

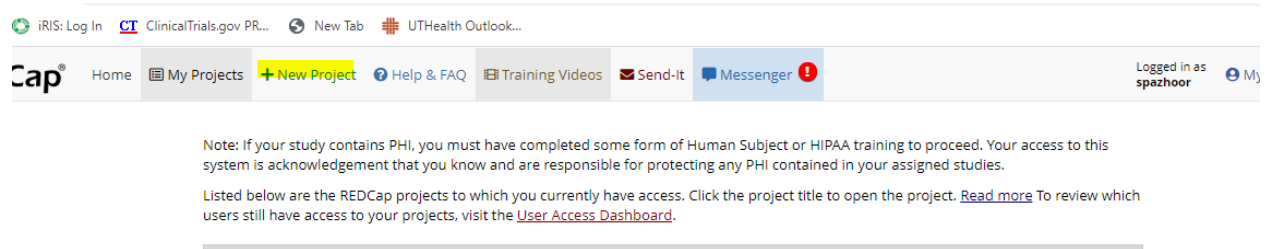
eConsent Using REDCap

1.0 How to set up a project using eConsent template:

Log into REDCap

*If you do not have a REDCap account, log into REDCap using your UT user name and password once-this will create an account for you in REDCap <https://redcap.uth.tmc.edu/>

Click on +New Project(see below)



Fill in following fields

The screenshot shows the 'Create a new REDCap Project' form. The form includes the following fields and options:

- Project title:** A text input field with the placeholder 'Title to be displayed on project webpage'.
- Purpose of this project:** A dropdown menu with 'Research' selected.
- Name of P.I. (if applicable):** Three text input fields for 'First name', 'MI', and 'Last name'.
- Email of P.I. (if applicable):** A text input field.
- Name of P.I. as cited in publications (if applicable):** A text input field with the example '(e.g., Harris PA)'.
- IRB number (if applicable):** A text input field.
- Please specify:** A list of checkboxes for project types: Basic or bench research, Clinical research study or trial, Translational research 1 (applying discoveries to the development of trials and studies in humans), Translational research 2 (enhancing adoption of research findings and best practices into the community), Behavioral or psychosocial research study, Epidemiology, Repository (developing a data or specimen repository for future use by investigators), and Other.

After filling in the fields, Select the highlighted options.

The screenshot shows the 'Choose a project template' dialog box. It includes the following options and a table:

- Start project from scratch or begin with a template?** Three radio button options: 'Create an empty project (blank slate)', 'Upload a REDCap project XML file (CDISC ODM format) [?]', and 'Use a template (choose one below)' (highlighted in yellow).
- Choose a project template** (comes pre-filled with fields, forms/surveys, and other settings): A table with the following data:

select template	Template title (sorted by title)	Template description
<input type="radio"/>		
<input type="radio"/>	Basic Demography	Contains a single data collection instrument to capture basic demographic information.
<input type="radio"/>	Classic Database	Contains six data entry forms, including forms for demography and baseline data, three monthly data forms, and concludes with a completion data form.
<input checked="" type="radio"/>	eConsent Template	This eConsent template contains a study details form, a consent survey form and informed consent documentation form that can be used as a template for eConsent that can be individually modified to suit a specific study. A formal... Show more

At the bottom of the dialog box, there are two buttons: 'Create Project' (highlighted in yellow) and 'Cancel'.

eConsent Using REDCap

2.0 Designing the project

Click on designer (on main page under Project Home and Design)

The screenshot shows the REDCap interface for the 'eConsent Template' project. The user is logged in as 'spazhoor'. The main navigation includes 'Project Home', 'Project Setup', 'Online Designer', 'Data Dictionary', and 'Codebook'. The 'Online Designer' section is active, showing a table of instruments and options to create, import, or upload new instruments.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Study Details	11		Enable	Choose action	
English Consent Document HSC-MS-20-1234	16			Choose action	Survey settings + Automated Invitations
Informed Consent Documentation	15		Enable	Choose action	

This will take you to the 3 instruments of the template:

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.

The screenshot shows the 'Data Collection Instruments' table with the 'Choose action' dropdown menu open for the 'Study Details' instrument. The dropdown menu options are: Rename, Copy, Delete, and Download instrument ZIP.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Study Details	11		Enable	Choose action	
English Consent Document HSC-MS-20-1234	16			Choose action	Survey settings + Automated Invitations
Informed Consent Documentation	15		Enable	Choose action	

You can rename each instrument by clicking on the choose action drop down menu

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.

