

eConsenting Using REDCap – Instructions

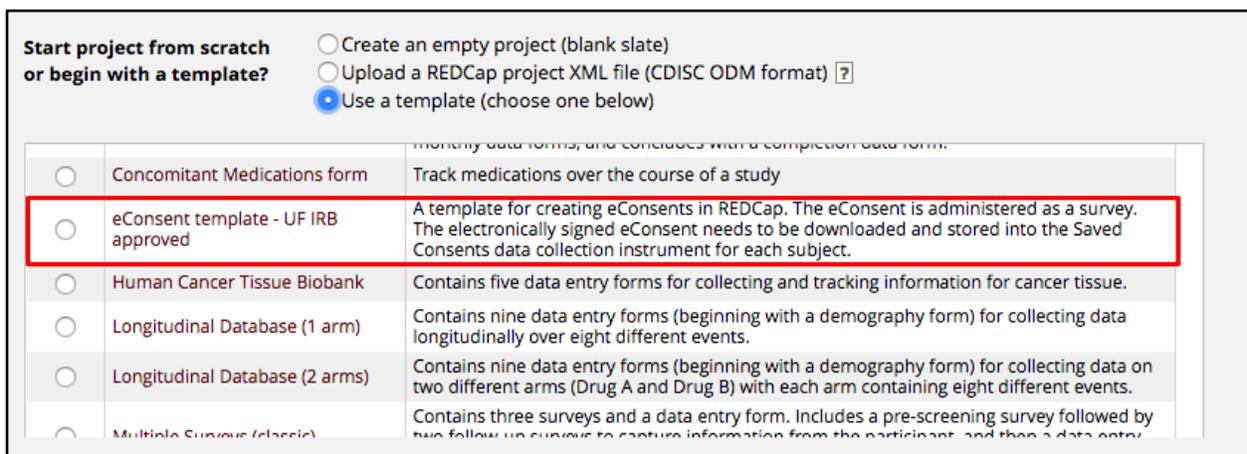
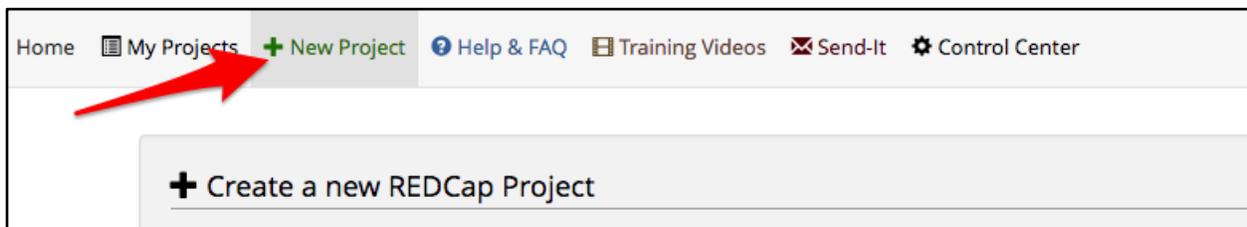
Introduction

This guide describes how you can use REDCap to administer electronic Informed Consents. Each consent is implemented in REDCap using the survey functionality. The survey functionality presents the pages of the traditional paper consent, including the IRB stamp, to a potential research subject, then uses REDCap to present the questions and signature fields that appear on the paper consent. Once an individual agrees to participate, electronically signs the informed consent, then hits submit, a PDF of the completed consent can be automatically generated and saved to a REDCap form to preserve the exact consent text along with the research subject's responses.

You can view an example of such an eConsent here:

<https://redcap.ctsi.ufl.edu/redcap/surveys/?s=F8YYC9AC7D>

You can also use the eConsent project template when creating a new REDCap project, that you would then modify for your project needs, such as uploading your project-specific Informed Consent and adding additional data fields to collect the subject's responses that are relevant to your study's ICF.



You can use the process described below to make a stand alone consent or make the consent the first step in a larger project that includes data collection forms and other surveys.

Requirements

Once you obtain IRB approval to do eConsenting, to make an eConsent, you'll need to create two REDCap forms: 1) The eConsent (enabled as a survey), and 2) a traditional case report form that will store the signed, downloaded copy of the eConsent after it has been submitted by the subject.

You will also need an electronic PDF of the IRB-approved and stamped informed consent form, which can be obtained in *myIRB* under *Stamped Documents*.

Instructions for Creating the eConsent form:

- 1) Obtain an electronic PDF version of the stamped, IRB-approved Informed Consent, which can be found in *myIRB* under *Stamped Documents*, and save it to your computer.
- 2) Open the PDF file of the Informed Consent on your computer and save it as a JPEG or PNG file (this will make each page of the Informed Consent its own separate image). Save these JPEG or PNG files to your computer with the current date in the title of the file.
- 3) In your REDCap survey form, using the "Descriptive Text (with optional Image/Video/Audio/File attachment)" fields type, upload each *individual* page of the Informed Consent with the display type as an 'Inline image.'
- 4) Add a 'Descriptive Text' field type between each page of the ICF that lets the users know to click on 'Next Page' in the survey to view the full ICF documents.
- 5) Add a 'Begin New Section' field type between each page of the ICF and the instructional 'Descriptive Text' fields so that *each page of the ICF is it's own page in the survey*.

Note: If the Informed Consent is 20 pages long, you'll need to create 20 Descriptive Text fields since each Descriptive Text field can only accommodate one JPEG or PNG upload.

