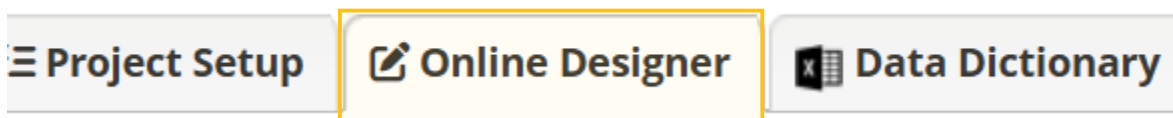


How to Enable e-Consent in REDCap (v15.3.2)

Step 1: Set Up the e-Consent Form

1. Go to the Online Designer. (Survey must be enabled in project setup first.)



2. Choose or create the instrument that will serve as the consent form. (Suggestions below)

Instrument name	Fields	PDF	Enabled as survey
Informed eConsent	16		
Eligibility	7		
Stop	1		<button>Enable</button>

The following fields should be added to the Consent instrument.

Add a field with the following action tags (Red font)

Add a descriptive field titled consent text (This will serve as a placeholder for the Inline PDF consent form)

Field Name: consent_intro

Evaluation of Cognitive and Physiological Responses to Simulated
Spaceflight Environments in Healthy Adults

Add Field Add Matrix of Fields Import from Field Bank

Field Name: intro_2

Dear Participant,

This study aims to evaluate the cognitive performance and physiological responses of healthy adult participants when exposed to simulated spaceflight environments, including altered gravity, confined spaces, and disrupted circadian rhythms. Using virtual reality simulations and biometric monitoring, the research seeks to identify potential stressors and adaptive behaviors relevant to long-duration space missions.

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University of Arizona
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(Optional) You can add a couple of fields (Descriptive Text) to inform your participants about the study, and in case you have an image or logo.

Field Name: version

ICF Version

Validation type: None

@CONSENT-VERSION @HIDDEN-SURVEY

Add a Text Box field and apply the action tag @CONSENT-VERSION. This tag automatically captures the version of the consent form being used in the current e-Consent context, based on the specific record, event, survey, Data Access Group (DAG), or MLM language.

⚠ Note: The @CONSENT-VERSION tag will only populate the field if it is initially blank and only when the instrument is being completed as a survey (not during data entry via the project dashboard or record status dashboard).

    [] Field Name: lbl_participant Branching logic: [consent] = '1' Contains embedded fields

Signing the consent form
 I have read (or someone has read to me) this form, and I am aware that I am being asked to participate in a research study. I have had the opportunity to ask questions and have had them answered to my satisfaction. I voluntarily agree to participate in this study.

I am not giving up any legal rights by signing this form. I will be given a copy of this form.

Printed name of subject	
First Name:	{first_name:icons}
Last Name:	{last_name:icons}
Email Address:	{email_address:icons}
Telephone:	{phone_number:icons}
DOB	{dob}
What is your contact preference?	{contact:icons}

We recommend embedding your fields directly within the consent instrument for a cleaner, more streamlined appearance. However, please note that **signature fields cannot be embedded**. They must remain as separate fields on the form of functioning properly.

    [] Field Name: part_signature Branching logic: [consent] = '1'

* must provide value  [Add signature](#)

Please click the green text to add your signature.

Add Field Add Matrix of Fields Import from Field Bank

    [] Field Name: econsent_date Branching logic: [consent] = '1'

eConsent Signature Date  Now M-D-Y H:M:S

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

@HIDDEN @NOW-SERVER @READONLY

Add Field Add Matrix of Fields Import from Field Bank

Lastly, apply branching logic to display the signature field only if the participant chooses to consent. Following the signature field, include a final field to automatically capture the signature date and time using the action tags: @HIDDEN, @NOW-SERVER, and @READONLY.

 Note: Do not embed the signature field, as embedded signature fields will not appear on the PDF snapshot of the consent form.

3. Add a Hard Stop on Consent and Eligibility (We suggest including this)

     [] Field Name: consent

Do you agree to participate in this study ☐ Yes ☐ No [End Survey] reset

If you have a question about the consent instrument, if they would like to participate, you can add a hard stop. Click the red hand.

