

Frequently Asked Question (FAQ) Library

How do I build an eConsent?

[pdf upload]

There are several ways to build an electronic consent document (eConsent) using the REDCap eConsent framework. These instructions explain how to upload a portable document file (pdf) of the consent form and enable the eConsent framework to capture the written elements of informed consent. At Yale, this method can be used for research, including FDA-regulated studies subject to 21 CFR Part 11 requirements. For more information, refer to [Yale's Human Research Protection Program \(HRPP\) eConsent Guidance](#).

To build an eConsent you will follow the steps outlined below:

- STEP 1. Create a new project.
- STEP 2. Build your eConsent instrument(s).
- STEP 3. Set up your Signature(s).
- STEP 4. Enable the eConsent Framework.
- STEP 5. Upload your PDF Consent Form.
- STEP 6. Test eConsent.

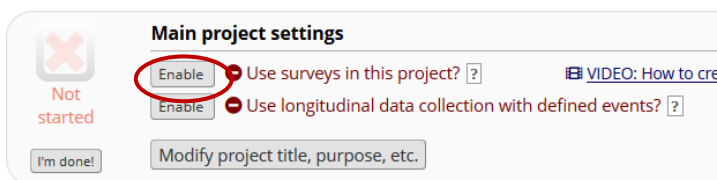
In this tutorial, you will build an eConsent in a new, stand-alone project that is distinct from your REDCap project with data collection forms. This ensures that the personal identifiers collected on the consent forms (e.g. name, date) and archived within eConsent documents are securely maintained and separated from the participant study ID and research data.

STEP 1: Create a new project.

1. Your eConsent should be set up as a new project, not an instrument within the main research project. To create a new project, follow the instructions found under [FAQ: Create a New Project](#). Your REDCap project can contain more than one consent form for the same study.

Pro Tip: Use a project title that includes or “*Study Name/ID/Acronym*” + eConsent

2. After your project is created, open it, and go to the ‘**Project Setup**’ tab to enable the survey design.
 - a. Under ‘**Main Project Settings**’ select the ‘**Enable**’ button for the option ‘**Use surveys in this project?**’

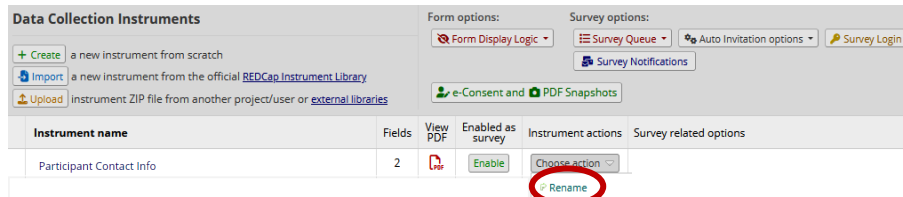


3. Next, click ‘**Online Designer**’ under ‘**Design your data collection instruments & enable your surveys.**’


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- Change the default 'My First Instrument' name by selecting the 'Rename' option found under the 'Choose action' drop down menu. Your first instrument will contain the participant's contact information. Rename this instrument. Then click 'Save'.

In the example below, the first instrument is renamed 'Participant Contact Info'.



- Open the first instrument, click the 'Add Field' button.
- Add field(s) to the Participant Contact Information form.

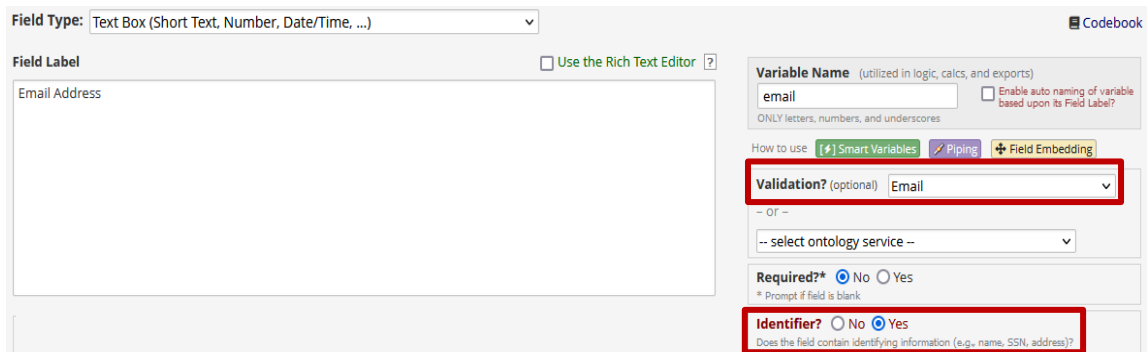


IMPORTANT: You must obtain Institutional Review Board (IRB) approval through a consent/HIPAA waiver to collect and use identifiers prior to informed consent.

Pro Tip: Duplicate information can create data discrepancies.

Participant name will be captured on the eConsent survey with their signature. To avoid discrepancies, you may wish to limit this form to other identifiers, such as email.

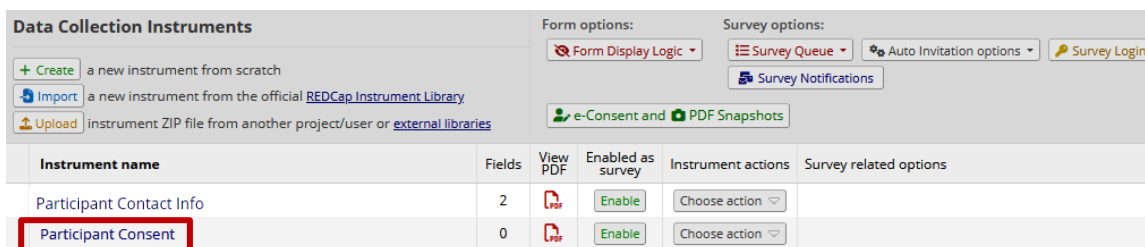
- If you are consenting remotely or plan to share the signed eConsent electronically, create a field to capture the participant email.
 - Under the 'Validation', select the **Email** option.
 - Under 'Identifier?', select **Yes** to tag the field as an identifier.



