add a phone number field (Optional)

- a. Click **Add Field** below “email” field
- b. For **Field Type**: Choose “Text Box (Short Text, Number, Date/Time, ...)”
- c. For **Field Label**: Type “Phone Number:”
- d. In the **Variable Name**: Type “phone”
- e. For **Validation**: Choose “Phone (North America)”
- f. Check “Yes” for **Required**
- g. Check “Yes” for **Identifier**
- h. Click “Save”.

Add New Field ✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date/Time, ...) Codebook

Field Label Use the Rich Text Editor ?

Phone Number:

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)

phone Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

Validation? (optional) Phone (North America) ▼

– OR –

-- select ontology service -- ▼

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV) ▼
Align the position of the field on the page

Field Note (optional) ▼
Small reminder text displayed underneath field

12. To add a **Consent Pin/Survey Login**: (This is *optional* but **required** if setting up electronic consent via REDCap.)
- Click **Add Field** below phone number field
 - For **Field Type**: Choose “Text Box (Short Text, Number, Date/Time, …)”
 - In the **Variable Name**: Type “consent_pin”
 - In the **Field Label**: Type “Consent Pin”
 - For **Validation**: Choose “Number”
 - Check “Yes” for **Required**
 - Check “No” for **Identifier**
 - Click “Save”

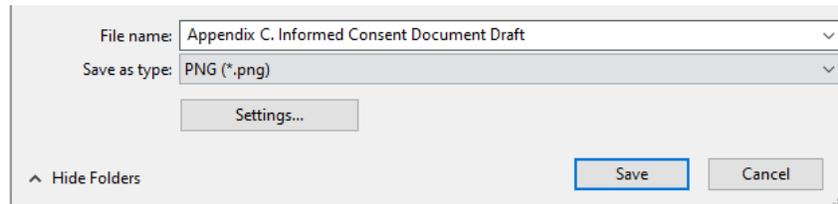
The screenshot shows the 'Edit Field' form in REDCap. The 'Field Type' is set to 'Text Box (Short Text, Number, Date/Time, ...)'. The 'Field Label' is 'Consent Pin'. The 'Variable Name' is 'consent_pin'. The 'Validation?' is set to 'Number'. The 'Required?' checkbox is checked. The 'Identifier?' checkbox is unchecked. The 'Custom Alignment' is set to 'Right / Vertical (RV)'. The 'Field Note' is empty. The 'Action Tags / Field Annotation' section is empty. The 'Save' and 'Cancel' buttons are at the bottom right.

13. To add a **consent email trigger**: (Required if completing Step 11)
- Click **Add Field** below “Consent Pin” field
 - For **Field Type**: Choose “Yes - No”
 - In **Variable Name**: Type “consent_email”
 - In **Field Label**: Type “Send consent email.”
 - Click “Save”.

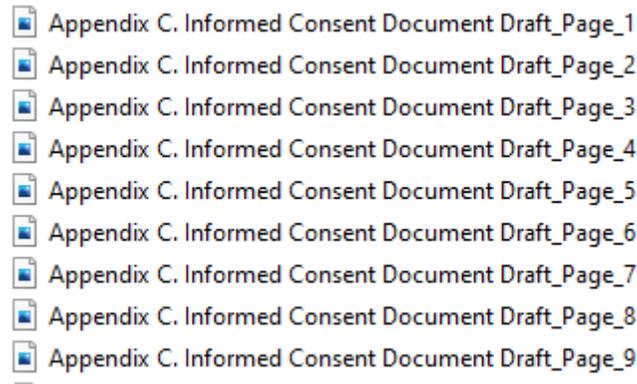
The screenshot shows the 'Edit Field' form in REDCap. The 'Field Type' is set to 'Yes - No'. The 'Field Label' is 'Send consent email'. The 'Variable Name' is 'consent_email'. The 'Required?' checkbox is checked. The 'Identifier?' checkbox is checked. The 'Custom Alignment' is set to 'Right / Vertical (RV)'. The 'Field Note' is empty. The 'Action Tags / Field Annotation' section is empty. The 'Choices (not modifiable)' section shows '1, Yes' and '0, No'. The 'Save' and 'Cancel' buttons are at the bottom right.

Setting Up Electronic Consent

1. If the approved **consent** document is a Word document, open the file and save it as a PDF. Conversion is needed before adding the consent in Step 9 below.
 - a. To convert to a JPEG or a PNG, after saving it as a PDF, click “File” and “Save As” and then “Save as JPEG”. Depending on operating system used, one may have to “Export” the PDF and save as a “JPEG” or a PNG. Name the file name accordingly ([Appendix C. Informed Consent Document Draft](#) is an example).



- b. It will save each page of the consent form as an individual image. Example:



**** Important Note:** A **Contact Information and Status** instrument **must** exist in your project and include fields for the participant’s email address and eConsent pin/password to setup electronic consent.

2. From Project Home and Design on the left side menu, click on **Designer** button.
3. Click the **+ Create** button in the gray **Data Collection Instruments** box.
4. Click on the **+ Add instrument here** button beneath the **Contact Information and Status** instrument name.
5. Type the desired instrument name (Example: Consent Form) then click **create**. REDCap will refresh the page and there will be a link to the new instrument.
6. Click on the **Consent Form** instrument, then **Add Field**.



****Note:** The next step allows for automatic documentation of what version of the consent was used and makes it so that this field is hidden in the consenting process.

7. In **Field Type**, choose “Multiple Choice – Radio Buttons (Single Answer)”.
 - a. For **Field Label**: Type in “Consent version:”
 - b. For **Variable Name**: Type in “econsent_version”
 - c. For **Choices**: Type in “1, Version 1”.
 - d. Check “Yes” for **Required**
 - e. For **Action Tags**: Type in “@HIDDEN-PDF @HIDDEN-SURVEY @READONLY @DEFAULT='1' ” and click **Update & Close Editor**.
 - f. Click “Save”.

****Note** – if the consent is modified during the study, you will need to add more rows for the different versions of the consent.

Edit Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Multiple Choice - Radio Buttons (Single Answer) Codebook

Question Number (optional)
Displayed only on the survey page

Field Label Use the Rich Text Editor ?
Consent version:

Choices (one choice per line) [Copy existing choices](#)
1. Version 1

[How do I manually code the choices?](#)

Action Tags / Field Annotation (optional)
@HIDDEN-PDF @HIDDEN-SURVEY @READONLY @DEFAULT='1'

[Learn about @ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)
econsent_version Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#) [Field Embedding](#)

Required? No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV) ▼
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

Save Cancel

8. To document date and time of consent, click **Add Field** to add a second field below the **Consent Version** field.
 - a. In **Field Type**: Choose “Text Box (Short Text, Number, Date/Time,...)”
 - b. For the **Variable Name**: Type in “econsent_dt_1”
 - c. For the **Field Label**: Type in “Date/time 1”
 - d. For **Validation**: Choose “Datetime w/ seconds (M-D-Y H:M:S)” or choose your preference for format.
 - e. In the **Action Tags**: Type “@NOW @HIDDEN-PDF @HIDDEN” and click **Update & Close Editor**.
 - f. Click “Save”.