The screenshot shows the 'Data Collection Instruments' table with the 'Choose action' dropdown menu open for the 'Study Details' instrument. The dropdown menu options are: Rename, Copy, Delete, and Download instrument ZIP.

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Study Details	11		Enable	Choose action	
English Consent Document HSC-MS-20-1234	16			Choose action	Survey settings + Automated Invitations
Informed Consent Documentation	15		Enable	Choose action	

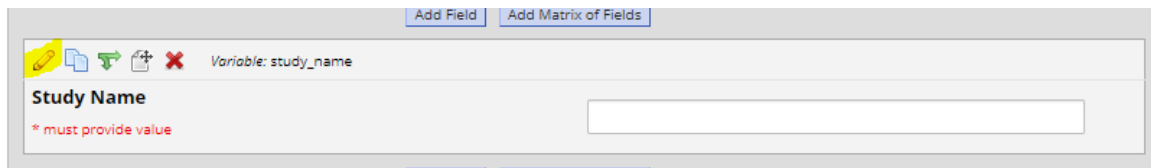
Click on each instrument to modify if needed

eConsent Using REDCap

2.1 STUDY DETAILS INSTRUMENT:

Click on study details instrument

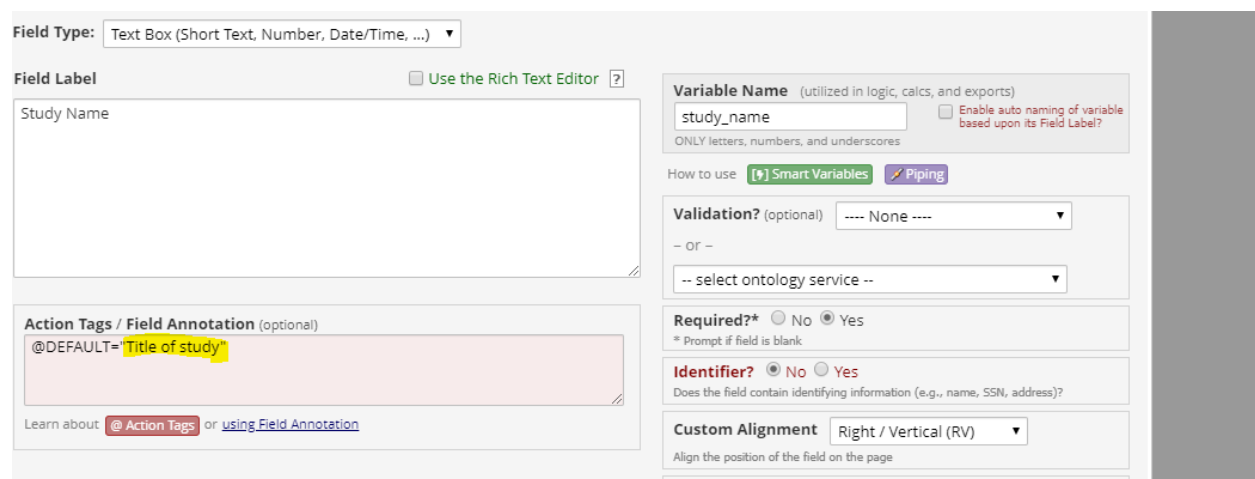
2.1.1 Study Name: click on the pencil icon in this field



A screenshot of the REDCap field editor interface. At the top, there are buttons for 'Add Field' and 'Add Matrix of Fields'. Below these, there are icons for editing (pencil), deleting (trash), and other actions. The field is labeled 'Study Name' and has a red asterisk indicating it is required. The variable name is 'study_name'. There is an empty text input field for the study name.

Under action tags change the title of study to actual title of study

Ex: @DEFAULT="Title of study" change to @DEFAULT="Blood Draw for Plasma Extraction"



A screenshot of the REDCap field configuration page. The 'Field Type' is set to 'Text Box (Short Text, Number, Date/Time, ...)'. The 'Field Label' is 'Study Name'. The 'Action Tags / Field Annotation' section shows '@DEFAULT="Title of study"'. The 'Variable Name' is 'study_name'. The 'Validation?' section is set to 'None'. The 'Required?' section is set to 'Yes'. The 'Identifier?' section is set to 'No'. The 'Custom Alignment' is set to 'Right / Vertical (RV)'. There are links for 'Smart Variables' and 'Piping'.

