Changes to e-Consent and PDF Snapshot Features

Key Changes:

1. **Enhanced e-Consent Framework:**

   o **Customizable Consent Forms**: Design consent forms with various field types, including text, dropdowns, and signature fields.

   o **Version Control**: Manage new versions of consent forms while maintaining historical versions for audit purposes.

   o **Certification Page**: Display an in-line PDF copy of the completed consent form for participant review and certification.

   o **Support for Multi-Form Signing**: Capture signatures across multiple forms, with each form generating its own PDF snapshot.

   o **Automatic PDF Snapshot Trigger**: Automatically create a read-only PDF snapshot trigger that saves a PDF copy of the survey response into the project's file repository.

2. **Improved PDF Snapshot Functionality:**

   o **Automatic Saving**: Save PDF copies of survey responses to the project's file repository or specified fields.

   o **Custom Triggers**: Create custom triggers for generating PDF snapshots based on specific events or conditions.

   o **Support for Multi-Form Consents**: Combine multiple forms into a single PDF snapshot.

   o **Custom Headers and Footers**: Add custom headers and footers to PDF snapshots, including text fields, smart variables, and piping.

   o **File Naming Customization**: Customize the file names of PDF snapshots using static text or piping, appended with date-time stamps.

   o **Audit Trails**: Maintain detailed audit trails for consent form completions and PDF snapshot generations.

   o **Vault Storage Integration**: Store PDF snapshots in the vault if enabled and allowed by the admin.

Benefits of the New Features:

- **Streamlined Consent Process**: Simplify and enhance the electronic consent process for both researchers and participants.

- **Improved Data Integrity**: Ensure secure and organized storage of consent forms and survey responses.

- **Enhanced Compliance**: Meet regulatory standards requirements with robust version control and audit trails.

What About My Existing e-Consent?

Transition to New Features:

- **New Location for e-Consent Framework**: The e-Consent Framework will move from survey settings to the Online Designer page. The auto-archive feature is also moving and being renamed to PDF Snapshots. Both features will have their own control page to assist users in managing these functionalities.

- **Automatic Transition**: Existing e-Consents will automatically move to the new location and continue to function as set up. However, run a test record through your consent process on go-live day to verify functionality. Document this test and its results for compliance.

No Data Loss:

- **Data Integrity:** All existing e-Consent data will be preserved during the transition. The new system enhances functionality without compromising your existing data.

Update Required:

- **Manual Project Updates:** Verify the functionality of your e-Consents post-transition by running a test record. Document this test and its results for compliance.

Familiarize Yourself with the New Features:

- Watch the tutorial to understand the updated e-Consent and PDF Snapshot functionalities: **Video Tutorial**

- Review the detailed guide to understand the full scope of the changes and how to implement them in your projects: **Read the Guide**