****Note**: These actions will automatically fill in the date and time on the PDF print-out of the consent but will be hidden from the survey view.

Edit Field
✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the **Save** button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date/Time, ...)

Question Number (optional)

Displayed only on the survey page

Field Label Use the Rich Text Editor ?

Date/time - 1

Action Tags / Field Annotation (optional)

@NOW @HIDDEN-PDF @HIDDEN

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)

econsent_dt_1 Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

Validation? (optional) Datetime w/ seconds (Y-M-D H:M:S)

Minimum:

Maximum:

Tip for min/max limits: You may pipe a value from another field to set dynamic range limits - e.g., [last_date] or [event_s_time_1][age]. You may also use the word **today** or **now** (not wrapped in quotes) for datetime fields.

-- select ontology service --

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV)

Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

9. Now to upload the consent. Click **Add Field** below the **Date/time** field to add the first page of the consent.
 - a. For the **Field Type**: Choose “Descriptive Text (with optional Image/Video/Audio/File Attachment)”
 - b. In the **Variable Name**: Type “econsent_pg1”
 - c. For the **Attach an image, file, or embedded audio** (under Variable Name on the right side): Click **+ Upload file** and select the .png or .jpeg file of the first page of the consent.
 - d. For the **Display format of attachment on page**: Choose “Inline image/PDF.”
 - e. Click “Save”.

Edit Field
✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the **Save** button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Descriptive Text (with optional Image/Video/Audio/File Attachment)

Question Number (optional)

Displayed only on the survey page

Field Label Use the Rich Text Editor ?

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)

econsent_pg1 Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

Optional media to embed or attach:

Embed media (video, website, survey, etc.)

Provide media URL

e.g. <https://youtube.com/watch?v=E1cCuWMUpz0>, <http://example.com/movie.mp4>, {survey-url[instrument_name]}, <https://redcap.mj.institution.org/surveys/?s=M9HL8L8WWT>

Display format of media: Inline Inside popup

-- or --

Attach an image, file, or embedded audio

[NM-New Consent Page_1\[1\].pdf](#)

Display format of attachment on page:

Link

Inline image/PDF

Audio file (play in embedded player on page)

[Compatibility notice for embedded audio](#)

(Images wider than 600 pixels will be downsized to fit page.)

10. Click **Add Field** *above* the first consent page.
 - a. For the **Field Type**: Choose “Begin New Section (with optional text)” to create a section header.
 - b. Click “Save”.
11. **Repeat** step 9 until all pages of the consent form have been added.
12. OPTIONAL – If you want to add comprehension questions regarding the consent, follow Steps 12-16 below.
 - a. Click **Add Field** below last page of consent.
 - b. For the **Field Type**: Choose “Descriptive Text (with optional Image/Video/Audio/File Attachment)”
 - c. In the **Variable Name**: Type “comp_ques_desc”
 - d. In the **Field Label**: Type in the language below. Replace # with number of comprehension questions.

“The following questions are designed to test your understanding of the Informed Consent Document, which you just downloaded and reviewed with the research team.

(Continued below)

Please complete all # questions.

Correctly answering all # questions will allow you to sign the consent document.

- Electronically sign this form using your finger or mouse.
- Click the "NOW" button to record today's date and time.
- Click the "SUBMIT" button when you are finished.

Once submitted, you will **[enter the next step as applicable to your study here].**”

- e. Check the box next to **Use the Rich Text Editor**. (You may have to remove extra parentheses if you copy and paste text.)
- f. Click “Save”.

Add New Field ✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Descriptive Text (with optional Image/Video/Audio/File Attachment) Codebook

Field Label Use the Rich Text Editor ?

Paragraph B I U </>

The following questions are designed to test your understanding of the Informed Consent Document, which you just downloaded and reviewed with the research team.

Please complete all X questions.

Correctly answering all X questions will allow you to sign the consent document.

- Electronically sign this form using your finger or mouse.
- Click the "NOW" button to record today's date and time.
- Click the "SUBMIT" button when you are finished.

Once submitted, you will complete a baseline symptom survey with the research team. You will then be given further information about your study participation.

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)

comp_ques_desc Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

Optional media to embed or attach:

Embed media (video, website, survey, etc.) ?

Provide media URL

e.g. <https://youtube.com/watch?v=E1cCuWMupz0>, <http://example.com/movie.mp4>, <https://redcap.myinstitution.org/surveys/?s=M9HL8L8WWT>

Display format of media: Inline Inside popup

- or -

Attach an image, file, or embedded audio

Upload file

Display format of attachment on page:

Link

Inline image/PDF

Audio file (play in embedded player on page)

[Compatibility notice for embedded audio](#)

(Images wider than 600 pixels will be downsized to fit page.)

Save
Cancel

13. Click **Add Field** above the comp_ques_desc field.
 - c. For the **Field Type**: Choose "Begin New Section (with optional text)"
 - d. Click "Save".
14. OPTIONAL – Adding consent comprehension questions.
 - a. Click **Add Field** below "comp_ques_desc" field.
 - b. For the **Field Type**: Choose "Multiple Choice – Radio Buttons (Single Answer)"
 - c. In the **Variable Name**: Type "comp_ques_1"
 - d. In the **Field Label**: Type in the first consent comprehension question (See example below).
 - e. For **Required**: Mark "Yes"

Add New Field ✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Multiple Choice - Radio Buttons (Single Answer) Codebook

Field Label Use the Rich Text Editor ?

My participation is voluntary and I can withdraw from the study at any time.

Choices (one choice per line) [Copy existing choices](#)

1. True

2. False

[How do I manually code the choices?](#)

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)

comp_ques_1 Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

Required* No Yes

* Prompt if field is blank

Identifier? No Yes

Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV) ?

Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save
Cancel

- f. In **Choices** (enter in separate lines):
 1, True
 2, False
- g. Click “Save”.
15. OPTIONAL - Add branching logic for correct answers for consent comprehension questions.
- Click **Add Field** below “comp_ques_1”.
 - For the **Field Type**: Choose “Descriptive Text (with optional Image/Video/Audio/File Attachment)”
 - In the **Field Label**: Check the **Use the Rich Text Editor box** and enter the correct answer for your consent comprehension question.

Example: “Participation is voluntary, and you may withdraw from the study at any time for any reason.”

- Click on the **align center** button to center the response. **Uncheck** the Bold font function.
- In the **Variable Name**: Type “comp_ans_1”.
- Click “Save”.

- Click on the  button in the “comp_ans_1 field”.
- Click the circle next to **Drag-N-Drop Logic Builder**.
- Drag the incorrect answer from the box on the left to the box on the right.
- Click “Save”.

