

# How to set up e-Consent in REDCap | 2020

## 1. Login to REDCap (https://ccts-redcap.ihrp.uic.edu/)

To create an e-consent project, the full access user right is required. If you need to set up your REDCap account, refer to this page: <u>https://ccts.uic.edu/tools/redcap/account-setup/</u>

Creating a consent form in REDCap is a similar process to set up a regular data entry form with the survey settings that requires basic understandings about REDCap features. If you are new to REDCap, please watch the introduction videos added in CCTS REDCap training resource page: <a href="https://ccts.uic.edu/tools/redcap/training/">https://ccts.uic.edu/tools/redcap/training/</a> and Vanderbilt training videos: <a href="https://ctts.uic.edu/tools/redcap/training/">https://ccts.uic.edu/tools/redcap/training/</a> and Vanderbilt training videos: <a href="https://ctts.uic.edu/tools/redcap/training/">https://ctts.uic.edu/tools/redcap/training/</a> and Vanderbilt training videos:

If you need REDCap e-consent consultation please submit your request here: <a href="https://webapps.ccts.uic.edu/CCTS\_Service\_Requests/login.aspx">https://webapps.ccts.uic.edu/CCTS\_Service\_Requests/login.aspx</a>

#### 2. Before using REDCap e-consent, get the IRB approval after reviewing regulatory component.

IRB approval must be obtained before using REDCap e-consent. If you need any regulatory support related to e-consent process, submit your service request here: <u>https://ccts.uic.edu/services/regulatory/</u>

## 3. Some options to consider before starting.

- a. If you have the consent document approved before setting up in REDCap and don't need to use the general template, start from a blank form or project in REDCap. Then, you can add texts in REDCap form such as *Descriptive Text, Text, Radio Buttons* field types for study descriptions, other paragraphs and questions. Signature fields and image uploads are supported in REDCap.
- b. For the informational paragraphs except for some interactive fields asking participants agreement (yes/no) or e-signature in your approved consent document, you can either <u>1</u>) save each page as image file such as .jpg and upload it in the REDCap form between sections and questions to show the original document as images, or <u>2</u>) type in or copy/paste the texts in each REDCap text fields. Font edit options are supported similarly as in Word documents.
- c. You can use the eConsent template uploaded in the CCTS REDCap by creating a new project. This template includes all additional languages with some instructions, so substantial amount of customizations will be required.

## 4. Create a new project to download the eConsent Template

Once you log in to REDCap, find '*New Project*' tab on the top menu options. Then add project title and select 'Research' at Purpose of this Project. Information about PI, project type, IRB number should be entered as applicable.

Figure 1. Create a project

| Projects + New Project @ Help   | & FAQ 🖬 Training Videos 🛛 Send-It 📮 Messenger 🌩 Control Center  |
|---|---|
|   |   |
| + Create a new REDCa  | p Project   |
| You may begin the creation of a button at the bottom.   | new REDCap project on your own by completing the form below and clicking the Create Project   |
| Project title:  | Title to be displayed on project webpage  |
| Purpose of this project:<br>How will it be used?  | Select One T  |
| Assign project to a Project<br>Folder?  |   |
| Project notes (optional):<br>Comments describing the project's use<br>or purpose that are displayed on the<br>My Projects page. |   |
| Start project from scratch<br>or begin with a template?   | <ul> <li>Create an empty project (blank slate)</li> <li>Upload a REDCap project XML file (CDISC ODM format)</li> <li>Use a template (choose one below)</li> </ul> |

#### a. Select a template

After adding the project info (title, purpose of this project, PI, IRB number), you can either select the template 'Biological Consent Template' UIC CCTS generated or start from a blank project if you have your own form to create.