- Return to the Online Designer by clicking on [Return to list of instruments](#)

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8. Create another instrument by clicking “+ **Create button**”. This form will be your consent instrument.



The screenshot shows the 'Data Collection Instruments' section of the REDCap interface. It includes options to 'Create', 'Import', or 'Upload' instruments. Below these options is a table listing existing instruments. The 'Participant Consent' instrument is highlighted with a red box.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Participant Contact Info	2		Enable	Choose action	
Participant Consent	0		Enable	Choose action	

Pro Tip: If you are using more than one eConsent on the same study, create multiple forms within you project for each participant population. To do so, repeat Step 4, but be sure to use a nomenclature that allows you to distinguish your eConsents (e.g. *Adult, Child*).

STEP 2: Build your eConsent instrument.

1. Select the newly created **Consent Form** instrument.

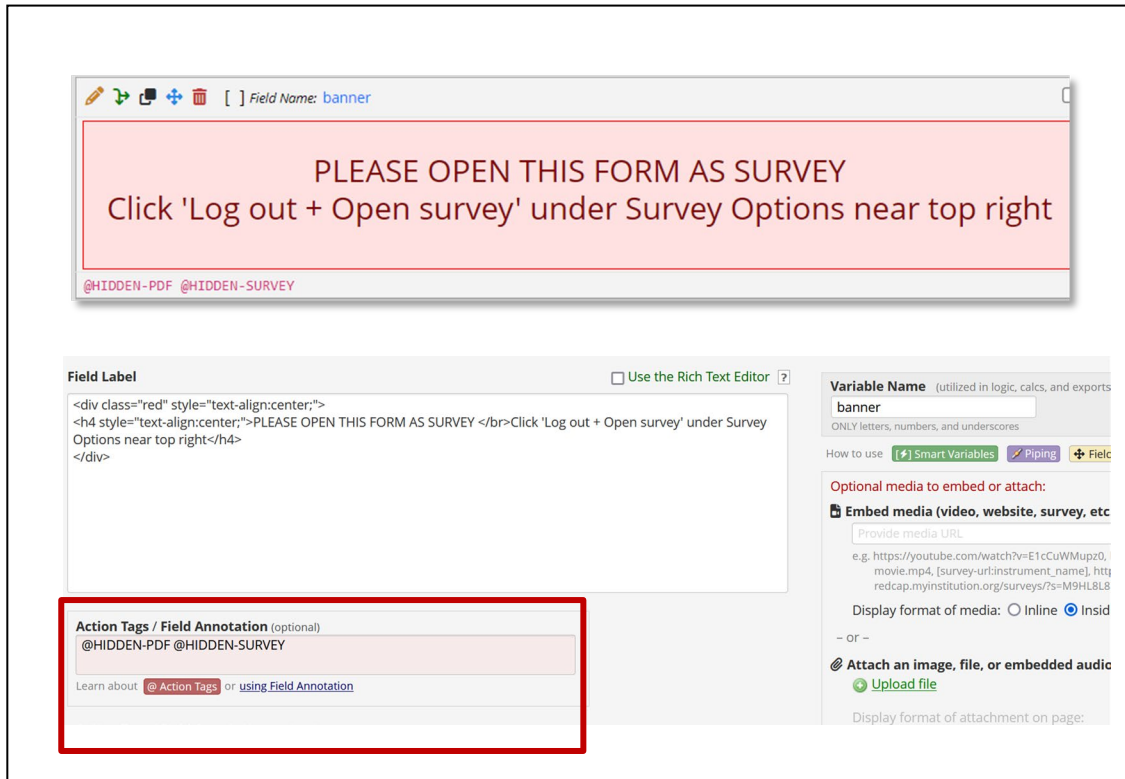
Pro Tip: Do NOT use embedded fields or the rich text editor in your eConsent Form. These features do not work well with the PDF snapshot in the eConsent Framework.

2. **If you will be consenting in-person/onsite**, add an instruction banner at the top of the instrument to remind staff to open the instrument as a survey.
 - a. Insert a descriptive field.
 - b. Copy the code below to the 'Field Label' box:

```
<div class="red" style="text-align:center;">
<h4 style="text-align:center;">PLEASE OPEN THIS FORM AS SURVEY </br>Click 'Log out +
Open survey' under Survey Options near top right</h4>
</div>
```
 - c. Add the following '**Action Tags**' to the **Action tags/Field Annotation box**:
 - i. @HIDDEN-SURVEY – this action tag will ensure the warning message appears on the instrument but not on the survey.
 - ii. @HIDDEN-PDF – this action tag will ensure the warning message will not be included on the PDF copy of the consent form.

