# RADAR Electronic consent training notes v1

Electronic consent to recruit patients can be used alongside existing methods such as face to face.

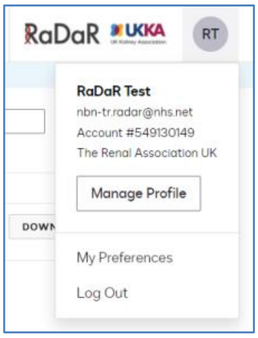
The main things to note are: patient email address is required. Patient should be contacted before e-consent is initiated to ensure informed consent and to check patient details. Every completed envelope has a cost implication therefore researcher should be fairly confident the patient wishes to take part.

## https://account.docusign.com/#/username

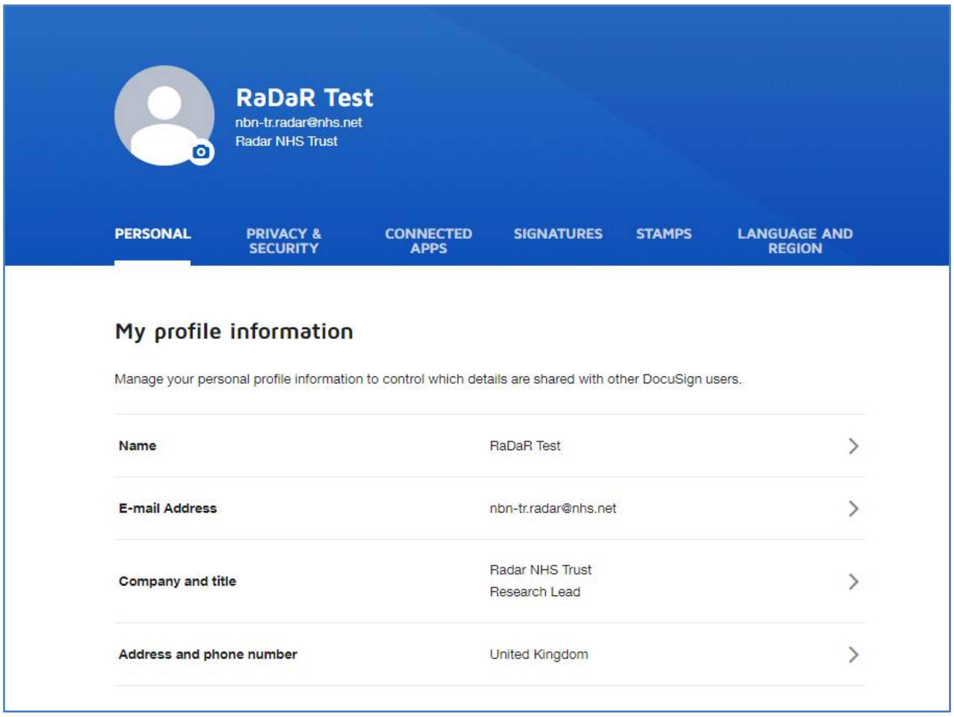
Site set up

- RADAR team sets up site user accounts with user name and email details provided.
- RADAR team sets up site letter/consent/PIS templates for site using site trust logo and contact details.
- For more sites with more than one user, RADAR team can enable “shared envelopes” for delegated management of envelopes. Upon request.

User set up




- User will be given PIN to activate their account. They will need to create a strong password.
- When user first logs in, they should check and complete details on user profile as contact details are displayed on emails to patient. Go to to circle top right of page, then **Manage Profile**. Go to **Personal** and add details. You can also go to **Signatures** to add your standard signature (this can speed up consent form countersignatures).



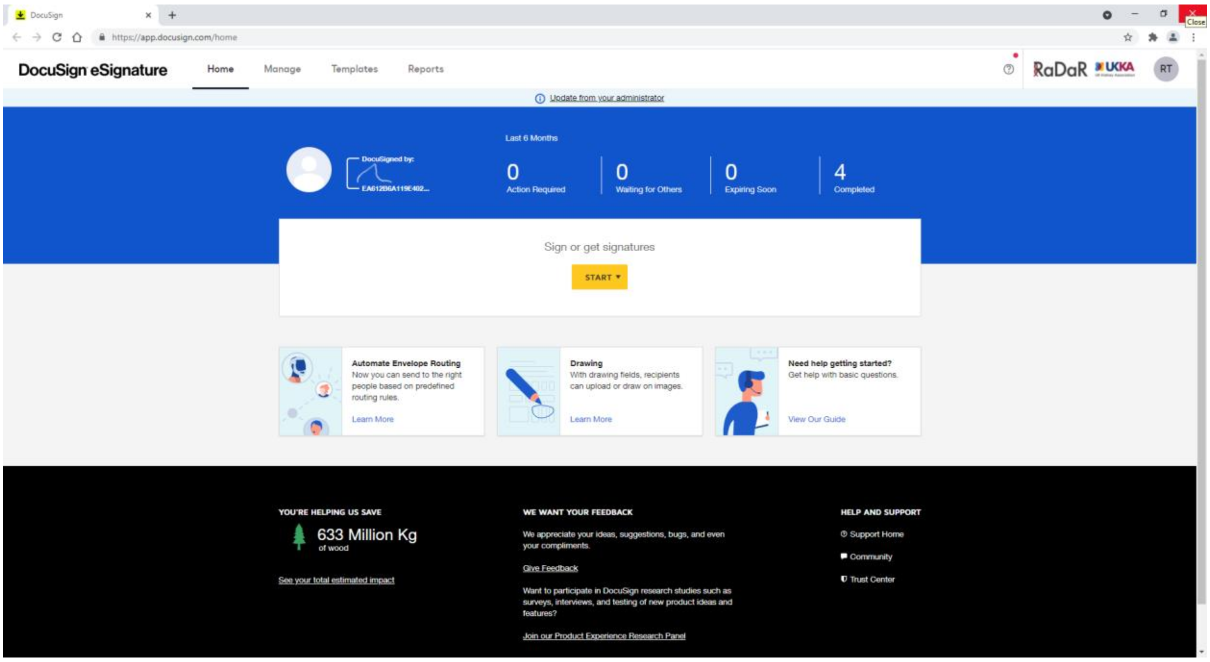
**One page summary of e-consent process**