Figure 2. Select a template

| Project title:   |   |  |
|--|---|--|
| ,  |   |  |
|  | Title to be o   | lisplayed on project webpage   |
| Purpose of this project:<br>How will it be used?   | Selec   | t One V  |
| Assign project to a Projec<br>Folder?  | t 🗌   |  |
| Project notes (optional):<br>Comments describing the project<br>or purpose that are displayed on   |   |  |
| My Projects page.  | the   |  |
| Start project from scratc<br>or begin with a template  | h Create<br>? Uploac<br>• Use a t   | an empty project (blank slate)<br>a REDCap project XML file (CDISC ODM format) ?<br>emplate (choose one below)<br>-filled with fields, forms/surveys, and other settings) + Add templates (Administrators only)  |
| Start project from scratc<br>or begin with a template<br>Choose a project temp<br>Select   | h Create<br>? Uploac<br>• Use a t   | i a REDCap project XML file (CDISC ODM format) 🛛<br>emplate (choose one below)   |
| Start project from scratc<br>or begin with a template<br>the choose a project template   | h Create<br>Upload<br>Use a t<br>olate (comes pre   | I a REDCap project XML file (CDISC ODM format) 2<br>emplate (choose one below)<br>-filled with fields, forms/surveys, and other settings)  |
| Start project from scrate<br>or begin with a template<br>template a project template<br>template Template title                          | h Create<br>Uploac<br>Use a t<br>Use a t<br>(comes pre<br>(sorted by title)<br>Ny<br>tt Template with | I a REDCap project XML file (CDISC ODM format) 2<br>emplate (choose one below)<br>-filled with fields, forms/surveys, and other settings)<br>-filled mith fields, forms/surveys, and other settings)<br>Template description   |
| Start project from scrate<br>or begin with a template<br>template<br>select<br>Basic Demograph<br>Biological Conser<br>Biological Conser | h Create<br>Uploac<br>Use a t<br>Use a t<br>(comes pre<br>(sorted by title)<br>Ny<br>tt Template with | A a REDCap project XML file (CDISC ODM format)<br>emplate (choose one below)<br>-filled with fields, forms/surveys, and other settings)<br>+ Add templates (Administrators only)<br>Template description<br>Contains a single data collection instrument to capture basic demographic information. |

#### b. Adding a template form to your existing project

A consent form can be added to your existing REDCap project where other data collection forms such as screening and follow-up forms are located. If you want to add a consent template form to another REDCap project, download the form as a zip file after creating a project using the consent template and upload it in Online Designer.

| 😭 Project Home                      | 🕼 Online Desig  | ner       | 📲 Dat  | ta Dictionary | Codebook             |  |                        |  |           |
|-------------------------------------|---|-----------|--------|---------------|----------------------|--|------------------------|--|-----------|
|                                     |   |           |        | Creat         | e snapshot of ir     |  | VIDEO: How to          | <u>use this page</u>                                       |           |
|                                     | ll allow you to make<br>hile in development   |           |        |               |                      |  |                        | ng only your   |           |
| Data Collection<br>Instruments      | ta Collection<br>truments Survey Queue Provide Survey Login (<br>Survey Notifications ( |           |        | Crea          | ort a new inst       | rument from scrat<br>rument from the o | official <u>REDCap</u> | Shared Library <b>?</b><br>er or <u>external libraries</u> | 2         |
| Instrument name                     | e   |           | Fields | View<br>PDF   | Enabled as<br>survey | Instrument action                      | ns Survey-relat        | ed options   |           |
| Biological_Conse<br>Elements and HI | nt_Template with Ad<br>PAA drop in text   | lditional | 57     | ۵             | ۷                    | Choose action<br>Rename<br>Copy        | Survey se              | ttings + Automated In                                      | vitations |
|                                     |   |           |        |               |                      | × Delete                               |                        |  |           |
|                                     |   |           |        |               |                      |  |                        |  |           |

Figure 3 Downloading a ZIP file of consent form

#### c. Customizing texts

You should edit your study specific languages and delete unnecessary paragraphs from the provided template in REDCap Online Designer.



#### Figure 4. Descriptive text field



#### 5. Uploading image of document

Instead of adding texts in Filed Label, a pdf or other image file can be uploaded up to 10Mb using Descriptive Text field type.

| You may add a new project field to this data collection instrument by completing<br>bottom. When you add a new field, it will be added to the form on this page. For<br>you may view the Eli <u>Field Types video (4 min)</u> .<br><b>Field Type:</b> Descriptive Text (with optional Image/Vide)/. |   |
|---|---|
| Question Number (optional) Deplayed only on the survey page Field Label Use the Rich Text Editor ?  | Variable Name (utilized in logic, calcs, and exports)<br>DNLY letters, numbers, and underscores   |
|   | How to use () Smart Variables   |
| Action Tags / Field Annotation (optional)   | Optional file attachment, image, audio, or video:  Embed an external video (provide video URL) ?  e.g. https://youtube.com/watch?w=E1cCuWMupz0, http://example.com/movie.mp4 Display format of video: Inline Inside pop - or -      |
| Learn about @ Action Tags or using Field Annotation   | Attach an image, file, or embedded audio O Upload file  |
|   | Display format of attachment on page:<br>© Link<br>Inline image<br>Audio file (play in embedded player on page)<br>• <u>Compatibility notice for embedded audio</u><br>(Images wider than 600 pixels will be downized to fit page.) |

