# Castor

## Castor eConsent Study Participant User Guide

Version 2024.1

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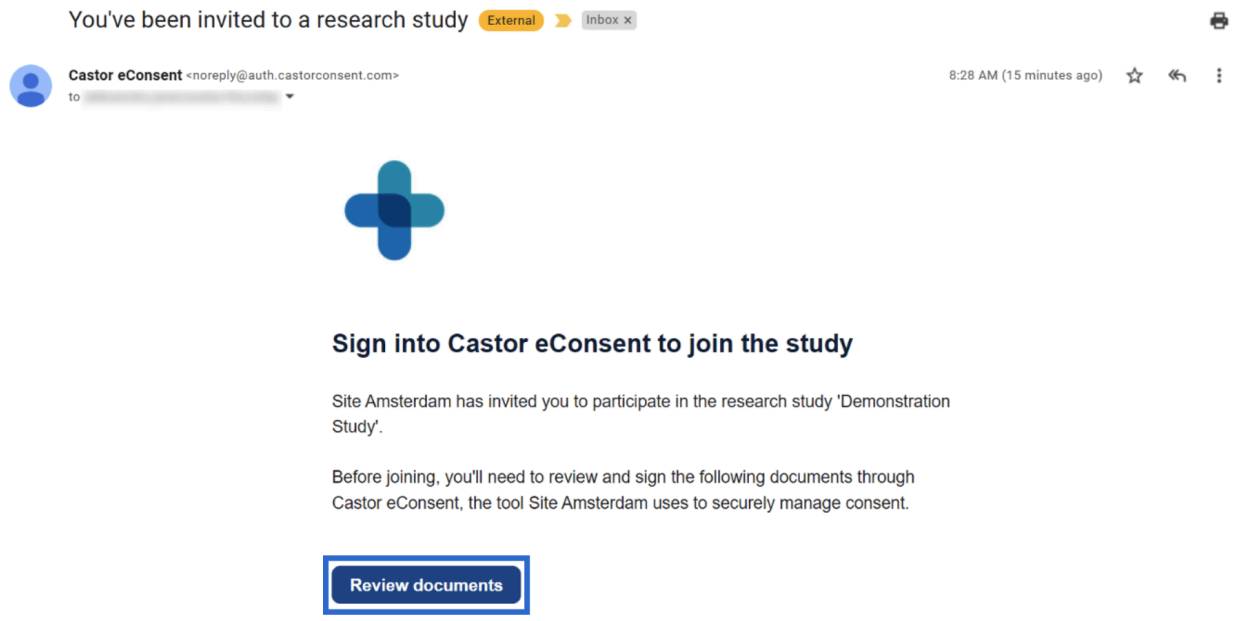
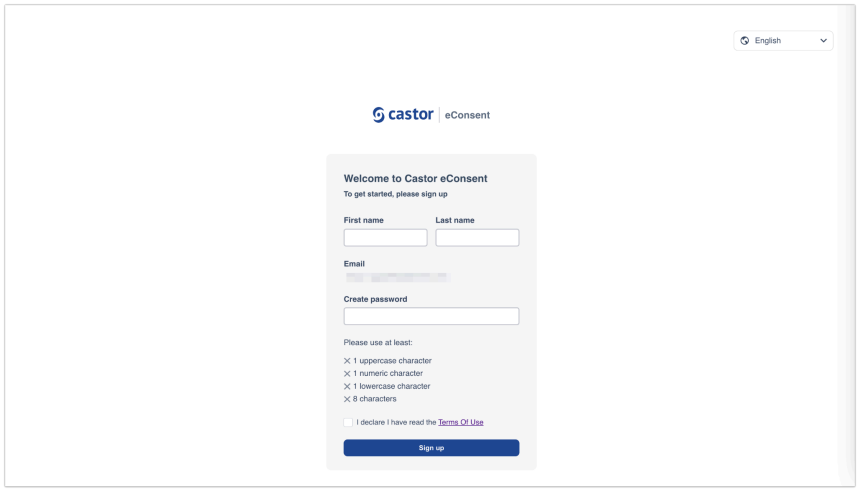
# 1. Register an account

Before you are able to participate in a study and submit your consent, you will first need to be invited and then create an account for eConsent.

After you have been added to the study, an email will be sent. By pressing the 'Review documents' button, you will be able to join the research study.



You will then be redirected to the registration page:



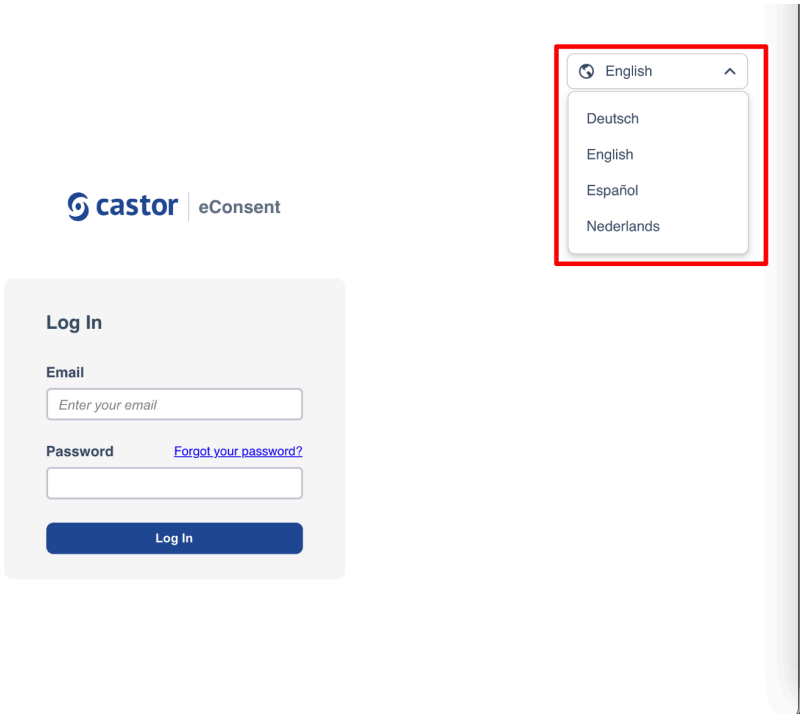

To complete the registration process, please accept the Terms of Use and provide the following details:

- 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.