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Instruction banner:



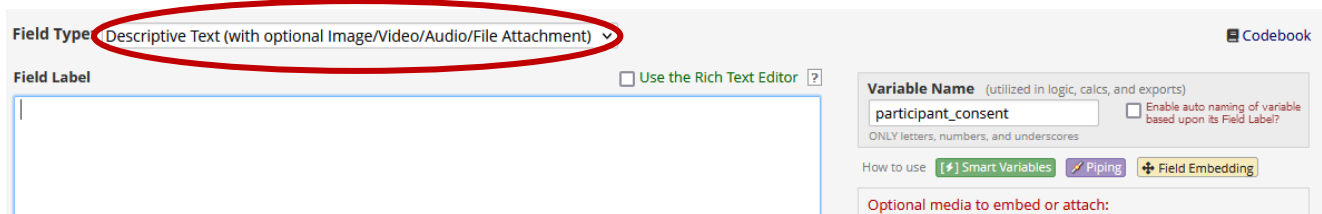
The screenshot shows the configuration for a field named 'banner'. The field label contains the following HTML code:

```
<div class="red" style="text-align:center;">
<h4 style="text-align:center;">PLEASE OPEN THIS FORM AS SURVEY </br>Click 'Log out + Open survey' under Survey Options near top right</h4>
</div>
```

The field type is set to 'Text'. The variable name is 'banner'. The 'Action Tags / Field Annotation' section is highlighted with a red box and contains the text '@HIDDEN-PDF @HIDDEN-SURVEY'. The 'Optional media to embed or attach' section is also visible.

3. Create ONE descriptive field as a placeholder for your eConsent pdf document.

- a. To add a descriptive field, click the **'Add Field'** button.
- b. Under the **Field Type** menu, choose **'Descriptive Text'** and create variable name.



The screenshot shows the 'Field Type' dropdown menu set to 'Descriptive Text (with optional Image/Video/Audio/File Attachment)'. The 'Field Label' is empty. The 'Variable Name' is 'participant_consent'. The 'Optional media to embed or attach' section is visible.

- c. You will use this field to upload your eConsent in **STEP 4- eConsent Framework**. The Field Label and other field settings can remain blank.

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4. If your research consent contains study-specific permissions, you can add fields to capture response items, as shown below.

To contact participants for future research, your eConsent fields would look like this:

Future Research:
We would like your consent to contact you about future research opportunities. You would be under no obligation to participate and would be provided with information about the study prior to agreeing to participate.

I agree to be contacted about future research.
 I decline to be contacted about future research.

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APPROVED BY THE YALE UNIVERSITY IRB 7

Pro Tip: Mark fields as 'Required' to prevent missing data.

Field Name: future_research_yn

Future Research:
We would like your consent to contact you about future research opportunities. You would be under no obligation to participate and would be provided with information about the study prior to agreeing to participate.

I agree to be contacted about future research.
 I decline to be contacted about future research.

* must provide value

reset

Step 3: Setup Signature

Electronic signature procedures and verification procedures will vary based upon the regulatory requirements for your research. Refer to [Yale HRPP eConsent Guidance](#) for more information. If your consent requires a signature (i.e. you do not have a waiver) you will collect the *name, signature, and date of consent from the participant and person obtaining consent* to comply with 45 CFR 46 regulations. If your research is subject to 21 CFR Part 11 requirements (i.e. IND/IDE studies, FDA-regulated studies), you will also collect *time of consent*. To limit the collection of personal information, do not include date of birthdate as a validation field.

Data Collection Instruments

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

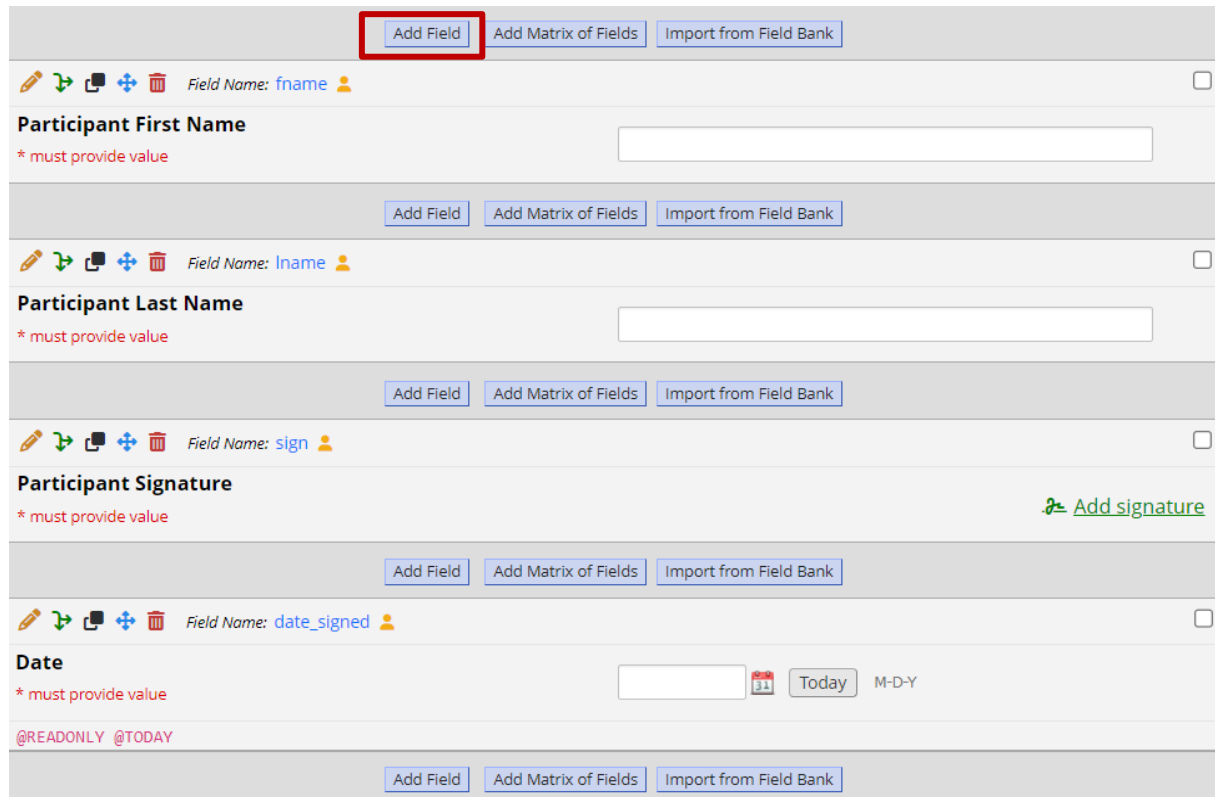
Instrument name	Fields
Participant Contact Info	2
Participant Consent	5
Person Obtaining Consent	9