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/A)

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)

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

Variable Name (utilized during data export)
icf_page1 Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

Optional file attachment, image, audio, or video:

Embed an external video (provide video URL) [?](#)

e.g. <https://youtube.com/watch?v=E1cCuWMupz0>,
<https://vimeo.com/62730281>,
<http://example.com/movie.mp4>

Display format of video: Inline Inside popup

- or -

Attach an image, file, or embedded audio
2017-09-21_at 2:18:56 PM.png [X] Remove

Display format of attachment on page:
 Link
 Inline image
 Audio file (play in embedded player on page)
[Compatibility notice for embedded audio](#)

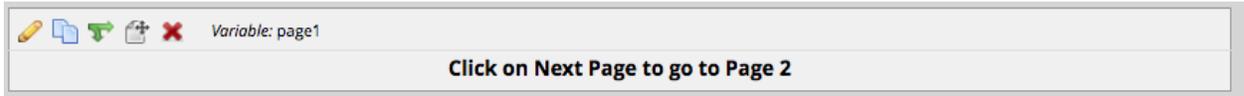
(Images wider than 600 pixels will be downsized to fit page.)

Save **Cancel**

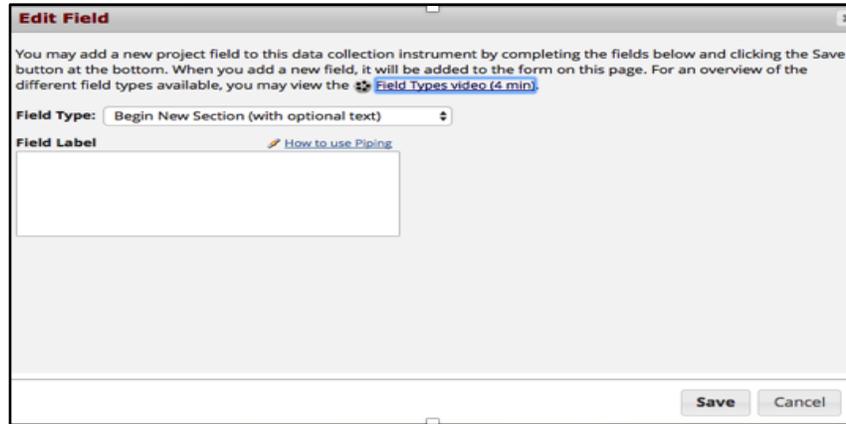
Each page of the Informed Consent, when uploaded to the ‘Descriptive Text’ fields, will look something like this:

6) Add instructions to click on Next Page using a “Descriptive Text” field type. Do this for every page of the ICF. This is so the potential subjects know to go to the next page in the survey.

Once added, these “Descriptive Text” fields should look similar to this:



- 7) Once all pages have been uploaded, create a blank “Begin New Section (with optional text)” field **between each page** of the Informed Consent so that *each page* of the Informed Consent will be on a *separate page* of the survey.



- 8) After uploading the pages of the ICF, add another “Descriptive Text” field right after the images and upload the PDF copy of the Informed Consent that you got from myIRB for the potential participant to download *before agreeing* to consent, with the display type being ‘Link.’

Add a **Descriptive Text** field type and attach a PDF copy of the ICF as a **Link**.

This will allow subjects to download the ICF for themselves so they can review prior to consenting.

Upload the PDF copy of the ICF

Display format: Link

The screenshot shows the 'Edit Field' dialog box with the following details:

- Field Type:** Descriptive Text (with optional Image/Video/A)
- Question Number (optional):** [Empty]
- Field Label:** Copy of Informed Consent for download. Please click on the PDF document below to download and save to your computer.
- Action Tags / Field Annotation (optional):** [Empty]
- Variable Name:** icf_download
- Optional file attachment, image, audio, or video:**
 - Embed an external video (provide video URL) [?]
 - Example URLs: https://youtube.com/watch?v=E1cCuWMUp20, https://vimeo.com/62730281, http://example.com/movie.mp4
 - Display format of video: Inline Inside popup
 - or -
 - Attach an image, file, or embedded audio
 - Attachment: ICF.pdf
 - Display format of attachment on page:
 - Link
 - Inline
 - Audio file (play in embedded player)

- 9) *Optional*: To allow the participant to email a copy of the Informed Consent to themselves (instead of downloading it to their computer/device as shown above), add a “Text Box” field type (validated as an ‘Email’) to capture the subject’s email address.

Note: If you collect the participant’s email address as part of the eConsent process, the participant’s email address **will be stored in the system permanently** unless you go in and manually delete it from the eConsent form. They will also be able to download a copy of the signed consent form once they submit the eConsent **without** having to store their email address in the system.

The screenshot shows a form interface with two sections. The top section, titled "Copy of Informed Consent for download.", includes a PDF attachment labeled "ICF.pdf (0.05 MB)" and two buttons: "Add Field" and "Add Matrix of Fields". The bottom section, titled "If you would like to receive a copy of the Informed Consent by email, please enter your email address here:", contains a text input field for an email address.

If emailing them a copy of the ICF, make sure you specify that in the ‘Field Note’ that *“Your email address will not be used for any other purpose.”*

- 10) Create a “Signature” field type to capture the participant’s signature.

