

Castor

Castor eConsent Site User Guide

Version 2023.3

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1. Register an account

Before you are able to access your eConsent study you will first need to be invited and create an account for eConsent.

Invited users will receive an email with a link.

You've received a new Castor eConsent invitation



Castor eConsent <no-reply@castorconsent.com>



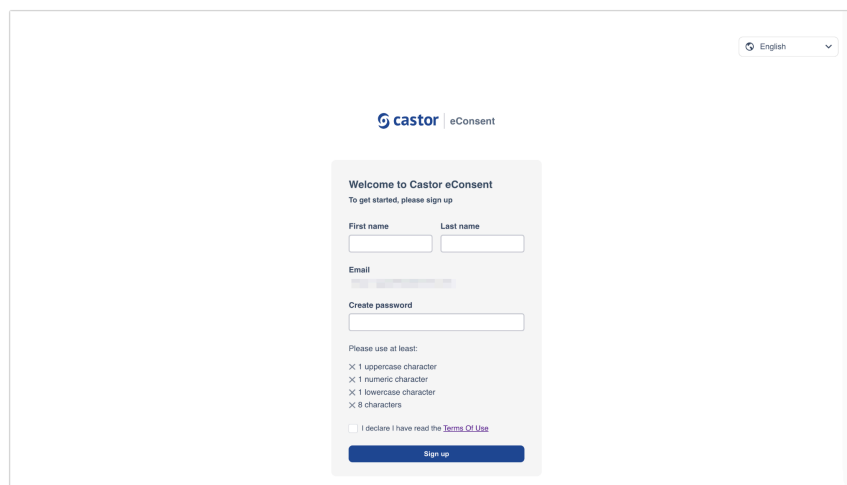
You've received a new Castor eConsent invitation

You have been invited to join the study team for 'Castor eConsent' in Castor eConsent.

To join the study please click the button below.

[Join the study](#)

By clicking the 'Join the Study' link provided in the email, you will be directed to the registration page:



The screenshot shows the registration page for Castor eConsent. At the top right, there is a language dropdown menu set to 'English'. The main heading is 'Welcome to Castor eConsent' with the subtext 'To get started, please sign up'. Below this, there are input fields for 'First name' and 'Last name', followed by an 'Email' field. A 'Create password' field is also present. Underneath, a list of requirements is shown: 'Please use at least: 1 uppercase character, 1 numeric character, 1 lowercase character, and 8 characters'. At the bottom, there is a checkbox for 'I declare I have read the Terms Of Use' and a 'Sign up' button.

You will need to accept the Terms of Use and provide the following details when registering the account:

- First name
- Last name
- Email will be automatically pre-filled
- Create password

After filling out the details and accepting the Terms of Use, click on the 'Sign up' button to complete the registration.

Should you already have an account registered in eConsent, you will be directed to the eConsent login page where you can log in with your eConsent credentials.

2. Log In

In order to access your eConsent study after registration has concluded you will need to access the following url's bases on the location of your study, US or Europe:

- US eConsent - <https://us.castorconsent.com/>
- EU eConsent - <https://eu.castorconsent.com/>

Study data is only stored on one of these servers and only one server location can be accessed at a time. If you don't see any studies listed please make sure to check our other server location.

You can toggle between the two study locations by selecting the Europe or USA icons at the top of the page.

castor | eConsent

Europe USA ⓘ

Studies

Search... ⓘ

Active

• Live	The Impact of Yoga and Meditation on Chronic Pain: A Randomize... ⓘ	Main contact:
• Testing (Castor)	Castor eConsent Study (Testing)	Main contact:
• Testing (Customer)	Castor eConsent Study	
• Testing (Customer)	Support Team Study ⓘ	Main contact:

Help us improve

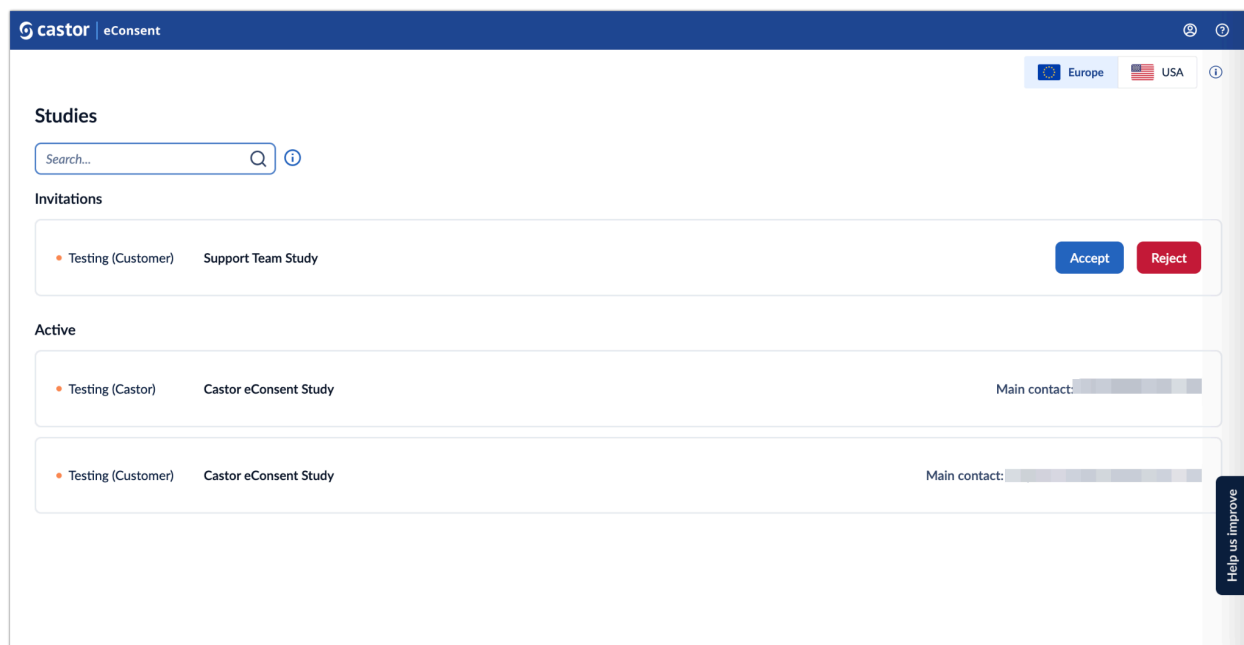
3. Open a study

After logging in, the ‘Studies’ overview will be displayed with two sections, ‘Invitations’ and ‘Active’.

The ‘Invitations’ section will only appear if you have been sent an invitation to join a study and have not yet accepted or rejected the invitation.

Before accessing any studies you will first need to accept the invitation by pressing the ‘Accept’ button.

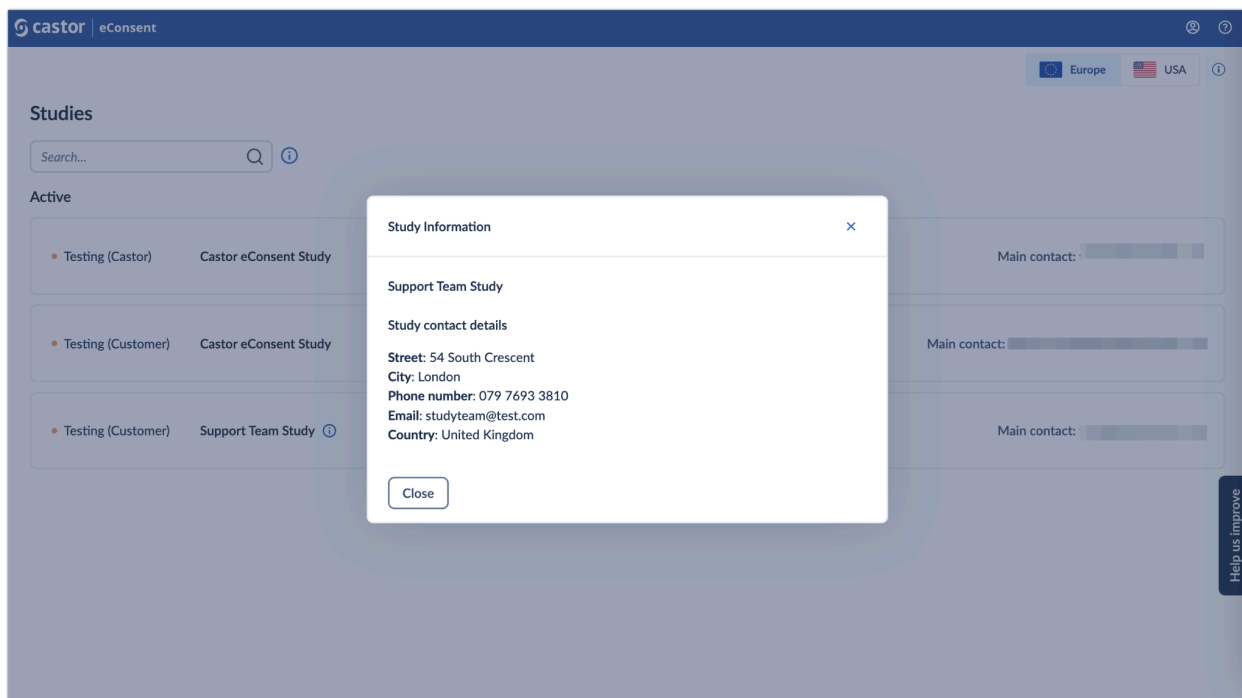
Rejecting the invitation cannot be undone and you will need to contact the study admin to request a new invite.



The ‘Studies’ overview consists of the following elements:

- **Servers:** Here the data storage locations are displayed. There are two server locations available: Europe and the United States. Study data is only stored on one of our servers and only one server location can be accessed at a time. If you don’t see any studies please make sure to check a different server location.