Signatures of participant and person obtaining consent are captured as **two separate forms** under one Study eConsent Framework as shown.

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Participant

1. Click **Add Field** to the Consent instrument. The signature & date should be the last entries on the form.



The screenshot shows the REDCap field configuration interface. It displays four fields in a list:

- Participant First Name**: Field Name: fname. Includes an "Add Field" button (highlighted with a red box), "Add Matrix of Fields", and "Import from Field Bank" buttons.
- Participant Last Name**: Field Name: lname. Includes "Add Field", "Add Matrix of Fields", and "Import from Field Bank" buttons.
- Participant Signature**: Field Name: sign. Includes "Add Field", "Add Matrix of Fields", and "Import from Field Bank" buttons, and a green "Add signature" link.
- Date**: Field Name: date_signed. Includes "Add Field", "Add Matrix of Fields", and "Import from Field Bank" buttons, and a date picker with "Today" and "M-D-Y" options.

2. Add fields for signature and verification:

- a. **Name (First, Last)**

- i. Create two separate fields for (1.) first name and (2.) last name.
- ii. Tag these fields as identifiers and mark as required.
- iii. The eConsent framework will insert the first and last name on each page of the snapshot PDF consent for audit purposes.

- b. **Signature**

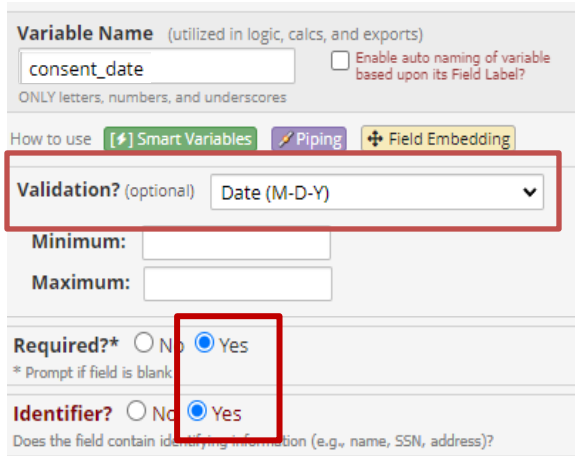
- i. The signature field allows participants to electronically sign via stylus, mouse or finger. FDA-regulated research subject to 21 CFR Part 11 requirements must use the REDCap 'signature' field.
- ii. Tag this field as an identifier and mark as required.

Pro Tip: Mark each field as **'Required'** to prevent missing data and non-compliance with regulatory requirements.

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c. Date & Time

- i. Create fields for (1.) date and (2.) time.
- ii. To ensure data quality and prevent errors, use validation and minimum/maximum range.
- iii. Tag date field as an identifier and mark both fields as required.



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

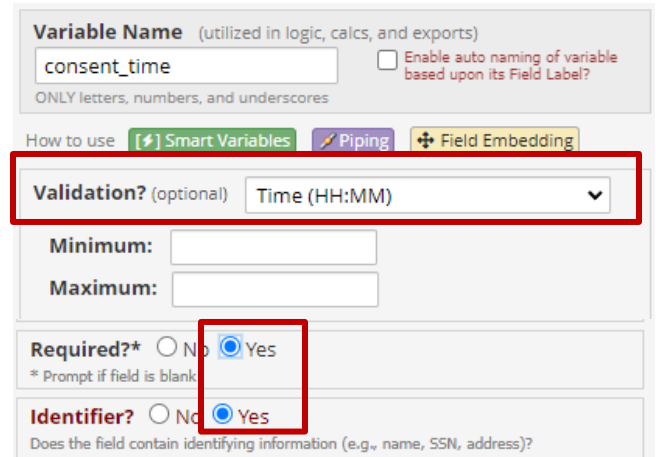
How to use [Smart Variables](#) [Piping](#) [Field Embedding](#)

Validation? (optional) Date (M-D-Y) ▼

Minimum:
Maximum:

Required?* No Yes
* Prompt if field is blank

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



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

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

Validation? (optional) Time (HH:MM) ▼

Minimum:
Maximum:

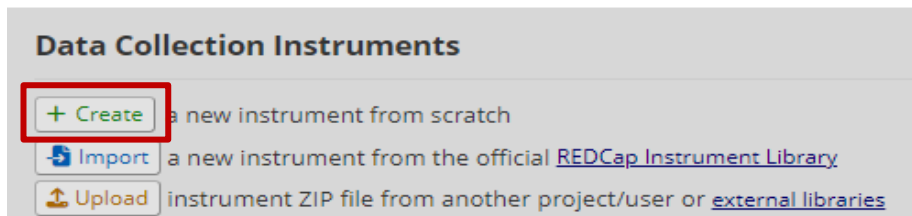
Required?* No Yes
* Prompt if field is blank

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

Person Obtaining Consent

To ensure best practices and prevent errors, the participant and the person obtaining consent will sign the eConsent in separate REDCap forms.