The "Edit Field" window shows configuration options for a "Signature" field type. Key settings include:

- Field Type:** Signature (draw signature with mouse or finger)
- Question Number:** (optional)
- Field Label:** Please click on the link to the right to add your signature.
- Variable Name:** signature (utilized during data export)
- Required?*** Yes (selected)
- Identifier?** No (selected)
- Custom Alignment:** Right / Vertical (RV)
- Field Note:** (optional)

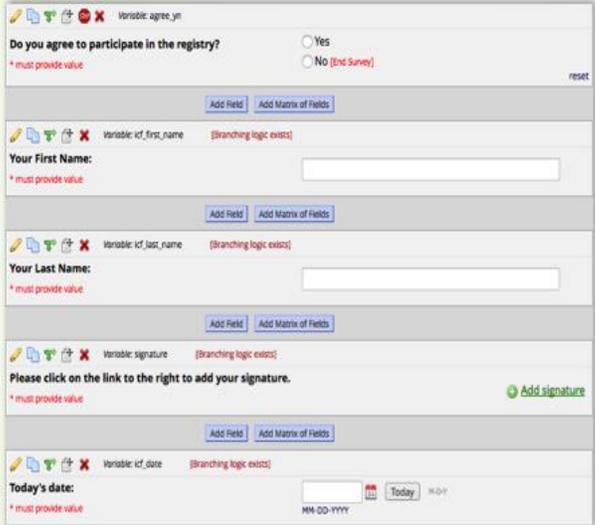
 Buttons for "Save" and "Cancel" are at the bottom.

Add a **Signature** field type to capture a signature which can be done by finger, stylus or mouse (depends on which device you are using)

- 11) Add any additional data fields to the consent form in REDCap that you want to capture from the participant, such as their agreement to be in the study, their first and last name, the consent date and time, their email address (for emailing a copy of the consent form), etc. **Make sure you mark each field as 'Required' so they cannot submit the eConsent form without filling in all required data fields.**

Note: You can add branching logic to the additional data fields so that they do not appear if the subject does not agree to be in the study.

Note: If your study is deemed more than 'low-risk' by the IRB, you will need to add fields to collect the consentor's name and signature.



Build fields for other data you need from the person being consented, such as their name and the consent date.

Be sure to make all questions **required** (*must provide value)

Signature field type

Text field validated as a date

- a) Make the ICF a *repeating form* in case you need to re-consent the subject.
- b) Go to *Enable optional modules and customizations* on the *Project Setup* page.
- c) Click on *Enable* next to "Repeatable Instruments."

Enable optional modules and customizations



Optional

I'm done!

Enable	⊖ Repeatable instruments ?
Disable	✔ Auto-numbering for records ?
Enable	⊖ Scheduling module (longitudinal only) ?
Enable	⊖ Randomization module ?
Enable	⊖ Designate an email field to use for invitations to survey participants ?
Additional customizations	

- d) Make the consent form a repeating instrument:

Repeatable instruments

An excellent way to collect repeating data in REDCap is to use repeatable instruments and/or repeatable events. This is sometimes called one-to-many data collection. Some examples may include but are not limited to the following: data from multiple visits or observations, concomitant medications, adverse events, or repetitive surveys (daily, weekly, etc.).

Below you can specify a data collection instrument to be infinitely repeatable, which means that an instrument can be repeated over and over again (a different number of times for each record) even without enabling REDCap's longitudinal module. Once an instrument is set to repeat, you will see options on the Record Home Page to add, edit, or delete instances of a repeating instrument. If you have multiple instances of a repeating instrument, you will be able to view the data for each instance, thus allowing viewing of the instances and easy navigation within them.

Optional: If you want the date the consent was submitted to appear on the Record Home Page, enter in the variable name that you assigned to the date field.

Repeat this instrument?	Instrument name	Custom label for repeating instruments (optional) Example: [visit_date], [weight] kg
<input checked="" type="checkbox"/>	eConsent Form	[icf_date]
<input type="checkbox"/>	Saved Consents	

Save Cancel

Survey Settings for the eConsent Form:

Once the eConsent form is built, enable it as a survey on the 'Online Designer' page and then configure your survey settings by clicking on 'Survey Settings' on the 'Online Designer' page:

- 1) Under *Survey Customizations*, select the following:
 - a. Question Display Format – 'One section per page (multiple pages).'
 - b. Allow participants to download a PDF copy of their responses at the end of the survey – 'Yes.'

Survey Customizations:

Question Numbering Custom numbered ▾
Question numbers will not display correctly if using auto numbering if some questions have branching logic employed. Question auto numbering has been automatically disabled because some of your survey questions use branching logic.

Question Display Format (One page or multiple pages?)
One section per page (multiple pages) ▾
 Display page numbers at top of survey page
 Hide the 'Previous Page' button (i.e., Back button) on the survey page (prevents respondents from going back to previous pages)

Allow participants to download a PDF of their responses at end of survey? Yes ▾
This option will not be available if the Survey Auto-continue or Survey Queue auto-start option is enabled. Also, if a field utilizes the @HIDDEN action tag, it will not be displayed in the PDF.

Display a button for the participant to download a PDF file of their responses for the survey they just completed.

For Question Display Format, select **One section per page (multiple pages)**.

- This will make each page of the ICF its own page in the survey.

Allow participants to download a PDF of their responses at the end of the survey? – Yes.

- This will allow the subject to download their signed ICF once they submit the eConsent.

- 2) Under *Survey Access*, select:
 - a. 'Yes' for 'Allow "Save & Return Later" option for respondents?'

Allow 'Save & Return Later' option for respondents?
(Allow respondents to leave the survey and return later.) ?

Allow respondents to return and modify completed responses ?

Yes ↕

- This will allow subjects to leave the eConsent Survey and return to it at a later time.
- If subject needs to return to the ICF later, they can return to the page they left off at.

- 3) Optional: Under *Survey Termination Options*, select:
 - a. "Yes" for "Send confirmation email (optional)?"
 - b. Fill out the 'From' (your email address), 'Subject line,' and any text you want include in the email.
 - c. Attach the stamped PDF copy of the ICF where it says 'Attachment.'
 - i. This will send the subject a copy of the ICF via email if they provided an email address on the consent form.
 - d. Click on 'Save Changes' when finished.
 - e. If you decide to use the Send Confirmation email option, please see the section called "Instructions for Setting Up the Confirmation Email with the PDF of the ICF" to complete the setup.