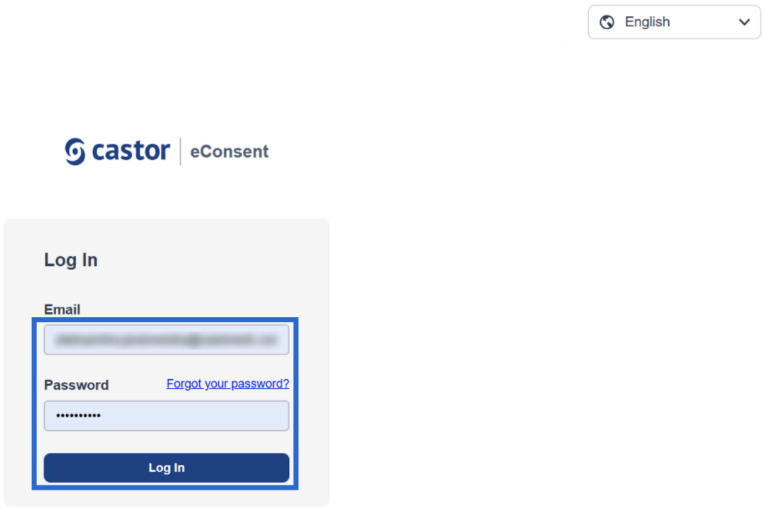
Should you already have an account registered in eConsent, after clicking on the 'Review documents' button, you will be directed to the eConsent login page where you can log in with your existing eConsent credentials.

During login and signup, you will be able to select your preferred language for the interface.

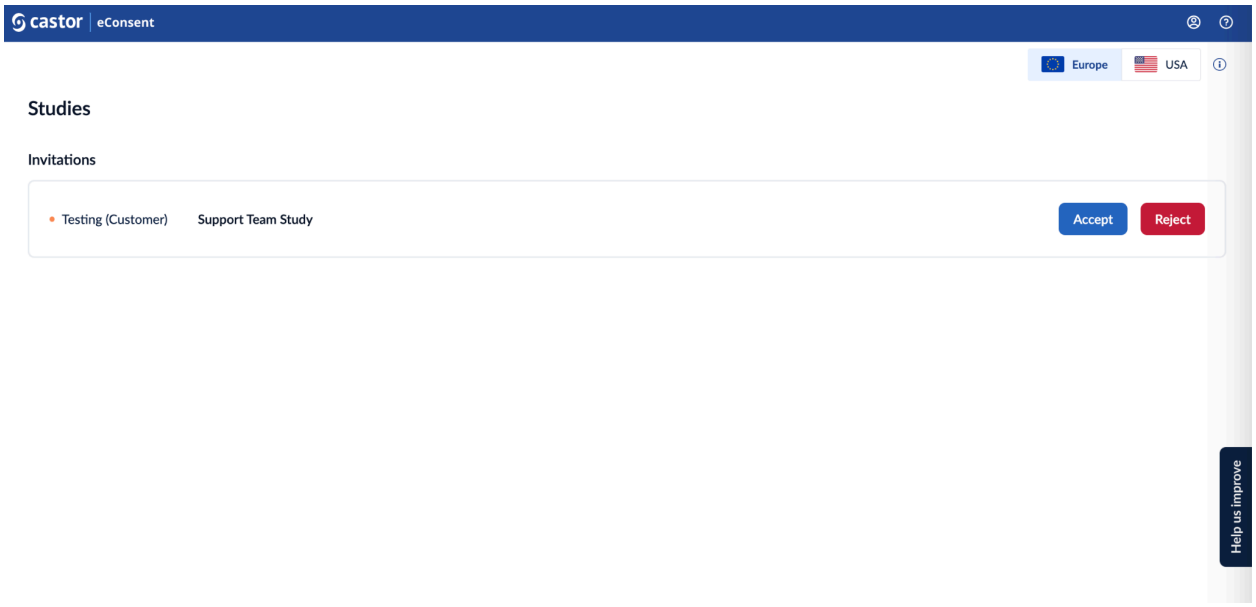


## 2. Log In

Once the registration is complete, you will then be redirected to the login page. To login into the system, provide the email address and password.




In the next step the eConsent will be opened with Study name displayed and two buttons Accept/Reject. To continue, the invitation must be accepted. Rejecting will end the consent process and it will not be possible to revert this action.

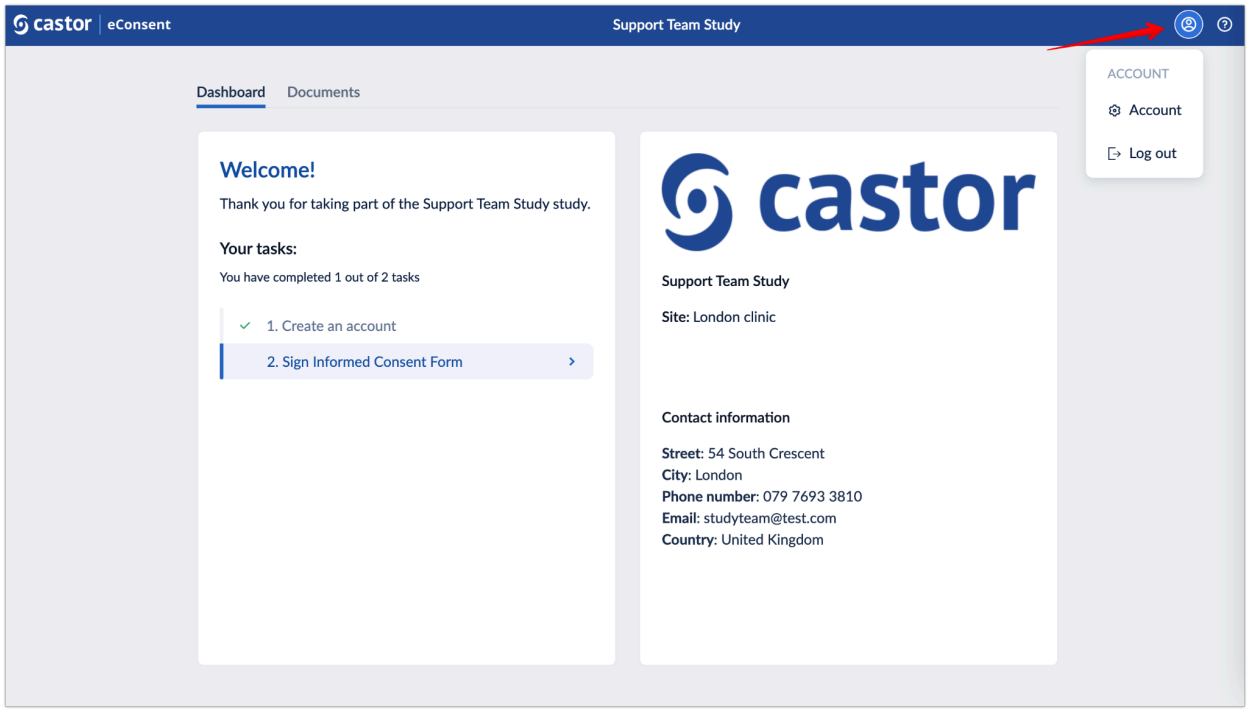



You can use the following links based on the location of your study, US or Europe:

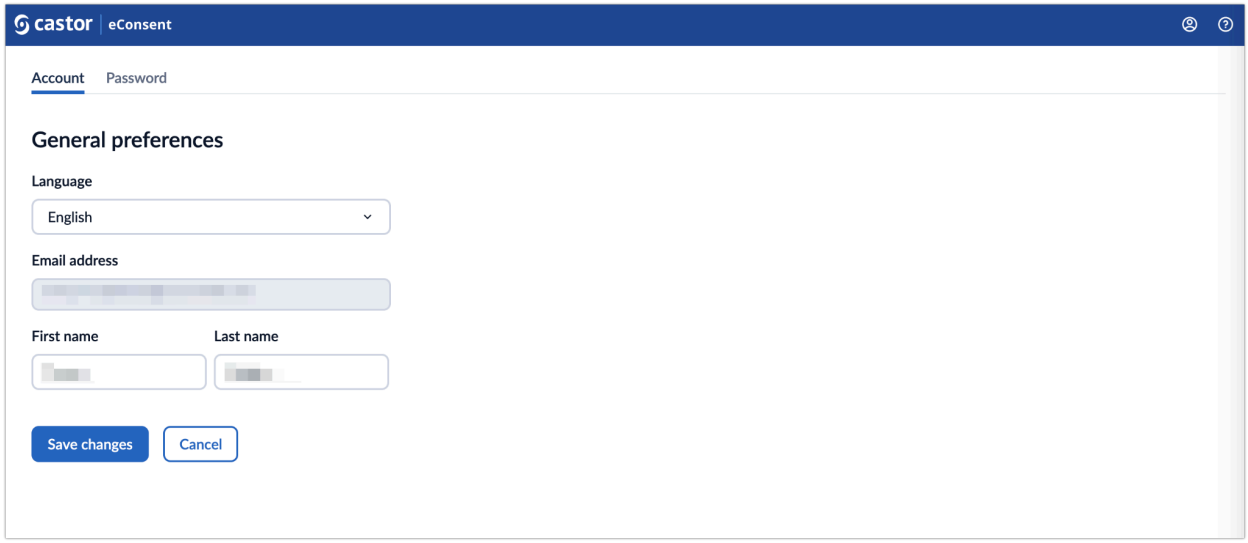
- US eConsent - https://us.castorconsent.com/
- EU eConsent - https://eu.castorconsent.com/

# 3. Manage account settings

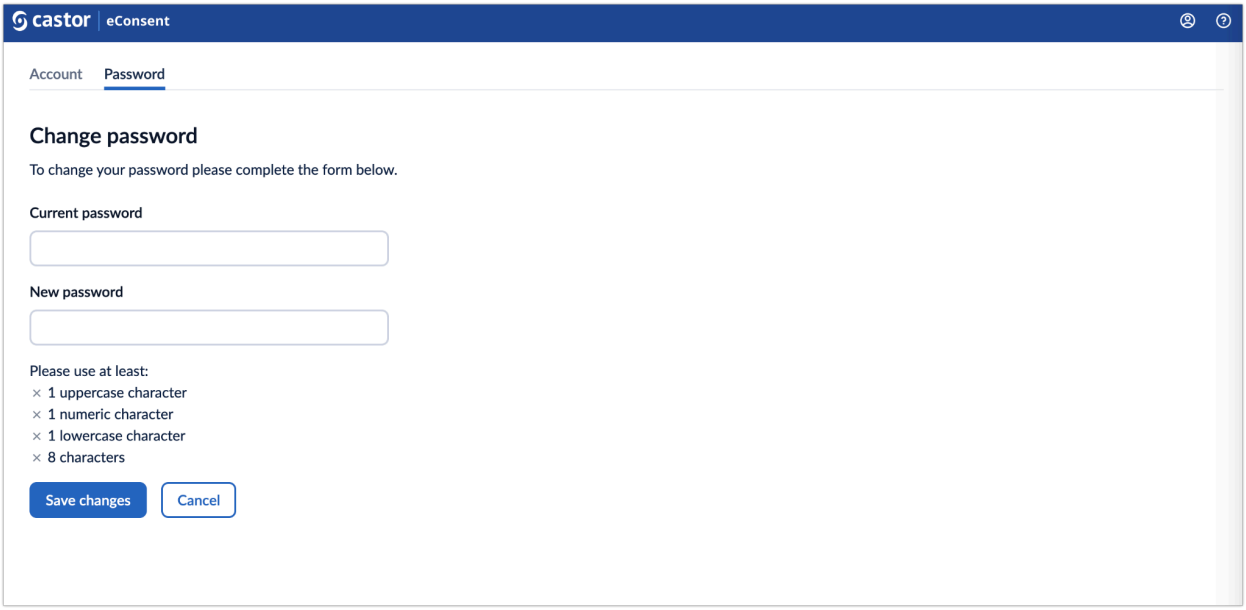
By clicking on the Account icon, you can manage your account settings.




The Account tab allows you to set preferences such as choosing the preferred language, changing First and Last name.