2.1.2 Study IRB Number: Do the same for Study IRB Number field

@DEFAULT="HSC-MS-20-1234"-change the HSC number to actual IRB number

The study name and study IRB number will be automatically generated for every subject

2.1.3 Paper copy of ICF: If for some reason paper copy of ICF was used ,select yes for the question (see below) and upload the paper copy(this is marked yes only if eConsent was not utilized and a paper consent was used under any circumstances by either patient,LAR or person obtaining consent)



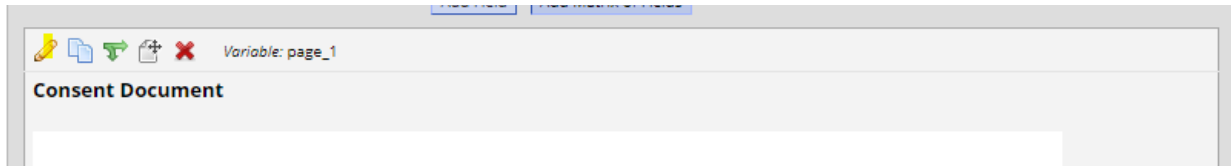
A screenshot of the REDCap survey instrument. It shows a question: 'Did patient, Legally Authorized representative (LAR) or person obtaining consent sign paper copy of informed consent document?'. The question is marked as required. There are radio buttons for 'Yes' and 'No', with 'Yes' selected. Below the question, there is a text input field for the file name and an 'Upload file' button. A 'reset' button is also visible.

eConsent Using REDCap

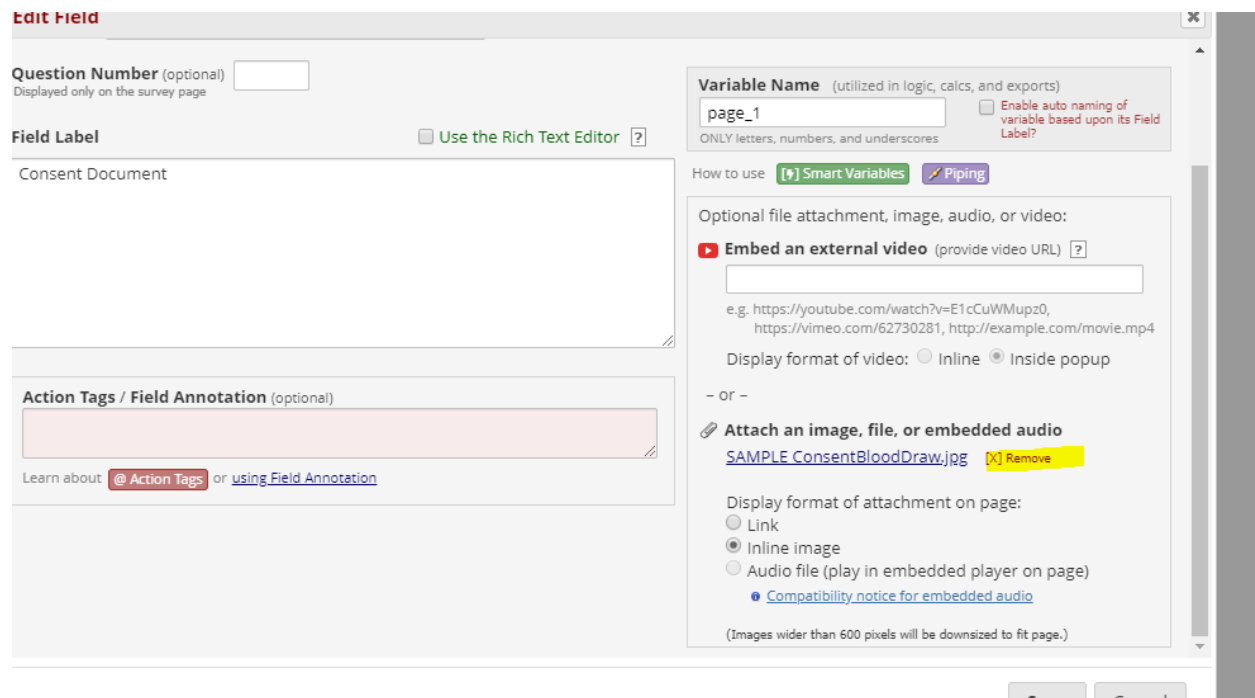
2.2 CONSENT DOCUMENT INSTRUMENT:

The Patient study ID should be generated automatically from the study details instrument

2.2.1 Uploading a consent document: Convert the consent document to jpeg format. Click on pencil icon



Remove the existing sample consent



Upload new consent and make sure inline image is selected

Save

Repeat the process for each page of the consent(change variable name to page_2,page_3 etc)

2.3 Informed Consent Documentation instrument

*Repeat steps 2.1.1 and 2.1.2 above for Informed Consent Documentation instrument as well

eConsent Using REDCap

3.0 How to change the consent version:

Step 1:

Go to Designer

Upload new version of consent in a new field(leave old consent as is)(repeat steps 2.2)

Click on designer and then click on consent instrument and click on pencil icon of consent version field:



1, eConsent v1-4/20/2020

2, eConsent v2-5/1/2020

A screenshot of the 'Edit Field' dialog box in REDCap Designer. The dialog box contains the following fields and options:

- Field Type:** Multiple Choice - Drop-down List (Single Ans)
- Question Number (optional):** [Empty text box]
- Field Label:** Consent version. There is a checkbox for 'Use the Rich Text Editor'.
- Choices (one choice per line):** 1, eConsnet v1- date. There is a link for 'Copy existing choices'.
- Enable auto-complete for this drop-down:** [Checked]. There is a link for 'How do I manually code the choices?'.
- Action Tags / Field Annotation (optional):** @HIDDEN @DEFAULT='1'. There is a link for 'Learn about @ Action Tags or using Field Annotation'.
- Variable Name:** consent_version. There is a checkbox for 'Enable auto naming of variable based upon its Field Label?'.
- Required?*** No (selected), Yes. * Prompt if field is blank.
- Identifier?** No (selected), 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):** [Empty text box]. Small reminder text displayed underneath field.

At the bottom right, there are 'Save' and 'Cancel' buttons.

eConsent Using REDCap

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 - Drop-down List (Single Answer)

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, eConsent v1- date
2, eConsent v2- date

Enable auto-complete for this drop-down ? [How do I manually code the choices?](#)

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

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

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

Under action tags change the default number to “2”

Action Tags / Field Annotation (optional)
@HIDDEN @DEFAULT = 2

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

This will make sure that the second version is selected and will be hidden on the survey but will automatically appear in the pdf of the signed consent form

eConsent Using REDCap

Step 2:

Online designer

Go to survey settings and change to version 2

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.

The screenshot shows the REDCap interface for managing survey instruments. It includes a 'Survey options' section with buttons for 'Survey Queue', 'Survey Login', 'Survey Notifications', and 'Upload or download Auto Invitations'. Below this is a table of instruments:

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Study Details	11		Enable	Choose action	
English Consent Document HSC-MS-20-1234	16			Choose action	Survey settings + Automated Invitations
Informed Consent Documentation	15		Enable	Choose action	

The screenshot shows the 'e-Consent Framework' settings in REDCap. It includes a 'PDF Auto-Archiver' section and an 'e-Consent Framework Options' section. The 'e-Consent Framework Options' section includes:

- Allow e-Consent responses to be edited by users?
- e-Consent version: 3.0
- First name field: pt_first_name "First Name of P."
- Last name field: pt_last_name "Last Name of P."
- Optional fields (these are not always necessary for e-Consent):
 - e-Consent type: English
 - Date of birth field: -- select a field --

Step 3:

Branching Logic:(ex if you want the version 1 to pop up)

Click on the green arrows in the consent document field,select Drag-N-Drop Logic Builder and drag consent _version=eConsent v1-date(1) into the box on the right-now every-time version 1 is selected only that version of the consent document will be seen

4.0 User Rights:

4.1For each user make sure the following rights are assigned (make sure owner of project also has all the below mentioned rights):

First, make sure the user has logged into REDCap using their UT user name and password once-this will create an account for the user in REDCap <https://redcap.uth.tmc.edu/>

Once account has been created, project owner can assign rights to the new user

eConsent Using REDCap

Click on user rights, search for user using the user name, and add with custom rights (see below)

