



# NED 2025

Networking to Enhance Development

**ITHS**

Institute of Translational Health Sciences

ACCELERATING RESEARCH. IMPROVING HEALTH.



# NED 2025

## WHAT'S NEW WITH REDCAP? NEW FEATURES AND UPDATES WITH Q&A

Adam Mahama, Ann Gleason,  
Courtney Howell, Gretchen Kuhn,  
University of Washington School of  
Medicine - Research IT

# Agenda

---

- New features
- Functionality updates
- Questions

# New REDCap Features

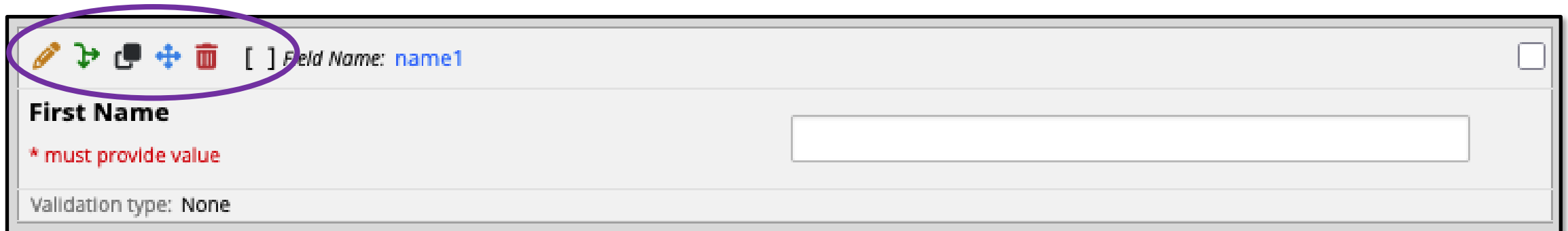
- New field navigator in REDCap Designer
- Multiple field editing
- Draft preview mode in Production
- Descriptive popups
- New survey settings and options
- List of upcoming calendar events
- New smart variables, action tags and special functions
- Mosio texting/SMS option
- New online training opportunities



# New Designer Field Navigation Options

---

- Updated icons
- Enhanced field movement
- Copy fields to new instrument
- Go to search option



The screenshot shows a field designer interface for a field named "name1". The field is titled "First Name" and has a validation type of "None". The field name is "name1". The field is currently empty. The validation message is "\* must provide value". The field is located in a grey panel. The navigation icons (edit, move, copy, paste, delete) are circled in purple. The field name is "name1". The validation type is "None". The validation message is "\* must provide value".

# Multiple Field Editing

- Quick modify
  - = Edit multiple fields
    - Branching logic
    - Action tags
    - Alignment
    - Required
    - Identifier
    - Multiple choice
- Matrix field options

The screenshot shows a survey form editor interface. At the top, there are navigation links: "Return to list of instruments" (with a left arrow), "Survey settings" (with a gear icon), and "Next instrument >>". Below this, it says "Current instrument: **Form 1**" and "Form name: form\_1".

The main area contains three field configurations:

- Field 1:** Field Name: record\_id. It has a red asterisk warning: "\* This field will NOT be displayed on the survey page." and another: "\* You should NOT use identifiers (e.g., MRN, SSN) for the record ID field." The field is labeled "Record ID" and has a validation type of "None". A note below states: "NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited." Below the field are buttons for "Add Field", "Add Matrix of Fields", and "Import from Field Bank".
- Field 2:** Field Name: name1. It is labeled "First Name" and has a red asterisk warning: "\* must provide value". The validation type is "None". Below the field are buttons for "Add Field", "Add Matrix of Fields", and "Import from Field Bank".
- Field 3:** Field Name: lname. It is labeled "Last name" and has a red asterisk warning: "\* must provide value". The validation type is "None". Below the field are buttons for "Add Field", "Add Matrix of Fields", and "Import from Field Bank".

## How to modify multiple fields together

To copy, move, or delete multiple fields at the same time, hold the Ctrl or Cmd key on your keyboard and click the field to reveal the **Quick-modify field(s)** feature.

Show:  Overlaid  On Side

## Field Navigator

You can quickly move to (and select a field) by using the 'Go to field' widget (keyboard shortcut: **CTRL-G** or **CMD-G**).