Set up Stop Actions for this Survey Question

 Stop Actions (for survey questions only):

The survey participant will be prompted to end the survey when ANY choices checked below are selected for this question on the survey. Stop Actions will not be enabled on the form when viewing in REDCap as an authenticated user, but only become enabled when a participant views this data collection instrument as a survey.

Please note that there are other Stop Action settings on the Survey Settings page for a given instrument, such as the ability to set custom text when a survey ends via Stop Action.

Do you agree to participate in this study

[Select All](#) | [Deselect All](#)
☐ Yes

☒ No

Save

Close

Select the response that should end the survey and click save. Repeat the same process for your eligibility questions, which is generally a separate instrument.

Instrument name	Fields	PDF	Enabled as survey	Instrument actions	Survey related op
Informed eConsent	16			Choose action ▾	Survey settings 

(Optional) If you use a hard stop for your informed consent, we suggest setting up the hard stop survey completion text. Click on “Survey Settings” to adjust the Completion text.

If a Stop Action triggers the end of the survey, you may choose to keep the submitted responses or to prevent them from being saved as data in the project.

This completion text is ONLY displayed when a Stop Action triggers the end of the survey. If left blank, the standard Survey Completion Text will be used.

Save all survey responses regardless of Stop Action being triggered (default) 

Do NOT save the survey response when a Stop Action is triggered

Save all survey responses regardless of Stop Action being triggered (default)

When a Stop Action is triggered, that data will be deleted. For example, if a participant completes a survey prior to triggering the Stop Action, all data collected thus far in that survey will be deleted as if the survey was never taken. Additionally, if the record does not contain data in any other instruments, the entire record itself will be deleted during this process.

Open Sans  Heading 3  28px  **B** *I* U   

Thank you for your interest in this study.
Unfortunately, you do not consent to enroll in
this study.
If you have questions please contact

In this section, you have two options:

1. Choose whether to **save the record** if a participant selects *No* (i.e., chooses not to consent).
2. Optionally, display **alternative text** to inform the participants that they have opted out of the study.

You can also use a **stop action trigger** to prevent further survey progression if the participant does not consent.

Survey Termination Options:

- ☒ **Auto-continue to the next survey?** Automatically start the next survey instrument after finishing this survey ?

(Optional) Conditional logic for Survey Auto-Continue:

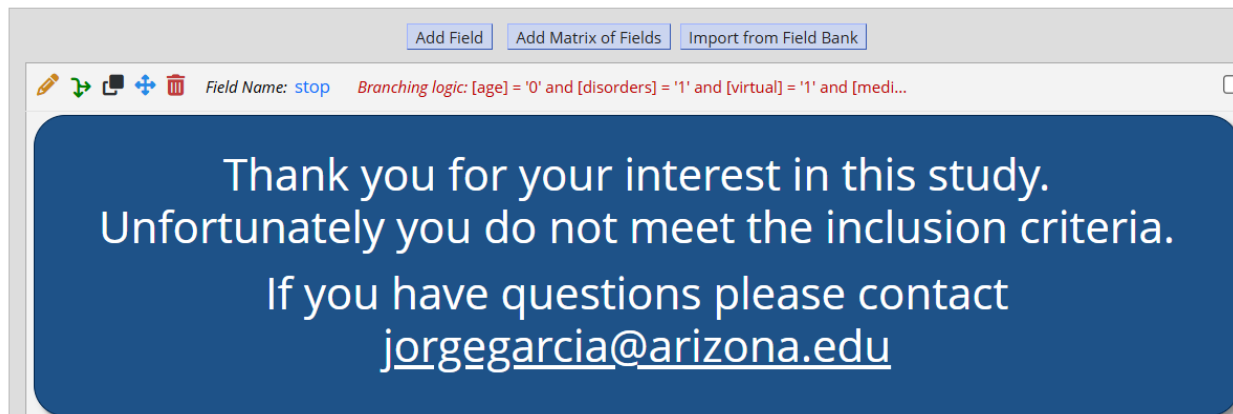
Auto-continue to the next survey ONLY if the conditional logic below is *TRUE* or if the textbox has been left blank.

```
[consent]='1'
```

On the same Survey Settings page, we recommend enabling the “Auto-continue to the next survey?” option and applying branching logic to ensure that only participants who consent to enroll in your study (e.g., 1 = Yes in this example) are directed to the next survey. Without this logic, participants who do not consent may still proceed to the next survey.