The screenshot shows the REDCap interface. On the left is a sidebar titled 'Applications' with a list of tools: Alerts & Notifications, Calendar, Data Exports, Reports, and Stats, Data Import Tool, Data Comparison Tool, Logging, Field Comment Log, File Repository, User Rights and DAGs (highlighted in yellow), Customize & Manage Locking/E-signatures, and Data Quality. The main content area has a top bar with 'I'm done!' and 'Modify project title, purpose, etc.'. Below that is a section titled 'Design your data collection instruments & enable your surveys' with a 'Not started' status indicator. The text explains that users can add or edit fields on data collection instruments (survey and forms) using the Online Designer (online method) or by uploading a Data Dictionary (offline method). It includes quick links for 'Download PDF of all inst' and 'Download the current Data Dictionary'. There are buttons for 'Go to Online Designer' or 'Data Dictionary', and a link to 'Explore the REDCap Shared Library'. A note asks if the user has checked the 'Check For Identifiers' page to ensure all identifier fields have been tagged. At the bottom, there are links for 'Smart Variables', 'Piping', and 'Action Tags'.

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

The screenshot shows a form for adding users and creating roles. It has two main sections: 'Add new users: Give them custom user rights or assign them to a role.' and 'Create new roles: Add new user roles to which users may be assigned.' The 'Add new users' section has two options: 'Add new user' (highlighted in yellow) and 'Add with custom rights' (highlighted in yellow), separated by '— OR —'. Below that is 'Assign new user' and 'Assign to role' (with a dropdown arrow). The 'Create new roles' section has 'Enter new role name' and 'Create role' buttons. Below the form is a horizontal line representing a table.

4.2 Customize User rights (for persons obtaining consent):

Click on user rights on the main page left hand side under Applications (see above)

Make sure Edit survey responses are checked (see below)

eConsent Using REDCap

Editing existing user "spazhoor"

Basic Rights

Expiration Date (if applicable) (M/D/Y)

Highest level privileges:

- Project Design and Setup
- User Rights
- Data Access Groups

Privileges for data exports (including PDFs and API exports), reports, and stats:

Data Exports No Access De-identified*

* De-identified means that all

Data Entry Rights

NOTE: The data entry rights "only" pertain to a user's ability to view or edit data on a web page in REDCap (e.g., data entry forms, reports). It has no effect on data imports or data exports.

	No Access	Read Only	View & Edit	Edit survey responses
Study Details (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
English Consent Document HSC-MS-20-1234 (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>

Scroll down to make sure Record Locking customization and Locking/Unlocking with E-signature authority are both checked (see below)

Delete Records

Settings pertaining to record locking and E-signatures:

- Record Locking Customization
- Lock/Unlock Records Disabled Locking / Unlocking Locking / Unlocking with E-signature authority

Users with locking privileges also have access to the E-signature and Locking Mgmt page on the left-hand Applications menu.

[Watch video about locking](#)

[What is an E-signature?](#)

Allow locking of all forms at once for a given record?

4.3 Customize and Manage Locking/E-signatures

Click on customize and manage locking and E-signatures under application in the main page left hand side

eConsent Using REDCap

Submit Changes for Review
Fields to be added: 0 / Total resulting field count: 218
Fields to be deleted: 0 / Existing field count: 218

Remove all drafted changes | View detailed summary of all drafted changes

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

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the Add Field buttons. You can begin editing an existing field by clicking on the Edit icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the Delete icon. To reorder the fields, simply drag and drop a field to a different position within the form below. Are you using Action Tags yet? If not, learn about Action Tags here.

Return to list of instruments

Current instrument: **Convallescent Plasma Recipient Intake Form** | Preview instrument

Add Field | Add Matrix of Fields

Check “Also display E-signature option on instrument?” (for consent document only)(see below)

Display the Lock option for this instrument?	Data Collection Instrument	Also display E-signature option on instrument?	Lock Record Custom Text	Edit / Remove Custom Text
<input checked="" type="checkbox"/>	Study Details	<input type="checkbox"/>	<input type="text"/> Save	
<input checked="" type="checkbox"/>	English Consent Document HSC-MS-20-1234	<input checked="" type="checkbox"/>	<input type="text"/> Save	

4.4 Survey Notifications:

Under Designer which is on the left side of the page under Project Home and design click on survey notifications

Project Home | Project Setup | **Online Designer** | Data Dictionary | Codebook

Create snapshot of instruments | VIDEO: How to use this page
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