**Scroll to Section Header:**  
Rank your favorite type of pet Section Header/Page Break

# Record Home Shortcuts

**Record Home Page**

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

**Legend for status icons:**

- Incomplete
- Unverified
- Complete
- Many statuses (mixed)
- Incomplete (no data saved) ?
- Partial Survey Response
- Completed Survey Response
- Many statuses (all same)

Choose action for record

- Download ZIP file of all uploaded documents
- Download PDF of record data for all instruments/events
- Download PDF of record data for all instruments/events (compact)
- Survey Queue Copy link
- Lock entire record
- Assign to Data Access Group
- Rename record
- Delete record (all forms/events)
- Database Query Tool
- Logging
- Notification Log
- Survey Invitation Log

Delete all data on event:

Repeating Instruments

Demo Survey		
Event 1 (Arm 1: Arm 1)		
(1)		
1		12-23-2022
<a href="#">+ Add new</a>		

- Open any record by clicking on the record number from the Record Home Dashboard
- “Choose an action” now shows options to find out more about this record

# Draft Preview Mode

---

- Preview drafted changes in production before submitting
  - View your changes by opening records in the Record Status Dashboard
- View a detailed list of drafted changes
- Remove all drafted changes option

Since this project is currently in **PRODUCTION**, changes will not be made in real time. [Tell me more](#)

Fields to be added: **0** / Total resulting field count: **46**  
Fields to be deleted: **0** / Existing field count: **46**

**Draft Preview Mode** [?](#) [View detailed summary of all drafted changes](#) – or – [Remove all drafted changes](#)

# Descriptive Popups

Descriptive Popups

- Descriptive popup text can now be added to forms/surveys in Designer
- Use to display descriptive text or instructions
- Display extra information without taking up space on the form
- Choose a custom color for the popup link

When someone moves their mouse over the link text, the descriptive popup will appear directly below it.

1) Is this an [adverse event](#) (AE)?

An adverse event (AE) in a clinical trial is any unfavorable or unintended medical occurrence that happens to a participant during the trial. AEs can include:

- Abnormal physical exam or lab results
- New illness or disease
- Deterioration of an existing illness or disease
- Death
- Life-threatening conditions
- Hospitalization
- Disability or incapacity
- Birth defects

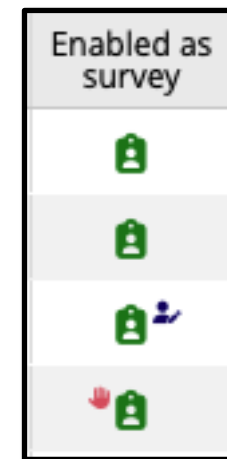
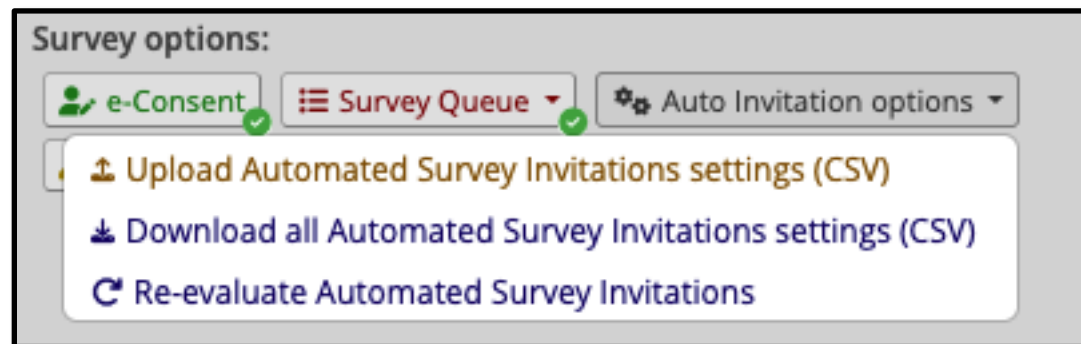
Yes

No

Next Page >>

# New Survey Settings and Options

- Use logic to continue to next survey
- Survey-specific email field setting
- New survey status icons
- Download/upload CSV of Survey Queue settings
- Download/upload CSV of ASIs



e-consent

stop actions

# Scheduling module display

---

If using the Scheduling module, upcoming events now show on the Project Home page

 <b>Upcoming Calendar Events</b> (next 7 days)			
	<b>Time</b>	<b>Date</b>	<b>Description</b>
		03/14/2025	15 (Event 1 (Arm 1: Arm 1))
		03/15/2025	15 (Event 2 (Arm 1: Arm 1))
		03/16/2025	15 (Event 3 (Arm 1: Arm 1))

# New Smart Variables

---

## New smart variables

- Randomization
  - [rand-number]
  - [rand-time]
- MyCap
  - [mycap-participant-url]
  - [mycap-participant-link]
- Record
  - [calendar-link]

[↗] Smart Variables

# New Action Tags

---

## New action tags

- @RICHTEXT
- @SHOWCHOICE
- @INLINE
- @INLINE-PREVIEW
- @LANGUAGE-FORCE
- @LANGUAGE-SET

@ Action Tags

# New Special Functions

---

## New special functions

- Date functions
  - year (date value)
  - month (date value)
  - day (date value)
- concat\_ws (separator, text, text, ...)