****Note:** This message will only display if the participant selects the incorrect answer for the consent comprehension question.

Add/Edit Branching Logic

Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (i.e. show the field only if...). You may specify those conditions in the text box below for the Advanced Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much easier fashion by simply dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that since the advanced logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: **comp_ans_1 - Participation is voluntary and you m...**

Advanced Branching Logic Syntax How to use [Branching Logic](#) [Smart Variables](#) [Special Functions](#)

Show the field ONLY if...

[comp_ques_1] = '2'

Test logic with a record: --select record-- [Clear logic](#)

— OR —

Drag-N-Drop Logic Builder

Displaying field choices for the following data collection instrument:
Consent Form

Field choices from other fields
(drag a choice below to box on right)

- econsent_version = Version 1 (1)
- econsent_dt_1 = (define criteria)
- comp_ques_1 = True (1)
- comp_ques_1 = False (2)
- consent_form_complete = Incomplete (0)
- consent_form_complete = Unverified (1)
- consent_form_complete = Complete (2)

Show the field ONLY if...

ALL below are true
 ANY below are true

comp_ques_1 = False (2) ✖

[Clear logic](#)

Save Cancel

16. Repeat steps 14 and 15 for each consent comprehension question.

17. For the **Signature of Participant**:

- Click **Add Field** below the last consent comprehension question.
- For the **Field Type**: Choose “Signature (draw signature with mouse or finger)”.

Add New Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Signature (draw signature with mouse or finger) [Codebook](#)

Field Label Use the Rich Text Editor [?](#)

SIGNATURE OF PARTICIPANT:

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)
econsent_partsig Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#) [Field Embedding](#)

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV) [?](#)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

Save Cancel

- In the **Variable Name**: Type “econsent_partsig”.
- In the **Field Label**: Type “SIGNATURE OF PARTICIPANT:”
- Mark “Yes” for **Required**
- Click “Save”.

18. To add **Consent Authorization Language**:

- Click **Add Field** above the “econsent_partsig” field.
- For the **Field Type**: Choose “Begin New Section (with optional text)”.
- Check the **Use the Rich Text Editor** box to the right of **Field Label**.
- In the **Field Label**: Enter the desired consent authorization language.

Example:

CONSENT/AUTHORIZATION

I understand the information in this consent form. I have had a chance to read the consent form for this study, or have had it read to me. I have had a chance to think about it, ask questions, and talk about it with others as needed. I give the study chair permission to enroll me on this study. By signing this consent form, I am not giving up any of my legal rights. I will be given a signed copy of this consent document.

- Click “Save”.

Add New Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Codebook

Field Label Use the Rich Text Editor ?

Paragraph
 I understand the information in this consent form. I have had a chance to read the consent form for this study, or have had it read to me. I have had a chance to think about it, ask questions, and talk about it with others as needed. I give the study chair permission to enroll me on this study. By signing this consent form, I am not giving up any of my legal rights. I will be given a signed copy of this consent document.

19. To add a **Participant Printed Name**:

- Click **Add Field** below “econsent_partsig” field.
- For the **Field Type**: Choose “Text Box (Short Text, Number, Date/Time,...)”
- In the **Variable Name**: Type “econsent_partname”.
- In the **Field Label**: Type “PRINTED NAME OF PARTICIPANT:”
- Mark “Yes” for **Required**
- Mark “Yes” for **Identifier**
- Click “Save”.

Add New Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date/Time, ...)

Field Label: PRINTED NAME OF PARTICIPANT: Use the Rich Text Editor ?

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)
econsent_partname Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

Validation? (optional) None

-- OF --
-- select ontology service --

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV)

Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save **Cancel**

20. To add a **Date/Time signed** field.

- Click **Add Field** below “econsent_partname” field.
- For the **Field Type**: Choose “Text Box (Short Text, Number, Date/Time,...)”
- In the **Variable Name**: Type “econsent_partdate”
- In the **Field Label**: Type “DATE:”
- For **Validation**: Choose “Datetime w/ seconds (M-D-Y H:M:S)” or choose your preference for format.
- Mark “Yes” for **Required**.
- Click “Save”.

Add New Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date/Time, ...)

Field Label: DATE: Use the Rich Text Editor ?

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)
econsent_partdate Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

Validation? (optional) Datetime w/ seconds (M-D-Y H:M:S)

Minimum:

Maximum:

Tip for min/max limits: You may pipe a value from another field to set dynamic range limits - e.g., [visit_date] or [event_date:1]age. You may also use the word today or now (not wrapped in quotes) for datetime fields.

-- OF --
-- select ontology service --

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV)

Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save **Cancel**

21. OPTIONAL – Only if using comprehension questions (This will make the signature, printed name of the participant and date **only** appear if all the comprehensive questions are correct):

- Click on the  button in the “econsent_partsig” field.
- Click the circle in the Drag-N-Drop Logic Builder.
- Click the circle to select “ALL below are true” under **Show the field ONLY if...**

- d. Drag correct answers for each comprehension question you created to the box on the right.
- e. **Repeat** these steps for the following fields: “econsent_partname” and “econsent_partdate”

22. To add a section for the **Person Obtaining Consent**:

- a. Click **Add Field** below “econsent_partdate” field.
- b. For the **Field Type**: Choose “Signature (draw signature with mouse or finger)”.
- c. In the **Variable Name**: Type “econsent_staffsig”
- d. In the **Field Label**: Type “SIGNATURE OF PERSON OBTAINING CONSENT:”
- e. In the **Action Tags**: Type “@HIDDEN-SURVEY” and click **Update & Close Editor**.
- f. Click “Save”

Add New Field ✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Signature (draw signature with mouse or finger) Codebook

Field Label Use the Rich Text Editor ?

SIGNATURE OF PERSON OBTAINING CONSENT:

Variable Name (utilized in logic, calcs, and exports)
econsent_staffsig Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV) ▼
Align the position of the field on the page

Field Note (optional) []
Small reminder text displayed underneath field

Action Tags / Field Annotation (optional)
@HIDDEN-SURVEY

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Save **Cancel**

23. To add **Language for Person Obtaining Consent**:

- a. Click **Add Field** above “econsent_staffsig” field.
- b. For the **Field Type**: Choose “Begin New Section (with optional text)”.
- c. Check the **Use the Rich Text Editor** box.
- d. Add desired language in the **Field Label** box.

Example:

PERSON OBTAINING CONSENT

I have discussed this research study with the participant and/or his or her authorized representative, using language that is understandable and appropriate. I believe that I have fully informed this participant of the nature of this study and its possible benefits and risks, and that the participant understood this explanation. **Protocol # (ADD IRB NUMBER HERE).**

e. Click “Save”

Add New Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Codebook

Field Label Use the Rich Text Editor ?