1. Researcher makes contact with patient or parent/guardian and explains study.
2. Researcher checks and confirms email address with what is held.
3. Researcher explains that consent form and information will be sent to them by email shortly.
4. Researcher logs into https://account.docusign.com/#/username
5. Researcher selects correct consent template in **Templates** tab, prefills field/s and sends.
6. The consent form completion status can be tracked within DocuSign under **Manage** tab. Various reports are available under **Reports** tab
7. The email sent to patient has a "Review Document" button. Patient can read the information and sign the consent form when they are ready (14 day expiry). When reviewing documents, the yellow "Start" button will take them straight to where they need to sign. They can draw or upload a signature.
8. Researcher countersigns the consent form (within Docusign if they are sender).
9. A notification email will be sent to the patient after the researcher signs form. Patient can then click link in email to download or print completed form.
10. Completed consents can be organised into custom folders with **Manage** page.
11. You can print completed consent form or save as PDF into folder on your network drive.
12. The researcher is free to recruit patient to RADAR once consent form is completed correctly.

**Comprehensive instructions on e-consent process**

## Book electronic consent

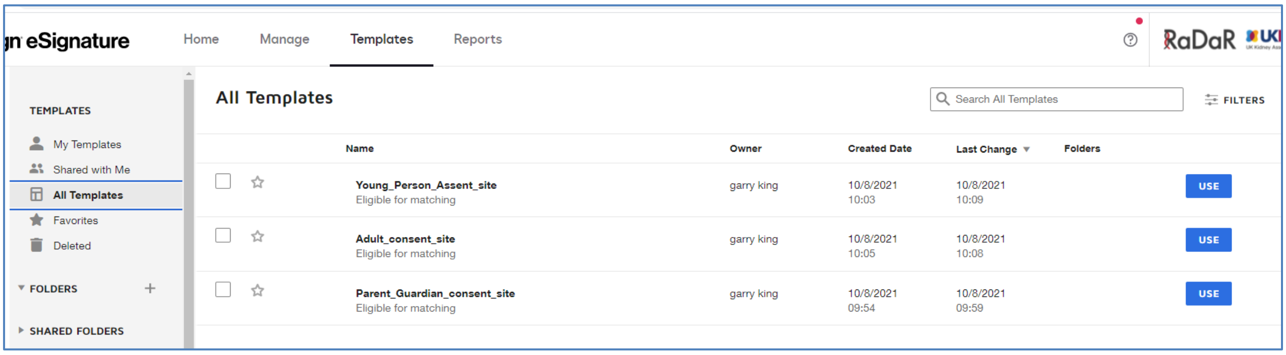
Site user logs into DocuSign ([https://account.docusign.com/#/username](https://account.docusign.com/#/username)), you will arrive at DocuSign landing page.




Please note, in the following steps, whenever you select options to a new page you can always navigate backwards with arrow < at top left in blue banner or yellow NEXT button to proceed to next stage.