√x Special Functions

# Mosio Texting Option

## Mosio SMS service is now available!

Using Mosio, REDCap can send SMS text messages for:

1. SMS Surveys – Sending questions and getting replies via text message.
  2. Alerts - Sending REDCap Alerts & Notifications via text message.
- With this service, you can invite a participant to take a survey by sending them an SMS message
  - The data will be collected in REDCap directly from the phone without having to use a webpage.
  - Mosio is a third-party web service ([www.mosio.com](http://www.mosio.com)) which requires a one-time activation fee per project
  - If you would like to learn more, please email [redcaphelp@uw.edu](mailto:redcaphelp@uw.edu)



# New Online Training Opportunities

---



Classes are now offered online, on-demand through the ITHS TREE LMS -- Login at [ithstree.org](http://ithstree.org)

- REDCap 101
- Beginning and Advanced REDCap Surveys
- Reports, Exports and Importing
- Data Dictionary
- Randomization in REDCap
- Coming soon: REDCap Longitudinal projects

# Updates to REDCap Functionality

- New eConsent framework
- Updates to randomization
- Updated codebook display
- Mobile technology options



# eConsent in REDCap

---



E-Consent is a computer-based consent for patients or participants



Online consent forms can be completed using a REDCap survey on a computer, mobile device, or tablet

# eConsent in REDCap


## Features:

- Collect signatures

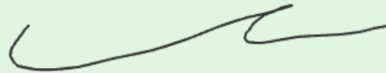
Subject's statement

This study has been explained to me. I volunteer to take part in this research. I have had a chance to ask questions. If I have questions later about the research, or if I have been harmed by participating in this study, I can contact one of the researchers listed on the first page of this consent form. If I have questions about my rights as a research subject, I can call the Human Subjects Division at (206) 543-0098 or call collect at (206) 221-5940. I give permission to the researchers to use my medical records as described in this consent form. I will receive a copy of this consent form.


**Name of subject:**

**Date:**    M-D-Y

**Signature**



[signature\\_2025-03-24\\_1509.png \(0.01 MB\)](#)

 [Remove signature](#)

# eConsent in REDCap

## Features:

- Participant review of responses on certification screen

Displayed below is a read-only copy of your survey responses. Please review it and the options at the bottom.

☰ 1 / 7 | - 120% + | 📄 🔗 ⬇️ 🖨️ ⋮

**Consent** Page 1

---

I certify that all of my 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.



If any information above is not correct, you may click the 'Previous Page' button to go back and correct it.

# eConsent in REDCap

## Features:

- Automatically generate a non-modifiable PDF of the signed form and save it in the project file repository

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
 f_name_l_name_pid109080_formConsent_id1_2025-03-24_151159.pdf		<u>1</u> Test, Test	Consent	03/24/2025 3:11pm		76.147.113.125	1	e-Consent

Showing 1 to 1 of 1 entries Previous 1 Next

# eConsent in REDCap

## What's New?

- More customizability
- A new e-Consent control page
- PDF Snapshots

### Settings for e-Consent & PDF Snapshots

[VIDEO: e-Consent Framework and PDF Snapshots](#)

[Back to Online Designer](#) **e-Consent Framework** PDF Snapshots of Records

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 rather than 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. You may optionally provide consent forms as either an inline PDF or rich text that will be displayed on the consent survey itself. The consent forms can be context-specific if you are using MLM languages and/or Data Access Groups so that it displays the correct consent form for a participant 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 for a survey. [Read more](#)

**e-Consent Framework Settings** [+ Enable the e-Consent Framework for a survey](#)  Hide inactive


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

Showing 1 to 2 of 2 entries Previous **1** Next

# Enabling eConsent 2.0 Framework

## 1. Enable Survey Mode for in your project:

- Navigate to the Project Setup page in your REDCap project.
- In the Main project settings section, click 'Enable' next to "Use surveys in this project".



Not started

I'm done!

### Main project settings

Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey.](#)

Use longitudinal data collection with defined events? [?](#)

Use the MyCap participant-facing mobile app? [Learn more about MyCap](#)