Paragraph

Save **Cancel**

24. To add a **Printed Name of Person Obtaining Consent**:

- Click **Add Field** below “econsent_staffsig” field.
- For the **Field Type**: Choose “Text Box (Short Text, Number, Date/Time, ...)”
- In the **Variable Name**: Type “econsent_staffname”
- In the **Field Label**: Type “PRINTED NAME OF PERSON OBTAINING CONSENT:”
- In the **Action Tags**: Type “@HIDDEN-SURVEY” and click on **Update & Close Editor**.
- Click “Save”.

Add New Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Codebook

Field Label Use the Rich Text Editor ?

PRINTED NAME OF PERSON OBTAINING CONSENT:

Variable Name (utilized in logic, calcs, and exports)
 Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#) [Field Embedding](#)

Validation? (optional)
 -- OR --

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Save **Cancel**

25. To add a **Date/Time Signed** field for the witness:

- Click **Add Field** Below “econsent_staffname” field
- For the **Field Type**: Choose “Text Box (Short Text, Number, Date/Time, ...)”
- In the **Variable Name**: Type “econsent_staffdate”
- In the **Field Label**: Type “DATE:”

- e. For **Validation**: Choose “Datetime w/ seconds (M-D-Y H:M:S)”
- f. In the **Action Tags**: Type “@HIDDEN-SURVEY” and click **Update & Close Editor**.
- g. Click “Save”

Add New Field ✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date/Time, ...) [Codebook](#)

Field Label Use the Rich Text Editor [?](#)

DATE:

Action Tags / Field Annotation (optional)

@HIDDEN-SURVEY

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)

econsent_staffdate Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

Validation? (optional) Datetime w/ seconds (M-D-Y H:M:S) ▼

Minimum:

Maximum:

Tip for min/max limits: You may pipe a value from another field to set dynamic range limits - e.g., [visit_date] or [event_1_amn_1][age]. You may also use the word **today** or **now** (not wrapped in quotes) for datetime fields.

-- or --

-- select ontology service -- ▼

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV) ▼
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

EConsent Survey Login

1. EConsent Survey Login requires participants to authenticate (log in) to your surveys before being allowed to view and complete the surveys. To set this up, click on the **Designer** button in the **Project Home and Design** section on the left side menu.
2. Click “Survey Login” at the right of the Designer page under “Survey options”

The screenshot shows the 'Data Collection Instruments' section on the left with buttons for '+ Create', 'Import', and 'Upload'. On the right, under 'Survey options', there are buttons for 'Form Display Logic', 'Survey Queue', 'Auto Invitation options', and 'Survey Login' (highlighted in yellow).

3. For **Enable survey login?**: Choose “Enabled”
4. For **Login field #1**: Choose “consent_pin: ‘Consent Pin’ ”
5. For **Apply the survey login to all surveys in project?**: Choose “only to selected surveys”
6. You can customize how many failed login attempts before locking a participant out if desired.
7. Type a custom error message: (See example below)
8. Click “Save”

🔑 **Survey Login** ✕

You may enable a Survey Login page on one or more surveys that will force your survey respondents to authenticate (log in) on your surveys before they are allowed to view and complete the survey. [Tell me more](#)

Below, select the fields that you wish to serve as the login fields for the respondent to enter, as well as several other settings that control how the survey login is applied to the surveys in your project. NOTE: Once a respondent has logged in to a survey, they will not be prompted to enter their login credentials again if they return to that survey or begin another survey using the survey login within the following 30 minutes.

🔑 Enable Survey Login?	Enabled ▾
Fields to display on the survey login form	
Login field #1 <small>🔗 Add another login field</small>	consent_pin "Consent Pin:" ▾
Customizations for survey login	
Minimum number of fields above that are required for login	1 ▾
Apply the survey login to all surveys in project?	Only selected surveys (set on Survey Settings ▾)
Custom error message: Provide a custom error message that will be displayed on the survey login form for when the user experiences issues, such as not being able to log in successfully, so that they may contact you for help. <small>EXAMPLE: "If you have any trouble logging in to the survey, please contact survey_admin@myinstitution.edu for help."</small>	<div style="border: 1px solid #ccc; padding: 5px;"> If you have trouble logging into this survey please contact the study team at: Phone: Email: </div> <small>HTML may be used in order to add links or to add style to text.</small>
Security settings for survey login (optional)	
Number of failed login attempts before respondent is locked out for a specified amount of time, which is set below.	0 <input type="text"/> 0 = Disabled
Amount of time respondent will be locked out after having failed login attempts exceeding the limit set above.	0 <input type="text"/> Minutes, 0 = Disabled

Save
Cancel

EConsent Survey Settings

- From the **Project Home and Design** on the left side of the screen, click on the “Designer” and then click “enable” to enable the eConsent (or title of your consent) as a survey. Now you can edit the appearance of the survey and how it will be displayed to the participant.

Data Collection Instruments		Form options:		Survey options:	
+ Create	a new instrument from scratch	Form Display Logic		Survey Queue	Auto Invitation options
Import	a new instrument from the official REDCap Instrument Library			Survey Login	Survey Notifications
Upload	instrument ZIP file from another project/user or external libraries				
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Contact Information and Status	6		Enable	Choose action	
Screening	12		Enable	Choose action	
Consent Form	14			Choose action	Survey settings + Automated Invitations
Test	0		Enable	Choose action	

- Clear survey title and survey instruction under **Basic Survey Options**.
- In **Survey Design Options**, update survey design options per your institutions branding guidelines (i.e. logo, theme/colors)
 - Logo** (save the image below [final file needs to be saved as a JPEG or PNG to be uploaded] or you can request a logo at <https://brandwise.unmc.edu/unmc/logo/>) and upload it to REDCap for the **Logo** option



- Leave the default settings for **radio buttons** = “standard radio buttons and checkboxes”, **size of survey text** = “large” and **font of survey text** = “open sans”.
- For **survey theme**: To make a customized UNMC theme, you will need to click on “Customize”. To choose colors according to UNMC branding, see the following screenshots for each custom color code.
 - In the **General** section on the left-hand side, for **Page Background**: Click on the down arrow next to the color, and default setting should state **#1a1a1a**. If not, change it to **#1a1a1a**.

The screenshot shows the 'Survey Design Options' interface. The 'General' section is active, showing 'Page Background Color' set to a dark grey/black color. A color picker is open, showing a spectrum of colors, with the hex code #1a1a1a highlighted. Below the color picker, there is a text input field containing '#1a1a1a' and a 'choose' button. The 'Survey title and instructions' section is also visible, with 'Text Color' set to black. The 'Section headers' section shows 'Text Color' and 'Background Color' both set to red. The 'Survey questions' section shows 'Text Color' and 'Background' both set to black. A preview of the survey design is shown at the bottom, featuring a red section header that reads 'This is a section header to divide the survey page into sections.'

- ii. For **Button Text Color**: Keep it at **#000000** or change it to **#000000** if it is not.