Figure 5. Uploading a document of image

#### 6. Survey page break

To display separate sections or paragraphs in different pages so that participants can move to the next pages instead of showing all in one screen requiring scrolls, add '*Begin new section*' field and select *Question Display Format as 'One section per page'* in *Survey settings*.

| Add New     | Field  |  |
|-------------|--|--|
| bottom. Wh  | d a new project field to this data collection instrument by completing<br>en you add a new field, it will be added to the form on this page. For a<br>w the IBI <u>Field Types video (4 min)</u> . |  |
| Field Type: | Select a Type of Field 🔻   |  |
|             | Select a Type of Field   |  |
|             | Text Box (Short Text, Number, Date/Time,)  |  |
|             | Notes Box (Paragraph Text)   |  |
|             | Calculated Field   |  |
|             | Multiple Choice - Drop-down List (Single Answer)   |  |
|             | Multiple Choice - Radio Buttons (Single Answer)  |  |
|             | Checkboxes (Multiple Answers)  |  |
|             | Yes - No   |  |
|             | True - False   |  |
|             | Signature (draw signature with mouse or finger)  |  |
|             | File Upload (for users to upload files)  |  |
|             | Slider / Visual Analog Scale   |  |
|             | Descriptive Text (with optional Image/Video/Audio/File Attachment)   |  |
|             | Begin New Section (with optional text)   |  |

Figure 6. Adding a section header for page break

Figure 7. Survey Settings to show one section per page

| E Question Numbering   | Custom numbered 🔻   |  |
|--|---|--|
| For custom numbering, each question's number<br>will be blank by default until manually added via<br>the Online Designer or Data Dictionary.   | Question numbers will not display correctly if us<br>branching logic employed. Question auto numbe<br>some of your survey questions use branching log   | ing auto numbering if some questions have<br>rring has been automatically disabled because<br>zic. |
| 🔜 Question Display Format  | All on one page   | •  |
| One page or multiple pages? Section headers,<br>which begin new sections on the instrument, will   | All on one page   | age  |
| serve as the page break in a multi-page survey, in which each page will begin with a section header.   | One section per page (multiple pages)   | k button) on the survey page<br>lous pages)  |
| Allow participants to download a PDF of<br>their responses at end of survey?<br>Display a button for the participant to download a<br>PDF file of their responses for the survey they just<br>completed. | No  This option will not be available if the Survey Aut<br>is enabled. Also, if a field utilizes the @HIDDEN a<br>ONte: Because the e-Consent Framework opti<br>here will not be the full-length PDF but will be the<br>questions and unselected choices. | ction tag, it will not be displayed in the PDF.<br>on is enabled on this page, the PDF included    |
| 🖂 Survey-specific email invitation field   | select a field 🔻  |  |

#### 7. Survey Settings

To enable e-consent features in REDCap, the form must be set up as a survey. Make sure to enable 'Use Survey in this project' option in Main Project Setting in Project Setup. Then, in Online Designer enable survey on the consent form. This default survey setting is already made in the e-consent template project, but when you add the consent form in other existing project enabling survey option will be needed.

Your study specific information and e-consent instructions including e-consent framework can be added and setup in Survey Settings at Online Designer. If you like to add study logo or IRB stamp, review Survey Design Options in Survey Settings.