Survey options:
 Survey Queue | Survey Login
 Survey Notifications | Upload or download Auto Invitations

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 as survey	Instrument actions	Survey-related options
Study Details	11	<input type="checkbox"/>	Enable	Choose action	
English Consent Document HSC-MS-20-1234	16	<input type="checkbox"/>	Enable	Choose action	Survey settings + Automated Invitations
Informed Consent Documentation	15	<input type="checkbox"/>	Enable	Choose action	

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Make sure emails of persons who need to get notification when a consent has been completed by a patient are selected

Email notifications for survey responses

If you or other users wish to be notified via email every time a participant completes a survey, select the users to be notified under each survey listed below by selecting their email address in the user's drop-down list, which may contain each user's primary, secondary, or tertiary email address for their REDCap account. To remove a user as a recipient for the survey notifications, change their email drop-down option to 'not selected', after which they will no longer receive notification emails for that survey.

Instrument name	Recipient email address	Notifications
English Consent Document HSC-MS-20-1234	<input checked="" type="checkbox"/> Recipient email address	Notifications Enabled
spazhoor (Shwetha Pazhoor)	shwetha.pazhoor@uth.tmc.edu (Primary)	<input checked="" type="checkbox"/>

Close

eConsent Using REDCap

HOW TO CONSENT A PATIENT USING ECONSENT:

4.1 In the main project page click on add/edit record

The screenshot shows the main project page for 'eConsent test 2'. On the left is a navigation sidebar with sections: Project Home (Project Setup, Designer, Dictionary, Codebook, Project status: Development), Data Collection (Survey Distribution Tools, Record Status Dashboard, Add/Edit Records), and Applications (Alerts & Notifications, Calendar, Data Exports, Reports, and Stats, Data Import Tool, Data Comparison Tool, Logging). The main content area has tabs for Project Home, Project Setup, Other Functionality, and Project Revision History. Below the tabs, text states: 'The tables below provide general dashboard information, such as a list of all users with access to this project, general project statistics, and upcoming calendar events (if any)'. There are three tables: 'Current Users (1)' with one user 'spazhoor (Shwetha Pazhoor)' who expires 'never'; 'Project Statistics' showing 0 records in project, most recent activity on 05/07/2020 at 10:52am, and 0.00 MB space usage for docs; and 'Upcoming Calendar Events (next 7 days)' showing no upcoming events.

This screenshot shows the 'Add/Edit Records' form. At the top, it says 'Total records: 0'. Below that is a section 'Choose an existing Record ID' with a dropdown menu currently showing '-- select record --'. At the bottom right of this section is a green button with a plus sign and the text '+ Add new record'.

This screenshot shows the 'NEW Record ID 1' form. On the left is a sidebar with a 'record' tab and a minus sign icon. The main content area has a table with the following structure:

Data Collection Instrument	Status
Study Details	<input type="radio"/>
English Consent Document HSC-MS-20-1234 (survey)	<input type="radio"/>
Informed Consent Documentation	<input type="radio"/>

4.2 Click on study details

eConsent Using REDCap

NEW Record ID 1

Data Collection Instrument	Status
Study Details	
English Consent Document HSC-MS-20-1234 (survey)	
Informed Consent Documentation	

4.3 Add all fields and complete the form and click on save and go to next form

Form Status

Complete? Complete

Save & Exit Form Save & ...

-- Cancel --

- Save & Stay
- Save & Go To Next Form
- Save & Exit Record
- Save & Go To Next Record

4.4 Click on compose survey invitation on drop down menu(survey options)

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

English Consent Document HSC-MS-20-1234

Invitation status:

Editing existing Record ID 1 (BD001)

Record ID 1

Patient Study ID BD001

Consent Document

Survey options

- Open survey
- Log out + Open survey
- Compose survey invitation
- Survey Access Code and QR Code

4.5 Survey invite:

- From email: this should automatically appear depending on who logged into redcap
- To email: you can select this form from the drop down menu
- **You can type your invite to the participant in the box but make sure everything below "please take survey" remains as is

eConsent Using REDCap

- Send invite

Compose message

From: (select any project user to be the 'Sender')

To: Or provide another email:

(NOTE: Any email address manually entered above will be used only this one time when sending an survey invitation. Any other invitations sent out at other times will instead go to the email address found in the Participant List for this participant.)