Custom survey theme options:

General:	Survey title and instructions:	Section headers:
Page Background Color <input type="color" value="#000000"/>	Text Color <input type="color" value="#000000"/>	Text Color <input type="color" value="#000000"/>
Button Text Color <input type="color" value="#000000"/>	Background Color <input type="color" value="#000000"/>	Background Color <input type="color" value="#000000"/>

[Save custom theme](#)

Survey design preview (sample survey):

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the survey, as well as what to expect once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

This is a section header to divide the survey page into sections.

- iii. For **Text Color** under **Survey title and instructions**: Keep it at **#000000**.

Custom survey theme options:

General:	Survey title and instructions:	Section headers:	Survey questions:
Page Background Color <input type="color" value="#000000"/>	Text Color <input type="color" value="#000000"/>	Text Color <input type="color" value="#000000"/>	Text Color <input type="color" value="#000000"/>
Button Text Color <input type="color" value="#000000"/>	Background Color <input type="color" value="#000000"/>	Background Color <input type="color" value="#000000"/>	Background Color <input type="color" value="#000000"/>

[Save custom theme](#) [Manage saved themes](#)

Survey design preview (sample survey):

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the survey, as well as what to expect once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

This is a section header to divide the survey page into sections.

[Expand](#)

- iv. For **Background Color** under **Survey title and instructions**: Keep it at #ffffff.

Custom survey theme options:

General:	Survey title and instructions:	Section headers:	Survey questions:
Page Background Color <input type="text" value=""/>	Text Color <input type="text" value=""/>	Text Color <input type="text" value=""/>	Text Color <input type="text" value=""/>
Button Text Color <input type="text" value=""/>	Background Color <input type="text" value=""/>	Background Color <input type="text" value=""/>	Background Color <input type="text" value=""/>

Survey design preview (sample survey):

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant as well as what to expect once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

This is a section header to divide the survey page into sections.

[Expand](#)

- v. For **Text Color** under **Section headers**: Change it to white. Type #ffffff (there are six of them to type).

Custom survey theme options:

General:	Survey title and instructions:	Section headers:	Survey questions:
Page Background Color <input type="text" value=""/>	Text Color <input type="text" value=""/>	Text Color <input type="text" value=""/>	Text Color <input type="text" value=""/>
Button Text Color <input type="text" value=""/>	Background Color <input type="text" value=""/>	Background Color <input type="text" value=""/>	Background Color <input type="text" value=""/>

Survey design preview (sample survey):

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant as well as what to expect once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

This is a section header to divide the survey page into sections.

[Expand](#)

- vi. For **Background Color** under **Section headers**: Change it to UNMC red. Type #ad122a.

Custom survey theme options:

General:	Survey title and instructions:	Section headers:	Survey questions:
Page Background Color <input type="text" value=""/>	Text Color <input type="text" value=""/>	Text Color <input type="text" value=""/>	Text Color <input type="text" value=""/>
Button Text Color <input type="text" value=""/>	Background Color <input type="text" value=""/>	Background Color <input type="text" value=""/>	Background Color <input type="text" value=""/>

Survey design preview (sample survey):

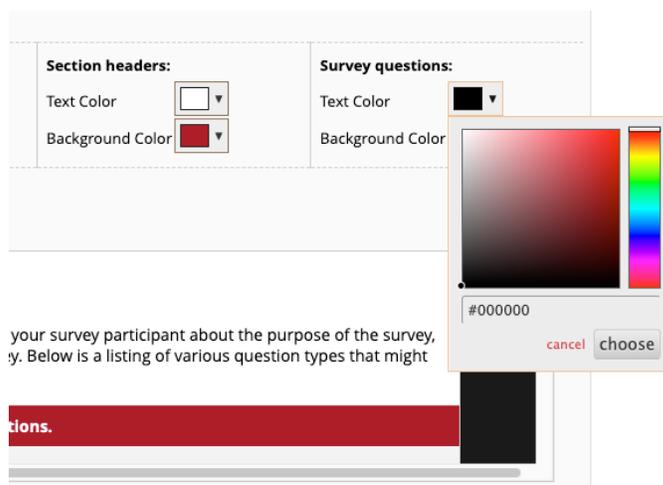
This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant as well as what to expect once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

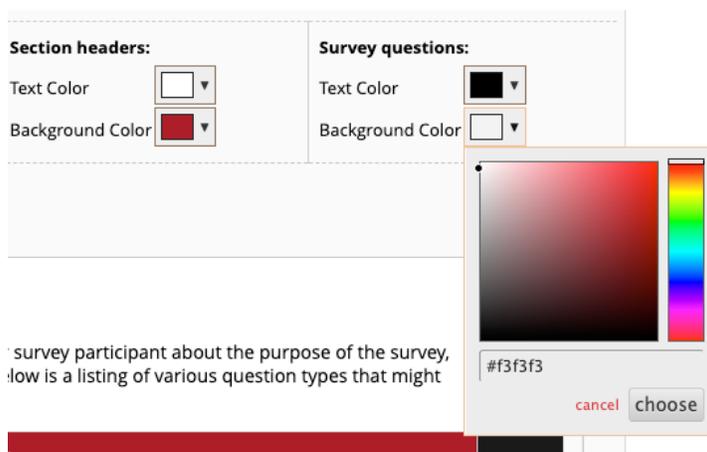
This is a section header to divide the survey page into sections.

[Expand](#)

vii. For **Text Color** under **Survey questions**: Keep it at **#000000**.



viii. For **Background** under **Survey questions**: Keep it at **#f3f3f3**.



- d. After entering colors and logo, be sure to save this theme (click on the **Save custom theme** below the **General** section on the left-hand side and name the theme as desired).
 - e. **Note:** You will apply this custom theme to all surveys once you have created all instruments for your project and for future projects.
4. Now in **Survey Customizations**: Update question numbering to "Custom numbered."
 5. For **Pagination**, choose "Single page."
 6. For **Allow participants to download a PDF of their responses at end of survey?**, choose default setting "no." If fields have the action tag **@HIDDEN**, that field/s will not be displayed in the PDF.

7. For **survey-specific email invitation field**, choose 'email "email".'

Survey-specific email invitation field
 Designate an email field for sending survey invitations for this survey only ?

✓ -- select a field --
 Contact Information and Status
 email "Email:"

Level email invitation
 participant List. Also, i
 be used instead.

8. For **'Required' fields**, display the red 'must provide value' text on the survey page?, choose "no".

* For 'Required' fields, display the red 'must provide value' text on the survey page?

✓ No
 Yes
 Display only the red asterisk

ing text beneath all 'Required' fields: * must provide value

Display the first three options at the top of

9. Keep the default setting as "disabled" for **allowing survey respondents to view aggregate survey results after completing the survey?** and **text to speech functionality**.
10. Scroll down until **Enforce 'Survey Login'?** in **Survey Access**, and select "Yes".

Enforce 'Survey Login'?
 (All respondents will be required to enter login credentials before beginning the survey and also any time they return to the survey again.)