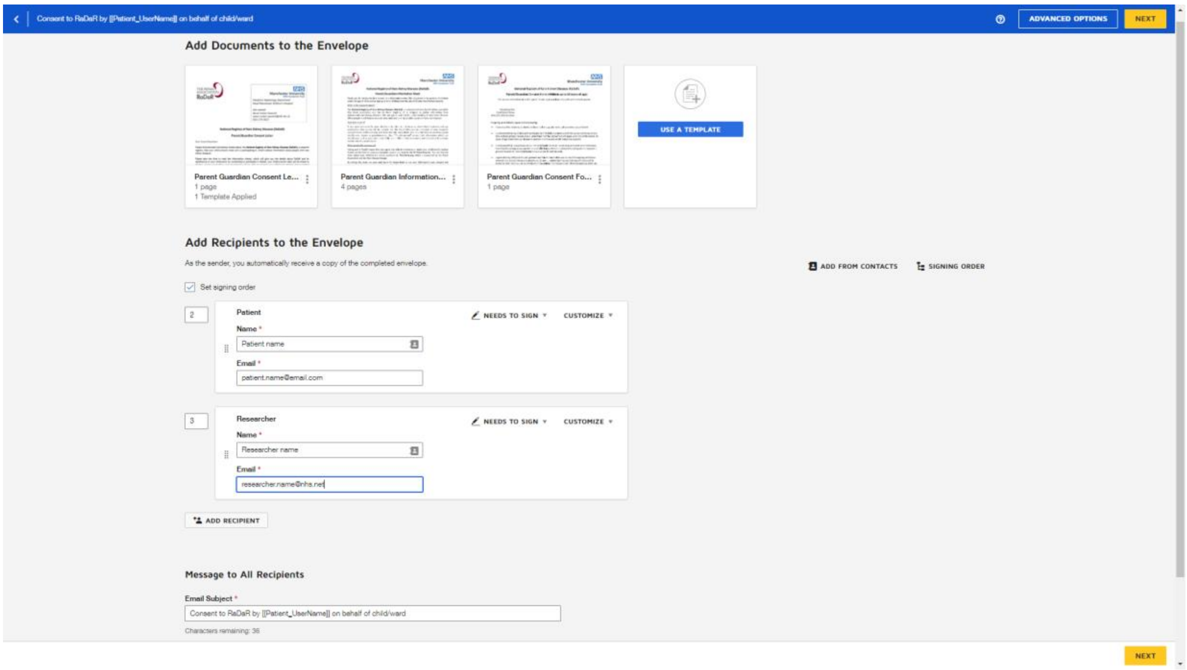
## Initiate e-consent

1. Go to **Templates** tab (templates are pre-designed packages of documents)
2. Click **All Templates** on left-hand side
3. **Use** correct consent package e.g. “Adult_consent_site_name” (**click blue USE button**)



## Add Recipient details

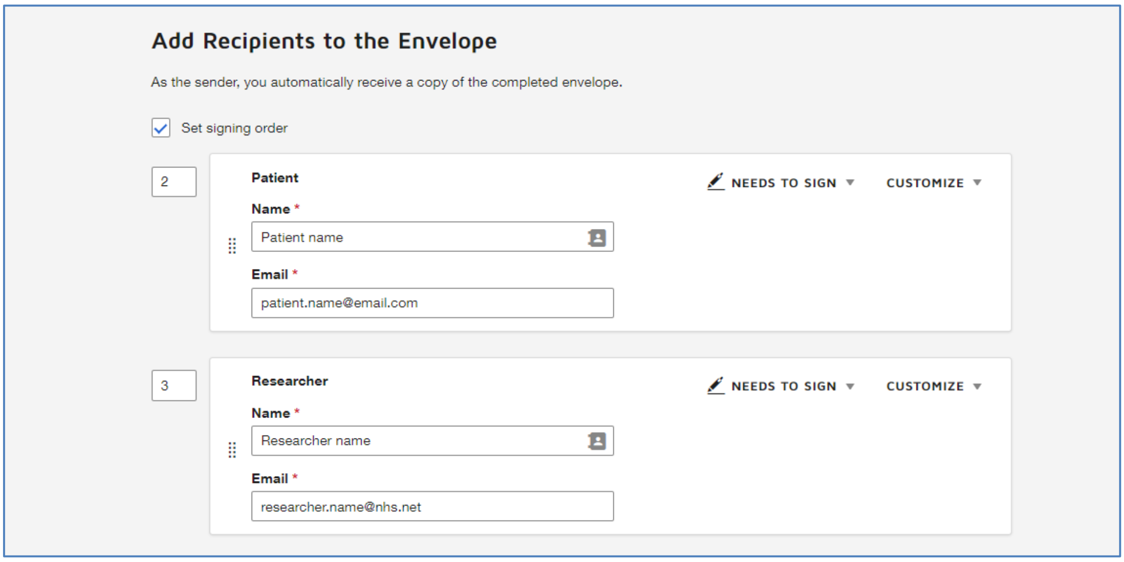
The next page allows you to see what is being sent and to whom




**Add Documents to the Envelope** – you can ignore this because all required documents have been added. You can view the documents here if you like by clicking view when hovering over them. You can delete letter/PIS from envelope here if you wish e.g. when patient already has been sent one.

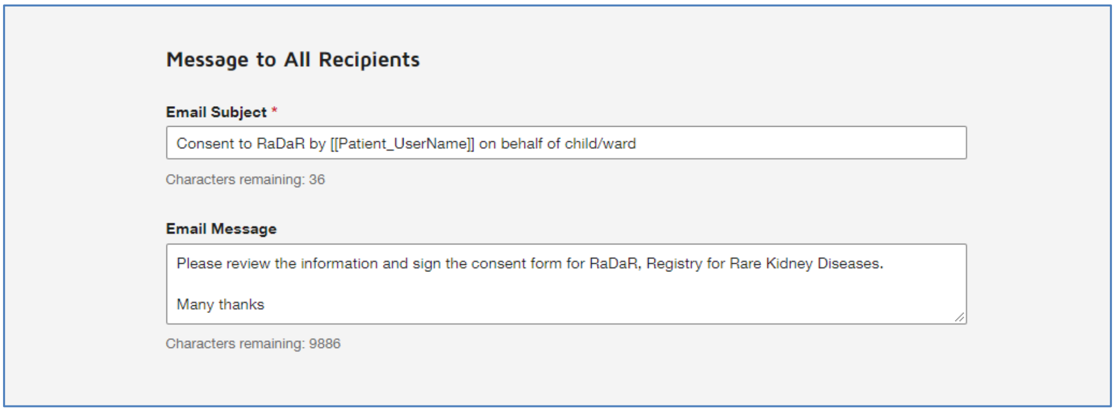
**Add Recipients to the Envelope**

1. **Add patient name and email**. If you have chosen parent/guardian template then add the name and email of parent/guardian (you will be given chance to add child/ward's name in consent form later).
2. **Add researcher name and email**. Typically this is the sender/user that is logged in. You can choose from a dropdown list of previous researcher names/emails at site or use user address book to save you typing details.