Send confirmation email (optional)?
(Email the respondent when they complete the survey)

Provide email subject, email message, and (optionally) an attachment to be sent to respondent when they complete the survey. [How to use Piping here](#)

From: CTSI-REDCAP-SUPPORT-L@lists.ufi.edu

Subject: Informed Consent

Compose Preview Send test email

Here is a copy of the form

Attachment: ICF.pdf (0.05 MB)

Expand

Save Changes

Create a Data Entry Form to Store the Signed Consents

- 1) Add another Data Collection Instrument that will store a copy of the signed ICF(s). **This MUST be done for versioning purposes. Uploading a PDF copy of the signed consent is the ONLY way the IRB can verify which version of the consent was signed.** Once you replace the consent form with a different version, it will look like the subject signed the version that was just added unless you save a copy of the original.

Data Collection Instruments

Survey options:

[Survey Queue](#) [Survey Login](#) [Survey Notifications](#)

Add new instrument:

+ **Create** a new instrument from scratch

↓ **Import** a new instrument from the official [REDCap Shared Library](#)

↑ **Upload** instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Enabled a survey	Instrument actions	Survey-related options
eConsent Form	14			Choose action	Survey settings + Automated Invitations
Saved Consents	3		Enable	Choose action	

- 2) On this Data Collection Instrument for storing the consents, create a few fields using the “File Upload (for users to upload files)” field type. Create **more than one** of these fields so that you can store more than one consent, just in case you need to re-consent the subject at a later date, either with the same ICF or a different version of the ICF.

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: File Upload (for users to upload files)

Field Label [How to use Piping](#)
Signed Consent 1

Variable Name (utilized during data export)
signed_consent_1 Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

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

Save **Cancel**

- 3) To use the **Save Survey PDF to a Field external module** (a fee-based extension, discussed late in this guide), these fields MUST have variable names that are *the same* but with different numerical endings, such as **signed_consent_1**, **signed_consent_2**, **signed_consent_3**, etc. The field base names (i.e., signed_consent) can be called whatever you want. If you’re not using the automated uploading of PDFs module, you can name these fields whatever you want but you will have to do the uploading process **manually**.

Save Survey PDF to a Field:

This module generates a PDF of a survey upon completion and saves it to a REDCap file upload field. It is configured at the project level with source instrument/target field pairs. In the event of save errors, the PDF is sent to a backup email address. Standard configuration for this customized piece of software is a one-time fee of **\$85**.

Once these *File Upload* fields are added, the form should look something like this:

Current instrument: **Saved Consents** [Preview instrument](#)

[Add Field](#) [Add Matrix of Fields](#)

Variable: signed_consent_1
Signed Consent 1 [Upload document](#)

[Add Field](#) [Add Matrix of Fields](#)

Variable: signed_consent_2
Signed Consent 2 [Upload document](#)

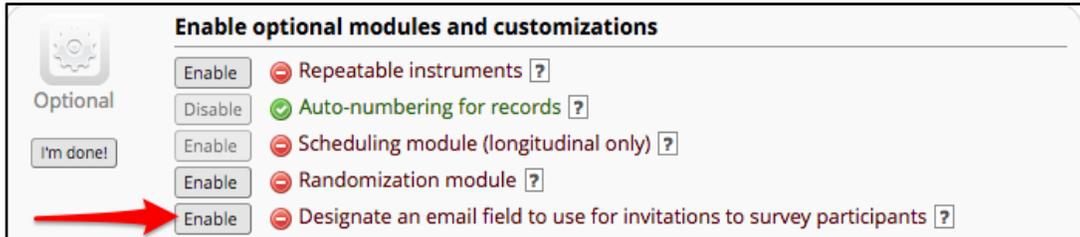
[Add Field](#) [Add Matrix of Fields](#)

Variable: signed_consent_3
Signed Consent 3 [Upload document](#)

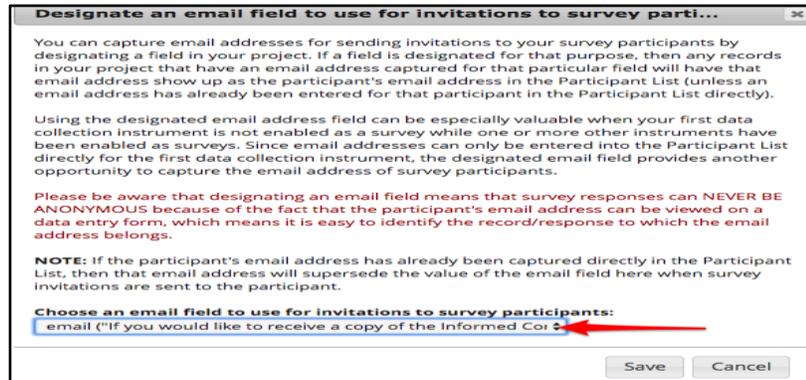
[Add Field](#) [Add Matrix of Fields](#)

(Optional) Instructions for Setting Up the Confirmation Email with the PDF of the ICF:

- 1) Go to the *Project Setup* page.
- 2) Under 'Enable optional modules and customizations,' click on 'Enable' next to "Designate an email field to use for invitations to survey participants."