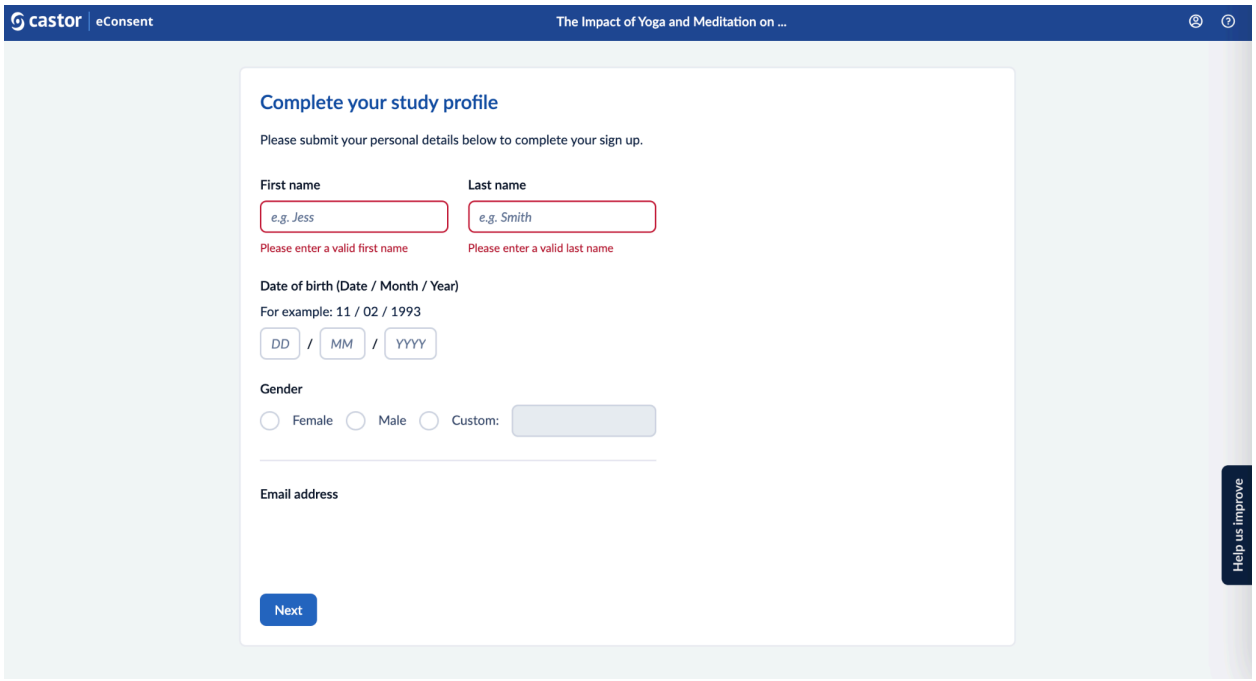


The Password tab allows you to set a new password.