No
 ✓ Yes

If set to 'Yes', this survey will employ the Survey Login feature according to its settings defined in

11. For the rest of **Survey Access**: Limiters are not necessary (response limit, time limit, survey expiration, etc). Do not enable **Save & Return Later** option as the **Survey Login** will override this setting.
12. For **Survey Termination Options**, enable "auto-continue to continue to next survey?" if desired (baseline surveys).
13. For **Survey Completion Text**, you can delete this default text if desired.
14. Please do customize options accordingly.
15. Click "Save Changes"

To enable and modify **Auto-Archiver + eConsent Framework** (to store signed consent files in the REDCap "File Repository" for the project and allow for witnesses to sign consent after the participant signs):

1. Click on the **Designer** button in the **Project Home and Design** section on the left-side menu.
2. Under form options on the right-hand side, click on **e-Consent and PDF Snapshots**. There are 2 tabs on the top "e-Consent Framework and PDF Snapshots of Records".
3. Click on "e-Consent Framework" and then click on **"Enable the e-Consent Framework for a survey"**. (The consent form needs to be 'enabled' before this step. If it has not, click on "Back to Online Designer" and click enable next to the consent form that will be used. It will have a 'check mark on a green shield' icon if it is already enabled.)
4. Under **Primary settings**, check the box next to "Allow eConsent responses to be edited by users?"
 - a. Select "first_name "First Name:" for the **First name field** and "last_name "Last Name:" for the **Last name field**.

- b. Under “**Force signature fields to be erased....**”, select ‘econsent_partisig “SIGNATURE OF PARTICIPANT:” ’ If the participant happens to go back and change a previous answer, this option will have the participant resign the consent form.
5. Click on “Save settings”.

Modify e-Consent Settings

e-Consent settings for survey “Consent Form” (consent_form)

Use the settings below for setting up the e-Consent Framework for this survey. e-Consent often requires obtaining the consenting participant’s name (and sometimes their date of birth) on the final consent form as documentation of their identity. Below you may select fields used to capture that info, in which the values for those fields will be automatically inserted into the footer of the PDF consent form that the participant will review at the end the survey. And then afterwards, that PDF “hard-copy” will be archived in the File Repository (with the additional option to also store the PDF in a File Upload field). Other e-Consent related options can be set below, such as setting a custom tag/category, custom label for the PDF header, location(s) to save the signed e-Consent snapshot, and the file name format of the snapshots being stored.

Primary settings

Allow e-Consent responses to be edited by users?

First name field:

Last name field:

Note: If you are using a single field to capture whole name, you may select it for either first/last name above while leaving the other name field unselected.

Additional settings

Date of birth field:

Custom tag/category for PDF footer:

Note: This should be static text only.

Custom label for PDF header:

Note: Piping may be utilized, including the use of Smart Variables. [Codebook](#) [Smart Variables](#)

Force signature field(s) to be erased if participant clicks Previous Page button while on the certification page?

Select a field below that serves as a signature field in this survey. It could be a free-form text field, a signature field, or a number field (e.g., to collect a PIN), and it must be a Required field. If any fields are selected below, then if the participant gets to the last page of the survey where it asks them to certify their responses, if they then choose to click the Previous Page button, it will erase the value of these signature fields, thus forcing them to ‘sign’ the field(s) again before completing the survey. If you do not want this behavior, do not select any fields below. You may use up to five signature fields.

Signature field #1:

6. Next click on the tab “PDF Snapshots of Records.” This will add a trigger for REDCap to capture a PDF of a record of your choice (need for to activie this function to store a copy of the consent).
7. For **Step 1: Trigger conditions**, choose “Consent Form” under **Every time the following survey is completed**.
8. For **Step 2: Scope of the snapshot**, click on the yellow pencil icon and select only “Consent Form”. Click “Update”

Add/Edit Trigger for PDF Snapshot

STEP 1: Trigger conditions - Define when the snapshot will be triggered.

Every time the following survey is completed:

-- OR --

When the following logic becomes true (only once per record): [How to use this](#)

(e.g., [age] > 30 and [sex] = "1")

STEP 2: Scope of the snapshot

Click the pencil in the text box below to select specific instruments/events to be included in the PDF.

[\[All instruments\]](#)

Select instruments:

[select all](#) [deselect all](#)

Instruments:

Contact Information and Status

Consent Form

STEP 3: Location(s) to save the snapshot

Save to File Repository

Save to specified field:

9. For **Step 3: Location(s) to save the snapshot**: Keep the checkmark next to “Save to File Repository”.
10. For **Step 4: Snapshot file name**, you can setup the file name to match the participant’s name so downloaded consent files are easier to locate for a participant. Type in **[last_name]_[first_name]_record[consent]** if this step is applicable.
11. Click “Save”.

STEP 2: Scope of the snapshot

Click the pencil in the text box below to select specific instruments/events to be included in the PDF.

🔗 TIP: Leave blank to include all instruments/events (i.e., the entire record's data).

Save as Compact PDF (includes only fields with saved data)

Store the translated version of the PDF (if using Multi-language Management)

STEP 3: Location(s) to save the snapshot

Save to File Repository

Save to specified field:

STEP 4: Snapshot file name

Use static text or piping to customize the prefix of the snapshot file's name when it gets stored. Note: The file name will always be appended with the date/time when the snapshot was saved.

File name:

e.g., [last_name]_[first_name]_[dob]_record[record-name]

Other survey settings

1. Allow eConsent to be edited by users so research staff can return and sign after participant completes eConsent.
 - a. On the **Applications** section on the left-hand side, Click on **User Rights**
 - b. Click on the staff member’s UserName that needs to be edited and then click on “Edit user privileges”. This is also where you can **remove the user** if applicable.
 - c. Check the checkbox under “Edit Survey Responses” in line with the “Consent Form”
 - d. There are Basic Privileges to the left-hand side that can be modified as well for the username selected.
 - e. Click “Save Changes”.

Privileges for Viewing and Exporting Data								
Data Viewing Rights pertain to a user's ability to view or edit data on pages in the project (e.g., data entry forms, reports). Users with 'No Access' Data Viewing Rights for a given instrument will not be able to view that instrument for any record, nor will they be able to view fields from that instrument on a report. Data Export Rights pertain to a user's ability to export data from the project, whether through the Data Exports page, API, Mobile App, or in PDFs of instruments containing record data. Note: Data Viewing Rights and Data Export Rights are completely separate and do not impact one another.								
	Data Viewing Rights				Data Export Rights			
	No Access (Hidden)	Read Only	View & Edit	Edit survey responses	No Access	De-Identified*	Remove All Identifier Fields	Full Data Set
Contact Information and Status	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Screening	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Consent Form (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Test	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Setting Up Automated Survey Invitation for eConsent

1. In **Designer** (left-hand side), click on “Automated Survey Invitations” button for the survey needed to be automated (helpful if wanting to send out repeated measures).