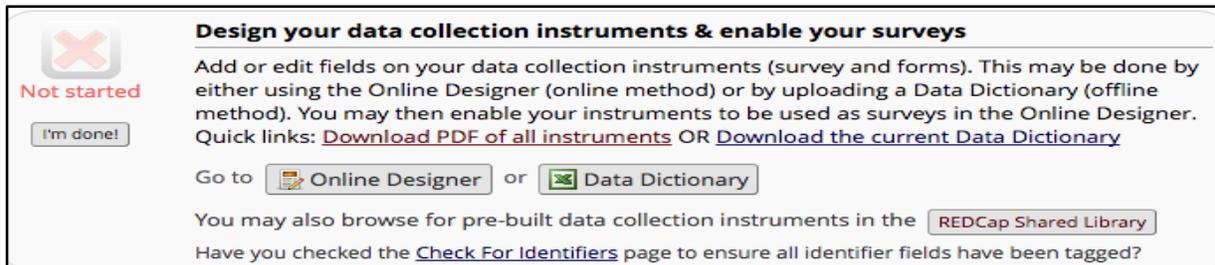
- 3) Select the field that you created to collect the subject's email and click on 'Save.'



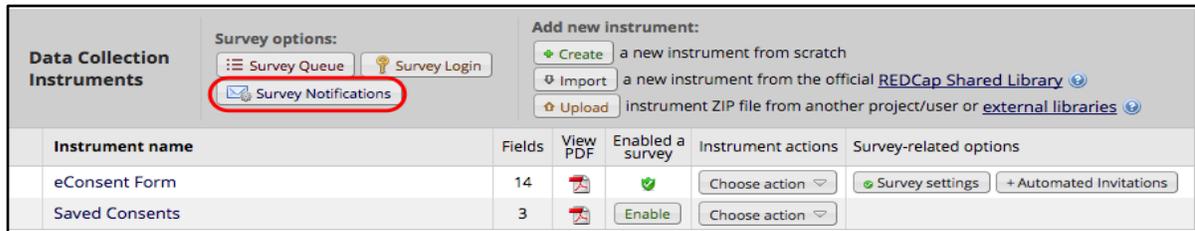
- 4) This will email the subject a PDF copy of the **unsigned Informed Consent** to the email address they provided on the eConsent form.
Note: this will save a copy of the subject's email address in the database. This is PHI.

Instructions for Receiving an Email When an eConsent Has Been Submitted:

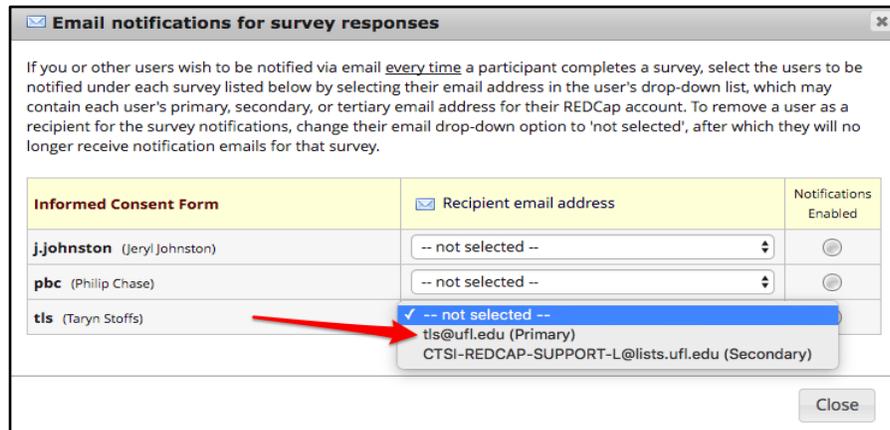
- 1) From the Project Setup page, click on 'Online Designer.'



- 2) Click on 'Survey Notifications.'



- 3) Select the email address(es) of those who should be notified when an eConsent has been submitted and then click on 'Close.'



Instructions for Setting up Save Survey PDF to a Field Module to Automatically Upload the Signed Copy of the eConsent into the Subject’s Record:

- 1) To enable this module, contact the REDCap Support Team (<http://j.mp/2k77B3j>). A fee of \$85 will be billed to the project. Otherwise, you will need to manually download and save a copy of the signed ICF and save it in the subject’s record.
- 2) Once the module has been enabled, configure it using the steps listed below.
- 3) Click on *External Modules* under the Applications menu.



- 4) Configure the module: 1) enter the email address of the person who should receive notification if a PDF fails to save; 2) Select the form name (i.e., econsent_form) that contains the eConsent next to “Name of survey instrument tha should be saved to the upload field;” 3) Select the first file upload field on the form that is saving the eConsents (i.e., signed_consent_1) next to “Field where PDFs of the survey names above should be saved;” 4) Click on *Save*.

Configure Module: Save Survey PDF to a Field

Project Settings	Value
Email address that should receive generated PDFs should this module be unable to save the PDF: <small>* must provide value</small>	do-not-reply@ufl.edu
1. instrument-upload_field pair: +	
1. Name of survey instrument that should be saved to the upload field: <small>* must provide value</small>	econsent_form
1. Field where PDFs of the survey named above should be saved: <small>* must provide value</small>	signed_consent_1 - Signed Consent 1
Cancel Save	

If the subject signs more than one consent form, the second signed consent form will *automatically* get saved into the second Signed Consents field you created, thus keeping a copy of the first consent that was signed and the second consent that was signed, and so on.

Note: the *Save Survey PDF to Field* only works if the eConsent is distributed as a **survey**. For non-survey responses, a manual download of the ICF PDF and subsequent PDF upload into the record must be done to comply with IRB rules on versioning.

Test Your Project Thoroughly

Once you're finished building the consent, have configured the survey settings, enabled the *Save Survey PDF to Field* Module, and have enabled survey notifications, test out the eConsent form and make sure you receive the Survey Confirmation email and the automatic uploading of the signed ICF into test records in the project.

The quickest way to do this is to go 'Manage Survey Participants' (under *Data Collection*) and then click on 'Open Public Survey.'