- **Search bar:** it is possible to search by organization name, study contact email address or study name
- **Invitations:** If you are invited to a study, but you have not accepted the invite yet, the study will be listed in the top panel. It is possible to either accept or reject an invitation to a study. Once you have accepted the invitation, you will be able to open a study.
- **Active:** once you have accepted an invitation to a study, it will appear in the 'Active' list. The list displays all studies you have access to. For each study, the following information is shown:
 - **Status:** Testing (Castor), Testing (Customer), Live. Read more about what each status means in the article: [Study status in eConsent](#)
 - **Study title:** name of the study
 - **Main contact:** main contact of the study. If the main contact has been invited to the study, but have not accepted the invitation yet, the status will be 'Main contact invited'
 - **Study information:** by clicking on the(i) icon, it is possible to view additional study information

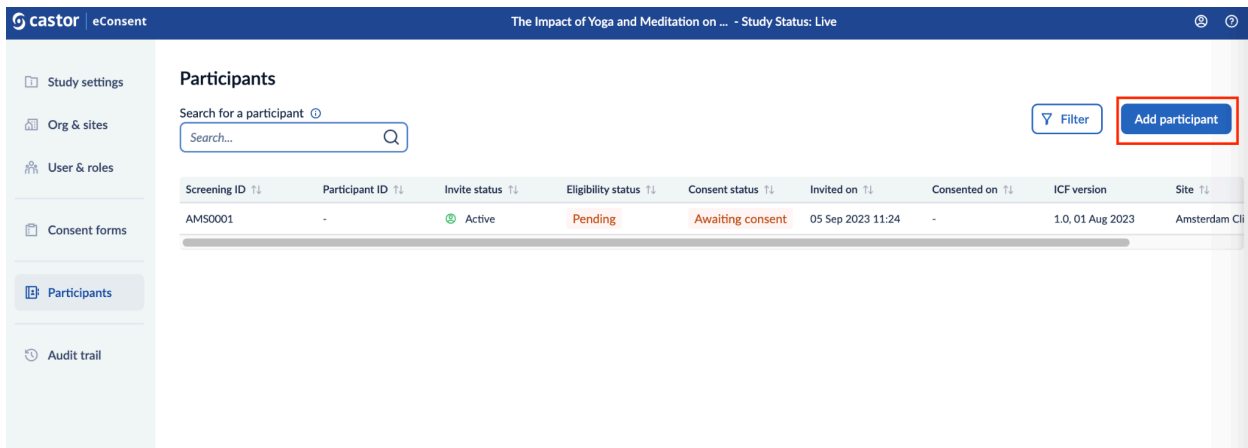


Studies for which an invitation has been accepted will appear in the 'Active' section and it is possible to access the study by clicking on the study row.

4. Adding a participant

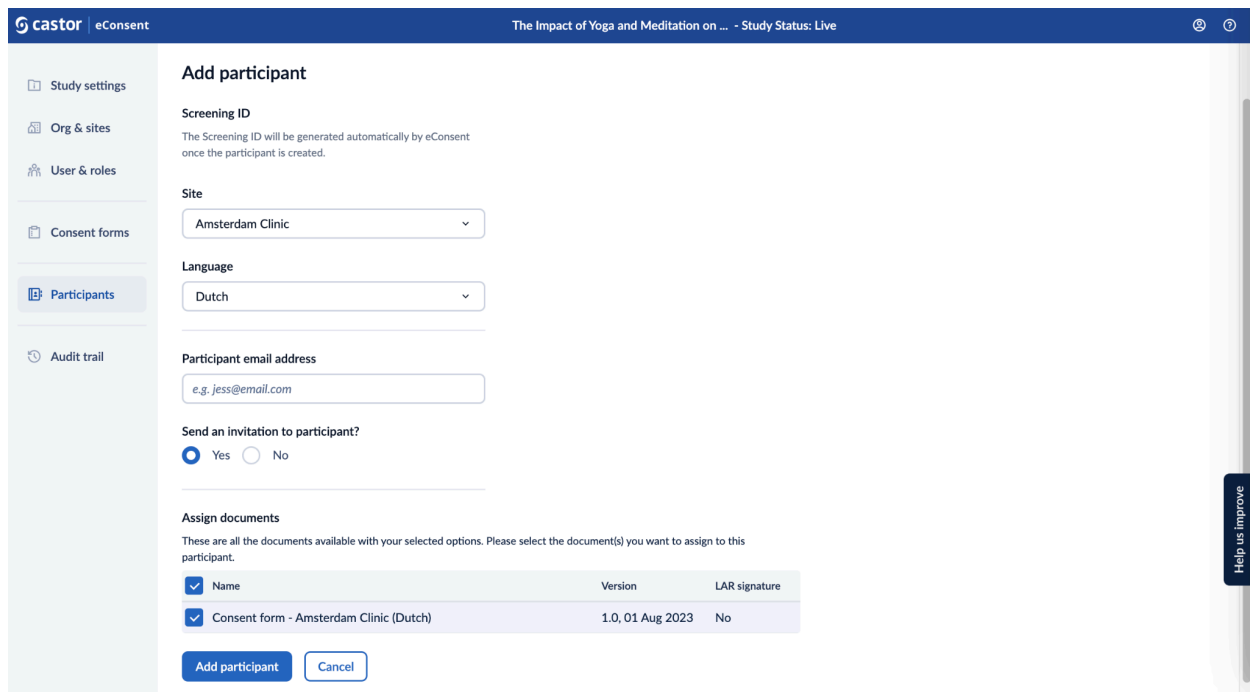
To create a new participant in your study, follow the steps below:

1. Navigate to the 'Participants' overview
2. Press the 'Add participant' button



The screenshot shows the 'Participants' overview page in the Castor eConsent system. The page title is 'Participants' and the study name is 'The Impact of Yoga and Meditation on ... - Study Status: Live'. A search bar is present with the placeholder text 'Search for a participant' and a search icon. A 'Filter' button is located to the right of the search bar. The 'Add participant' button is highlighted with a red box. Below the search bar is a table with the following columns: Screening ID, Participant ID, Invite status, Eligibility status, Consent status, Invited on, Consented on, ICF version, and Site. The table contains one row with the following data: Screening ID: AMS0001, Participant ID: -, Invite status: Active, Eligibility status: Pending, Consent status: Awaiting consent, Invited on: 05 Sep 2023 11:24, Consented on: -, ICF version: 1.0, 01 Aug 2023, Site: Amsterdam CI.

3. On the 'Add participant' screen, fill out the details:
 - **Site:** choose a site where a participant should be created.
 - **Language:** specify the language
 - **Add consent form:** choose the applicable consent form
 - **Send an invitation to participant?:** set this option to 'Yes' if you wish to send an email invitation to the participant and to 'No' if no notification emails should be sent.
 - **Participant email address:** if you wish to send an invitation to a participant, make sure to add the participant's email address. If no notification should be sent, please skip this field.



If you only have rights for one site or one consent form, the applicable fields will be automatically populated.

4. Once you are ready, click on the 'Add participant' button to add the participant. Clicking on 'Cancel' will discard all the information. You will be redirected to the 'participants' overview screen.
5. When a participant is created, a screening ID will be generated automatically.

4.1 (Un)Archiving a participant

1. To archive a participant, start by navigating to the 'Participants' listing.
2. Locate the participant you wish to archive, then click on the three-dot context menu in the Options column.
3. From the dropdown menu, select the 'Archive Participant' option. This will securely archive the participant, and please note that after archiving, the participant ID cannot be reused.

castor | eConsent The Impact of Yoga and Meditation on ... - Study Status: Live

Participants

Search for a participant

Screening ID	Participant ID	Invite status	Eligibility status	Consent status	Invited on	Consented on	ICF version	Site	Options
AMS0007	-	Not invited	Pending	-	-	-	1.0. 01 Aug 2023	Amsterdam Clinic	⋮
AMS0006	-	Invited	Pass	Awaiting consent	17 Sep 2023 11:44	-	1.0. 01 Aug 2023	Amsterdam Clinic	⋮
AMS0005	-	Invited	Pending	Awaiting consent	06 Sep 2023 18:04	-	1.0. 01 Aug 2023	Amsterdam Clinic	⋮
BER0001	-	Not invited	Pass	Consented	-	01 Sep 2023	1.0. 09 Aug 2023	Berlin Clinic	⋮
AMS0004	-	Not invited	Pending	Awaiting consent	-	-	1.0. 01 Aug 2023	Amsterdam Clinic	⋮
AMS0003	-	Not invited	Pass	Consented	-	05 Sep 2023	1.0. 01 Aug 2023	Amsterdam Clinic	⋮
AMS0002	-	Not invited	Pass	-	-	-	1.0. 01 Aug 2023	Amsterdam Clinic	⋮
AMS0001	-	Active	Pass	Awaiting consent	05 Sep 2023 11:24	-	1.0. 01 Aug 2023	Amsterdam Clinic	⋮

4. Once the participant ID is archived, it will no longer be displayed in the 'Participants' page. To locate the archived participant ID, click on the 'Filter' button and choose 'Include archived' option, afterwards click 'Apply filters':

castor | eConsent The Impact of Yoga and Meditation on ... - Study Status: Live

AMS0003	-	Not invited	Pass	Consented	-	05 Sep 2023
AMS0002	-	Not invited	Pass	-	-	-

End

Eligibility status

Consent status

Consented between

Countries

Site

Include archived

Help us improve

5. Locate the archive participant, click on the context menu (three dots) and choose 'Unarchive' option:

castor | eConsent The Impact of Yoga and Meditation on ... - Study Status: Live

- Study settings
- Org & sites
- User & roles
- Consent forms
- Participants
- Audit trail

Participants

Search for a participant

Eligibility status	Consent status	Invited on	Consented on	ICF version	Site	Options
Invited	Consented	17 Sep 2023 14:12	04 Oct 2023 10:39	1.0, 01 Aug 2023	Amsterdam Clinic	⋮
Invited	Consented	-	10 Oct 2023 17:19	1.0, 01 Aug 2023	Amsterdam Clinic	⋮
Invited	Awaiting consent	17 Sep 2023 11:44	-	1.0, 01 Aug 2023	Amsterdam Clinic	⋮
Invited	Awaiting consent	06 Sep 2023 18:04	-	1.0, 01 Aug 2023	Amsterdam Clinic	⋮
Invited	Consented	-	01 Sep 2023	1.0, 09 Aug 2023	Berlin Clinic	⋮
Invited	Awaiting consent	-	-	1.0, 01 Aug 2023	Amsterdam Clinic	⋮
Invited	Consented	-	05 Sep 2023	1.0, 01 Aug 2023	Amsterdam Clinic	⋮
Invited	-	-	-	1.0, 01 Aug 2023	Amsterdam Clinic	⋮
Invited	Awaiting consent	05 Sep 2023 11:24	-	1.0, 01 Aug 2023	Amsterdam Clinic	⋮

Unarchive

Invite status

All × x ▾

Invited between

Start

End

Eligibility status

All × x ▾

Consent status

All × x ▾

Consented between

Start

Help us improve

5. Signing a eConsent form

Castor eConsent platform supports two consent methods: Electronic (created with the eConsent ICF Builder) or Paper (used to upload a form signed on paper). Consenting can be done electronically with a participant account or without a participant account (in-person signing). In cases where a paper consent method is used, signed consent forms can be uploaded into the eConsent platform.

If your desired consent form is not visible or your desired consent method (paper or electronic) is not present, please reach out to the study admin and request the study admin to add the consent method or consent form to your site.

5.1 Electronic signing

When choosing an electronic consent method, participants can consent online with an account or in-person without creating an account.

5.1.1 Electronic signing with an account (remotely)

To initiate the electronic signing, follow these steps:

1. Add a participant from the 'Participants' tab
2. When adding a new participant, choose 'Electronic' consent method
3. In the 'Participant email address' add the participant's email
4. If the signing procedure happens remotely, select 'Yes' in the 'Send an invitation to participant?' field
5. Choose the relevant documents in the 'Assign documents' section
6. Click on the 'Add participant' button create a participant and send an invite

castor eConsent
The Impact of Yoga and Meditation on ... - Study Status: Live

- 📄 Study settings
- 🏢 Org & sites
- 👤 User & roles
- 📄 Consent forms
- 👤 Participants
- 🕒 Audit trail

Add participant

Screening ID
The Screening ID will be generated automatically by eConsent once the participant is created.