# Enabling eConsent 2.0 Framework

## 2. Create the e-Consent Instrument:

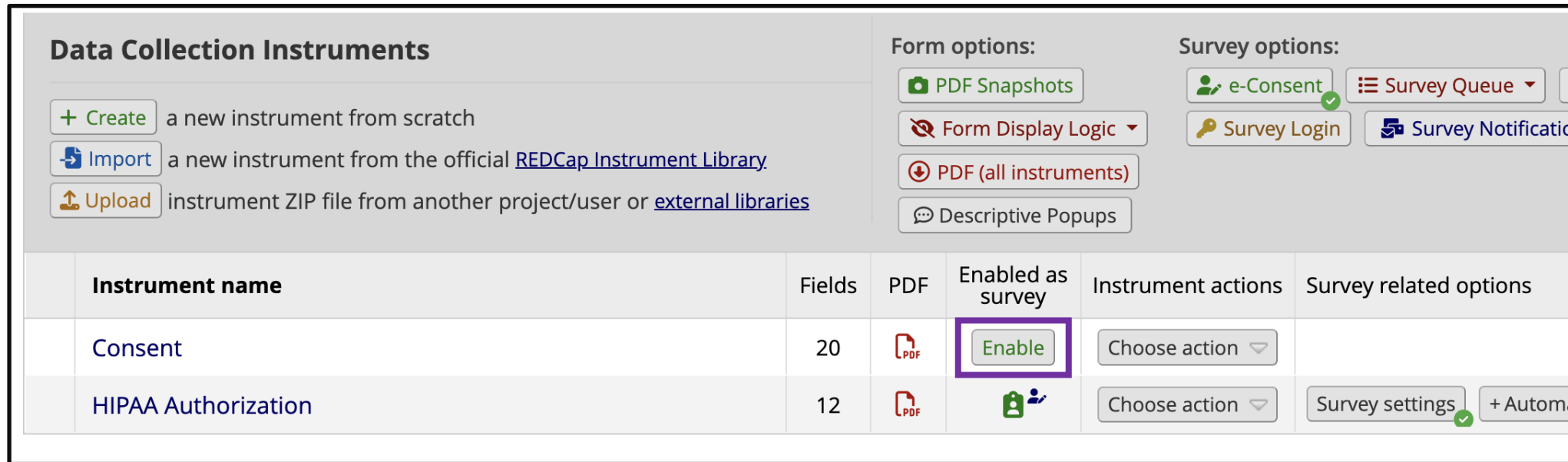
- Design your consent form, including all necessary fields such as:
  - Participant name
  - Date of birth
  - Signature fields
- *Optional: Add a descriptive field as a placeholder for the PDF or text of the consent form.*

The screenshot displays two field editors in the eConsent 2.0 framework. The top editor is for a field named 'consent\_placeholder' and contains three buttons: 'Add Field', 'Add Matrix of Fields', and 'Import from Field Bank'. The bottom editor is for a field named 'name' and contains a 'Contains embedded fields' checkbox. Below the checkbox, the text 'Name of subject:' is followed by two placeholder codes: '{subject\_fname}' and '{subject\_lname}'. Below that, the text 'Date:' is followed by the placeholder code '{consentdate}'. The bottom editor also contains the same three buttons as the top editor.

# Enabling eConsent 2.0 Framework

## 3. Enable Survey for the Consent Instrument:

- In the Online Designer, click “Enable” next to the consent instrument to enable it as a survey.
- Modify survey settings as needed.



**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](#)

**Form options:**

- PDF Snapshots
- Form Display Logic
- PDF (all instruments)
- Descriptive Popups

**Survey options:**

- e-Consent
- Survey Queue
- Survey Login
- Survey Notification

Instrument name	Fields	PDF	Enabled as survey	Instrument actions	Survey related options
Consent	20	PDF	Enable	Choose action	
HIPAA Authorization	12	PDF		Choose action	Survey settings + Automate

# Enabling eConsent 2.0 Framework

## 4. Enable the e-Consent Framework:

- In the Online Designer, click on the “e-Consent button.

**Data Collection Instruments**

**Form options:**

- PDF Snapshots
- Form Display Logic
- PDF (all instruments)
- Descriptive Popups

**Survey options:**

- e-Consent** (highlighted)
- Survey Login
- Survey Queue
- Survey Notification

Instrument name	Fields	PDF	Enabled as survey	Instrument actions	Survey related options
Consent	20	PDF	Enable	Choose action	
HIPAA Authorization	12	PDF		Choose action	Survey settings  + Automate

# Enabling eConsent 2.0 Framework

- Click on the “Enable the e-Consent Framework for a survey” button.

**Settings for e-Consent & PDF Snapshots** [VIDEO: e-Consent Framework and PDF Snapshots](#)

[Back to Online Designer](#) **e-Consent Framework** [PDF Snapshots of Records](#)

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 rather than 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. You may optionally provide consent forms as either an inline PDF or rich text that will be displayed on the consent survey itself. The consent forms can be context-specific if you are using MLM languages and/or Data Access Groups so that it displays the correct consent form for a participant 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 for a survey. [Read more](#)

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

e-Consent active?	Edit settings	Survey	Location(s) to save the signed consent snapshot	Custom tag/category	Notes
No e-Consent items to display					

Showing 0 to 0 of 0 entries [Previous](#) [Next](#)

# Enabling eConsent 2.0 Framework

- Select the survey you want to enable for the e-Consent framework.