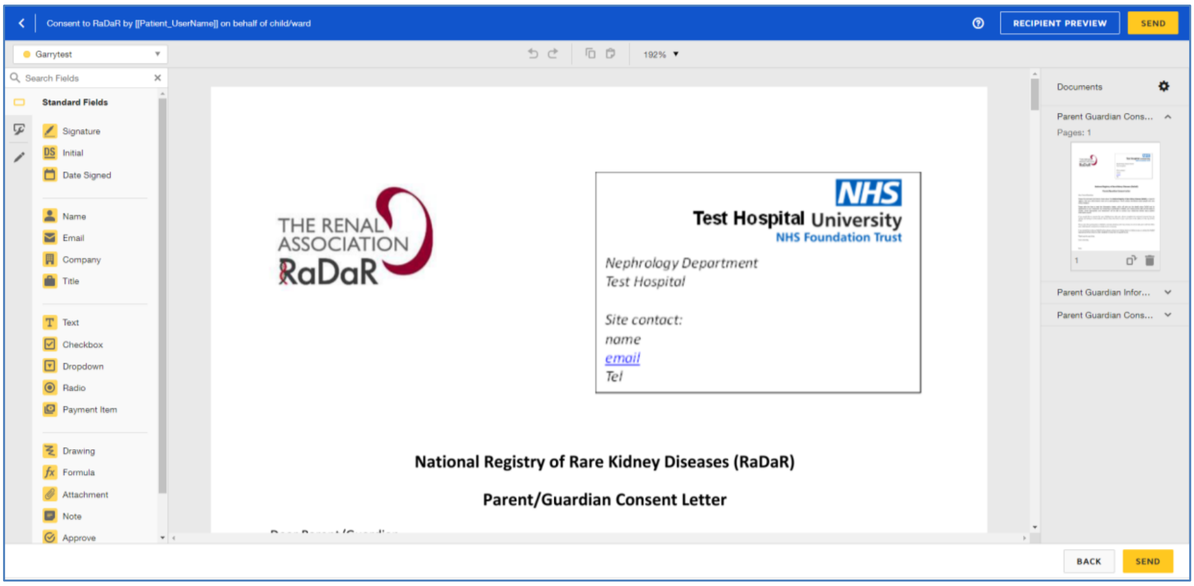
### Message to All Recipients

1. The subject and email message has default text. Please leave the email subject as it is (this shows a merge field which will show patient name (or Parent/Guardian) to make it easier to reference in emails). You can add further instructions to email message if you wish.
2. Click **Next** when you wish to proceed