Site
Amsterdam Clinic

Language
Dutch

Consent method
 Electronic
 Paper (used to upload a form signed on paper)

Participant email address
e.g. jess@email.com

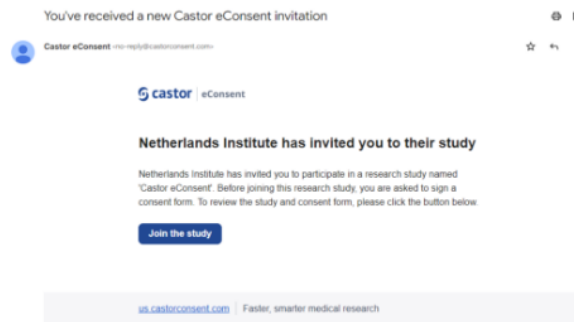
Send an invitation to participant?
 Yes No

Assign documents
These are all the documents available with your selected options. Please select the document(s) you want to assign to this participant.

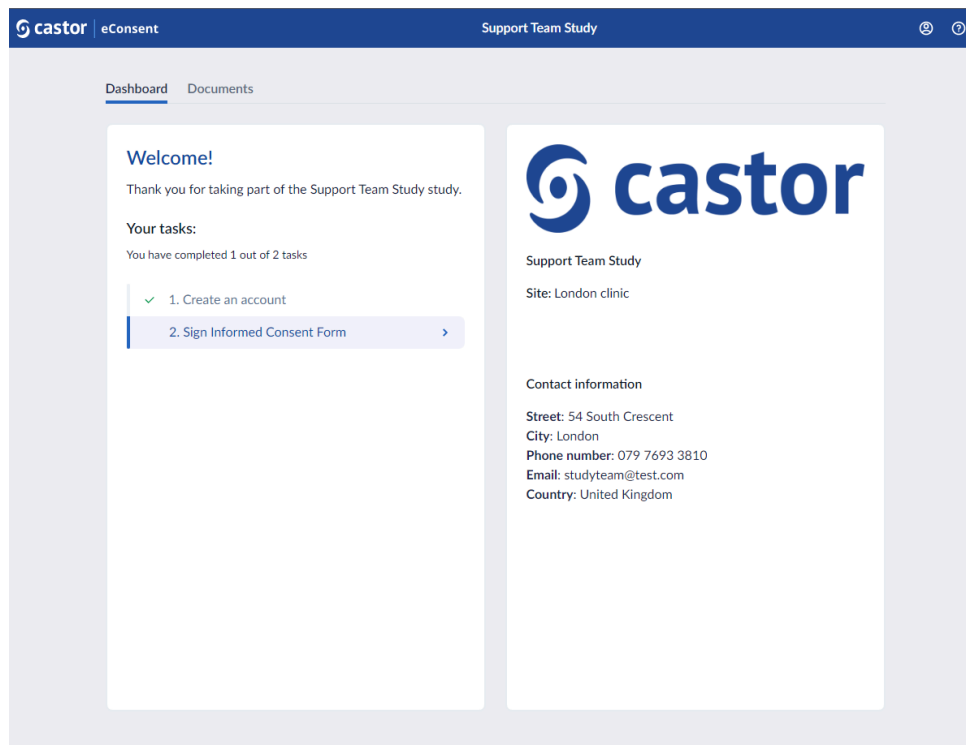
<input checked="" type="checkbox"/> Name	Version	LAR signature
<input checked="" type="checkbox"/> Consent form - Amsterdam Clinic (Dutch)	1.0, 01 Aug 2023	No

7. You will then be redirected to the 'Participants' listing.
8. From the 'Participants' listing, double click on the participant row
9. You will be presented with the participant details
10. If eligibility is checked in the study, the 'Eligibility status' will be automatically set to 'Pending'. Click on the 'Update eligibility status' button to change the eligibility status. Choose from the following options: Pass, Pending, Fail. If an integration is set up with a Castor CDMS study, the eligibility field might be updated automatically, check with the study admin if this is applicable for your study.
11. To allow a participant to sign the form, in the 'Consent information (most recent)' section, click on the 'Unlock' button. Please confirm you would like to update the form status to unlocked in the pop-up window. The form will now become available for the participant for signature.
12. In order to prompt your invitee once more, simply click on the 'Send Reminder' button to resend the invitation.

A participant can electronically sign a consent form by creating an account from the invitation email. When a participant clicks on the 'Join the study' button, they need to [create an account](#) if they don't have one yet. Participants with an account, can login using their credentials.



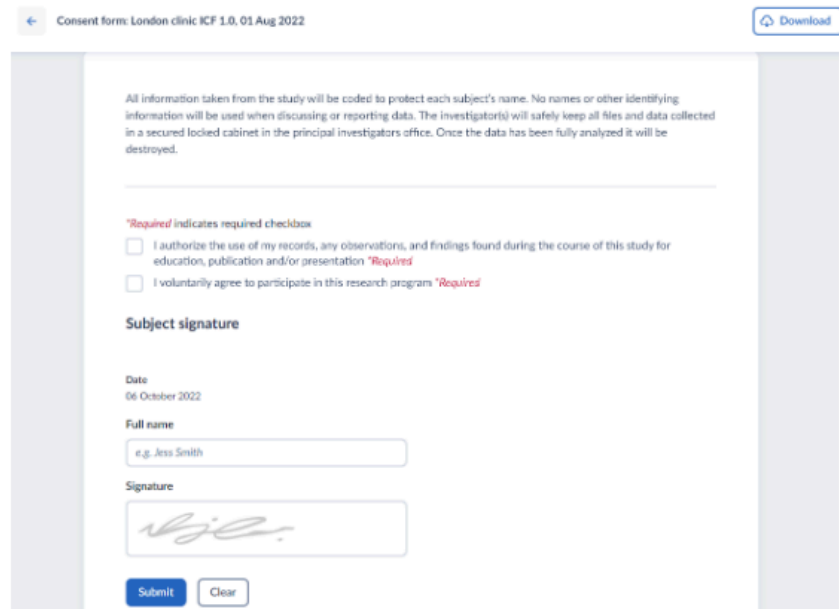
After setting up their account and logging in, a dashboard will be presented.



The participant will need to Press the ‘Sign Informed Consent Form’ where they can download the consent form or view and sign.



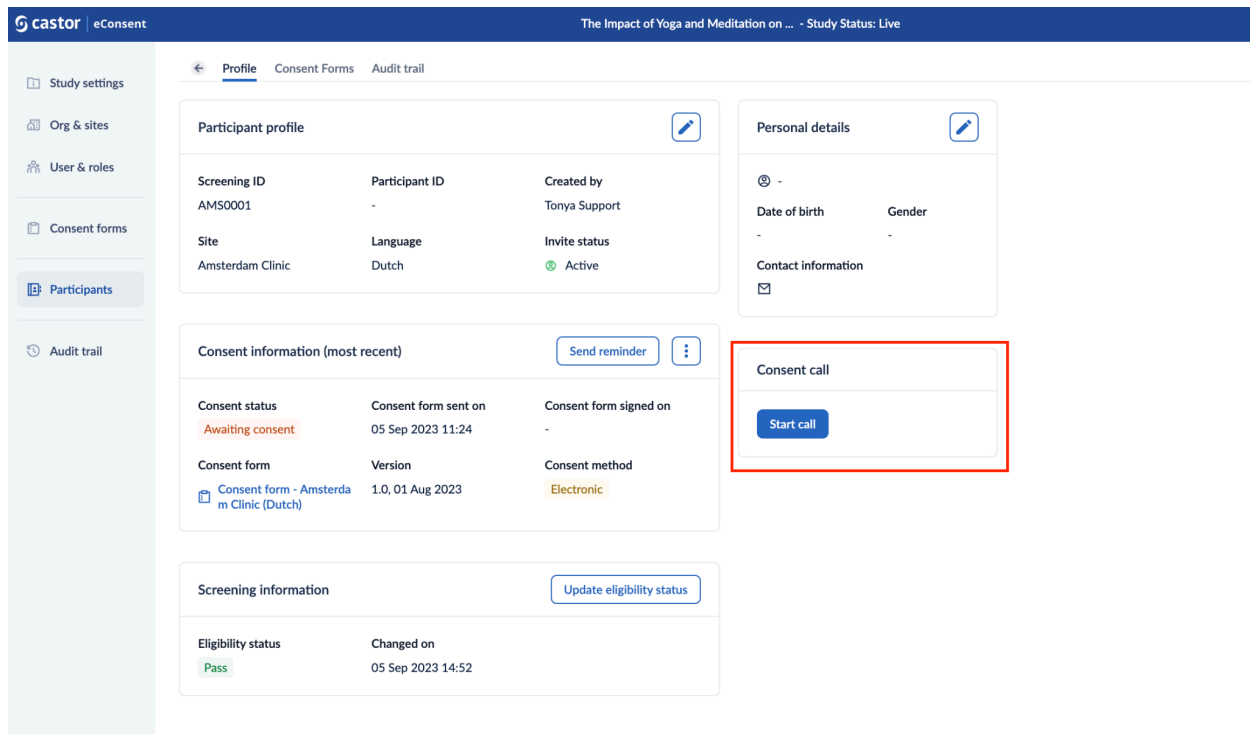
Upon selecting ‘View & Sign’, the participant will then select the required fields, type their full name, add their electronic signature, then press the ‘Submit’ button to submit their signature.



5.1.2 Electronic signing via a Video-call (remotely)

When the option 'Video calling for signing' is enabled in the study settings tab, it is possible to obtain informed consent remotely via a video call.