|  | 😤 Project Home 🛛 🖅 Project Setup 🕼 Online Designer 👔 Data Dictionary 🖉 Codebook   |
|--|---|
| Data Collection  | Greate snapshot of instruments  |
| <ul> <li>Survey Distribution Tools</li> <li>deta public survey link or build a participant list for<br/>invitume repondents</li> <li>Record Status Dashboard</li> <li>View data collection status of all records</li> <li>Add / Edit Records</li> <li>- create new records or edit/view existing ones</li> </ul> | Last snapshot: never         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       Survey options: |
| Show data collection instruments Applications  | Instruments Survey Notifications Upload or download Auto Invitations Upload instrument ZIP file from another project/user or <u>external libraries</u>  |
| Alerts & Notifications     Calendar  | Instrument name Fields View Enabled as Instrument actions Survey-related options  |
| <ul> <li>Data Exports, Reports, and Stats</li> <li>Data Import Tool</li> <li>Data Comparison Tool</li> </ul>   | Biological_Consent_Template with Additional 57 这 🥑 Choose action 🗢 Survey settings +Automated Invitations   |

#### Figure 8 Survey Setting for e-consent framework

Figure 9 e-Consent Framework

| 🛓 e-Consent Framework  | Disabled   |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|
| – and –  | Auto-Archiver en   |  |  |  |  |  |  |  |
| D PDF Auto-Archiver  | Auto-Archiver + e-Consent Framework <u>What is the e-Consent Framework?</u> (includes end-of-survey certification & archival of PDF consent form)  |  |  |  |  |  |  |  |
| Upon survey completion, a compact PDF copy of the<br>survey response will be automatically stored in the | 🛃 e-Consent Framework Options:   |  |  |  |  |  |  |  |
| project's File Repository, from which the archived<br>PDFs can be downloaded at any time.                | For e-Consent it is sometimes required to include the consenting participant's name<br>(and date of birth in some cases) on the final consent form as extra documentation<br>of their identity. Below you may select fields used to capture that info. You may also<br>enter the current e-Consent type for this form. The values fo<br>the fields below will be automatically inserted into the footer of the PDF consent<br>form that the participant will review at the end the survey, after which that PDF<br>'hard-copy' will be archived in the File Repository. <u>Bead more</u> |  |  |  |  |  |  |  |
|  |  | responses to be edited by users?   |  |  |  |  |  |  |
|  | e-Consent version:   | 1 e.g., 4  |  |  |  |  |  |  |
|  | First name field:  | select a field 🔻   |  |  |  |  |  |  |
|  | Last name field: select a field 🔻  |  |  |  |  |  |  |  |
|  | Note: If you are using a single field to capture whole name, you may select it for e first/last name above while leaving the other name field unselected.  |  |  |  |  |  |  |  |
|  | Optional fields (thes  | ese are not always necessary for e-Consent):   |  |  |  |  |  |  |
|  | e-Consent type:  | e.g., Pediatric  |  |  |  |  |  |  |
|  | Date of birth field:   | select a field 🔻   |  |  |  |  |  |  |
|  | Force signature field(s) to be erased if participant clicks Previous Page button while<br>on the certification page?   |  |  |  |  |  |  |  |
|  | field, a signature field<br>field. If any fields are<br>survey where it asks t<br>Page button, it will en<br>field(s) again before c   | at serves as a signature field in this survey. It could be a free-form tex<br>or a number field (e.g., to collect a PNN), and it must be a <u>Bequired</u><br>selected below, then it the participant gets to the last page of the<br>hen to certify their responses, if they then choose to click the Previou<br>sase the value of these signature fields. Thus forcing them to sign the<br>ompleting the survey. If you do not want this behavior, do not select<br>may use up to five signature fields. |  |  |  |  |  |  |
|  | Signature field #1:  | select a field 🔻   |  |  |  |  |  |  |
|  | + Select another sig   |  |  |  |  |  |  |  |

#### 8. Sending consent form to participants

There are different options to send out the e-consent form to participants.

#### 1) Using Public Survey Link

Public link is only available when the consent form is the first form in your REDCap project, and when the link needs to be sent to multiple people in one email message. So anyone who clicks the link can access the consent form for multiple times using the same link.