**Settings for e-Consent & PDF Snapshots** [VIDEO: e-Consent Framework and PDF Snapshots](#)

Back

**Enable e-Consent for a Survey** [Close]

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 --  
"Consent" (consent)


Close

Electronic... traditional... provides s... "hard-copy... enabled fo... The conse... with a spe...  
...ome using a computer-based consent fo... ile phone, or tablet. The REDCap e-Consent... and a storage function which automatically... your specific needs. The e-Consent Fram... h text that will be displayed on the conse... it displays the correct consent form for a... ls after enabling e-Consent for a survey. E...  
e-Consent Framework Settings [Hide inactive] [Search]

# Enabling eConsent 2.0 Framework

- Complete the e-Consent settings, including:
  - First and last name
  - Date of birth (if needed)
- These values are inserted in the footer of the consent PDF

### Enable e-Consent

 e-Consent settings for survey "Consent" (consent)

Use the settings below for setting up the e-Consent Framework for this survey. e-Consent often requires obtaining the consenting participant's name (and sometimes their date of birth) on the final consent form as documentation of their identity. Below you may select fields used to capture that info, in which the values for those fields will be automatically inserted into the footer of the PDF consent form that the participant will review at the end the survey. And then afterwards, that PDF "hard-copy" will be archived in the File Repository (with the 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 snapshots 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:  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](#)

# Enabling eConsent 2.0 Framework

- Complete the e-Consent settings, including:
  - Signature field(s)
  - Custom file name (optional)

### Enable e-Consent

**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:

**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)

**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:

e.g., [last\_name]\_[first\_name]\_[dob]\_record[record-name]

# Enabling eConsent 2.0 Framework

## 5. Add a New Consent Version:

- Click the “Add consent form” button within the e-Consent Framework settings.

The screenshot displays the 'e-Consent Framework Settings' interface. At the top, there is a green button labeled '+ Enable the e-Consent Framework for a survey' and a toggle switch for 'Hide inactive'. A search bar is also present. Below these are several columns: 'e-Consent active?' (with a toggle switch), 'Edit settings' (with a pencil icon), 'Survey' (with a dropdown arrow), 'Location(s) to save the signed consent snapshot' (with a folder icon), 'Custom tag/category' (with a dropdown arrow), and 'Notes' (with a dropdown arrow). The 'Survey' column shows a single entry: '"Consent" (consent)'. Within this entry, the '+ Add consent form' button is highlighted with a purple box. At the bottom left, it says 'Showing 1 to 1 of 1 entries'. At the bottom right, there are 'Previous', '1', and 'Next' navigation buttons.

# Enabling eConsent 2.0 Framework

Complete the add version settings form, including:

- Version number
- Placement of consent within the survey (what instrument variable it should come after)

### 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:**

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:**

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:**

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:**

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

**Consent Form (Rich Text)**

Provide your consent form as a block of styled text that will be displayed directly below the field selected for 'Location of consent form' on the instrument/survey. NOTE: Piping and field embedding are not allowed in the consent form text below and thus cannot be used there.

# Enabling eConsent 2.0 Framework

Add consent form text or PDF

**Consent Form (Rich Text)**

Provide your consent form as a block of styled text that will be displayed directly below the field selected for 'Location of consent form' on the instrument/survey. NOTE: Piping and field embedding are not allowed in the consent form text below and thus cannot be used there. Additionally, images added via the rich text editor will not be rendered in PDF exports or stored PDF snapshots that include the consent form text below.

Open Sans Paragraph 10pt B I U S A

Consent form test

Add new consent form Cancel

# Enabling eConsent 2.0 Framework

## 6. Verify Setup:

- After adding the consent form, it will go live **immediately** on the e-consent survey.

The screenshot displays the 'e-Consent Framework Settings' interface. At the top, there is a green button labeled '+ Enable the e-Consent Framework for a survey', a toggle switch for 'Hide inactive' (which is turned on), and a search bar. Below this is a table with columns: 'e-Consent active?', 'Edit settings', 'Survey', 'Location(s) to save the signed consent snapshot', 'Custom tag/category', and 'Notes'. The table contains one entry for a consent form named '"Consent" (consent)'. The 'e-Consent active?' column shows a green toggle switch. The 'Survey' column shows a document icon, the text 'Consent form v1.0', and links for '+ Add consent form' and 'View all versions'. The 'Location(s) to save the signed consent snapshot' column shows a folder icon and the text 'File Repository'. At the bottom left, it says 'Showing 1 to 1 of 1 entries'. At the bottom right, there are 'Previous', '1', and 'Next' navigation buttons.

e-Consent active?	Edit settings	Survey	Location(s) to save the signed consent snapshot	Custom tag/category	Notes
<input checked="" type="checkbox"/>		"Consent" (consent) Consent form v1.0 <a href="#">+ Add consent form</a> <a href="#">View all versions</a>	File Repository		


# Enabling eConsent 2.0 Framework

## 6. Verify Setup:

- Navigate through the survey as a participant would, ensuring that the e-Consent form is presented correctly, and the PDF is saved as expected.