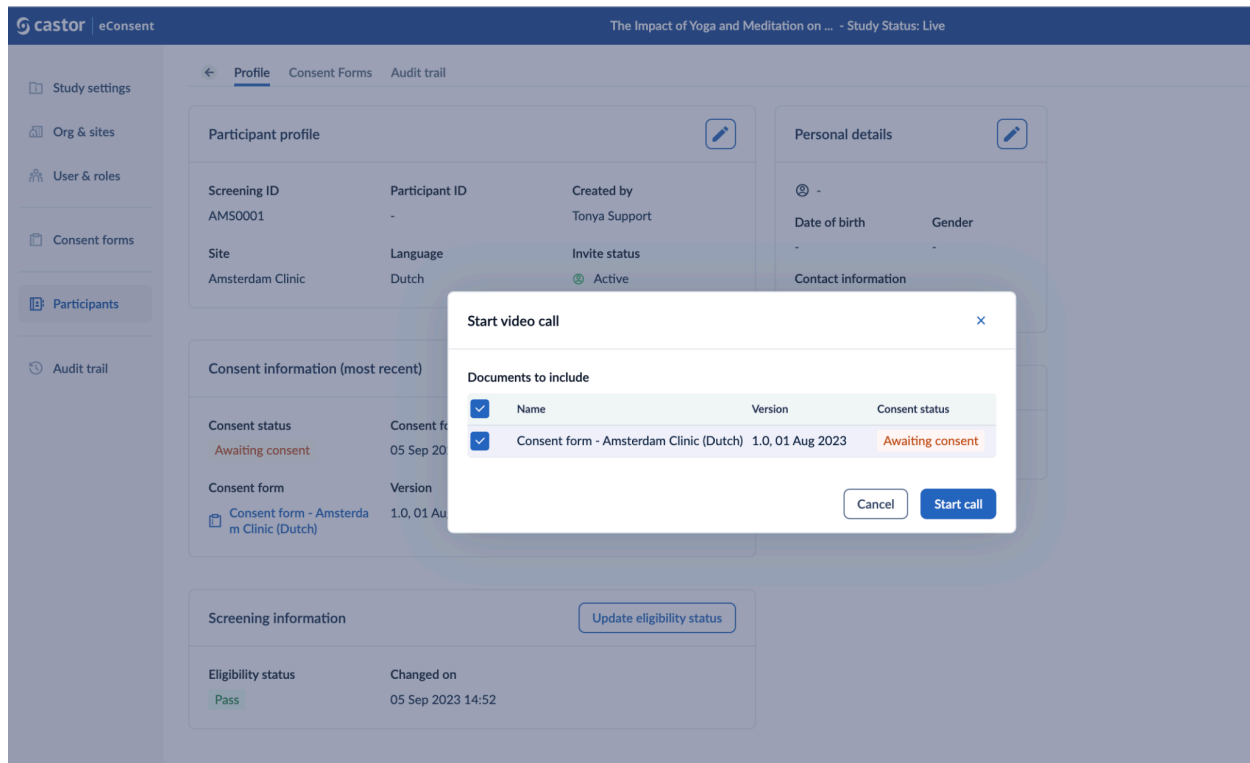
1. Once the configuration is enabled, when opening an individual participant, a 'Consent call' card will appear:



The screenshot shows the Castor eConsent interface for a study titled "The Impact of Yoga and Meditation on ...". The study status is "Live". The interface is divided into several sections:

- Participant profile:** Includes Screening ID (AMS0001), Participant ID (-), Created by (Tonya Support), Site (Amsterdam Clinic), Language (Dutch), and Invite status (Active).
- Personal details:** Includes Date of birth and Gender, both currently blank.
- Consent information (most recent):** Includes Consent status (Awaiting consent), Consent form sent on (05 Sep 2023 11:24), Consent form signed on (-), Consent form (Consent form - Amsterdam Clinic (Dutch)), Version (1.0, 01 Aug 2023), and Consent method (Electronic).
- Screening information:** Includes Eligibility status (Pass) and Changed on (05 Sep 2023 14:52).
- Consent call:** A card with a "Start call" button, highlighted with a red box.

2. Click on the 'Start call' button to initiate the video call. A pop-up window will appear which allows to specify whether an ICF form should be included in the call. Specify which ICF should be included in the 'Select ICF' dropdown field and click 'Start call' button to proceed to the call:



3. You will be redirected to the call screen. During the call, the following options are presented:
 - Unlock to enable signing/Lock to disable signing which allows to enable the ICF for signing and lock it after the form has been signed
 - Start video/Stop video which allows to turn on/off the investigator's camera
 - Mute/Unmute to turn on/off the investigator's microphone
 - End call button to finish the call
 - Arrow to return back to the participant overview

← Consent form - Amsterdam Clinic (Dutch)

Lock Stop video Mute Phone

Introduction: You are invited to participate in a clinical trial titled "The Impact of Yoga and Meditation on Chronic Pain: Randomised Controlled Trial." This study aims to investigate the effects of yoga and meditation on chronic pain management. Before you decide whether to participate, it is important that you understand the purpose, procedures, potential risks, and benefits of the study. Please take the time to read this consent form and ask any questions you may have before making your decision.

Purpose of the Study: The purpose of this study is to evaluate whether participating in regular yoga and meditation sessions can have a positive impact on managing chronic pain. The study will also investigate any potential improvements in quality of life, psychological well-being, and physical function.

Procedures: If you agree to participate, you will be randomly assigned to one of two groups: the yoga and meditation group or the control group. If you are in the yoga and meditation group, you will be required to attend structured yoga and meditation sessions conducted by certified instructors. These sessions will take place [specify frequency and duration]. Participants in the control group will continue their usual care routines.

Throughout the study, you will be asked to complete questionnaires about your pain levels, quality of life, and psychological well-being at specific intervals. These questionnaires will provide valuable information about the effects of the interventions.

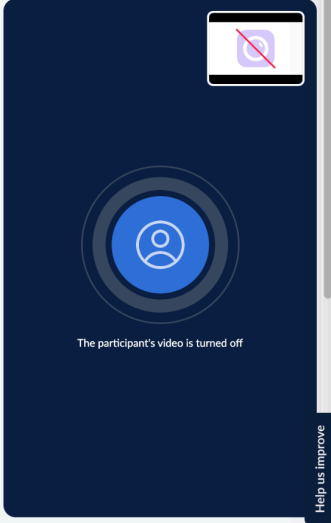
Risks and Benefits: Participating in this study may involve some risks. The yoga and meditation sessions could potentially cause minor physical discomfort or strain. There is also a possibility of feeling emotionally uncomfortable during discussions about pain experiences. However, the study team will take measures to ensure your safety and comfort throughout the study.

Potential benefits of participating include a potential reduction in chronic pain, improved psychological well-being, increased relaxation, and a greater sense of control over your pain management.

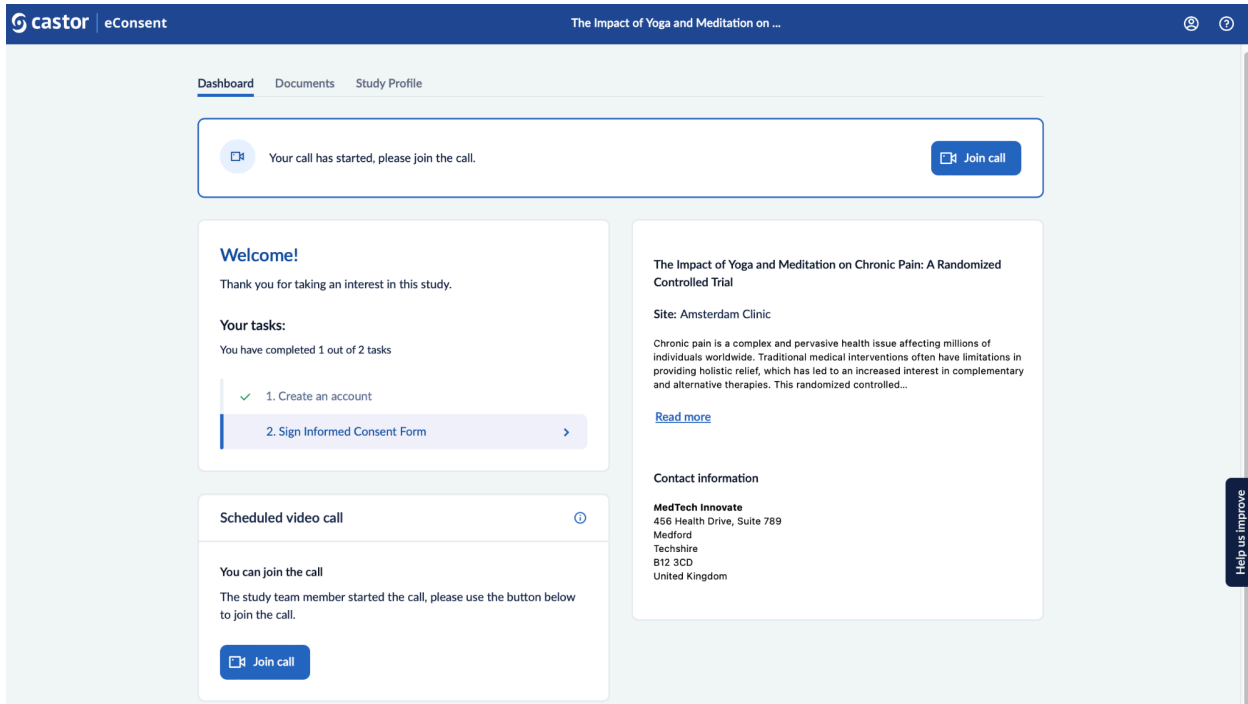
Confidentiality: Your privacy is important to us. All the information collected during the study will be kept confidential and stored securely. Your personal information will be coded and kept separate from study data to maintain your anonymity.

Voluntary Participation: Participation in this study is completely voluntary. You have the right to withdraw at any time without any consequences or loss of benefits to which you are otherwise entitled. Your decision to participate or not will not affect your medical care or relationship with the research team.

- You understand that your participation in this study is voluntary. You can choose to withdraw from the study at any time without any negative consequences.
- You understand the procedures involved in the study, including attending yoga and meditation sessions (if assigned to that group) and completing questionnaires about your pain experiences and well-being.
- If you are selected for participation, you understand that you will be randomly assigned to either the yoga and meditation group or the control group.



4. The participant will need to login to the participant portal and choose the relevant study in the 'Studies' overview.
5. Once the investigator starts the call, the participant will see an invitation to 'Join call' within the 'Dashboard' tab.



castor | eConsent | The Impact of Yoga and Meditation on ...

Dashboard | Documents | Study Profile

Your call has started, please join the call. [Join call](#)

Welcome!
Thank you for taking an interest in this study.

Your tasks:
You have completed 1 out of 2 tasks

- 1. Create an account
- 2. Sign Informed Consent Form >

Scheduled video call ⓘ

You can join the call
The study team member started the call, please use the button below to join the call.

[Join call](#)

The Impact of Yoga and Meditation on Chronic Pain: A Randomized Controlled Trial
Site: Amsterdam Clinic

Chronic pain is a complex and pervasive health issue affecting millions of individuals worldwide. Traditional medical interventions often have limitations in providing holistic relief, which has led to an increased interest in complementary and alternative therapies. This randomized controlled...

[Read more](#)

Contact information
MedTech Innovate
456 Health Drive, Suite 789
Medford
Techshire
B12 3CD
United Kingdom

Help us improve

5. To finish a call, click on the End call button



Please refer to the article [Troubleshooting Video/Audio](#) on how to resolve potential video/audio issues.