Current instrument: **Stop**

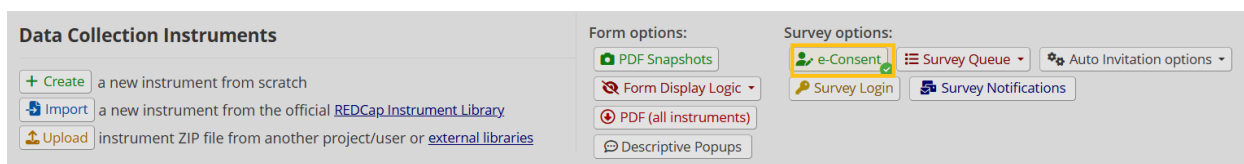
Form name: stop



The screenshot shows the REDCap form editor interface. At the top, there are buttons for 'Add Field', 'Add Matrix of Fields', and 'Import from Field Bank'. Below these, a toolbar contains icons for editing, saving, and deleting. The main area displays a message box with the following text: 'Thank you for your interest in this study. Unfortunately you do not meet the inclusion criteria. If you have questions please contact jorgegarcia@arizona.edu'. The message box has a blue background and white text. Above the message box, the 'Field Name' is set to 'stop' and the 'Branching logic' is defined as '[age] = '0' and [disorders] = '1' and [virtual] = '1' and [medi...'. A small checkbox is visible in the top right corner of the form editor.

Add an instrument for your eligibility responses that would exclude a participant from joining your study. You will use branching logic to trigger this alert.

4. eConsent Settings: Go to Online Designer, click “ e-Consent” (you’ll see a green button)



The screenshot shows the REDCap Online Designer interface. On the left, under 'Data Collection Instruments', there are buttons for 'Create', 'Import', and 'Upload'. In the center, under 'Form options', there are buttons for 'PDF Snapshots', 'Form Display Logic', 'PDF (all instruments)', and 'Descriptive Popups'. On the right, under 'Survey options', there are buttons for 'e-Consent' (highlighted with a green box), 'Survey Login', 'Survey Queue', 'Survey Notifications', and 'Auto Invitation options'.