Subject:

[Send test email](#)

Paragraph **B** *I*

Type your invite to the participant here(leave evrything below "please take survey" as is

Please take this survey.

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

Leave page

4.6 Participant will now get the email to sign consent

Once patient completes the form make sure they click on add signature and sign the form click on date and time and click on next page

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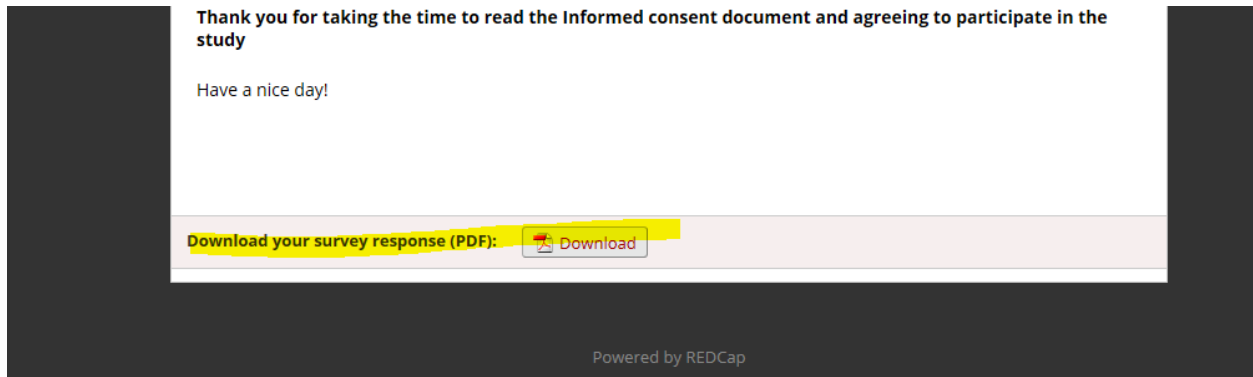
The screenshot shows a form with two main sections. The first section is titled "Signature of Patient" and includes a red asterisk and the text "* must provide value". It contains a digital signature image and a file name "signature_2020-05-07_1128.png (0.01 MB)" with a "Remove file" link. The second section is titled "Date and time of signature" and also includes a red asterisk and the text "* must provide value". It features a date and time input field showing "05-07-2020 11:28" with a "Now" button and a "M-D-Y H:M" format indicator. At the bottom of the form is a yellow "Next Page >>" button.

4.7 Patient will be asked to certify that everything they have entered is correct and then submit

The screenshot displays the "English Consent Document HSC-MS-20-1234" on "Page 1". The document text includes: "Please read and complete the Informed Consent Document below.", "Thank you!", and a line for "Patient Study ID" with the value "BD001". A green box contains a checked checkbox and the text: "I certify that all the information in the document above is correct. I understand that clicking 'Submit' will electronically sign the form and that signing this form electronically is the equivalent of signing a physical document." Below this is the instruction: "If any information above is not correct, you may click the 'Previous Page' button to go back and correct it." At the bottom are two buttons: "<< Previous Page" and a yellow "Submit" button. The footer reads "Powered by REDCap".

4.8 The patient can then chose to download the consent with their responses here (please note this will not have the signature of the person obtaining consent)

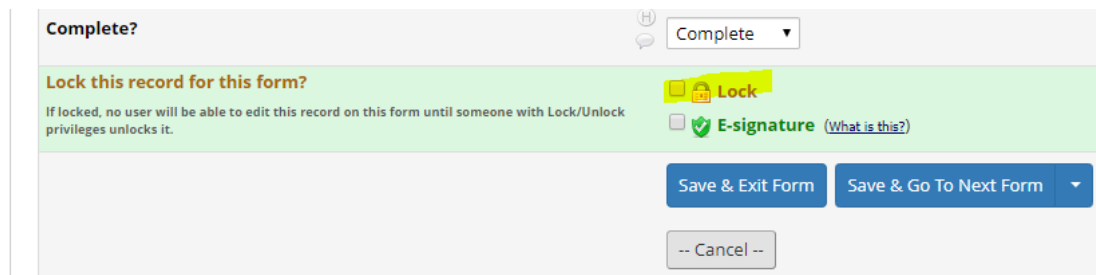
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4.9 Once the patient submits the consent the person obtaining consent will get an email notification