Data Collection Edit Instruments

- Manage Survey Participants
- Get a public survey link or build a participant list for inviting respondents
- Record Status Dashboard
- View data collection status of all records
- Add / Edit Records
- Create new records or edit/view existing ones

Show data collection instruments ▾

Manage Survey Participants

Public Survey Link Participant List Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

Public Survey URL: <https://redcap.ctsi.ufl.edu/redcap/surveys/?s=FB...> This is the link to your eConsent

Link Actions

- Open public survey
- Send me URL via email
- Survey Access Code or QR Code

Link Customizations

- Get Short Survey Link
- Create Custom Survey Link
- Get Embed Code

Fill out the eConsent as you would if you were a subject and submit it.

To make sure the signed ICF PDF saves to the signed consent field (if using the module), go to the record you just created by submitting the eConsent and view the Saved Consents form. You can do this by going to *Add / Edit Records* and finding the record ID with the *highest number* or by going to the *Record Status Dashboard* and finding the record ID with the highest number.

Record ID 30

Data Collection Instrument	Status
eConsent Form (survey)	 
Saved Consents	 

You can tell if the PDF has been saved by seeing if there is an uploaded file now appearing on the Saved Consents form. The date and time the file was uploaded is *automatically appended* to the file name.

Saved Consents

Editing existing Record ID 30

Record ID 30

Signed Consent 1  [econsent_form_2017-12-01_1140.pdf \(1.27 MB\)](#)  Remove file or  Send-It

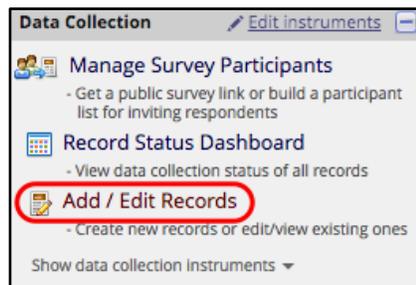
Signed Consent 2  [Upload document](#)

Signed Consent 3  [Upload document](#)

Printing Out the Latest Signed Consent Form Each Year to Submit to the IRB:

If your REDCap project uses the *auto-numbering* feature and you are *not* re-naming the records to a unique identifier specific to your study, such as an acrostic, follow the steps below:

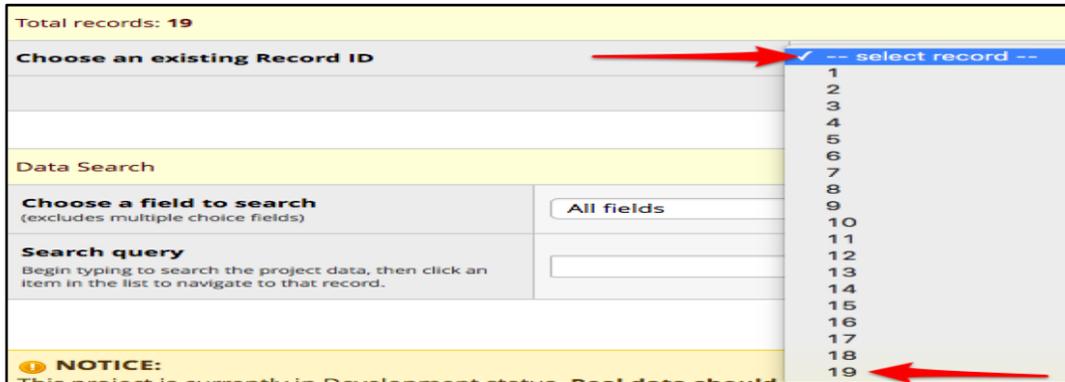
- 1) Click on *Add / Edit Records* under Data Collection.



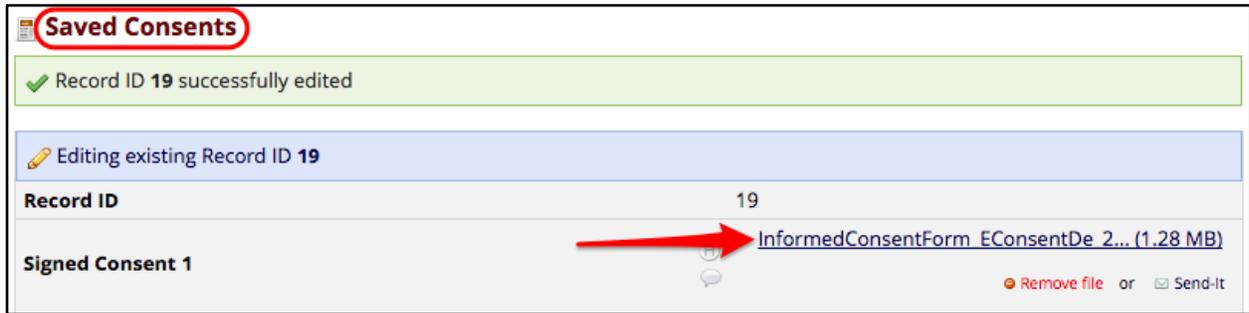
- 2) Click on the dropdown menu next to "Choose an existing Record ID."

- 3) Select the record with the *highest* numerical Record ID.

Note: If there are 19 records in your project, Record ID '19' is the latest signed consent form.



- 4) Inside that record with the highest Record ID, go to the form where you are saving the uploaded copies of the signed, stamped, versioned Informed Consent (i.e., 'Saved Consents').
- 5) Click on the attachment of the uploaded consent to *download* the Informed Consent to *your computer*.



- 6) Print the downloaded consent to give to the IRB and then delete the download from your computer.