1. Return to the online designer and create a new instrument 'Person Obtaining Consent.'



Data Collection Instruments

[+ Create](#) a new instrument from scratch

[Import](#) a new instrument from the official [REDCap Instrument Library](#)

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

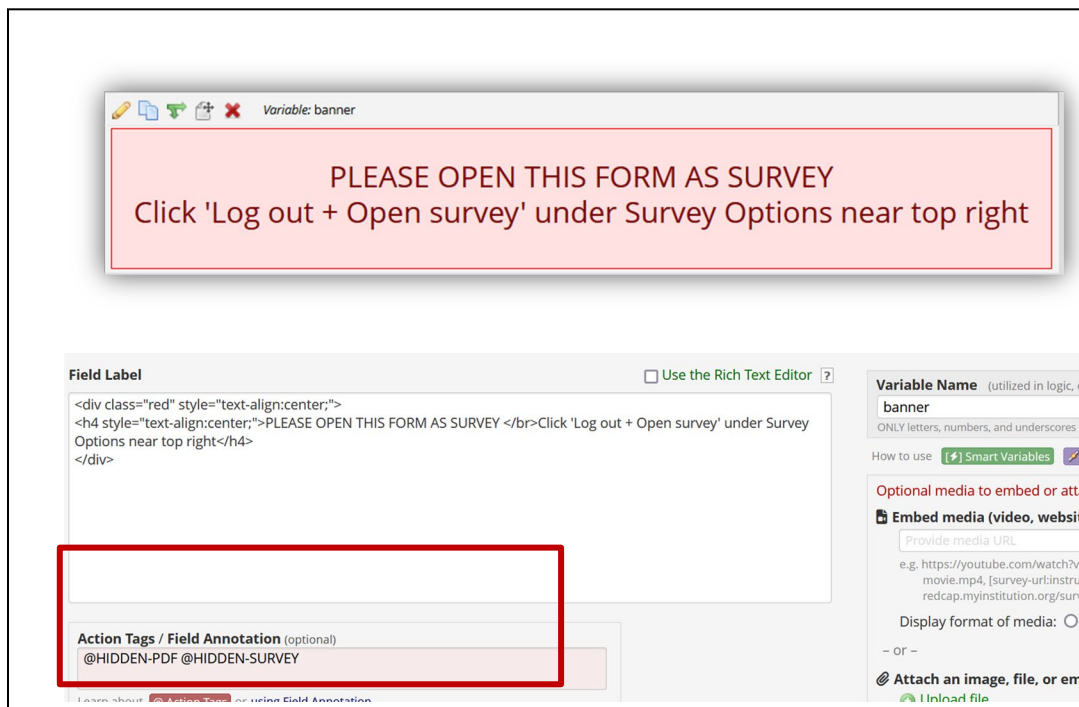
2. This form must be completed in survey mode to use the eConsent framework feature in REDCap. Add an instruction banner at the top of the instrument by inserting a descriptive field as shown in the example below.
 - a. Copy the code below to the 'Field Label' box:


```
<div class="red" style="text-align:center;">
<h4 style="text-align:center;">PLEASE OPEN THIS FORM AS SURVEY </br>Click 'Log out +
Open survey' under Survey Options near top right</h4>
</div>
```

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- b. Add these two **'Action Tags'** to the Action tags/Field Annotation box:
 - i. @HIDDEN-SURVEY - the warning message will appear on the instrument and not the survey.
 - ii. @HIDDEN-PDF - the warning message will not print on the PDF copy of the consent form.

Instruction banner:



3. Add fields for signature and verification:
 - a. **Name (First, Last) of Person Obtaining Consent**
 - i. Create two separate fields for (1.) first name and (2.) last name.
 - ii. Tag as an identifier and mark as required.
 - b. **Optional: Method of Consent**
 - i. If the consent administration process varies, capture the method (e.g. phone, video conference, in-person).
 - c. **Optional: Documentation of Consent process**
 - i. You may wish to include an acknowledgement that documents the consent process as shown in the example below.

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d. Signature of Person Obtaining Consent

- i. REDCap options include electronically signing via stylus, mouse or finger, free text, or entering a number (i.e. PIN). Describe the signature method in your protocol- some methods may require a waiver of consent documentation.
- ii. Tag this field as an identifier and mark as required.

e. Date & Time

- i. Create fields for (1.) date and (2.) time.
- ii. To ensure data quality and prevent errors, use validation and minimum/maximum range.
- iii. Tag date field as an identifier and mark both fields as required.

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

How to use Smart Variables Piping Field Embedding

Validation? (optional)

Minimum:

Maximum:

Required?* No Yes
* Prompt if field is blank

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

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

How to use Smart Variables Piping Field Embedding

Validation? (optional)

Minimum:

Maximum:

Required?* No Yes
* Prompt if field is blank

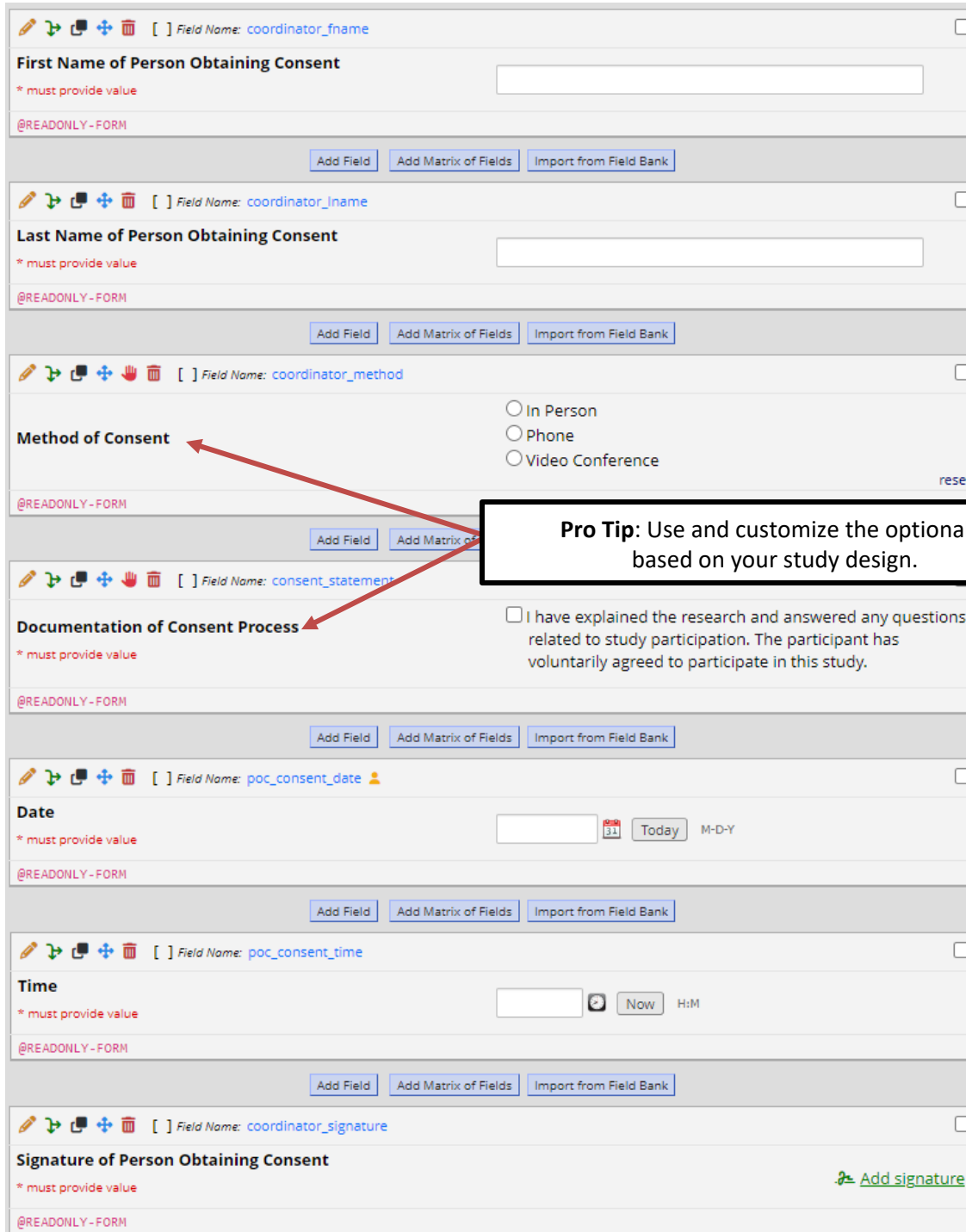
Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

4. To prevent study staff completing this instrument in form mode, which is not valid for eConsent Framework, add **@READONLY-FORM** action tag to all fields.

Action Tags / Field Annotation (optional)

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Examples of person obtaining consent signature fields:



The screenshot displays a series of form fields in a REDCap interface. The fields are:

- Field Name: coordinator_fname**: First Name of Person Obtaining Consent. Includes a red asterisk indicating it is required.
- Field Name: coordinator_lname**: Last Name of Person Obtaining Consent. Includes a red asterisk indicating it is required.
- Field Name: coordinator_method**: Method of Consent. Includes radio buttons for "In Person", "Phone", and "Video Conference".
- Field Name: consent_statement**: Documentation of Consent Process. Includes a checkbox and a text area with the text: "I have explained the research and answered any questions related to study participation. The participant has voluntarily agreed to participate in this study."
- Field Name: poc_consent_date**: Date. Includes a date picker and a "Today" button.
- Field Name: poc_consent_time**: Time. Includes a time picker and a "Now" button.
- Field Name: coordinator_signature**: Signature of Person Obtaining Consent. Includes a red asterisk indicating it is required and a green "Add signature" button.

Each field has a toolbar with icons for edit, copy, paste, add, and delete, and a "Field Name" label. Below each field are buttons for "Add Field", "Add Matrix of Fields", and "Import from Field Bank".

Pro Tip: Use and customize the optional fields based on your study design.

Frequently Asked Question (FAQ) Library

Enable Survey

- When you have finished building your Participant and Person Obtaining Consent Forms, click the **'Enable'** button to enable the instruments as surveys.

Data Collection Instruments		Form options:		Survey options:	
+ Create	a new instrument from scratch	Form Display Logic	Survey Queue	Auto Invitation options	Survey Login
Import	a new instrument from the official REDCap Instrument Library	Survey Notifications			
Upload	instrument ZIP file from another project/user or external libraries	e-Consent and PDF Snapshots			
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Participant Contact Info	2		Enable	Choose action	
Participant Consent Form	5		Enable	Choose action	
Person Obtaining consent	9		Enable	Choose action	

- For each survey instrument, go to Survey Settings to configure your survey. Enter the eConsent name in the **'Survey Title'** as well as any study-specific instructions and survey customizations.
 - Do *not* include version number in **'Survey Title'**. The survey will be used for multiple versions.