REDCap Training Project PID 6892

Project Home Project Setup Online Designer Data Dictionary Codebook

VIDEO: How to use this page Create snapshot of instruments Last snapshot: never ?

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser.
NOTE: While in development status, all field changes will take effect immediately in real time.

Data Collection Instruments

Form options: Form Display Logic Survey Queue Auto Invitation options Survey Login Survey Notifications

+ Create a new instrument from scratch
+ Import a new instrument from the official REDCap Instrument Library
+ Upload Instrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Contact Information and Status	6		Enable	Choose action	
Screening	12		Enable	Choose action	
Consent Form	14			Choose action	Survey settings + Automated Invitations
Test	0		Enable	Choose action	

2. Be sure the default “Active” is selected.

Define Conditions for Automated Survey Invitations (ASI)

In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (i

Activate automated invitations for this survey?

Survey title: Consent Form

"Active" must be selected in order for automated survey invitations to be triggered and sent using the conditions specified in this popup. You may make it Not Active (and vice versa) at any point in the future. ?

Active Not Active

3. Complete **Step 1**:
 - a. Enter the PI's email in the “From” field
 - b. Change subject to include the name of your study “X (enter name) Study Consent Form”
 - c. Optional -
Modify survey invitation text
(See example below)

From: Display name (optional) gisele.tlusty@unmc.edu
(select any project user to be the 'Sender')

To: [All participants who meet the conditions defined]

Subject: X Study Consent Form

Send test email

Open Sans Paragraph 10pt B I U A

Thank you for your interest in participating in the X Study,
You may open the consent form in your web browser by clicking the link below:
[survey-link]
If the link above does not work, try copying the link below into your web browser:
[survey-url]
This link is unique to you and should not be forwarded to others.

4. Complete **Step 2**:

- a. Check box for “When following logic becomes true

STEP 2: Conditions

Specify conditions for sending invitations:

When the following survey is completed:
 --- select a survey ---

AND

When the following logic becomes true:

- b. Enter the following logic: `([consent_email] = 1)`

Logic Editor

Use the text box below to compose your logic, calculation, action tags, etc. If you need more space, click the Fullscreen Mode button to enlarge the text box. When you are finished, click the 'Update' button to minimize the Editor window. Learn how to use [Smart Variables](#) [Special Functions](#) [Action Tags](#) or open the [Codebook](#)

`([consent_email] = 1)`

5. Complete **Step 3**:

- a. Select “Send immediately”

STEP 3: When to send invitations AFTER conditions are met

Send immediately

Send on next -- select day -- at time H:M

Send the invitation days hours minutes
 after the exact time that the automated invitation was triggered

Send at exact date/time: M/D/Y H:M

6. Click “Update & close editor or Save”

Enabling Email Communication for Surveys

1. Click on “Project Setup” either on the tab on the top or on the left-hand side near the top.
2. Under the third group **Enable optional modules and customizations**: click “Enable” for “Designate an email field for communications (including survey invitations and alerts)”

Enable optional modules and customizations

Optional

I'm done!

Enable Repeating instruments ?

Disable Auto-numbering for records ?

Enable Scheduling module (longitudinal only) ?

Enable Randomization module ?

Enable Designate an email field for communications (including survey invitations and alerts) ?

Enable Twilio SMS and Voice Call services for surveys and alerts ?

Enable Mosio SMS services for surveys and alerts ?

Enable SendGrid Template email services for Alerts & Notifications ?

Additional customizations

3. Choose “email” for the designated field
4. Click “Save”

Designate an email field for communications (including survey invitations and alerts)

Choose an email field to use for invitations to survey participants:

✓ -- select a field --

Contact Information and Status

email "Email:"

Direct specific email communications to the email address provided. This includes sending survey invitations, automated survey invitations, survey confirmation emails, and Alerts & Notifications. If a field is designated for that purpose, then any records in your project that have an email address captured for that particular field will have that email address show up as the participant's email address in the Participant List (unless an email address has already been entered for that participant in the Participant List directly).

Testing your project

Be sure to **fully test your project** prior to sending it to production by creating sample participants and testing the consent functionality. Sending the consent to yourself is a great way to test your project.

1. Click on **Add / Edit Records**. Click on **+ Add new record**.

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, click the button below.

NOTICE: This project is currently in Development status. **Real data should NOT be entered** until the project has been moved to Production status.

Total records: 0	
Choose an existing Record ID	-- select record --
+ Add new record	

Data Search	
Choose a field to search <small>(excludes multiple choice fields)</small>	All fields
Search query <small>Begin typing to search the project data, then click an item in the list to navigate to that record.</small>	

2. The next screen will display the **Data Collection Instruments** that are available for participants to complete. Click on the **grey round circle** next to “Contact Information and Status”. (If it is green, it is already done). Enter in random information for the fields except for the “Consent Pin” (will need to reenter the same pin to test the consent) and “Email” fields (need an accessible **email** test the consent). Choose “Complete” and click on “Save & Exit Form”

REDCap Training Project PID 6892 [Save](#)
[Cancel](#)

Actions: [Modify instrument](#) [Download PDF of instrument\(s\)](#) [Video: Basic data entry](#)

Contact Information and Status

Adding new Record ID 1.

Record ID 1

Contact Information

MRN * must provide value

First Name: * must provide value

Last Name: * must provide value

Email * must provide value

Phone Number: * must provide value

Consent Pin * must provide value

Send consent email: Yes No [reset](#)

Form Status

Complete?

[Save & Exit Form](#) [Save & ...](#)
[Cancel](#)

- Now click on the grey circle next to “Consent Form”. On the top right of the consent, there is an **Invitation status** option. Click on “Survey options”. Then “[Compose survey invitation](#)”.



- Keep the default “Immediately” selected for **When should this email be sent?**
- Select the **emails** applicable for the “To” and “From” fields. Select the **correct email for the “To” field to be able to test out the consent form.**
- Add a Subject title.
- Click “Send Invitation”
- Click “Leave page”
- In one’s email account, click on the [Consent Form](#) link in the email sent.
- Enter the “Consent Pin” (the example uses ‘1012’). Complete the survey. Go back and modify any spelling errors and applicable changes if necessary, before moving the project to “Production” status.

Completing the eConsent form with the Participant

In-Person Consenting

1. Open the “Contact Information and Status” form.
 - a. Ask the participant for the PIN or Password that they would like to use to access the eConsent form. The PIN/Password field is not validated so the participant can use as many or as few digits, letters, or characters as they would like. The PIN/Password should be memorable for the participant to remember but should not contain any identifiable information (birthday, etc.).

Contact Information and Status

 Editing existing Record ID 1.

Record ID 1
To rename the record, see the record action drop-down at top of the [Record Home Page](#).

MRN:
* must provide value

Email:
* must provide value

Phone Number:

Consent Pin:
* must provide value

- b. Enter “no” in “Send consent email” field.
 - c. Leave the form status as “Incomplete” and then click “Save and Exit Form.”
2. Open the “Consent Form” by clicking on the grey circle.