5. Configure the e-Consent settings:

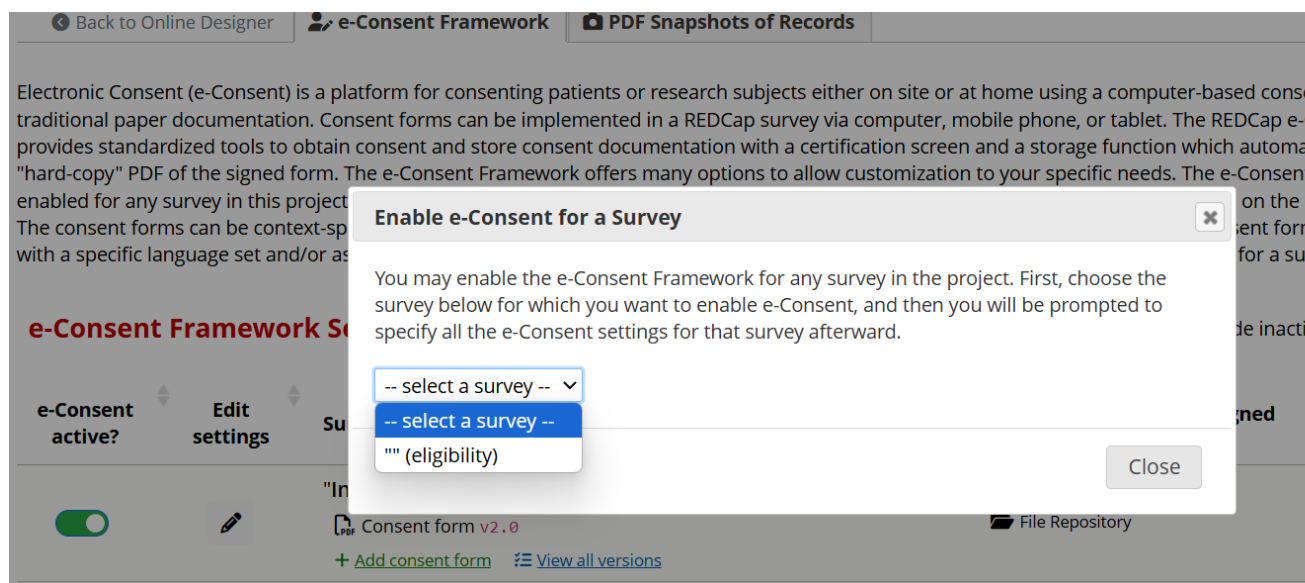


Electronic Consent (e-Consent) is a platform for consenting patients or research subjects either on site or at home using a computer-based consent form instead of traditional paper documentation. Consent forms can be implemented in a REDCap survey via computer, mobile phone, or tablet. The REDCap e-Consent Framework provides standardized tools to obtain consent and store consent documentation with a certification screen and a storage function which automatically generates a "hard-copy" PDF of the signed form. The e-Consent Framework offers many options to allow customization to your specific needs. The e-Consent Framework can be enabled for any survey in this project. The consent forms can be context-specific if you are using MLM languages and/or Data Access Groups so that it displays the form with a specific language set and/or assigned to a specific DAG. See the "Add consent form" link for more details after enabling

e-Consent Framework Settings

[+ Enable the e-Consent Framework for a survey](#)

Check "Enable the e-Consent Framework for a survey".



Select the survey you want to enable the e-consent for. (This will be the instrument that has the consent version and information in step 2)

Modify e-Consent Settings

additional option to also store the PDF in a File Upload field). Other e-Consent related options can be set below, such as setting a custom tag/category, custom label for the PDF header, location(s) to save the signed e-Consent snapshot, and the file name format of the snapshot being stored.

Primary settings

☐ Allow e-Consent responses to be edited by users?

First name field:

Last name field:

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

Additional settings

Date of birth field:

Custom tag/category for PDF footer:

Note: This should be static text only.

Custom label for PDF header:

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

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

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

Signature field #1:

Select the fields that include the participant's first and last name. Optionally, you may also include fields such as date of birth (DOB), a custom tag, and a custom label. If you select the Signature Field #1 option, be aware that any signature entered will be cleared if the participant clicks the *Previous Page* button while on the certification page.

Location(s) to save the signed consent snapshot

☒ Save to File Repository

☐ Save to specified field:

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

Select save to file repository (recommended) and the default setting. Click save at the bottom of the page.

**Edit
settings**

Survey

"Informed eConsent" (econsent)



Consent form v2.0

[+ Add consent form](#)

[View all versions](#)

Return to the e-consent framework and click Add consent form.

Add consent form

You may use this dialog to provide your static consent form (or consent form text) that will be displayed on the survey page to the participant. Below you may add a consent form or replace an existing one with a new version. If you have a simple project, you may choose to add your consent form to a Descriptive field via the Online Designer. But if you have a more complex project that utilizes multiple Data Access Groups and/or multiple MLM languages, each of which might require their own unique consent form, then providing your consent forms in this interface might be a more manageable option.

Consent forms added here will be displayed dynamically on the survey based on the current context. For example, if you have a DAG-specific consent form, you can specify that the consent form only be displayed for participants in that DAG, while participants in other DAGs will see a different consent form. The consent forms provided here will be displayed immediately below a specific Descriptive field (specified below) on the survey. **NOTICE: After clicking the "Add new consent form" submit, the consent form will GO LIVE IMMEDIATELY on the e-Consent survey.**

Consent form version: 1.0

It is required to version each consent form (e.g., "1.1", "2.3.1 2024-06-01") so that you may manage any future changes and differentiate all versions of the consent form. It is recommended that you do not begin the version number with the letter "v".

Placement of consent form: consent_text ""

Choose a Descriptive field on the survey that will serve as the location of the consent form. The consent form will be displayed immediately below this field on the survey page. Note: The Descriptive field selected must be the same for all consent forms specified for this survey. If the field is changed, it will be changed for all consent forms for this survey.