Consent form test

**Name of subject:**

**Date:**   Today M-D-Y

**Signature** [Add signature](#)

# Enabling eConsent 2.0 Framework

## Keep in Mind

- **Automatic PDF Snapshot:** When the e-Consent Framework is enabled for a survey, a read-only PDF snapshot trigger is automatically created.
- This trigger makes sure that a PDF snapshot of the e-Consent form is always saved.

Triggers for PDF Snapshots								<a href="#">+ Add new trigger</a>	<input checked="" type="checkbox"/> Hide inactive	<input type="text" value="Search"/>
Active?	Edit settings	Name	Type of trigger	Save snapshot when...	Scope of the snapshot	Location(s) to save the snapshot	Snapshot ID			
<input checked="" type="checkbox"/>	Governed by e-Consent		Survey completion	Complete survey " <b>Consent</b> " (consent)	Single survey response	File Repository	15684			

Showing 1 to 1 of 1 entries

Previous 1 Next

# Enabling eConsent 2.0 Framework

---

## Keep in Mind

**Version Control:** Once a consent for version number is used, it cannot be reused. Use separate REDCap version numbers and document version numbers to prevent confusion.

**One-to-One Setup:** The e-Consent Framework configuration is one-to-one, meaning you'll need to set up separate e-Consents for each consent survey you want to use.

# PDF Snapshot

- A PDF Snapshot is a REDCap-generated PDF file of a single instrument/survey, multiple instruments, or all the instruments of a given record.

The screenshot displays the 'Data Collection Instruments' section in REDCap. On the left, there are three buttons: '+ Create' (a new instrument from scratch), 'Import' (a new instrument from the official REDCap Instrument Library), and 'Upload' (instrument ZIP file from another project/user or external libraries). On the right, there are two sections: 'Form options' and 'Survey options'. The 'Form options' section includes 'PDF Snapshots' (highlighted with a purple box), 'Form Display Logic', 'PDF (all instruments)', and 'Descriptive Popups'. The 'Survey options' section includes 'e-Consent', 'Survey Queue', 'Survey Login', and 'Survey Notifications'. Below these sections is a table with the following data:

Instrument name	Fields	PDF	Enabled as survey	Instrument actions	Survey related options
Consent	21			Choose action ▾	Survey settings  + Automated
HIPAA Authorization	12			Choose action ▾	Survey settings  + Automated

# PDF Snapshot

- **PDF Snapshots can be triggered when:**
  - 1) A survey is completed, or
  - 2) When specified conditional logic evaluates as True.
- When triggered, snapshots are stored in the PDF Snapshot Archive folder in the File Repository and/or stored in a specified File Upload field.

Triggers for PDF Snapshots							<a href="#">+ Add new trigger</a>	<input checked="" type="checkbox"/> Hide inactive	<input type="text" value="Search"/>
Active?	Edit settings	Name	Type of trigger	Save snapshot when...	Scope of the snapshot	Location(s) to save the snapshot	Snapshot ID		
<input checked="" type="checkbox"/>	Governed by e-Consent		Survey completion	Complete survey "Consent" (consent)	Single survey response	File Repository	15684		

Showing 1 to 1 of 1 entries

Previous  Next

# PDF Snapshot

## Add/Edit Trigger for PDF Snapshot ✕

Use the options below to create a trigger for capturing a PDF Snapshot of a record. The snapshot can be triggered by a survey being completed \*or\* when specified conditional logic becomes true (but not by both). You may provide the scope of the snapshot, which is simply which instruments/events you wish to include in the snapshot (one instrument, multiple instruments, or all instruments). When triggered, snapshots can be saved to the File Repository and/or a single File Upload field. Additionally, you may specify a custom prefix for the snapshot's file name when it is saved. You may create as many triggers as you wish, and you can deactivate/reactivate them at any time.

Name of trigger:

### STEP 1: Trigger conditions - Define when the snapshot will be triggered.

Every time the following survey is completed:

--- select a survey ---

-- OR --

When the following logic becomes true (only once per record): [How to use this](#)

(e.g., [enrollment\_arm\_1][age] > 30 and [enrollment\_arm\_1][sex] = "1")

# PDF Snapshot

---

## STEP 2: Scope of the snapshot

Click the pencil in the text box below to select specific instruments/events to be included in the PDF.