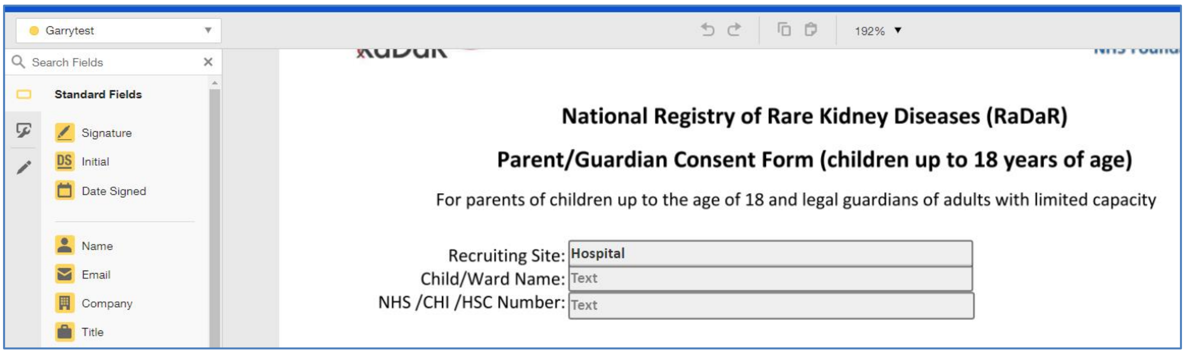



### Pre-fill fields on Consent Form

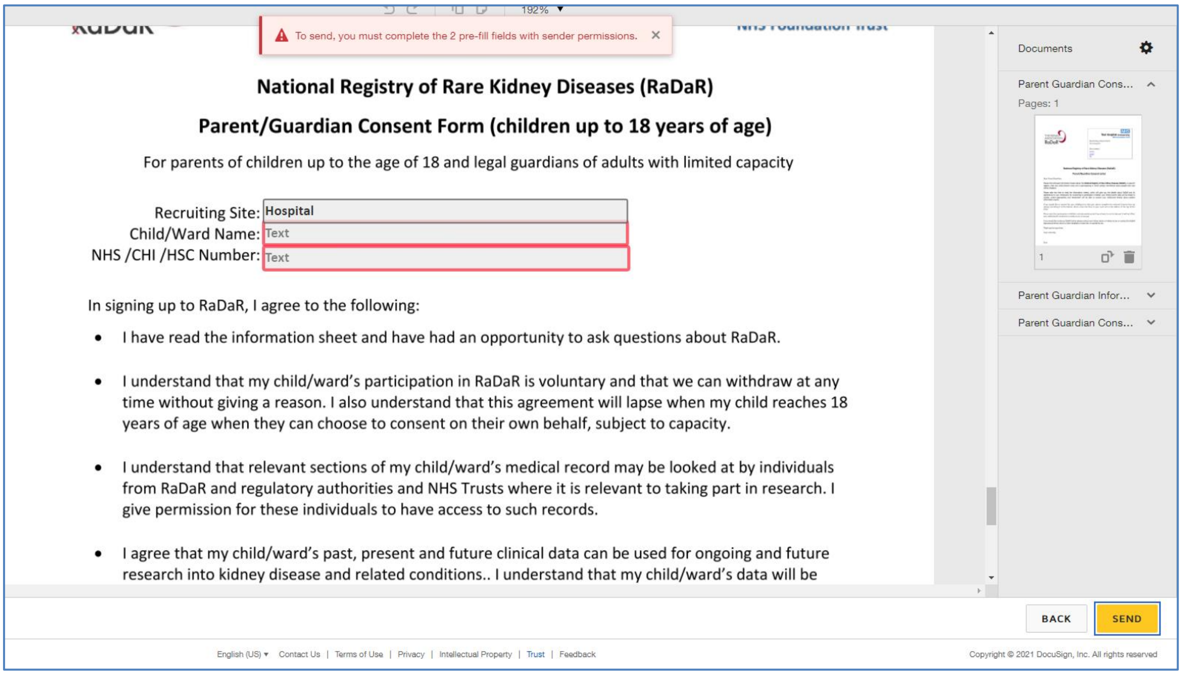
Here you are given opportunity to add pre-fill information to form before it gets sent. Any site contact details will be shown here alongside trust logo.




On the consent form itself, the recruitment site name should already be defaulted to your site name. You should **copy/paste the patient NHS number** (perhaps from your clinical system) into the correct field. The **Parent/Guardian form** also has **child/ward name to enter here**.



*If you click send before you enter the pre-fill fields then you will get a warning.

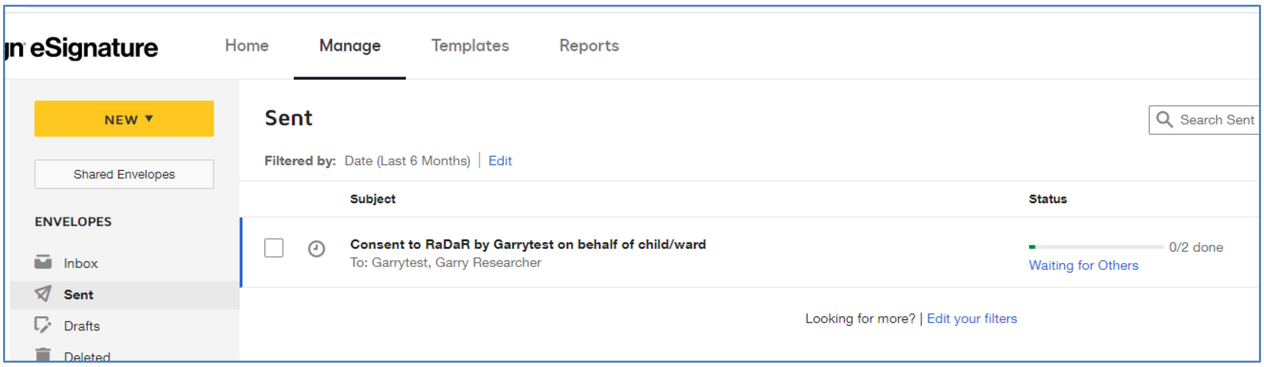



When you are ready click the **yellow send button!**

The application will indicate that it has been sent.

## Tracking e-consent status

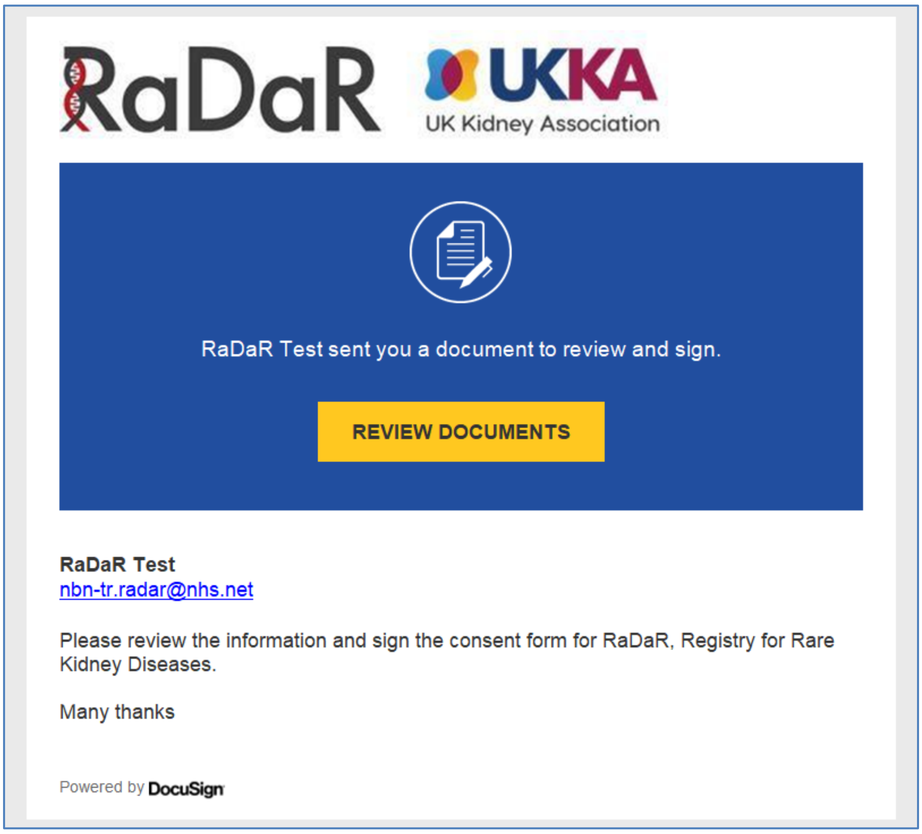
Go to **Manage** tab. The **Sent** folder will show status of envelopes sent. If you haven't navigated anywhere else, you can click F5 to refresh the screen. The status updates automatically once form is signed by the patient. Once patient signs, if the researcher who needs to countersign is the sender logged in then they can sign straightaway in application else they will be sent an email to do this.