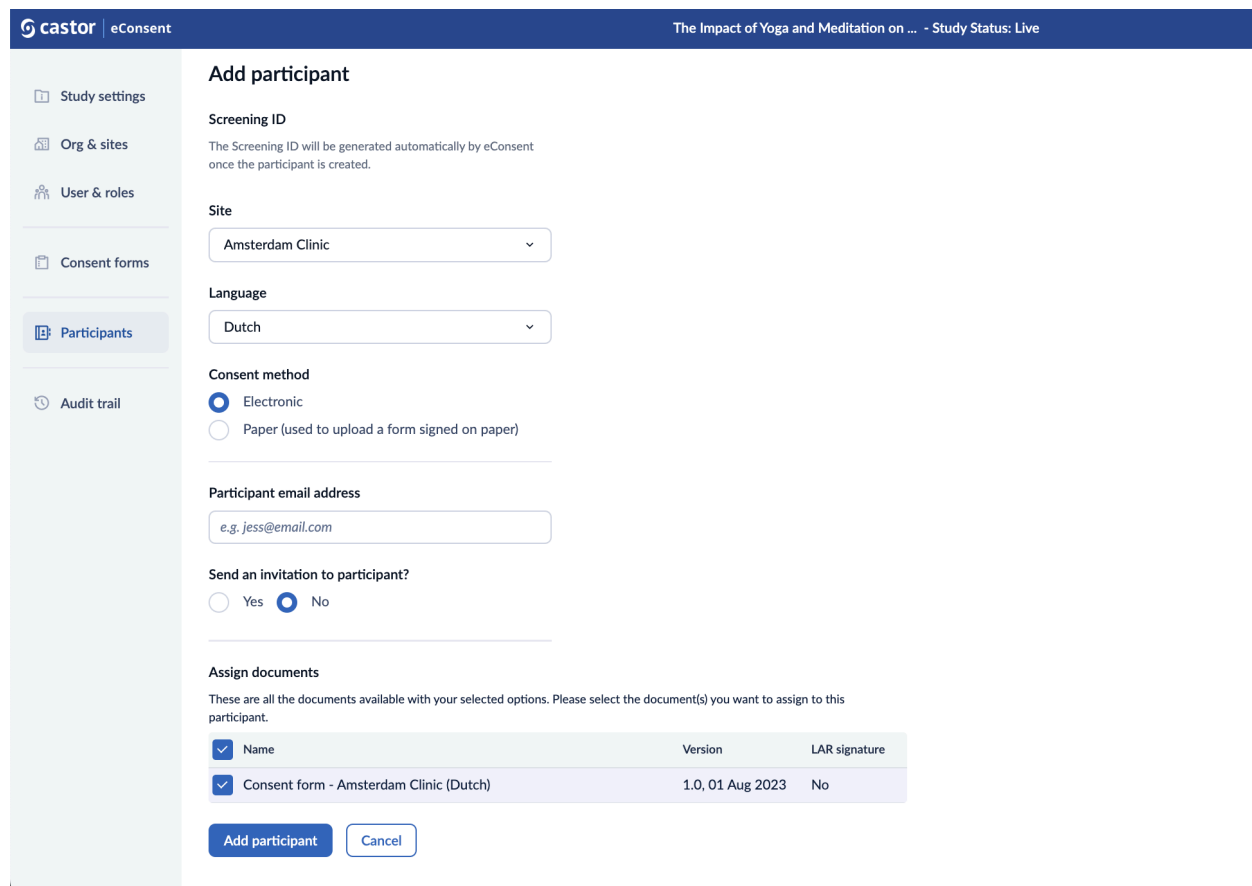
5.1.3 Electronic signing in-person

If a participant is invited to sign the consent form online but instead wishes to sign in-person, if the study allows, follow the steps below.

In-person signing, with or without an account

If the study allows in-person signing, the study team members with the 'Site Admin', 'Study Investigator', 'Site Investigator' roles can start the in-person signing flow:

1. Navigate to the 'Participants' overview and click on the 'Add participant' button or choose an existing participant.
2. When creating a new participant, you may want to set the field 'Send an invitation to participant' to 'No'. In this case, an email invite will not be sent and the invite status in the Participants listing will be set to 'Not invited'.



castor | eConsent The Impact of Yoga and Meditation on ... - Study Status: Live

- Study settings
- Org & sites
- User & roles
- Consent forms
- Participants**
- Audit trail

Add participant

Screening ID
The Screening ID will be generated automatically by eConsent once the participant is created.

Site
Amsterdam Clinic

Language
Dutch

Consent method
 Electronic
 Paper (used to upload a form signed on paper)

Participant email address
e.g. jess@email.com

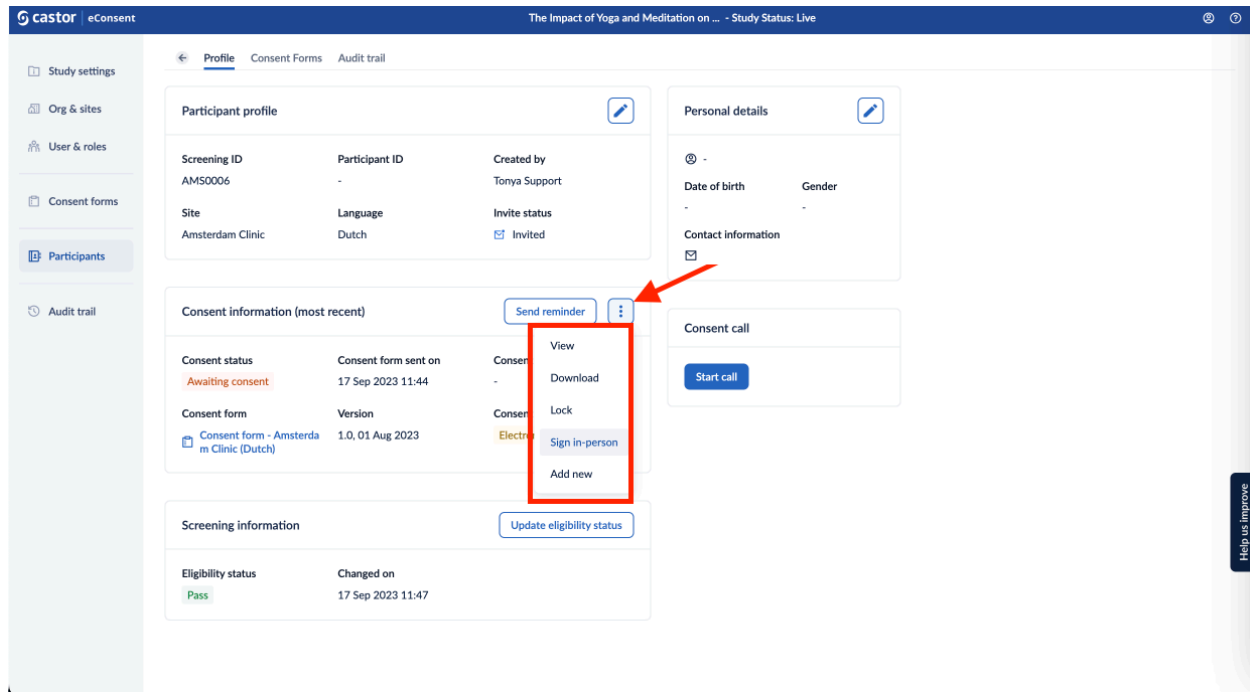
Send an invitation to participant?
 Yes No

Assign documents
These are all the documents available with your selected options. Please select the document(s) you want to assign to this participant.

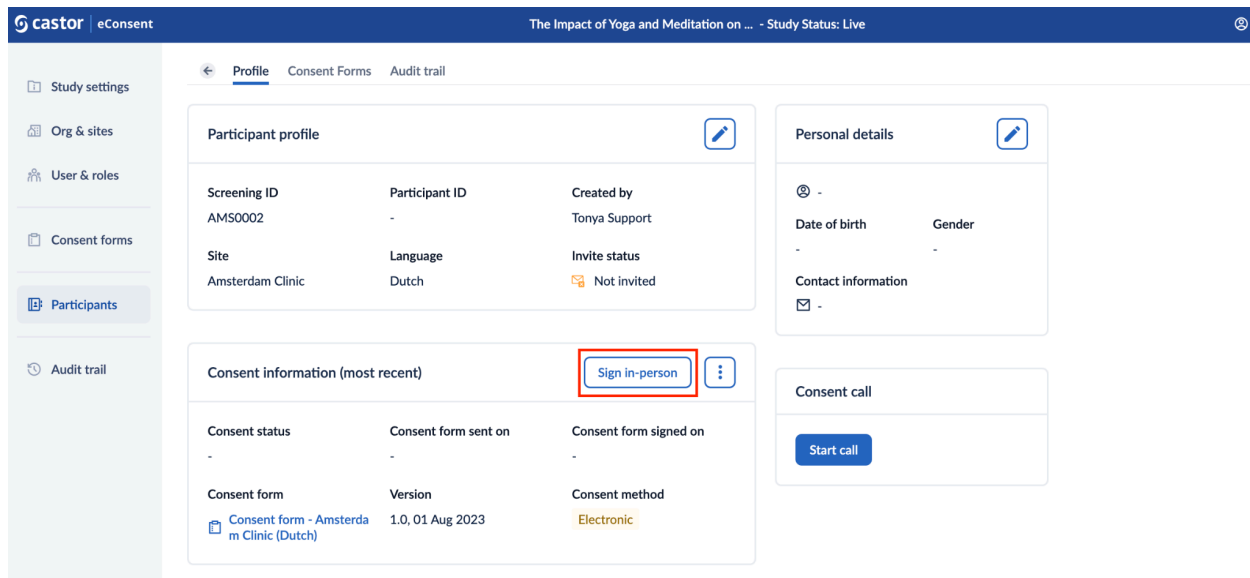
<input checked="" type="checkbox"/>	Name	Version	LAR signature
<input checked="" type="checkbox"/>	Consent form - Amsterdam Clinic (Dutch)	1.0, 01 Aug 2023	No

Add participant

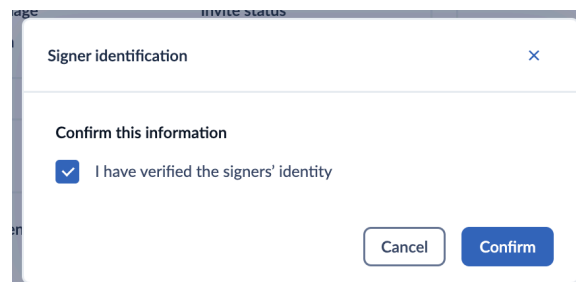
- Participants who received an invite per email can also use the in-person signing flow. In this case, the option to sign in-person will appear in the 'Consent information (most recent)' section in the context menu (three dots menu):



- In case where no invite to a participant is sent and when there is already an ICF added which hasn't been signed by the participant yet (status of the ICF is "Awaiting consent" if the invite is already sent, or "undefined" if there is no invite sent), in the 'Consent information (most recent)' section, click on the "Sign in-person" option:



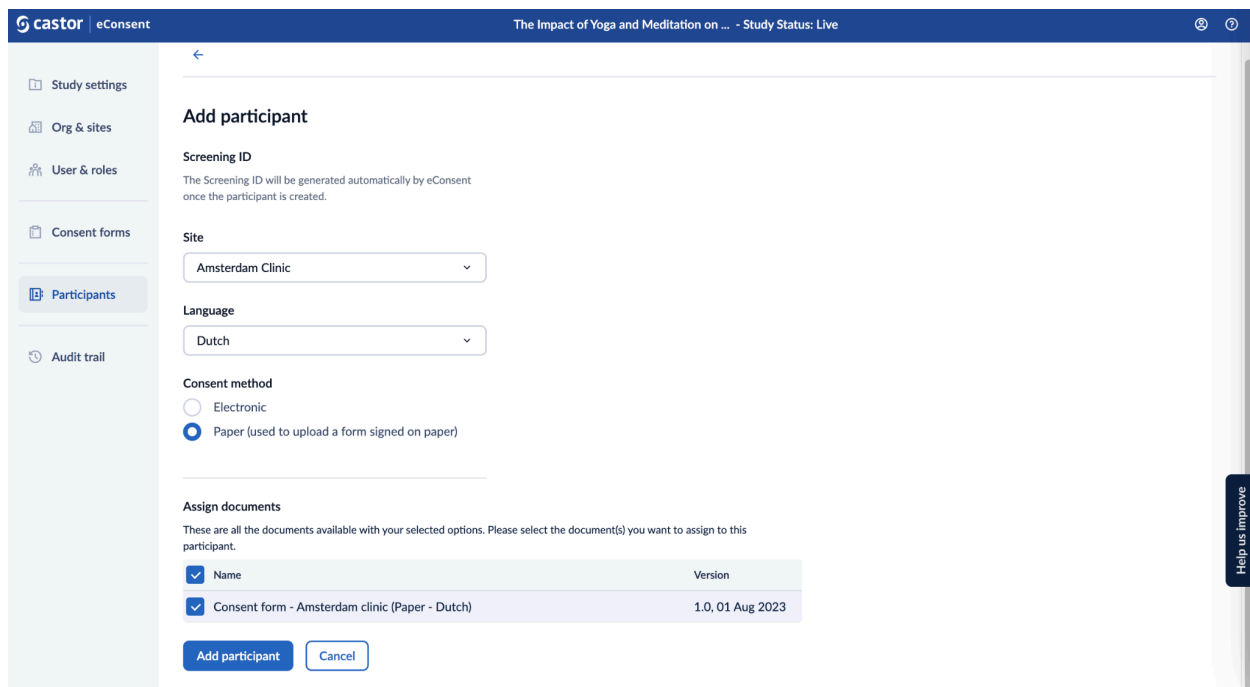
- After clicking on the "Sign in-person" options, a confirmation dialog will be shown with the following message: "The form will be unlocked for signing, the study team member will be required to monitor the consent form so that the signer does not access other parts of the application." Select the checkmark for the confirmation statement "I have verified the signer's identity as part of the in-person signing procedure." and click on the 'Confirm identification' button to proceed further:



5.2 Consenting on paper

If the ICF template uses a paper consent method and this method is enabled in the study Settings tab, a scan/copy of the paper signed ICF can be uploaded against the template. Make sure that a paper consent form is created in the 'Consent forms' tab first, otherwise it will not be possible to upload a paper ICF.

1. When adding a participant, choose the 'Paper (used to upload a form signed on paper)' and select the applicable paper consent form.



Add participant

Screening ID
The Screening ID will be generated automatically by eConsent once the participant is created.

Site
Amsterdam Clinic

Language
Dutch

Consent method

Electronic

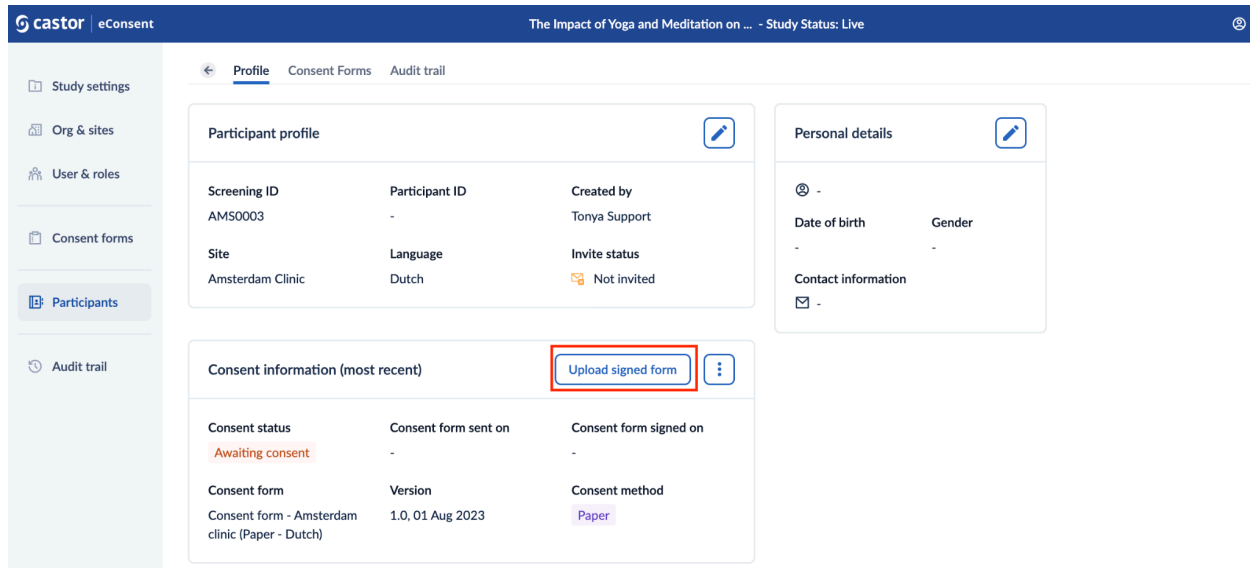
Paper (used to upload a form signed on paper)

Assign documents
These are all the documents available with your selected options. Please select the document(s) you want to assign to this participant.

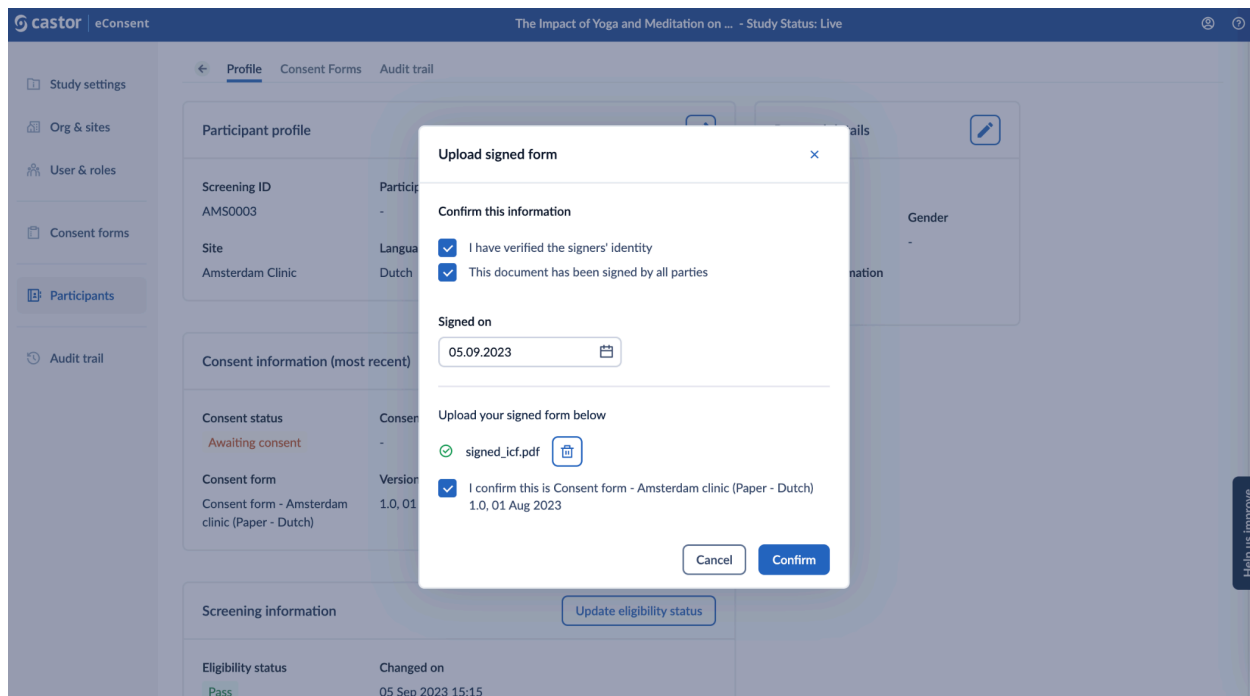
<input checked="" type="checkbox"/>	Name	Version
<input checked="" type="checkbox"/>	Consent form - Amsterdam clinic (Paper - Dutch)	1.0, 01 Aug 2023

Add participant **Cancel**

2. After the participant is added, in the participants overview, click on the participant row.
3. In the 'Consent information (most recent)' section, click on the 'Upload signed form' button.



- In the 'Upload signed form' pop-up window, confirm the requested details and upload the signed form. To save the form, click on the 'Confirm' button.



Accepted files: .pdf, .jpeg, .jpg, .png and the maximum file size is 15 Mb.

- After the file is uploaded, the 'Consent status' will be automatically changed to 'Consented' in the 'Consent information (most recent)' section in case there are no other pending documents for signature.

The screenshot shows the 'Profile' page for a participant in the 'The Impact of Yoga and Meditation on ...' study. The 'Consent information (most recent)' section is highlighted with a red box. It contains the following data:

Consent status	Consent form sent on	Consent form signed on
Consented	-	05 Sep 2023
Consent form	Version	Consent method
Consent form - Amsterdam clinic (Paper - Dutch)	1.0, 01 Aug 2023	Paper

- If you would like to view, download or remove the uploaded file, click on the options menu (three dots) in the 'Consent information (most recent)' section:

The screenshot shows the same 'Profile' page as above, but with the options menu (three dots) in the 'Consent information (most recent)' section highlighted in red. A red arrow points to the menu, which contains the following options:

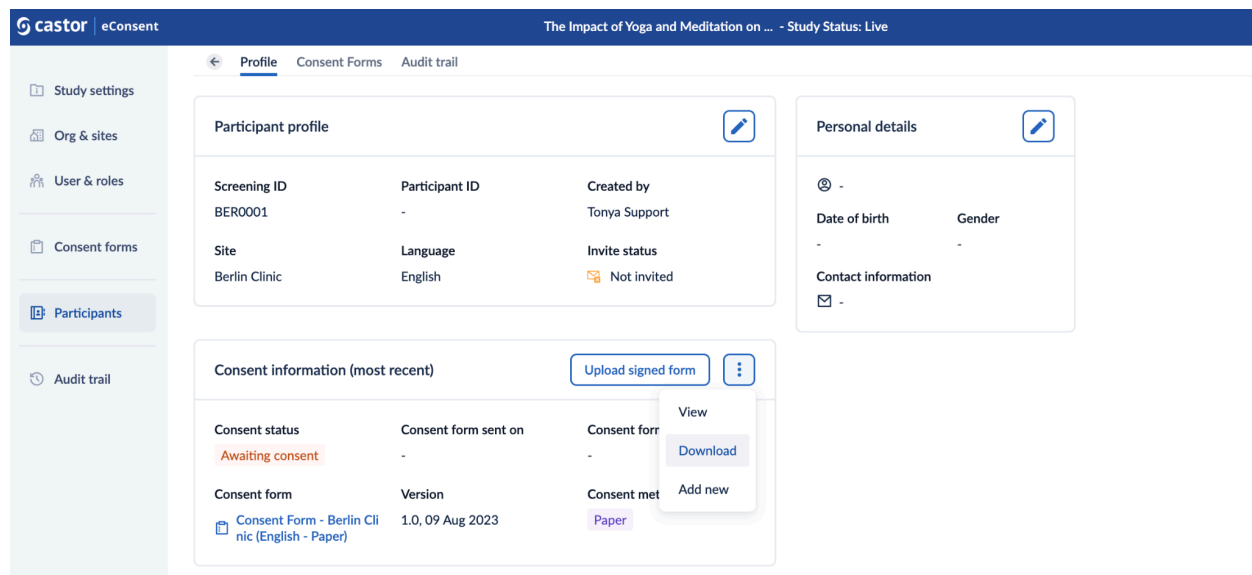
- View
- Download
- Remove upload

If a participant/LAR has been invited to the study, they will also be able to view the uploaded paper form.