| <ul> <li>A Project Home          ·</li></ul>  | 🛃 Survey Distributio  | n Tools  |  |   |
|---|---|--|--|---|
| Project status: Development   | -   |  |  |   |
| Data Collection   | Se Public Survey Link   | Se Participant List  | 🚰 Survey Invitation Log  |   |
| <ul> <li>Survey Distribution Tools         <ul> <li>deta public survey link or build a participant list for inwiting respondents</li> <li>Record Status Dashboard</li> <li>We data collection status of all records</li> </ul> </li> <li>Add / Edit Records         <ul> <li>Create new records or edit/view existing ones</li> </ul> </li> <li>Show data collection instruments</li> </ul> | survey link below to email it<br>contains questions asking fo<br>link for all participants, it allo<br>necessary in some cases. | to your participants. Re<br>r identifying data from<br>ows for the possibility o<br>by the URL below and p | esponses will be collected anoi<br>the participant). <b>NOTE:</b> Since<br>f participants taking the surve<br>aste it into the body of an em | your survey. You may obtain the<br>nymously (unless the survey<br>this method uses a single survey<br>y multiple times, which may be<br>ail message in your own email |
| Applications  | Public Survey URL: https://   | www.redcan.ibrn.uic.ec   | lu/surveys/?s=WFPTAX9NRT   | r.  |
| Alerts & Notifications  | incps.//  | www.redcap.imp.dic.ed  | arsurveys/:s=wirriAx5iviti   |   |
| Calendar Calata Exports, Reports, and Stats Cata Import Tool Cata Comparison Tool Logging   | Link Actions  |  | Get Short Survey Link  | s   |
| <ul> <li>Logging</li> <li>Field Comment Log</li> <li>File Repository</li> </ul>   | Open public survey +  | 🗭 Log out  | 🆧 Create Custom Survey Li  | nk  |
| 💄 User Rights and 🚢 DAGs  | Send me URL via ema   | il   | > Get Embed Code   |   |
| Customize & Manage Locking/E-signatures Data Quality  | Survey Access Code o  | r 🎇 QR Code  |  |   |

2) Using Survey Distribution Tool

When you have individual participant' email address the e-consent survey form can be sent to each participant using unique survey link so that the response status and follow-up can be done using the

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individually linked information. If there is a separate data entry form where the study participants' information including email address is entered by the study staffs, turn on the option 'Designate an Email field for sending survey invitations' in Project Setup. Then the participant list in survey distribution tool will automatically shows up all entered email address, and from there you can send the invitation.

| Designer · I Dictionary · Codebook     Project status: Development  | Survey Distribution                     | 회 Survey Distribution Tools |                                      |             |                          |                     |      |   |         |
|---|---|-----------------------------|--------------------------------------|-------------|--------------------------|---------------------|------|---|---------|
| Data Collection 📃   | ${ {                                  $ | 🚉 Participant List          | 🔄 Survey Invitation Log              |             |                          |                     |      |   |         |
| <ul> <li>Survey Distribution Tools         <ul> <li>det a public survey link or build a participant list or<br/>inviting reported</li> <li>det a public survey link or build a participant list or<br/>inviting reported</li> <li>det a public survey link or build a participant list or<br/>inviting reported</li> <li>det a public survey link or build a participant list or<br/>inviting reported</li> <li>det fait Record Status O all records</li> <li>Add / Edit Records</li> <li>Create new records or edit/we existing ones</li> </ul> </li> <li>The Participant List belonging to [Initial survey] "Biological_Consent_Template with Additional Eleme *</li> </ul> |   |                             |                                      |             |                          |                     |      |   |         |
| - Create new records or edit/view existing ones<br>Show data collection instruments   | Participant List belongin               | g to [Initial survey] "Bio  | ogical_Consent_Template with Additio | nal Eleme 🔻 |                          |                     | Rem  | ove all partic                          | ipant   |
| Applications  | Displaying 1 - 4 ▼ of 4                 | Add participants            | Compose Survey Invitations           |             |                          |                     |      | 🗷 Expo                                  | rt list |
| <ul> <li>Alerts &amp; Notifications</li> <li>Calendar</li> </ul>  | Email                                   | Record                      | Participant Identifier               | Responded?  | Invitation<br>Scheduled? | Invitation<br>Sent? | Link | Survey<br>Access<br>Code and<br>QR Code |         |
|   | [No email listed]                       |                             |                                      | 0           |                          |                     | 68)  |   |         |
| Data Exports, Reports, and Stats  | [IVO eman instea]                       |                             |                                      | -           |                          |                     |      |   |         |
| -S Data Import Tool   | [No email listed]                       |                             |                                      | 0           |                          |                     |      |   |         |
|   |   |                             |                                      |             | •                        |                     | •    | •                                       |         |