Survey Status ✔ [Survey Active](#) If offline, respondents will not be able take the survey.
 Custom text to display on survey page when offline: [Add offline message](#)

Basic Survey Options:

[Survey Title](#)
Title to be displayed to participants at the top of the survey page

Survey Instructions
(Displayed at top of survey after title)

Open Sans Paragraph 10pt **B I U** **A**

- Scroll down to **'Survey Termination Options'** and edit the text in the **Survey Completion Text Box** which is set to default to *"Thank you for taking the survey. Have a nice day!"*.

Survey Completion Text
(Displayed after survey is completed as 'thank you' text or as acknowledgement text)

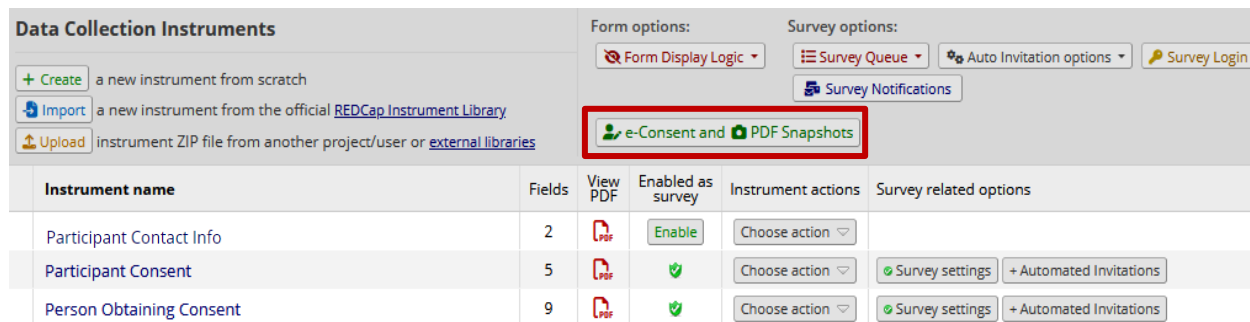
Pro Tip: Change the default message to include a thank you, acknowledgement, or study contact information. This language must be submitted to the IRB for approval.

Thank you for joining the study!

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STEP 4: Enable the eConsent Framework

- Once your surveys are enabled, return to the Online Designer and select the **'eConsent and PDF Snapshots'** option.



Data Collection Instruments

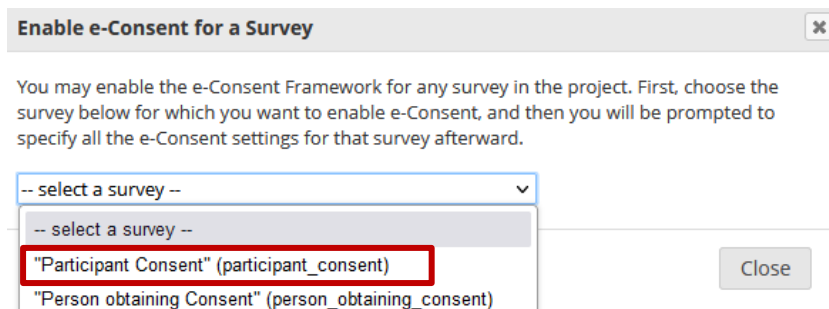
Form options: Form Display Logic Survey Queue Auto Invitation options Survey Login

Survey options: Survey Notifications

e-Consent and PDF Snapshots

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Participant Contact Info	2		Enable	Choose action	
Participant Consent	5			Choose action	Survey settings + Automated Invitations
Person Obtaining Consent	9			Choose action	Survey settings + Automated Invitations

- Click on **'Enable the eConsent Framework'** for a survey. You will enable and configure the eConsent Framework for each eConsent survey individually.
 - In this tutorial, you will enable the eConsent framework for the (1.) Participant Consent form and (2.) Person Obtaining Consent form.
- Select your eConsent forms:



Enable e-Consent for a Survey

You may enable the e-Consent Framework for any survey in the project. First, choose the survey below for which you want to enable e-Consent, and then you will be prompted to specify all the e-Consent settings for that survey afterward.

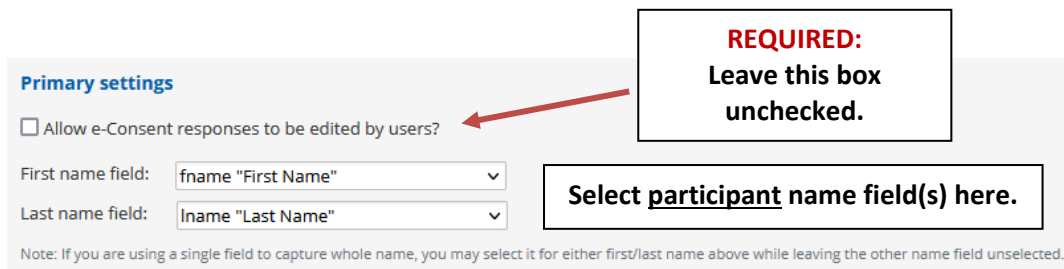
-- select a survey --

"Participant Consent" (participant_consent)

"Person obtaining Consent" (person_obtaining_consent)

Close

- Configure the eConsent Framework settings.



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.

REQUIRED: Leave this box unchecked.

Select participant name field(s) here.

- Primary settings:**
 - Allow eConsent to be edited by users:** Yale HRPP requires to leave this box unchecked to ensure the validity of the consent process. Checking this option allows you to edit a signed consent form.