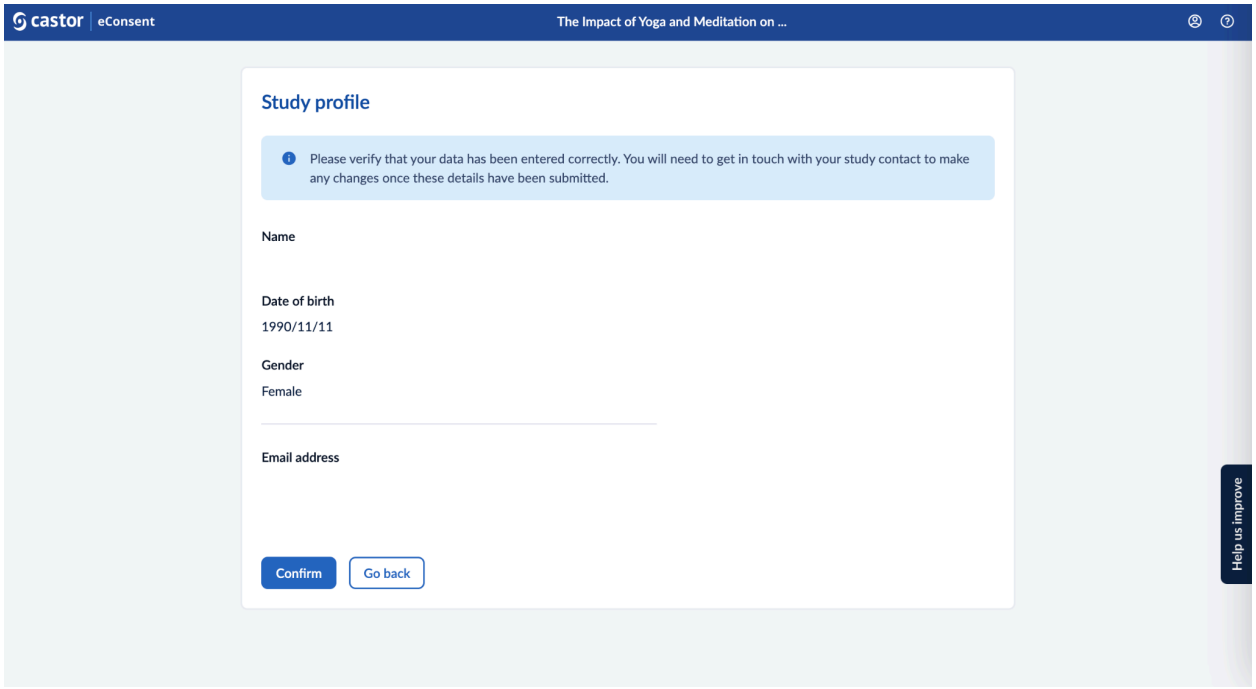


# 4. Study Profile

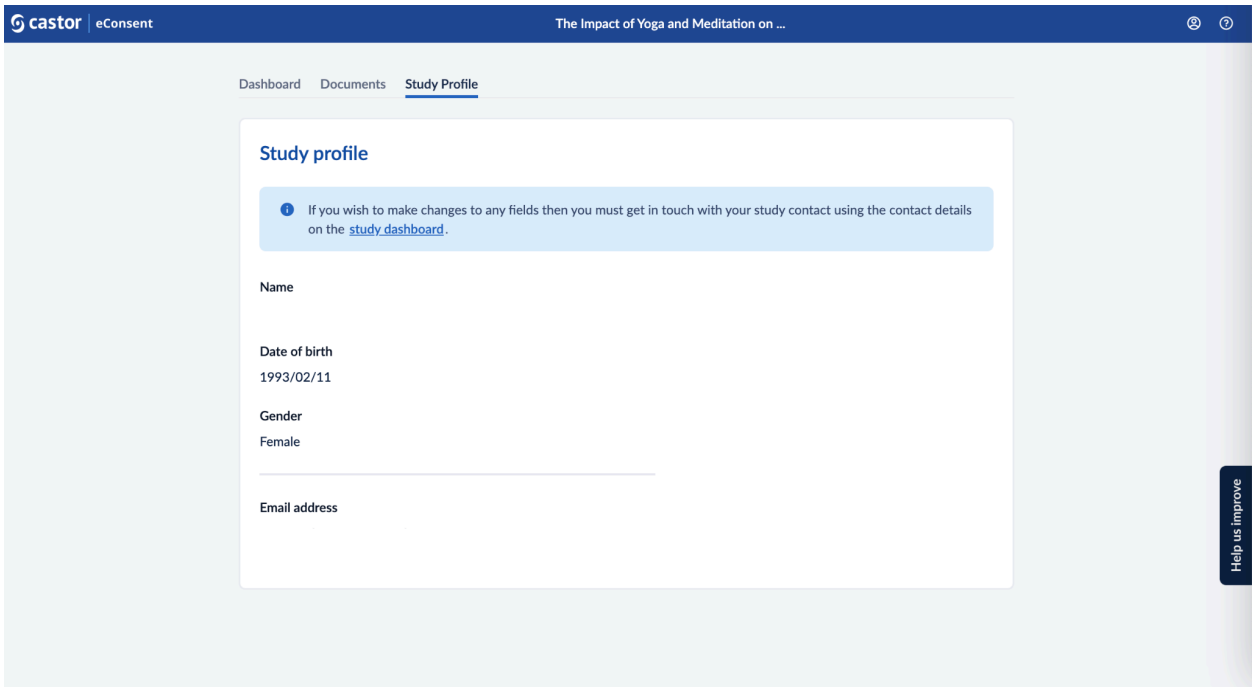
Some studies might require filling out additional details, such as name, date of birth, gender. In this case, you will be requested to complete study profile:




After filling out the necessary information, click on the ‘Next’ button to save the changes. You will be asked to verify that your data has been entered correctly. You will need to get in touch with your study contact to make any changes once these details have been submitted.



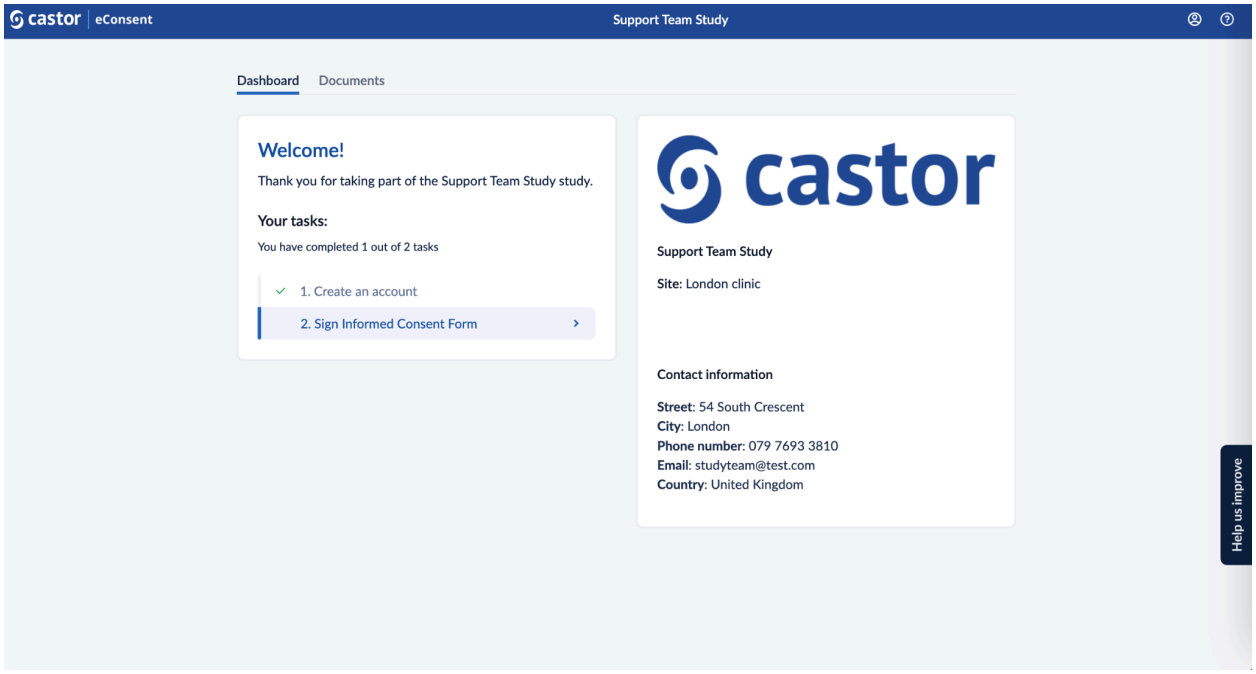

This information will be shown in the ‘Study Profile’ tab:



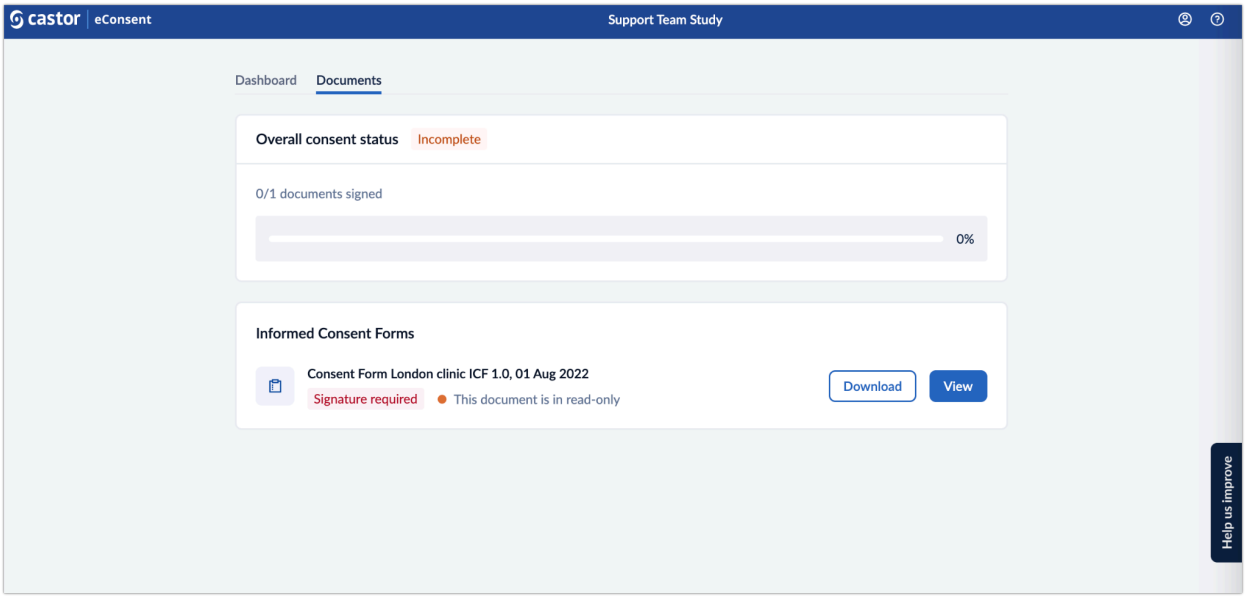

If you wish to make changes to any fields then you must get in touch with your study contact using the contact details on the study dashboard.