Display for specific DAG: No data access groups exist

Only display this consent form when the record is assigned to the selected data access group. Note: The default option will be used if no DAG-specific consent forms exist.

Display for specific language: No languages defined on MLM page

Only display this consent form when viewing the survey in the selected language.

Consent Form (Rich Text)

Consent Form (Inline PDF)

Provide your consent form as a PDF file that will be displayed inline on the page directly below the field selected for 'Location of consent form' on the instrument/survey.

Upload your PDF consent form: Choose File No file chosen [Reset](#)

Add new consent form
Cancel

Fill out the required information. Please note that the Consent Version refers to the version used in REDCap, not the IRB-approved version.

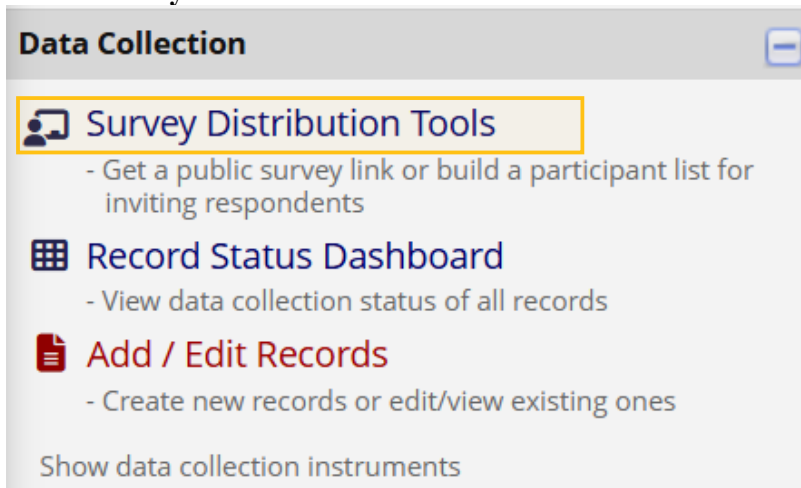
Next, choose where you would like the PDF consent form to appear (Part 1, Step 2). If your project uses Data Access Groups (DAGs) or Multi-Language Management (MLM), be sure to select the appropriate DAG group and language for this consent form.

You have two options when uploading a consent form: Rich Text or Inline PDF. After uploading your file, click "Add New Consent Form" to complete the process.

According to guidance from the UA IRB, the recommended format is the Inline PDF option.

Step 3: Testing the e-Consent Process

1. Go to Survey Distribution Tools



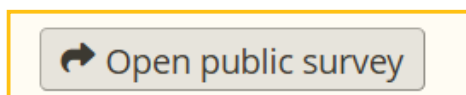
2. Click Open Public Survey

can then click the link to begin taking your survey

Public Survey URL:

☒ Protect the public survey using the Google

Link Actions



3. Fill it out like a participant would.

4. Sign it and submit.

Applications

- Project Dashboards
- Alerts & Notifications
- Multi-Language Management
- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging and Email Logging
- Field Comment Log
- File Repository**
- User Rights and DAGs
- Customize & Manage Locking/E-signatures
- Data Quality
- API and API Playground
- REDCap Mobile App

All Files

☐	Name	Size
★	Data Export Files	0 Files
★	PDF Snapshot Archive	9 Files
★	Miscellaneous File Attachments	1 File
★	Recycle Bin	0 Files

5. Make sure the PDF Snapshot archive is created and show e-consent under the type.

All Files / PDF Snapshot Archive

[Download file list](#) [Download all \(zip\)](#)

Name	PDF utilized e-Consent Framework	Record	Survey Completed	File Storage Time	Identifier (Name, DOB)	IP Address	Version	Type	Size
 pid20733_formInformedConsent_id13_2025-04-25_125241.pdf		13 Scissors Scissors	Informed eConsent	04/25/2025 12:52pm	Scissors Scissors, Scissors		2.0	e-Consent	139.3 KB

Done!

Now your e-Consent is live and working. You can monitor signed consents, download PDFs, and include them in audit trails.