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- ii. **First and last name fields:** Select the fields where the participant's name was entered by the participant. The eConsent framework will insert the *first and last name* in the footer and the filename of the PDF snapshot for auditing and archiving.

b. **Additional settings:**

Additional settings

Date of birth field:

Custom tag/category for PDF footer: e.g., Pediatric
Note: This should be static text only.

Custom label for PDF header: e.g., PID [project-id] - [last_name]
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 another signature field](#)

- i. **Date of birth fields:** Yale HRPP discourages the collection of date of birth for eConsent.
- ii. **PDF footer and header:** All eConsent PDFs will contain version, first name, and last name in the footer (if identified in the eConsent settings) and the date/time the PDF is generated.
 1. You may add additional fields or text to the footer or header by defining '**Custom tag/category for PDF footer**' and '**Custom label for PDF header**' and these will be automatically captured in the eConsent PDF snapshot.
- iii. **Signature field #1:** Associate your signature field here. If multiple signatures are required on a single eConsent instrument, you may add additional signature fields (e.g. Participant, Legally Authorized Representative).

c. **Snapshot settings:**

When the eConsent is activated on a survey, a 'trigger' for an automated snapshot is automatically created for the survey in the '**PDF Snapshots of Records**' tab. When the eConsent survey is completed, each instrument with the eConsent framework enabled will generate a PDF snapshot that is automatically saved to the File Repository. See [FAQ: eConsent Administration](#) for more information.

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- i. In the eConsent 'Edit Settings', you may customize the PDF Snapshot's file name or keep the default settings.
- ii. Review and save the settings.

Location(s) to save the signed consent snapshot

Save to File Repository

Save to specified field: -- select a File Upload field --

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

Snapshot file name

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

File name: pid[project-id]_form[instrument-label]_id[record-name]_YYYY-MM-DD_HHMMSS.pdf

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

Optional notes: You may add any custom notes here for reference and documentation purposes.

Notes:

Save settings
Cancel

STEP 5: Upload your PDF Consent Form

1. To utilize eConsent 2.0 versioning, you must upload your PDF consent form in the eConsent Framework Settings.

e-Consent Framework Settings + Enable the e-Consent Framework for a survey Hide inactive Search

e-Consent active?	Edit settings	Survey	Location(s) to save the signed consent snapshot	Custom tag/category	Notes
<input checked="" type="checkbox"/>		"Participant Consent" (participant_consent)	File Repository		
		+ Add consent form			

- a. Click the "Add consent form".
2. Identify and upload the consent form.

Consent form version: ←

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: -- select a field -- v

Choose a Descriptive field on the survey page below this field on the survey page. If the field is changed, it will be changed.

-- select a field --
participant_consent ""

Placement of the consent form. The consent form will be displayed immediately below this field on the survey page. If the field is changed, it will be changed. ←

- a. Define the REDCap consent version in the '# Consent form version' field.
 - i. The '# Consent form version' tracks the unique version of the consent form to be displayed.
 - ii. We recommend using a version numbering system that begins with "RC" (REDCap).
 1. Once a value is used for a survey, *it cannot be reused even in Development mode*. Duplicate or incorrect uploads cannot be deleted and may result in misalignment with your IRB-approved consent document versioning.

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- b. In the “Placement of consent form”, select the field that will display the IRB-approved consent PDF. This is the descriptive field you created in STEP 2 for this consent form.
- c. Click the **Consent Form (Inline PDF)** tab.
- d. Click **Choose File** to upload the PDF of your consent form.
- e. Once the upload is complete, click **Add new consent form**.

[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: No file chosen [Reset](#)

WARNING: If you upload an incorrect consent form, you cannot delete the PDF.

You can deactivate the upload by clicking the '**View all versions**' link and selecting '**Set as inactive**.' You can then repeat the steps above to re-upload the correct PDF. However, you will not be able to reuse the version number.

Frequently Asked Question (FAQ) Library

Person Obtaining Consent

- Repeat STEP 4 for the Person Obtaining Consent instrument with the following considerations.

e-Consent settings for survey "Person obtaining Consent" (*person_obtaining_consent*)

Use the settings below for setting up the e-Consent name (and sometimes their date of birth) on the capture that info, in which the values for those fields will review at the end the survey. And then afterwards also store the PDF in a File Upload field). Other label for the PDF header, location(s) to save the s

Primary Settings: Select the Participant Name here, NOT the name of the person obtaining consent. The eConsent framework will insert the first and last name on each page of the PDF snapshot. Participant name should be used for audit purposes.

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: Select the Person Obtaining Consent signature field here.

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 ce

Select a field below that serves as a signature field in this survey. It could be a free-form text field (e.g., to collect a PIN), and it must be a Required field. If any fields are selected below, then if the survey where it asks them to certify their responses, if they then choose to click the Previous Page signature fields, thus forcing them to 'sign' the field(s) again before completing the survey. If you any fields below. You may use up to five signature fields.

Signature field #1:

[+ Select another signature field](#)

The forced signature field will erase the signature if the Previous Page button is clicked and will require that the person obtaining consent re-enter a signature to complete the eConsent. **Enable this option.**

STEP 6: Test eConsent

Once your consent form is built, it is important that you test the project to verify that the form functions as expected, the consent process described in your protocol can be implemented, and the resulting PDF is correct and readable.

Pro Tip: Test thoroughly and carefully before moving your project to production.

Ask a variety of people with different roles on your project to enter test data in your eConsent, to check the functionality and to confirm the legibility of the eConsent found in your file repository.

We have provided a self-evaluation checklist to support testing in STEP 6. You can customize this checklist by adding study-specific quality controls checks to ensure your requirements are being met.

See: [eConsent New Build: Self Evaluation Checklist](#)