Clicking the envelope shows more info on the status.


## Email/docs sent to patient

Logos/pictures may not appear due to email limitations. Patient should click “**Review Documents**”



## Patient Reviews Documents

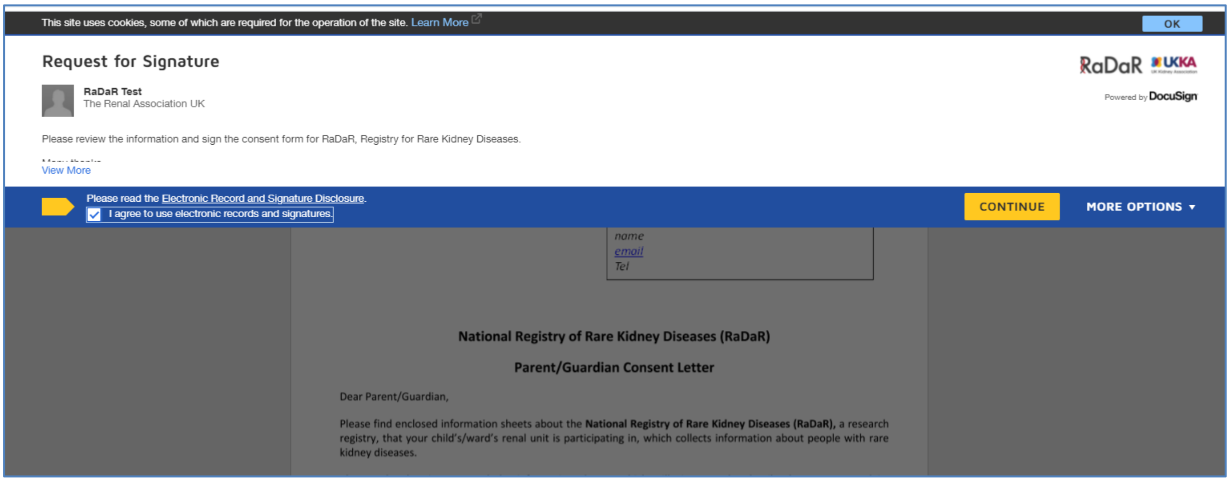
The web browser will open up a page. The message appears "This site uses cookies, some of which are required for the operation of the site". **Click OK blue button at top right**.