#### 3) Using data entry form (Add/Edit Records)

When the study participants are unable to send the consent form by themselves or don't have email address available the study staff should open the e-consent form on their device and let them fill out the form. When the public survey link is not available and(or) the participant's information is already entered in the other form, the study staff can create a new record or open an existing record to go the survey page linked to the record. If you don't see Survey Options in data entry form, click 'Save and Stay'.

| Project status: Development   | Biological_Consent_Template with Additional Element  | s and HIPAA drop in t  | ext   |
|---|--|--|---|
| Data Collection   |  |  |   |
| Survey Distribution Tools   |  | Invitation status: 🖂   | 🛃 Survey options 🛛 🗢                          |
| <ul> <li>Get a public survey link or build a participant list<br/>inviting respondents</li> </ul> | for Sediting existing Record ID 4  |  | 萨 Open survey                                 |
| 🗰 Record Status Dashboard   |  | 4  | 🕒 Log out + 🏟 Open survey                     |
| - View data collection status of all records     Add / Edit Records                               | Record ID  | To rename the record, see the re<br><u>Record Home Page</u> .  | 🖂 Compose survey invitation                   |
| - Create new records or edit/view existing ones   | Health & Biological Sciences Research Consent form template – 11/01/19<br>Delete this instruction box by clicking the red X.   |  | 🗼 Survey Access Code and<br>器 QR Code         |
| Data Collection Instruments:  | Instructions:  |  | Der Gir code                                  |
| Lock all instruments  | 2. Text in [] is to be replaced with specific information about your re-     3. Instructions and/or information for the section are in [bracket]. Dr     4. > and indics indicate guidelines. Delete guidelines, arrows, and itail     5. Uggested text is often included in the guidelines. Suggested text i     Text* and text not being included in the consent before finalizing t | elete the directions and corr<br>cized text before finalizing t<br>s preceded by <b>*Suggested T</b> | esponding text as applicable.<br>he document. |
| Alerts & Notifications  | 6. Additional language that may be required based on your research   |  | e Additional Informed                         |
| 🗰 Calendar  | Consent Template Language document.  |  |   |
| 🖹 Data Exports, Reports, and Stats  |  |  |   |
| - Data Import Tool  | University of Illinois at Chica<br>University of Illinois Hospital & Health Si   |  |   |
| ≠ Data Comparison Tool  | Research Information and Consent [Parental Permission delete if not  |  |   |
| Logging   | for Participation in Biomed  |  | ion [delete il not applicable]                |
| Field Comment Log   | [Insert Study Tit  |  |   |
|   |  |  |   |
| <ul> <li>File Repository</li> <li>User Rights and 📽 DAGs</li> </ul>                               | Principal Investigator/Researcher Name and Title: Insert name & title  | 1  |   |

Figure 10. Open survey from data entry form (Add/Edit Records)

# How to set up e-Consent in REDCap

**9.** Study participants will look at the option to download the signed consent form in pdf. When e-consent frame work is setup, at the end of consent form participant will be asked to certify the information before submitting. Downloading option is given as marked in the image below.



#### Figure 11. Consent form submission page

#### 10. Archive of pdf consent forms

Submitted consent form will be archived in File Repository  $\rightarrow$  PDF Survey Archive so that the study team with given access right can view and download when it is needed.