## 5. Signing a eConsent form

After the study invitation has been accepted, you will be redirected to the ‘Dashboard’ tab where you will be able to view the study related information and any outstanding tasks (for example Create an account or Sign Informed Consent Form).



By clicking on the ‘Sign Informed Consent Form’, you will be redirected to the ‘Documents’ tab to choose an electronic consent form for signing:

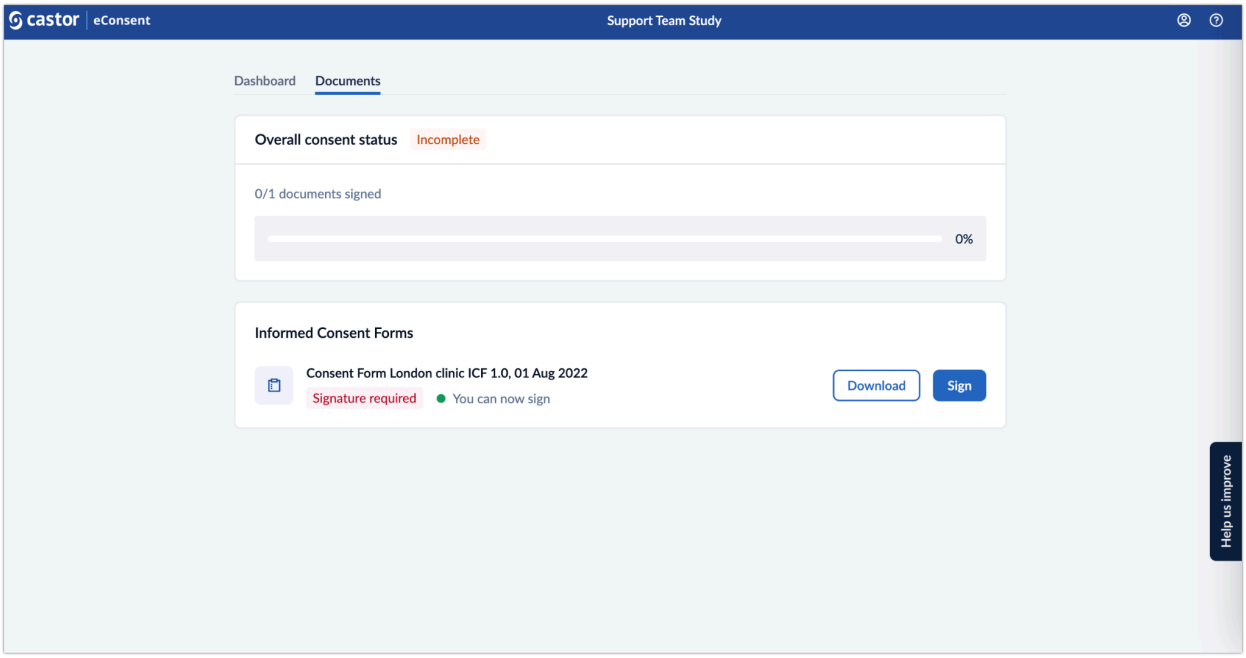



If you are seeing the message ‘This document is read-only’, it means that the consent form is not available for signature yet and the study admin needs to activate it first. You can preview the form by pressing on the ‘Download’ or ‘View’ buttons.

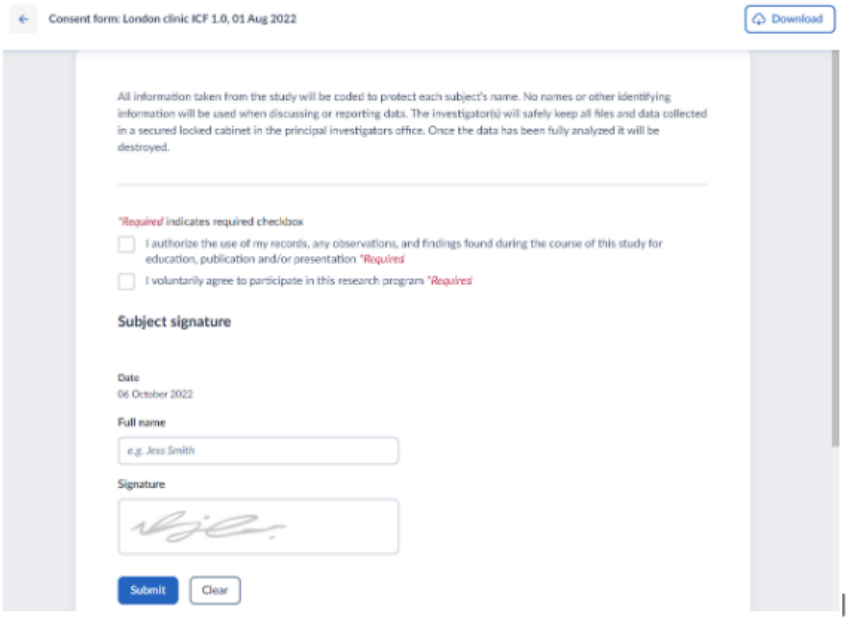
## 4.1 Electronic signing

After the form is activated by the study admin, follow the steps below:

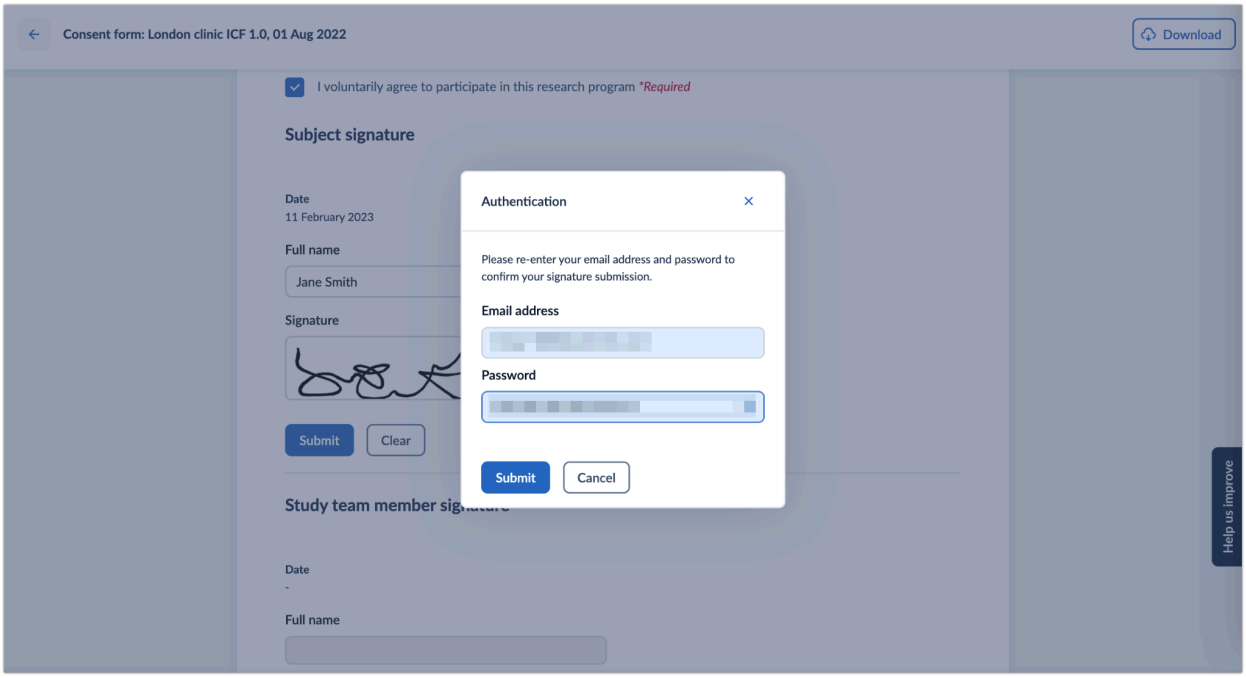
1. Press the ‘Sign’ button to sign the form:




2. Upon selecting ‘Sign’, you will be redirected to the form.
3. Please select the fields, type your full name, add the electronic signature.

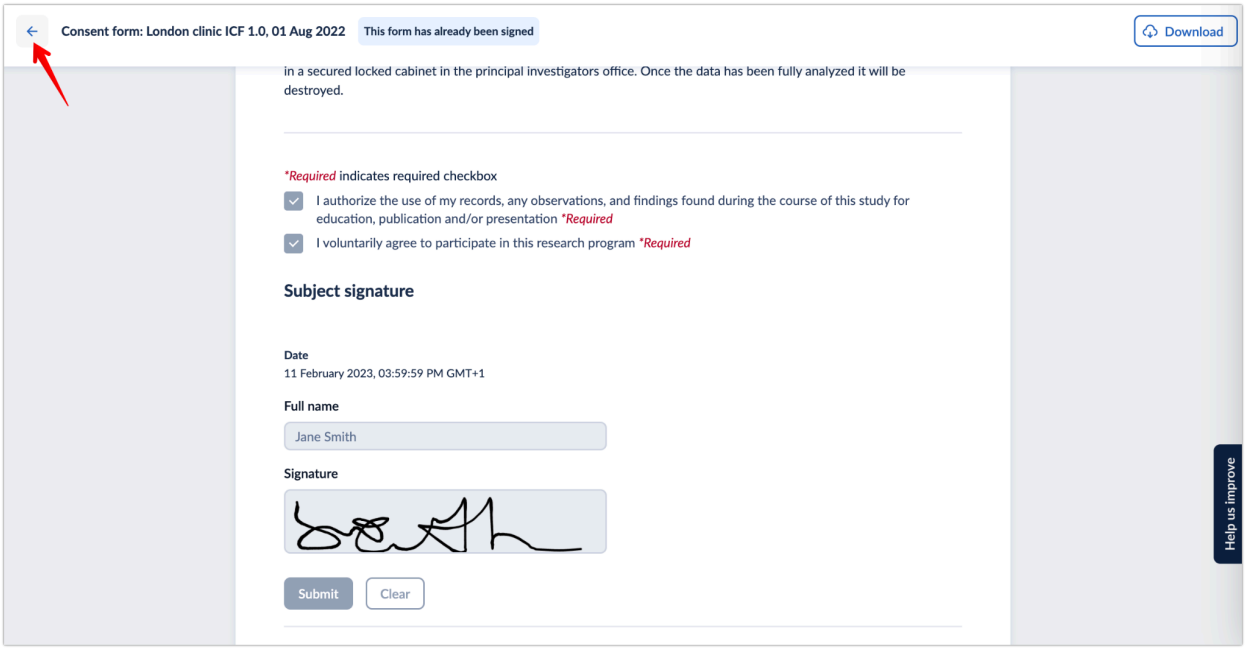



4. Press the 'Submit' button to proceed to the next step.
5. You will be asked to authenticate your account by providing your login credentials:




6. Press the 'Submit' button to complete the signature submission.

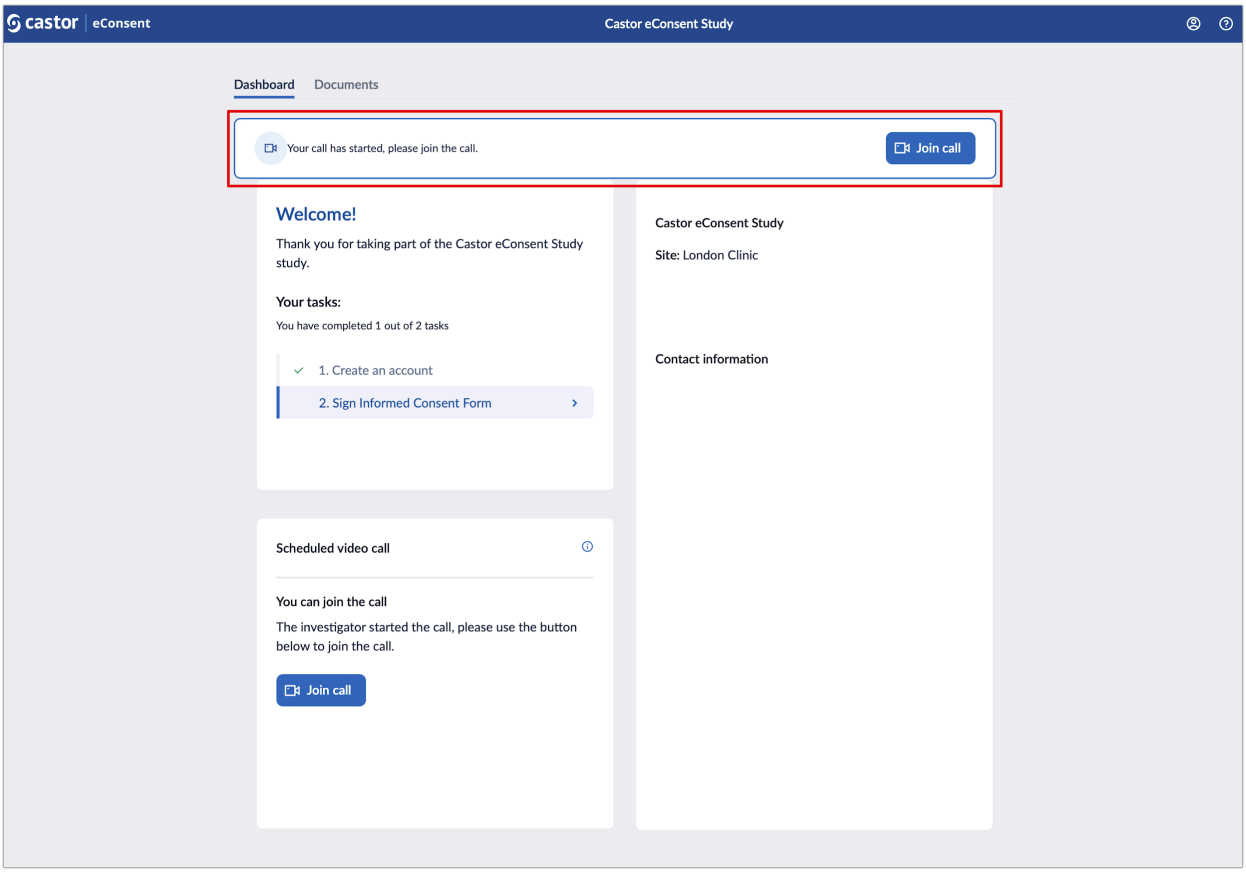
7. After the form has been signed, press the arrow to return to the ‘Documents’ overview:



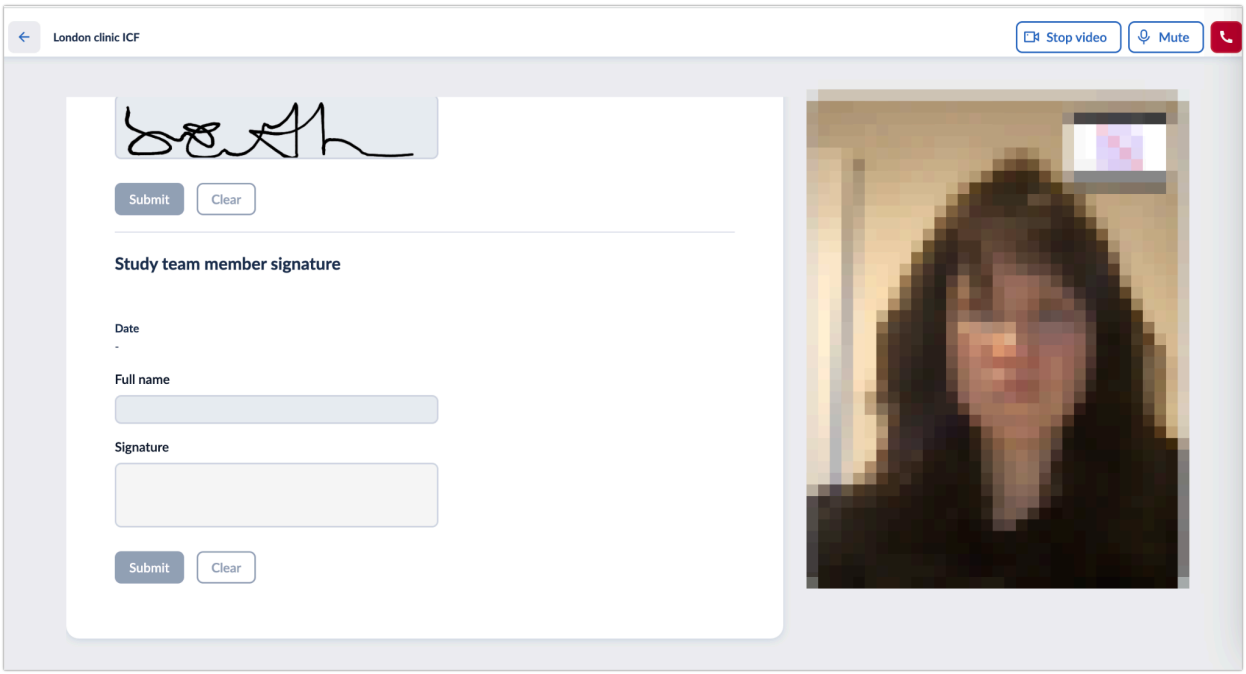
## 4.2 Joining a video-call for a remote electronic signing

To join a video-call, to then sign the documents remotely, follow the instructions below:

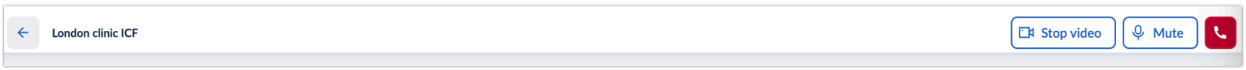
1. When the investigator initiates a call, you will see an invitation to 'Join call' within the 'Dashboard' tab.



2. After pressing the 'Join call' button, you will be redirected to the video call screen:




3. Use the options on the panel above to stop video, mute the microphone or leave the call:




Please refer to the article Troubleshooting Video/Audio on how to resolve potential video/audio issues.

## 5. Further Information

If you have any questions or concerns, please contact the site staff.