To initiate review, Tick **"I agree to use electronic records and signatures"**

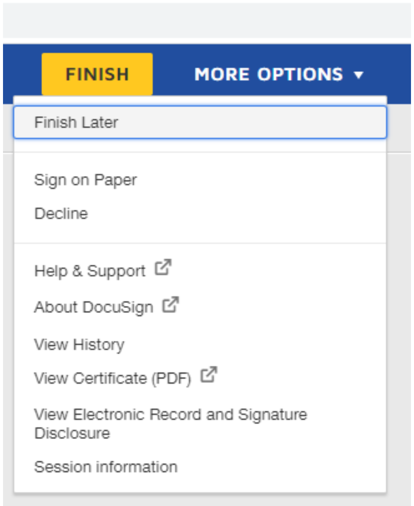
Click **Continue**

**Read documents** (letter, patient information sheet) and scroll down to the consent form.

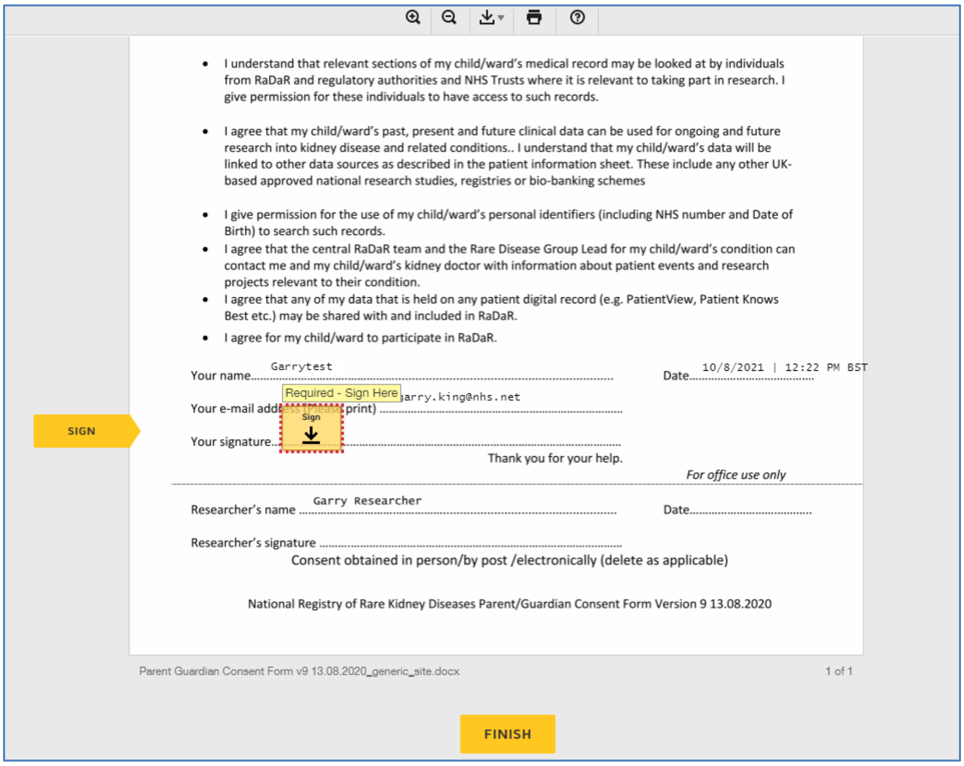
Note: clicking **START** or **FINISH** will to take you to straight to end of document for signature.




Please note, there are **More Options** top right of page if patient wishes to Finish Later, Decline or sign on paper.



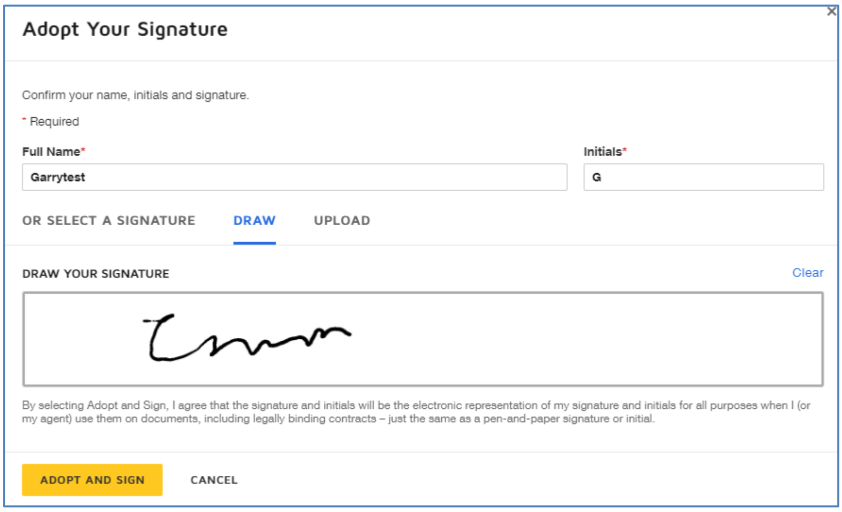
Once documents are read, patient can click on the **Sign** box in order to provide signature.




You are given 3 options, select a default signature, draw or upload.

Draw is typically selected.

The Upload option enables you to get a signature you may have saved on your device.