| Collection     Collection     Survey Distribution Tools     Cotta public survey link or build a participant list for     Inviting respondents     Record Status Dashboard     -View data collection status of all records |                       | ind synta | x files are stored here also                     |                | in the file list belov | v. Whenever a data e   | export is pe   | rforme                                  | d, the    |  |  |  |  |
|---|-----------------------|-----------|--|----------------|------------------------|------------------------|--|---|-----------|--|--|--|--|
| - Get a public survey link or build a participant list for<br>inviting respondents  Record Status Dashboard  - View data collection status of all records   | -                     |           |  |                |                        |                        | retrieval later, or you may download previously uploaded files in the file list below. Whenever a data export is performed, the<br>resulting data and syntax files are stored here also. |   |           |  |  |  |  |
| Inviting respondents<br>Record Status Dashboard<br>- View data collection status of all records   | 🚢 User F              | iles      |  |                |                        |                        |  |   |           |  |  |  |  |
| - View data collection status of all records  |                       |           | 🛃 Data Export Files                              | 🔓 PDF Su       | rvey Archive           | @ Upload New F         | ile  |   |           |  |  |  |  |
|   |                       |           |  |                |                        |                        |  |   |           |  |  |  |  |
|   | Displayed below       | w are PD  | F files that have been auto                      | matically cap  | otured and stored      | by the PDF Auto-Arch   | niver settin   | g, which                                | has be    |  |  |  |  |
| Add / Edit Records  | enabled by one        | or more   | surveys on their Survey S                        | ettings page.  | Only users with 'F     | ull data set' data exp | ort privileg   | ges will                                | be able t |  |  |  |  |
| - Create new records or edit/view existing ones   |                       |           | iles. Note: The PDFs below                       |                |                        |                        |  | ieans th                                | ey migh   |  |  |  |  |
| Show data collection instruments  | different from o      | other dov | vnloadable PDFs in the pro                       | oject that are | generated on den       | hand using the curre   | nt data.   |   |           |  |  |  |  |
| Applications  | Show 10 🔻 e           | ntries    |  |                |                        |                        | Searc  | ch                                      |           |  |  |  |  |
| Alerts & Notifications  | <b>6</b>              |           |  | 4              |                        | <b>A</b>               | <b>A</b>   | A.                                      |           |  |  |  |  |
| 🛗 Calendar  | Survey Completion     | Record    | Survey   |                | Identifier (Name, I    | OOB) IP Address        | Version  | Туре                                    | Down      |  |  |  |  |
| Data Exports, Reports, and Stats  | Time                  |           |  |                |                        |                        |  | .,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, |           |  |  |  |  |
| - Data Import Tool  |                       |           |  |                |                        |                        |  |   |           |  |  |  |  |
| 🗲 Data Comparison Tool  | 04/24/2020            | 3         | Biological_Consent_Ten<br>with Additional Elemen |                |                        | 99,74,9,248            |  |   | PDF       |  |  |  |  |
| E Logging   | 10:44am               | 2         |  | its and        |                        | 99.74.9.248            |  |   |           |  |  |  |  |
| Sield Comment Log   |                       |           | niews urop in text                               |                |                        |                        |  |   |           |  |  |  |  |
| File Repository   |                       |           | Biological Consent Ter                           | nplate         |                        |                        |  |   |           |  |  |  |  |
| 👗 User Rights and 🚢 DAGs  | 04/24/2020<br>10:39am | 2         | with Additional Elemen                           |                |                        | 99.74.9.248            | 1  |   | PDI       |  |  |  |  |
| Se Field Commont Log  |                       |           | HIPAA drop in text                               | nplate         |                        |                        |  |   |           |  |  |  |  |

## 11. Setting up User Rights

The study team members should have corresponding access right on your e-consent form project in User Rights. The user who has the access to 'User Rights' must add other users and set up their access level.

| Basic Rights  | (M/D/Y)   | Data Entry Rights<br>NOTE: The date antry rights "only" pertain to a user's<br>ability to view or edit data on a web page in REDCap<br>(e.g., data entry forms, reports). It has no effect on data<br>imports or data exports   |
|---|---|---|
| Highest level privileges:<br>≅ Project Design and Setup<br>▲ User Rights<br>▲ Data Access Groups  | 10<br>10<br>10<br>10<br>10<br>10<br>10<br>10<br>10<br>10<br>10<br>10<br>10<br>1 | No         Read         View           Access         Only         a           Edit         Edit         response           Biological_Consent_Template         with Additional Elements and         Image: Consent_Template  |
| Privileges for data exports (includi<br>reports, and stats)<br>Data Exports<br>Data Exports<br>Data Exports<br>Data Exports<br>Data Exports<br>Data Exports<br>defaultion fields will be<br>removed, as well as any<br>data time fields and Identifier<br>fields.<br>Adso allows user to view ALL<br>reports (but no necessarily all<br>data in the reports)<br>Stats & Charts<br>Other privileges:<br>Survey Distribution Tools<br>Discussions   | Ing PDFs and API exports).  | HPAA drop in text (survey)  External Modules: Configuration Permissions  Privileges may be defined regarding whether the user can set or modify the configuration of an Externity enabled modify the configuration of an Externity enabled configuration permissions here.  Date Calculated Fields*  Field Notes Diplay**  **Module does not have project-level configuration options  **Module does not have project-level configuration options |
| Calendar Ca |   |   |