 [All instruments]

 TIP: Leave blank to include all instruments/events (i.e., the entire record's data).

- Save as Compact PDF (includes only fields with saved data)
- Store the translated version of the PDF (if using Multi-language Management)

# PDF Snapshot

## STEP 2: Scope of the snapshot

Click the pencil in the text box below to select specific instruments/events to be included in the PDF.

 [All instruments]

### Select instruments:

Update

Cancel

[select all](#)

[deselect all](#)

### Instruments:

Consent

HIPAA Authorization

STEP 3: Location(s) to save the snapshot

# PDF Snapshot

## STEP 3: Location(s) to save the snapshot

Save to File Repository

Save to specified field:

OR

## STEP 3: Location(s) to save the snapshot

Save to File Repository

Save to specified field:

Consent

consent\_pdf "Consent PDF"

# PDF Snapshot

---

## STEP 4: 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]

# Multi-Signature Consent

- Can use PDF snapshots to collect multiple signatures and render them in the same PDF
- **Process:**
  - Create consent form instruments (one signature per instrument) and set up e-consent for each instrument
  - Create PDF snapshot logic to save a snapshot when all forms you want combined are completed

**STEP 1: Trigger conditions** - Define when the snapshot will be triggered.

Every time the following survey is completed:

--- select a survey ---

-- OR --

When the following logic becomes true (only once per record):

[How to use this](#)

[consent\_complete]='2' AND [consent\_2\_complete]='2'

(e.g., [age] > 30 and [sex] = "1")

# Updates to Randomization

## 1. Multiple randomizations in a project

- Users can define more than one randomization model in a single project
- Each model is independent (own strata, randomization fields, and allocation table)

Summary

Show 10 entries Search:

#	Target	Allocation Type	Stratification	Total Allocations (Development)	Total Allocations (Production)	Setup	Dashboard	Randomization ID
1	<a href="#">random</a> View trigger logic		age_range site	16	0			1940
2	<a href="#">rand_groups</a>		age_range	0	0			1942

Showing 1 to 2 of 2 entries Previous 1 Next

[+ Add new randomization model](#)

# Updates to Randomization

---

## 2. **Blinded randomization** using a “randomization number”

- When a record is randomized, the randomization field shows a randomization number as its value rather than the randomization assignment itself
- The randomization value is uploaded as part of the allocation table

# Updates to Randomization

---

## 2. **Blinded randomization** using a “randomization number”

- When a record is randomized, the randomization field shows a randomization number as its value rather than the randomization assignment itself
- The randomization value is uploaded as part of the allocation table
- You can still use the traditional unblinded randomization

## 🔗 Randomization

📺 VIDEO: [How to use this page](#)

Randomization is a process that assigns participants/subjects by chance (rather than by choice) into specific groups, typically for clinical research and clinical trials. The randomization module in REDCap will help you implement a defined randomization model within your project, allowing you to randomize your subjects (i.e. records in your project). In this module, you first define the randomization model with various parameters. Based on the defined parameters, the module creates a template allocation table, which you can use to structure the randomization table you will import. The module also monitors the overall allocation progress and assignment of randomized subjects. **Note: It is recommended that only people with experience in randomization set up the Randomization module.** [More details](#)

Summary

Setup 0

### STEP 1: Define your randomization model

This step will allow you to define the randomization model you will be implementing and all its parameters, which includes defining strata (if applicable) and optionally randomizing subjects per group/site (if a multi-site study).

#### A) Use stratified randomization?

It is often necessary to ensure equal treatment among a number of factors. Stratified randomization is the solution to achieve balance within one or more subgroups, such as gender, race, diabetics/non-diabetics, etc. By choosing strata (multiple choice criteria fields), you may then be able to ensure balance within those subgroups. [Tell me more](#)

#### B) Randomize by group/site?

If this is a multi-center/multi-site project (or something similar), you may want to stratify the randomization by each group/site. You can select an existing multiple choice field that represents the groups/sites, OR you can use Data Access Groups to stratify by group/site.

#### C) Choose your randomization field

This is the field where the "Randomize" button will appear on your data collection form. The type of field you choose (text field vs. single-select multiple choice field) dictates the Allocation Type for this randomization model.

##### For open randomization:

- Select a single-select (dropdown or radio) field. The randomized **group allocation** will be saved to this field.

##### For concealed (blinded) randomization:

- Select a text field that does not have field validation. The assigned **randomization number** will be saved to this field.

Note that the randomization number is available through the smart variable `[rand-number]`.