If your REDCap project does **not** use the *auto-numbering* feature or you are *re-naming* the records to a unique identifier specific to your study, such as an acrostic, you can find the latest created record by using the Logging feature.

- 1) Click on 'Logging' under the *Applications* menu



- 2) Select “Record created (only)” for the Filter by event dropdown menu.

- 3) The most recently created record will appear at the top of the Logging grid. You can find this record’s Record ID under the “List of Data Changes OR Fields Exported” column.

Time / Date	Username	Action	List of Data Changes OR Fields Exported
10/27/2017 10:40am	[survey respondent]	Created Response 19	record_id = '19', econsent_form_complete = '0'
10/24/2017 11:21am	[survey respondent]	Created Response 18	record_id = '18', econsent_form_complete = '0'

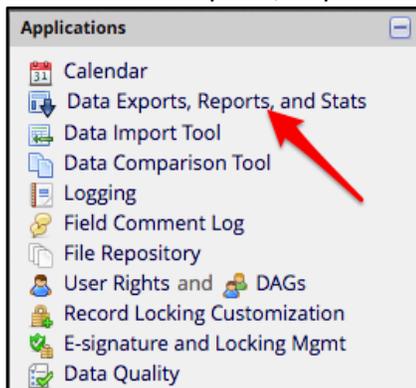
- 4) Go to *Add / Edit Records* and select that Record ID from the dropdown list next to ‘Choose an existing Record ID.’
- 5) Follow steps 4, 5 and 6 in the previous section to download the uploaded copy of the signed Informed Consent.

Printing Out All Consent Forms for the IRB or Another Oversight Group:

Unfortunately, there’s not an easy way to print *just* the consent forms for each subject if your project contains other data collection forms. You would either need to go into *each record* and download the ICF (*Add / Edit Records* → *Choose an existing Record ID* → *Saved Consents* form → Click on link to *download*); or download a PDF file of ALL the project’s data collection forms and delete the forms that are not the ICF.

To download ALL the data collection forms:

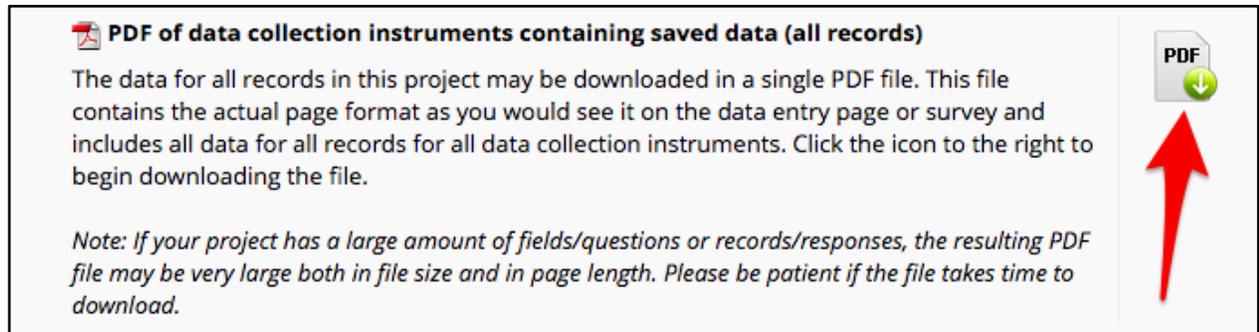
- 1) Click on *Data Exports, Reports and Stats*.



- 2) Go to the *Other Export Options* page.



- 3) Click on the PDF icon next to “PDF of data collection instruments containing saved data (all records).”



- 4) Open the downloaded file in Adobe and delete all pages that are not the ICFs.

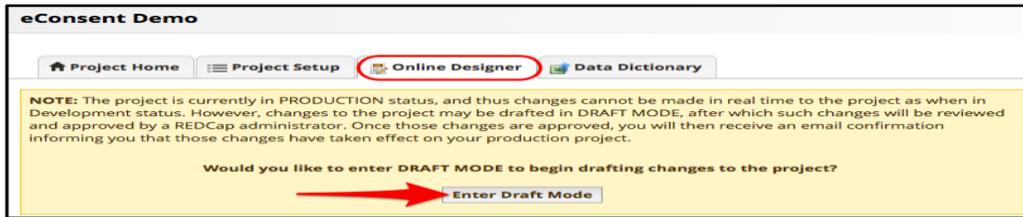
Re-Consenting Subjects Using a Revised Consent Form and/or Updating the Consent Form

If a subject needs to sign a **revised** consent form or the consent form needs to be replaced with a newer version, you’ll need to replace the ICF in the existing project or create a new project that contains the revised/updated consent form.

If you create a new project, just follow the same steps outlined above.

To replace the existitng ICF in your current project, follow the steps below.

- 1) Make sure all records have an uploaded PDF of the signed eConsent. Once you change the ICF in the project, **all existing records** will have this new IFC showing up on the eConsent page. This is why the automated saving of the signed ICFs is crucial.
- 2) Obtain an electronic PDF version of the new/revised stamped, IRB-approved Informed Consent, which can be found in *myIRB* under *Stamped Documents*, and save it to your computer.
- 3) Open the PDF file of the Informed Consent on your computer and save it as a JPEG or PNG file (this will make each page of the Informed Consent its own separate image). Save these JPEG or PNG files to your computer with the current date in the title of the file.
- 4) Click on *Online Designer* on the Project Setup page.
- 5) Click on *Enter Draft Mode*.



6) Click on the form that contains the Informed Consent:

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. Below you have the options to modify an existing instrument, delete an instrument, create a new instrument, download an instrument as a PDF document, or reorder your instruments. However, whether in Draft Mode or not, you are allowed to download the PDF or modify survey settings for any instruments below.