Record ID 1

 Data Collection Instrument	Status
Contact Information and Status	
Screening	
Consent Form (survey)	
Test	

3. Click “Survey options” at the top of the eConsent form and then “Open survey” and give the iPad/laptop to participant.

Consent Form

Invitation status: 

Survey options 

 Editing existing Record ID 1.

Record ID 1

Consent Version:  Version 1

 Open survey

 Log out +  Open survey

 Compose survey invitation

 Survey Access Code +  QR Code

----- PT NAME

4. REDCap will prompt the participant for the PIN/Password that they just set up.

5. Review contents of the consent form with participant.
 6. Have participant complete the comprehension questions.
 - Signature fields will not open unless all the comprehension questions are answered correctly. Popups have been added if a participant answers a question incorrectly.

7. Have participant enter their name, signature, and today's date at the bottom of the eConsent form.
 - If the participant requests additional time to review the consent, that is okay if all the above steps have been completed.

8. Inform the participant that once they sign and date, the survey will auto-continue into the remaining baseline surveys (if this step was completed above).

***Continue to “Adding Staff Signature and Downloading PDF of Consent” below

Over the Phone Consenting

1. Open “Contact Information and Status” form.
 - a. Ask the participant for the PIN or Password that they would like to use to access the eConsent form. The PIN/Password field is not validated so the participant can use as many or as few digits, letters, or characters as they would like. The PIN/Password should be memorable for the participant to remember but should not contain any identifiable information (birthday, etc.).

Contact Information and Status

 Editing existing Record ID 1.

Record ID	1 <small>To rename the record, see the record action drop-down at top of the Record Home Page.</small>
MRN: <small>* must provide value</small>	<input type="text" value="123456"/>
Email: <small>* must provide value</small>	<input type="text" value="gisele.tlusty@unmc.edu"/>
Phone Number:	<input type="text" value="(402) 456-7890"/>
Consent Pin: <small>* must provide value</small>	<input type="text" value="456"/>

- b. Enter “yes” in the “Send consent email” field.
 - c. Leave the form status as “Incomplete” and then click “Save & Exit Form.”
 - i. Once the Contact Information and Status Form is saved, an email containing a link to the eConsent form will be **immediately** sent to the participant’s email.
2. Direct the participant to their email and to click the link in the email they just received.

X Study Consent Form



Tlusty, Gisele C

To:  Tlusty, Gisele C

Tue 7/30/2024 3:23 PM

Thank you for your interest in participating in the X Study.

You may open the consent form in your web browser by clicking the link below:

[Consent Form](#)

If the link above does not work, try copying the link below into your web browser:

<https://unmcrcdcap.unmc.edu/redcap/surveys/?s=nSAaYBJW3oNWJBYa>

This link is unique to you and should not be forwarded to others.

- REDCap will prompt the participant for their PIN/Password that they just set up.

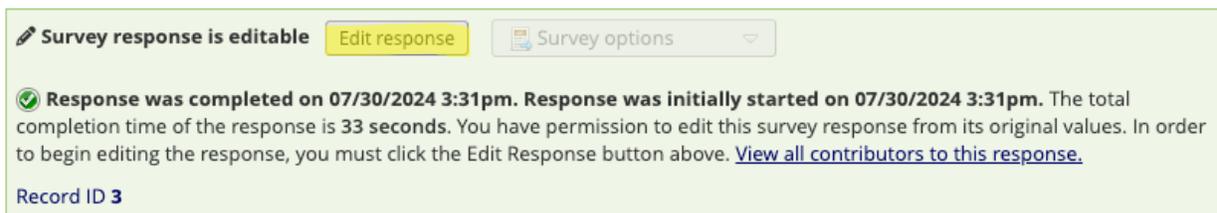
- Review contents of the consent form with participant.
- Have participant complete the comprehension questions.
 - Signature fields will not open unless all the comprehension questions are answered correctly. Popups have been added if a participant answers a question incorrectly.

- Have participant enter their name, signature, and today's date at the bottom of the eConsent form.
 - If the participant requests additional time to review the consent, that is okay if all the above steps have been completed.
- Inform the participant that once they sign and date, the survey will auto-continue into the remaining baseline surveys (if this step was completed above).

Adding Staff Signature and Downloading PDF of Consent

1. Return to eConsent form after participant has completed it and add staff name and signature.
 - a. At the top of the “Consent Form,” click on “Edit Response.”

Consent Form

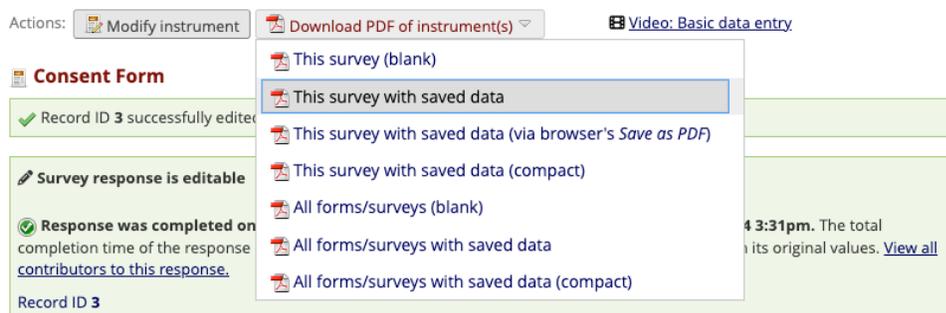


Survey response is editable [Edit response](#) [Survey options](#)

Response was completed on 07/30/2024 3:31pm. Response was initially started on 07/30/2024 3:31pm. The total completion time of the response is 33 seconds. You have permission to edit this survey response from its original values. In order to begin editing the response, you must click the Edit Response button above. [View all contributors to this response.](#)

Record ID 3

- b. Scroll down to the “Person Obtaining Consent” section and add staff name, signature, and date/time.
 - i. Leave form status as “Complete” and then click “Save & Stay”
 2. To download completed eConsent form, scroll back to the top of the “Consent Form.”
 - a. Click “Download PDF of Instrument(s)” and the “This survey with saved data.”



Actions: [Modify instrument](#) [Download PDF of instrument\(s\)](#) [Video: Basic data entry](#)

Consent Form

Record ID 3 successfully edited

Survey response is editable

Response was completed on completion time of the response [contributors to this response.](#)

Record ID 3

4 3:31pm. The total completion time of the response is 33 seconds. You have permission to edit this survey response from its original values. [View all](#)

Download PDF of instrument(s) dropdown menu:

- This survey (blank)
- This survey with saved data
- This survey with saved data (via browser's Save as PDF)
- This survey with saved data (compact)
- All forms/surveys (blank)
- All forms/surveys with saved data
- All forms/surveys with saved data (compact)

- b. A PDF will download. Save the PDF per protocol procedures.