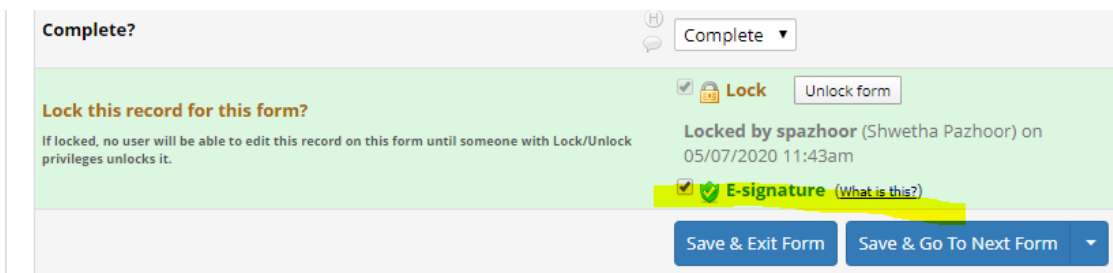
5.0 Person obtaining Consent

5.1 Click on the link and sign into redcap-this will take you to the signed consent form-check the form and click on lock at the bottom of the page



Then ok and close

5.2 Go back to bottom of page and click on E-signature



5.3 Save and go to next form

You will have to log in to REDCap again(to confirm your e-signature)

6.0 Complete Informed Consent documentation form

Once all three forms are complete it will appear green like this:

eConsent Using REDCap

✓ Record ID 1 successfully edited

Record ID 1 (BD001)

Data Collection Instrument	Status
Study Details	
English Consent Document HSC-MS-20-1234 (survey)	
Informed Consent Documentation	

Click on record status dashboard to see the list of all your patients

Viewing 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

Applications

- Alerts & Notifications
- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Customize & Manage Locking/E-signatures
- Data Quality
- REDCap Mobile App

Click on the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Dashboard displayed: [Default dashboard] Create custom dashboard

Displaying record Page 1 of 1: "1" through "1" of 1 records ALL (1)

+ Add new record

Displaying: Instrument status only | [Lock status only](#) | [E-signature status only](#) | [Lock and E-signatures](#)

Record ID	Study Details	English Consent Document HSC-MS-20-1234	Informed Consent Documentation
1 (BD001)			

7.0 Click on the consent instrument and download pdf instrument drop down menu to download the signed ICF

Actions: Modify instrument Download PDF of instrument(s) VIDEO: Basic data entry

English Consent Document

E-signed by spazhoor (Shweta)

Locked by spazhoor (Shweta)
A user has locked record "1" for this instrument. You may unlock this record at the bottom of the page if you have locking/unlocking privileges.

Survey response is read-only because it was completed via the e-Consent Framework. However, because you have 'Lock/Unlock Records' privileges, you will still be able to lock this form at the bottom. Survey options

Response was completed on 05/07/2020 11:31am. Survey responses are not able to be edited once a participant has completed a survey. They are read-only.

Record ID 1 (BD001)

Download PDF of instrument(s) menu items:

- This survey (blank)
- This survey with saved data
- This survey with saved data (compact)
- This survey with saved data (for survey participant)
- All forms/surveys (blank)
- All forms/surveys with saved data
- All forms/surveys with saved data (compact)

eConsent Using REDCap

*****STOP HERE*****

9.0 Moving your project to production:

Once you have tested your project and are ready to move into production go to the project set up page

Scroll to the bottom of the page and click on move to production

The screenshot shows the REDCap project setup interface for a project named "eConsent test 2". The page is in the "Project Setup" tab, which is highlighted in yellow. The project status is "Development" and it shows "Completed steps 0 of 7". There are two main sections with "Not started" status:

- Main project settings:** Includes options to "Disable" or "Enable" "Use surveys in this project?" (currently enabled) and "Use longitudinal data collection with defined events?" (currently disabled). There is a link to a video: "VIDEO: How to create and manage a survey". A "Modify project title, purpose, etc." button is also present.
- Design your data collection instruments & enable your surveys:** Provides instructions on adding or editing fields on data collection instruments (survey and forms) using the Online Designer or uploading a Data Dictionary. It includes quick links: "Download PDF of all instruments" and "Download the current Data Dictionary".

At the bottom of the page, there is a prominent callout box with a red "X" icon and the text "Not started" that reads: "Move your project to production status. Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect. Go to [Move project to production](#)".

Once the project is in production you have to enter in =to draft mode to make any changes and submit for approval.