5.3 Print-to-sign

The ICF builder for ICF templates that use a paper consent method allows pdf file uploads. This means that the finalized “paper” ICF file can be uploaded against the eConsent paper ICF template. By doing so, the actual content of the ICF becomes available for site members. The site member can download and print the ICF template directly from the eConsent participant record, in order to make sure the right ICF version is getting signed.

1. To download, open the participant record and in the “Consent Information (most recent)” dialogue box select the options menu (three dots) to the right and select download.



The screenshot shows the Castor eConsent interface for a study titled "The Impact of Yoga and Meditation on ... - Study Status: Live". The interface is divided into several sections:

- Participant profile:**

Screening ID	Participant ID	Created by
BER0001	-	Tonya Support
Site	Language	Invite status
Berlin Clinic	English	Not invited
- Personal details:**

Date of birth	Gender
-	-
- Consent information (most recent):**

Consent status	Consent form sent on	Consent form
Awaiting consent	-	-
Consent form	Version	Consent method
Consent Form - Berlin Clinic (English - Paper)	1.0, 09 Aug 2023	Paper

A dropdown menu is open over the 'Consent form' column in the 'Consent information' section, showing the following options: View, Download, and Add new.

2. Once the printed version is signed by all parties, a scan can be uploaded into the system by selecting “Upload signed form”.

3. In the dialog box confirm the required information and upload the file by selecting “choose file” or drag and drop the file into the box and confirm.

Accepted file formats: .pdf, .jpeg, .jpg, .png and the maximum file size is 15 Mb.

5.4 Reconsenting

If a participant needs to be reconsented during the study, follow the steps below:

1. Select the participant row to access the participant’s profile.
2. Press the ‘Add New’ button to assign the new consent form.

The screenshot shows the Castor eConsent interface for a study titled "The Impact of Yoga and Meditation on ...". The study status is "Live". The interface is divided into several sections:

- Participant profile:** A table with columns for Screening ID (BER0001), Participant ID (-), Created by (Tonya Support), Site (Berlin Clinic), Language (English), and Invite status (Not invited).
- Personal details:** Fields for Date of birth, Gender, and Contact information, all currently empty.
- Consent information (most recent):** A table with columns for Consent status (Consented), Consent form sent on (-), Consent form signed on (01 Sep 2023), Consent form (Consent Form - Berlin Clinic (English - Paper)), Version (1.0, 09 Aug 2023), and Consent method (Paper). An "Add new" button is highlighted with a red box.

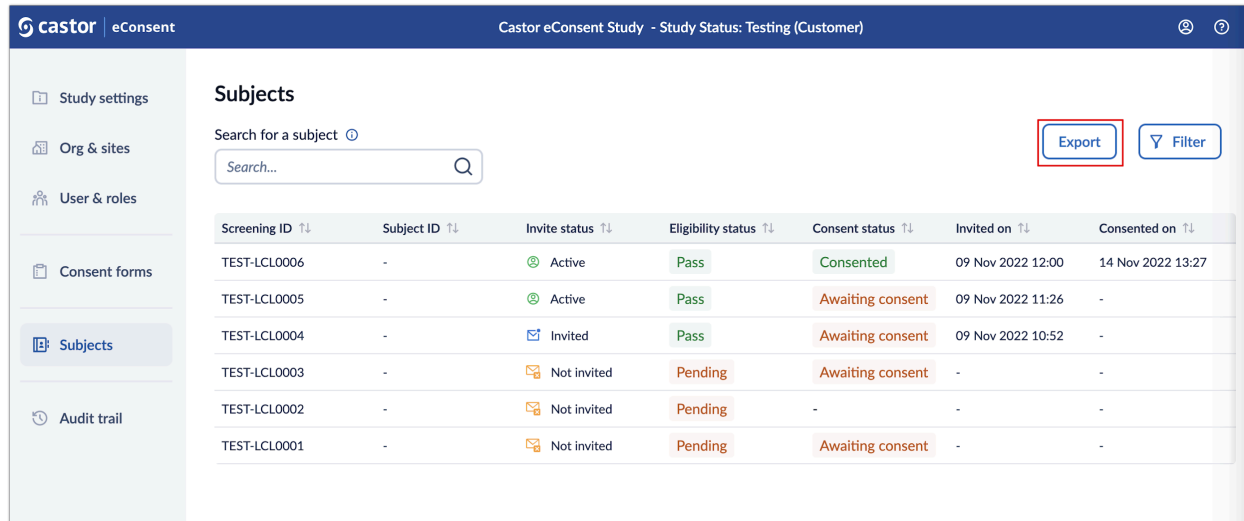
3. In a new pop-up screen, you can repeat the process for on-site, remote or paper consent by selecting the relevant consent method and consent form.
4. Once required settings are set and the consent form is selected, press ‘Add’ to continue.
5. The consent status will be updated to ‘Awaiting consent’.

6. Exporting consent form and participant information

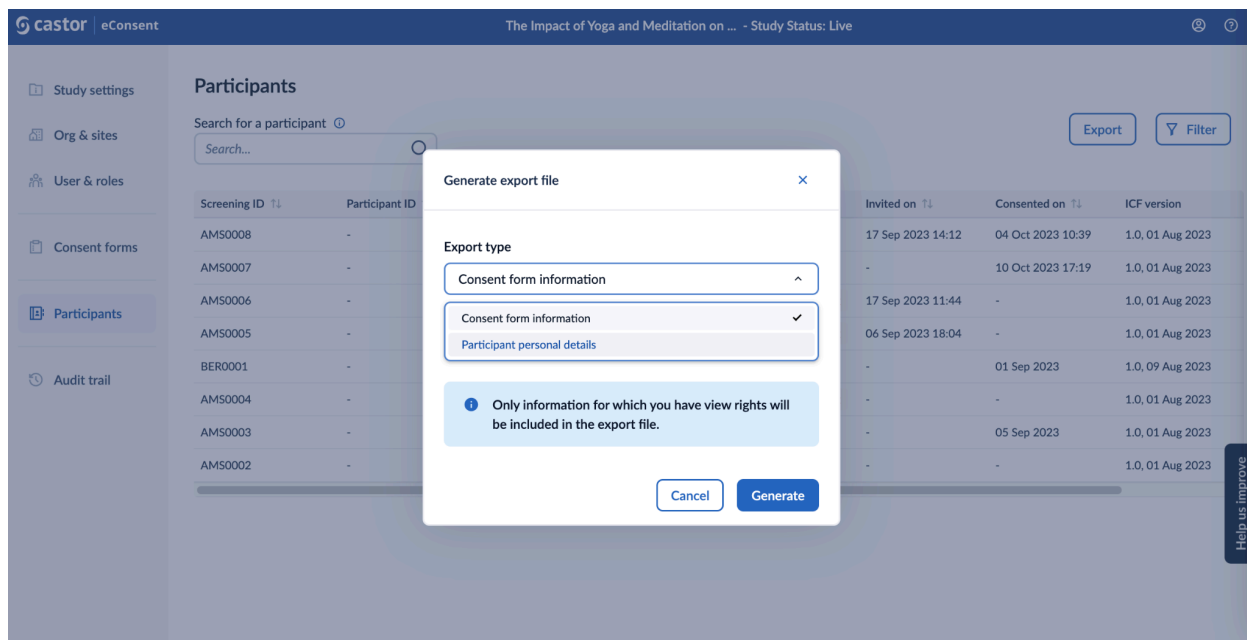
Users with the ‘Study Investigator’ or ‘Study Monitor’ role are able to generate the export that contains consent form signature or participant personal details information.

To export the consent form or personal details information, follow the steps below:

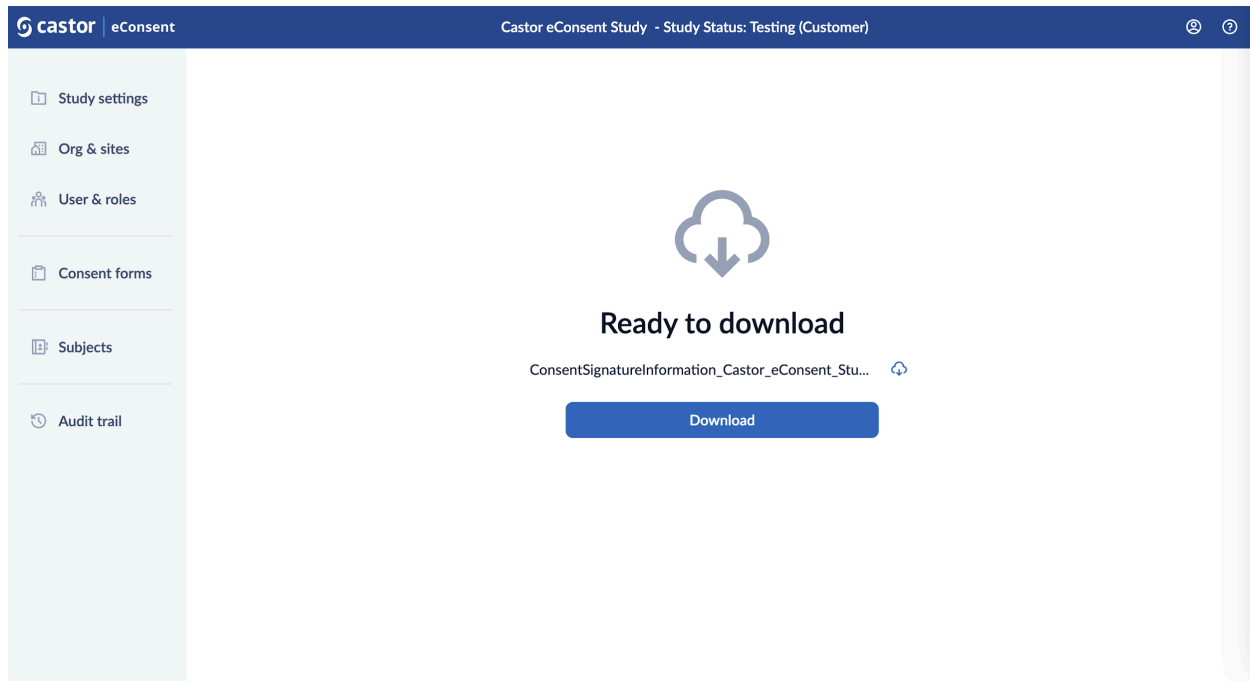
1. In the 'participants Overview', click on the 'Export' button:



2. In the 'Generate export file' pop-up window, in the 'Export type', select 'Consent form information' or 'Participant personal details' option. Click on the 'Generate' button to proceed with the export. Only signature information for which you have view rights will be included in the export file.