Data Collection Instruments

Survey options:
[Survey Queue](#) | [Survey Login](#)
[Survey Notifications](#)

Add new instrument:
[Create](#) a new instrument from scratch
[Import](#) a new instrument from the official [REDCap Shared Library](#)
[Upload](#) instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Enabled a survey	Instrument actions	Survey-related options
eConsent Form	14			Choose action	Survey settings + Automated Invitations
Saved Consents	3		Enable	Choose action	

7) Go to the field that contains the first page of the ICF and click on Edit (pencil icon in top left corner)



- 8) Click on *Remove* next to the file upload name and then replace it with the new first page of the ICF.
- 9) Do this for EVERY field that contains the images of the ICF. Each 'page' of the eConsent will need to be replaced.

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/A)

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)
ONLY letters, numbers, and underscores Enable auto naming of variable based upon its Field Label?

Optional file attachment, image, audio, or video:

Embed an external video (provide video URL)

e.g. <https://youtube.com/watch?v=E1cCuWMupz0>,
<https://vimeo.com/62730281>,
<http://example.com/movie.mp4>

Display format of video: Inline Inside popup

– or –

Attach an image, file, or embedded audio
[Screen Shot 2017-09-21 at 2.18.56 PM.png](#)

Display format of attachment on page:

Link
 Inline image
 Audio file (play in embedded player on page)
[Compatibility notice for embedded audio](#)

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

Once you click on Remove, upload the first page of the new ICF and click on Save.

10) You will also need to replace the copy of the ICF for the subject's to download with the new/revised ICF.

Variable: icf_download

Copy of Informed Consent for download.

Please click on the PDF document below to download and save to your computer.

Attachment: [sample-ICF \(7\).pdf](#) (0.24 MB)

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/A)

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)

Please click on the PDF document below to download and save to your computer.

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)
ONLY letters, numbers, and underscores Enable auto naming of variable based upon its Field Label?

Optional file attachment, image, audio, or video:

Embed an external video (provide video URL)

e.g. <https://youtube.com/watch?v=E1cCuWMupz0>,
<https://vimeo.com/62730281>,
<http://example.com/movie.mp4>

Display format of video: Inline Inside popup

– or –

Attach an image, file, or embedded audio
[sample-ICF \(7\).pdf](#)

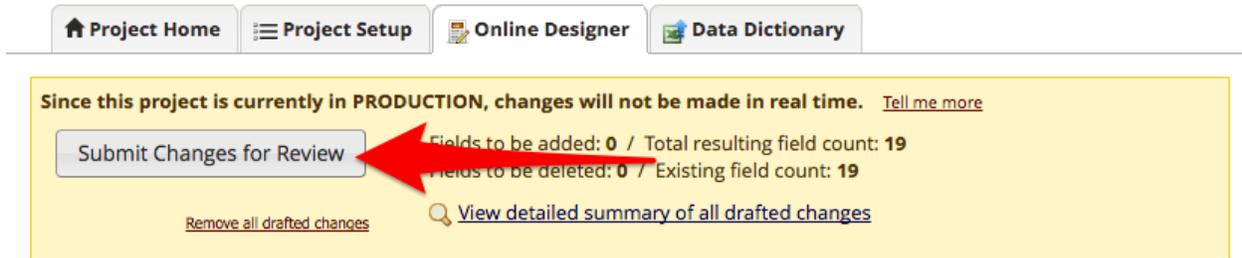
Display format of attachment on page:

Link
 Inline image
 Audio file (play in embedded player on page)
[Compatibility notice for embedded audio](#)

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

After you click on Remove, upload the PDF copy of new ICF, and click on Save.

Once all the changes have been made, go back to the Online Designer page and click on *Submit Changes for Review*. Since these changes will not affect existing data, the changes should take affect immediately.



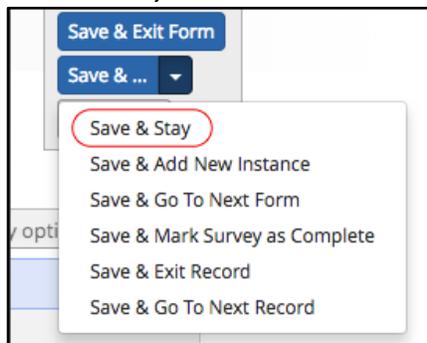
This is where the repeating eConsent form comes into play.

- 1) Find the subject's record in REDCap who needs to be reconsented via *Add / Edit Records* or the *Record Status Dashboard*.

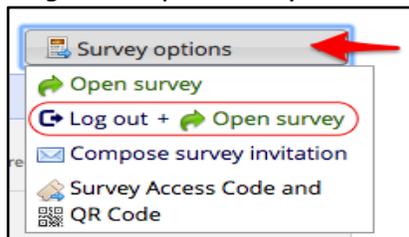
Record ID 30

Data Collection Instrument	Status
eConsent Form (survey)	
Saved Consents	

- 2) Click on the plus sign next to the eConsent Form to add another instance of the consent form.
- 3) Click on *Save & Stay* under the form saving options.



- 4) Click on *Log out + Open Survey* under Survey options



- 5) After subject submits the revised (or same) consent form, a copy of the second consent will be saved in the second File Upload field on the form that is saving the consents.

Saved Consents

Editing existing Record ID **29**

Record ID	29
Signed Consent 1	 econsent form 2017-12-01 1136.pdf (1.28 MB)  Remove file or Send-It
Signed Consent 2	 econsent form 2017-12-01 1137.pdf (1.27 MB)  Remove file or Send-It
Signed Consent 3	 Upload document

Questions? Email the REDCap Support Team at: <http://j.mp/2k77B3j>