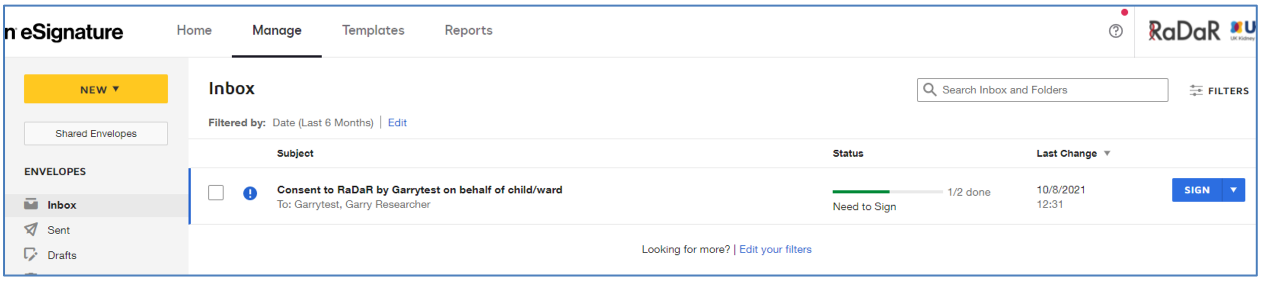


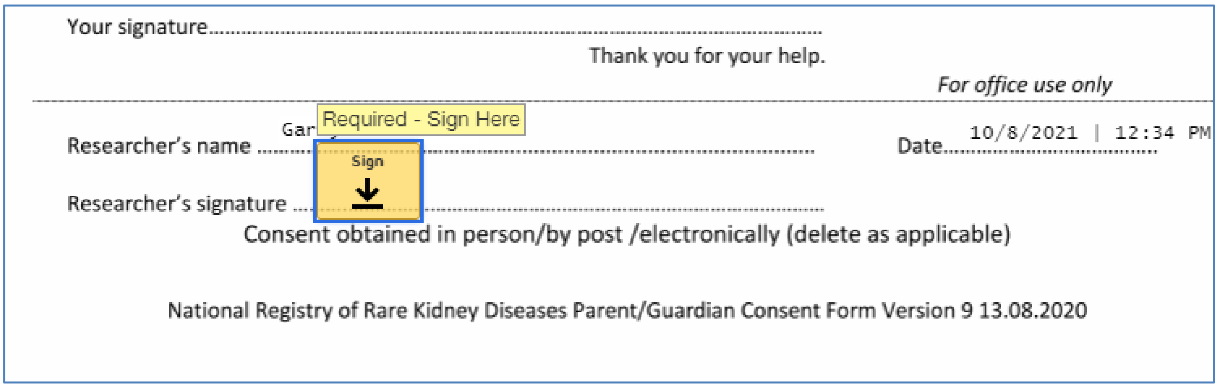

After signature, click **Adopt and Sign** button, then **Finish** button. You may get a pop up message that "you are done signing". Click **done**.

The form will be sent to research for countersignature. The patient will be sent link to completed documents after countersignature. They can save or print completed documents.

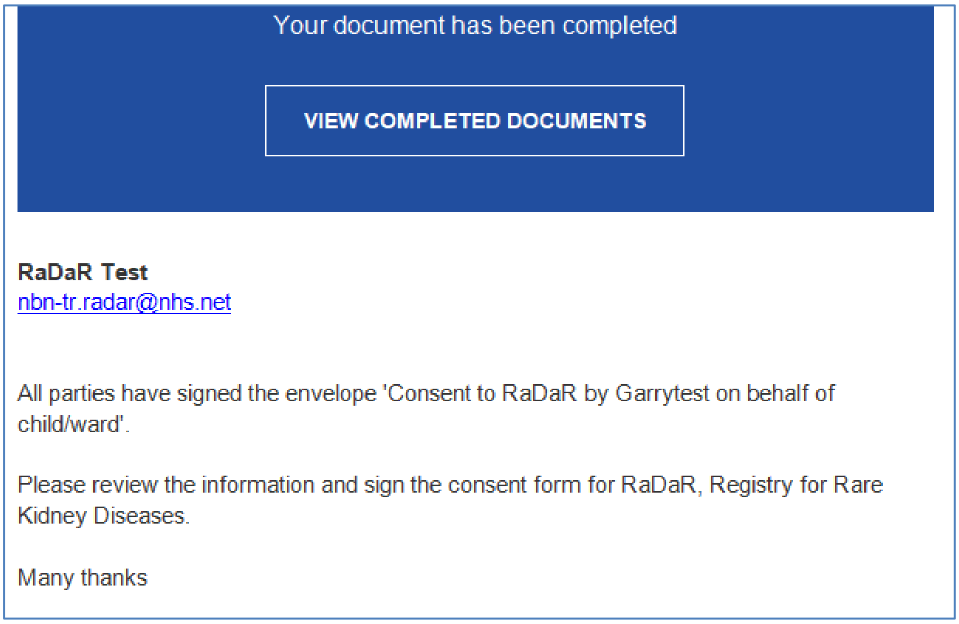
## Researcher signature and completed documents

The manage tab inbox shows all documents waiting to be signed by researcher. Researcher can sign in the application by using signature saved in user profile. Specified researchers who don't have DocuSign account can sign via an email (similar to patient).




**Once researcher signs, patient will get an email with a link to the completed documents.**

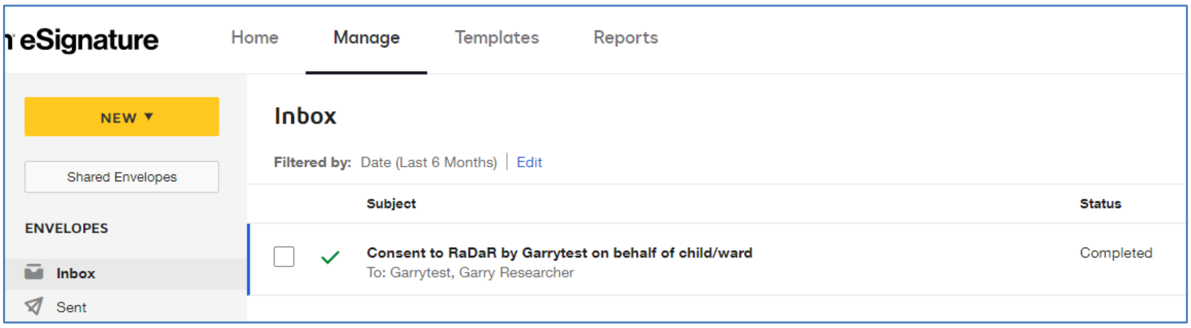


Researcher can see all completed envelopes in the inbox of the **Manage** tab.

Researcher can recruit all patients with completed consents to RADAR!

Note: completed envelopes can be moved to created folders to tidy up the space.

You can **print or save the consent form** as a PDF on your local network folder fro your records. At the relevant completed document row, use the dropdown next to download button and select "Print". You then have the option to print, if available, or to "Save as PDF". If you save as PDF then select custom to choose the last page number where the consent form is. Give the form an appropriate filename such as patient name or NHS number then save.




## Other Features

The **Reports** tab enables the user to run reports to see the status of sent envelopes and provide lists.

In the **Manage** tab there is a "Shared Envelopes" button. Use this to see the envelope status lists of other users at your site in case of delegation. Radar team can set up shared envelopes for users at site upon request.