3. Once the export is generated, the requester is notified by an email that includes a personal download link. The generated export can then be downloaded from within eConsent by clicking on the 'Download' button.



7. Audit trail

The audit trail is a log of study related events:

Date and Time	Actor	Type of user	Screening Id	Action	Additional Info
04-Oct-2022 09:47:38 UTC	[Redacted]	Study team member	TEST-LND0001	Subject viewed	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
04-Oct-2022 09:47:38 UTC	[Redacted]	Study team member	TEST-LND0001	Consent form/information view	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
04-Oct-2022 09:03:10 UTC	[Redacted]	Study team member	TEST-LND0001	Paper signed ICF uploaded	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
04-Oct-2022 09:03:10 UTC	[Redacted]	Study team member	TEST-LND0001	Consent form/information view	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
04-Oct-2022 09:01:25 UTC	[Redacted]	Study team member	TEST-LND0001	Consent form/information view	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
04-Oct-2022 09:01:24 UTC	[Redacted]	Study team member	TEST-LND0001	Subject edited	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
04-Oct-2022 09:01:24 UTC	[Redacted]	Study team member	TEST-LND0001	Subject invited to sign ICF	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
04-Oct-2022 09:01:24 UTC	[Redacted]	Study team member	TEST-LND0001	Subject viewed	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
04-Oct-2022 08:52:18 UTC	[Redacted]	Study team member	TEST-LND0001	Consent form/information view	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
04-Oct-2022 08:52:17 UTC	[Redacted]	Study team member	TEST-LND0001	Subject viewed	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
04-Oct-2022 08:52:05 UTC	[Redacted]	Study team member	TEST-LND0002	Consent form/information view	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
04-Oct-2022 08:52:04 UTC	[Redacted]	Study team member	TEST-LND0002	Subject viewed	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
28-Sep-2022 11:58:09 UTC	[Redacted]	Subject	TEST-LND0007	Consent form/information view	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
28-Sep-2022 11:57:15 UTC	[Redacted]	Subject	TEST-LND0007	Subject accepted invitation	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
28-Sep-2022 11:54:15 UTC	[Redacted]	Study team member	TEST-LND0007	Subject record created	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
28-Sep-2022 11:54:15 UTC	[Redacted]	Study team member	TEST-LND0007	Subject invited to sign ICF	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
28-Sep-2022 10:49:23 UTC	[Redacted]	Study team member		Study updated	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
28-Sep-2022 10:44:13 UTC	[Redacted]	Study team member	TEST-LND0001	Subject edited	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
28-Sep-2022 10:44:13 UTC	[Redacted]	Study team member	TEST-LND0001	Subject viewed	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
28-Sep-2022 10:44:13 UTC	[Redacted]	Study team member	TEST-LND0001	Consent form/information view	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
28-Sep-2022 10:44:03 UTC	[Redacted]	Study team member	TEST-LND0001	Consent form/information view	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]
28-Sep-2022 10:44:02 UTC	[Redacted]	Study team member	TEST-LND0001	Subject viewed	["siteName":"London clinic","abbreviation":"LND","countryCode":"GBR"]

To view additional details for each event, click on the row:

The screenshot shows the audit trail table with a modal window open for the event 'Subject viewed on 04-Oct-2022 09:47:38 UTC'. The modal displays the following details:

- Study Status**: [Redacted]
- User email**: [Redacted]
- User name**: [Redacted]
- Type of user**: [Redacted]
- Event**: [Redacted]
- Date**: [Redacted]
- Role**: [Redacted]
- siteName**: [Redacted]
- abbreviation**: [Redacted]
- countryCode**: [Redacted]
- screeningId**: [Redacted]
- uid**: [Redacted]
- subjectLanguage**: [Redacted]
- subjectEmail**: [Redacted]

Below the details is a 'Value change' table with columns for 'Field', 'Old value', and 'New value'. At the bottom of the modal is an 'Export' button with a folder icon.

7.1 Audit trail export

Study roles with PII access (i.e. study investigators/monitors) will see an 'Export' button on the global audit trail page they can use to run the export.

castor | eConsent The Impact of Yoga and Meditation on ... - Study Status: Live

Audit trail Export

Date and Time	Actor	Type of user	Screening id	Action	Additional Info
04-Jan-2024 07:15:25 UTC		Study team member		Study team member edited	["siteName":"Amsterdam Clinic","a
04-Jan-2024 07:05:12 UTC		Study team member	AMS0006	Consent form/information view	["siteName":"Amsterdam Clinic","a
04-Jan-2024 07:05:11 UTC		Study team member	AMS0006	Consent form/information view	["siteName":"Amsterdam Clinic","a
04-Jan-2024 07:05:01 UTC		Study team member	AMS0006	Participant viewed	["siteName":"Amsterdam Clinic","a
04-Jan-2024 07:05:00 UTC		Study team member	AMS0006	Participant viewed	["siteName":"Amsterdam Clinic","a
18-Dec-2023 12:55:05 UTC		Study team member	AMS0006	Consent form/information view	["siteName":"Amsterdam Clinic","a
18-Dec-2023 12:55:05 UTC		Study team member	AMS0006	In-person consent procedure st	["siteName":"Amsterdam Clinic","a
18-Dec-2023 12:55:00 UTC		Study team member	AMS0006	Consent form/information view	["siteName":"Amsterdam Clinic","a
18-Dec-2023 12:54:59 UTC		Study team member	AMS0006	Consent form/information view	["siteName":"Amsterdam Clinic","a
13-Dec-2023 08:08:24 UTC		Study team member	AMS0006	Participant viewed	["siteName":"Amsterdam Clinic","a
13-Dec-2023 08:08:14 UTC		Study team member		Participant viewed	["siteName":"Amsterdam Clinic","a
20-Nov-2023 09:40:41 UTC		Study team member		Study team member accepted	["email":
20-Nov-2023 09:40:26 UTC		Study team member		Study team member invited	["email":
20-Nov-2023 09:09:53 UTC		Study team member		Study team member removed	["email":
20-Nov-2023 09:09:53 UTC		Study team member		Study team member invited	["email":
20-Nov-2023 09:09:53 UTC		Study team member		Study team member invited	["email":
20-Nov-2023 09:09:53 UTC		Study team member		Study team member invited	["email":

A pop-up window will appear, click 'Generate' to run the export:

Generate export file ✕

i Only audit trail events for which you have view rights will be included in the export file.

Export format

Excel

Cancel
Generate

Only audit trail events for which you have view rights will be included in the export file.

You will receive an email notification when the file is ready to download. Click the link in

the email or 'Download' button to download the audit trail export. The Export is provided in the Excel format.



Your export is ready for download

Hello ,

Your requested export file of AuditTrailInformation_The_Impact_of_Yoga_and_Meditation_on_Chronic_Pain:_A_Randomized_Controlled_Trial_04-01-24_07-19-34.xlsx is now available.

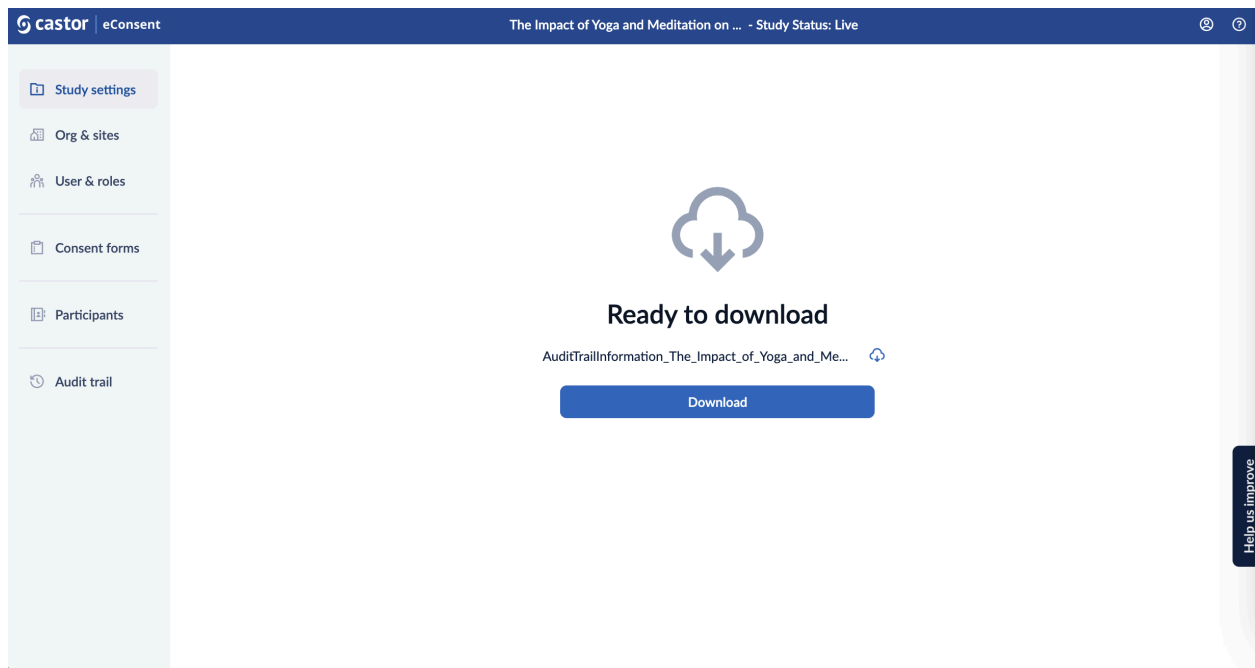
Click the following link <https://eu.castorconsent.com/studies>

or use the

button below to download.

Download

You will then be redirected to the download page, click the 'Download' button



8. Further Information

If you would like to view our Castor eConsent video tutorials, you can do so [here](#).

For more information regarding creating and managing study as a study admin, please check Castor EDC's knowledge base:

https://helpdesk.castoredc.com/en_US/castor-econsent-manual. If you have any questions or concerns, please contact us at support@castoredc.com