- select a field -

📁 Save randomization model

🗑 Erase randomization model

# Updates to Randomization

---

## 3. New randomization smart variables

**[rand-number]** - Returns the randomization number assigned to the record.

**[rand-time]** – Returns the server date and time at which a record was randomized.

**[rand-utc-time]** – Returns the UTC data and time at which a record was randomized.

# Updates to Randomization

---

## 4. Real-time trigger logic

- **Manual Only** - A user must click the “Randomize” button on the data entry form.

# Updates to Randomization

---

## 4. Real-time trigger logic

- **Manual Only** - A user must click the “Randomize” button on the data entry form.
- **NEW Trigger logic, for users with randomize permissions only** - When the Save button on a specified data entry form is clicked, if the logic is True (**and the current user has “Randomize” user permissions**), the record will automatically be randomized.

# Updates to Randomization

---

## 4. Real-time trigger logic

- **Manual Only** - A user must click the “Randomize” button on the data entry form.
- **NEW Trigger logic, for users with randomize permissions only** - When the Save button on a specified data entry form is clicked, if the logic is True **(and the current user has “Randomize” user permissions)**, the record will automatically be randomized.
- **NEW Trigger logic, for all users (including survey respondents)** - When the Save button on a specified data entry form or survey page is clicked, if the logic is True **(no matter the user’s permissions)**, the record will automatically be randomized.

# Updates to Randomization

## 4. Real-time trigger logic

### STEP 4: Automatic Triggering Option

Randomization can be automated to occur in real time when a data entry form or survey page is saved when the logic expression entered below becomes true (i.e., without someone clicking the Randomize button). If strata are being utilized in the randomization model, all required strata fields must have saved values before the automatic triggering can take place. Using the options below, please provide 1) the trigger option, 2) the instrument (and event, if longitudinal) where the automatic randomization will occur, and 3) the trigger logic that must become true in order to trigger the automatic randomization. Note: For multi-page surveys, the logic expression will be checked when each survey page is submitted; however, if you prefer the randomization to be triggered when a multi-page survey is completed, consider appending `[form_complete]='2'` to the trigger logic, in which 'form' in the variable name should be substituted with the unique instrument name of the survey.

Trigger option

Trigger logic, for users with Randomize permission only

Save trigger option

Instrument

Demographics

Trigger logic

`[demographics_complete]='2'`

Tip: you may utilise the smart variables `[is-survey]` or `[is-form]` to provide different behaviour in survey view or on the data entry form.

# Updated Codebook Display






- Form names in the Instruments table are now linked to the corresponding form for easy navigation.

The screenshot displays the 'Data Dictionary Codebook' interface. At the top left is a 'Print page' button. The title 'Data Dictionary Codebook' is centered at the top. Below the title is a 'Field finder' search bar with the placeholder text 'Search by variable name or by keyword in field label'. To the right of the search bar are three icons: an upward arrow, a downward arrow, and a printer icon, followed by the text '— When viewing this page'. Below the search bar is a table titled 'Instruments' with a checkmark and an upward arrow icon. The table has two columns: 'Instrument' and 'Form Name'. The first row is 'Consent' (with a red underline) and 'consent'. The second row is 'HIPAA / Scroll to this instrument' (with a tooltip) and 'hipaa\_authorization'. The third row is 'Consent 2' and 'consent\_2'.

Instrument	Form Name
<a href="#">Consent</a>	consent
HIPAA / <small>Scroll to this instrument</small>	hipaa_authorization
Consent 2	consent_2

# Updated Codebook Display

- The codebook now has an edit icon next to each variable, linking to that variable in the Online Designer for easy edits.

	#	Variable / Field Name	Field Label <i>Field Note</i>	Field Attributes (Field Type, Validation, Choices, Calculations, etc.)
	Instrument: <b>Consent</b> (consent)		 Enabled as survey	<a href="#">^ Collapse</a>
	1	[record_id]	Record ID	text
		[consent1]	THIS IS AN EXAMPLE AND WILL NEED TO BE UPDATED TO THE IRB APPROVED CONSENT FORMUNIVERSITY OF	descriptive Field Annotation: THIS IS AN EXAMPLE AND WILL NEED TO
				

# REDCap Mobile App vs MyCap



REDCap Mobile App	MyCap
Offline data collection	Requires cellular or Wi-Fi connection
Data entry by study staff	Data entry by participant themselves
Collected on shared study device (like an iPad)	Collected in the participant's personal device (like a smart phone)
For data collected once a week or less frequently	For data collected daily or more frequently
Integrated with REDCap with little minimal set-up	Extremely limited functionality and specialized set-up
	Supports specialized "active tasks"



# Limitations of MyCap

---

- Single condition branching logic that can only reference data within that page.
- Action tags, calculations, and piping are not supported.
- Additional project set-up is required to enable instruments in MyCap.
- Study teams must ensure participants install the correct version of MyCap.
- Users are responsible for keeping the app updated on their personal devices.



**QUESTIONS?**