



Cohorte en soins primaires
Cohort in primary care

Procedures Manual

April 2025

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1. RECRUITMENT OF PARTICIPANTS

The recruitment of participants for the COPRI study can be done either by clinicians or by research assistants (RAs).

Patients recruited are eligible to participate in the COPRI study if they meet the following criteria:

- They are at least 18 years old.
- They are registered or designated with a family physician, a medical resident or a nurse practitioner in a participating family medicine clinic.

1.1. Clinician-led recruitment

The participants that are recruited by the clinicians are recruited at the time of their appointment. If a patient meets the eligibility criteria and the clinician determines that the patient is suitable for the COPRI study, they can inform them of the study and ask for their consent to be contacted by the research team. If the patient is interested, the clinician can share the patient's full name, contact information, and preferred language with the COPRI research team.

It is also possible that a patient may be interested but prefers to communicate with the research team directly, because they might prefer reflecting on it before confirming their participation. In this case, we would have to follow the same procedures described in 1.2.3.

1.2. RA-led recruitment

To support clinicians, RAs can recruit patients at the waiting rooms of the participating clinics. The recruitment session can be coordinated with the Co-Investigator of the participating clinic. The Co-Investigator may also refer the RAs to another staff member, such as the Continuous Quality Improvement Agent or Research coordinator, who can assist in acting as a COPRI correspondent if the Co-Investigator is unavailable. The COPRI correspondent can inform the clinic staff of COPRI RA presence on the day of the recruitment session and inform RAs of which waiting rooms to recruit from. Each

clinic operates differently, the RAs should discuss with the COPRI correspondent at the clinic on how to best organize themselves once on site.

1.2.1. RA recruitment in waiting rooms of the clinics

Prior to a recruitment session, RAs must print some copies of the consent form in all languages. Once the RAs arrive on site, they can start recruiting patients in the waiting room. The RAs can each follow these steps:

- I. Approach the patient and present themselves politely.
- II. Ask the patient for their preferred language.
- III. Provide a brief overview of the COPRI study
- IV. Verify if the patient is registered with a family doctor, medical resident or nurse practitioner at the clinic by simply asking them
 - A. If they are not registered, explain that this is an eligibility criteria so they can't participate, and thank them for their time.
- V. If they are eligible, the RA should ask the patient if they are interested.
 - A. If they are not interested, the RAs **should not take it personally**. RAs should thank the patient and move on to the next patient.
- VI. If they are interested, the RA should note down the patient's full name, phone number (if they are comfortable to provide it), email and language spoken.
 - A. This can be collected on an Excel sheet, however, it is important to **delete** this Excel sheet from your computer and Trash after patients have been added to REDCap.
 1. Both emails and phone numbers are important forms of contact. Emails enable us to send surveys directly to participants, while phone numbers are useful for following up if participants do not respond to emails.
 - a) Additionally, phone numbers are valuable during the verification stage (**Section 1.2.3**) for identifying participants. While participants may have multiple email addresses that are not recorded in their EMR, their phone number is usually consistent, making it a reliable identifier.
- VII. The RA should ask the patient whether they prefer for the informed consent form (ICF) to be sent to them by email with the self-serve option (considered as an

electronic consent) or for the ICF to be read and signed at that moment (considered as a written consent).

A. If the ICF is read and signed at that moment, the RA should follow the steps outlined in 1.2.2.

B. If self-serve ICF, the RA should inform the participant that the ICF will be sent to them in the next week through the YourUniversity@copri.ca email and once it is signed, the questionnaire will be sent automatically.

VIII. The RA should also record the number of refusals and ineligible participants. Collecting this data provides valuable insights into the clinic population and can help identify potential patterns.

Recrutement à la clinique A					
	Les refus	9			
	Inéligibles	2			
Prénom	Nom	Numéro de téléphone	Courriel	Langue préférée	Date du recrutement

1.2.2. Completing the consent form in the clinic

Although most patients will prefer to read and sign the ICF online at their own time, there will be cases of patients ready to complete the ICF at the clinic. The RA can provide the patient with a paper version of the ICF and the patient can read and sign it by themselves at the clinic. If the patient wishes to read and sign the ICF with the RA, the RA can go through the form with them and make sure to answer all their questions. In all cases, patients must have a copy of their signed ICF, therefore the RA can propose to send a scanned version of the signed ICF to the patient by email or to fill out an additional one on-site for the patient to keep. Lastly, the RA must inform the new participant that the questionnaire will be sent to them once they are verified at the clinic and ideally in the following week from YourUniversity@copri.ca email.

1.3. Self-enrollment (cohort intake form)

Lastly, participants can self-enroll in the study by filling out the *Cohort Intake Form* on the COPRI website (<https://copri.ca/participer-a-notre-recherche/>), providing their full name, contact information, preferred language and their GMF. Some participating clinics have been approved by the ethics board to send a mass email to patients directing them to the form, providing another way to self-enroll.

The McGill central team will monitor the “Cohort Intake Verification” report on REDCap to identify patients that completed the *Cohort Intake Form* and hence require verification with the clinic to confirm they meet the eligibility criteria. The McGill central team will then assign the participants to their respective university on REDCap, based on the clinic they listed in the intake form i.e. a participant that listed *GMF-U Lafontaine* will be assigned to *UdeM*, and hence will be visible as a record for UdeM RAs. The McGill central team will indicate that the patient has not been verified in the participant database.

The RAs from the specific university group can then follow these steps:

1. Review the “Patients non vérifiés/Unverified Patients” report to identify patients requiring verification (see **section 4.1** for more information on reports).
2. Verify with the respective clinic that the participant meets the eligibility criteria (**section 1.3.1**). For details on how to communicate the patient’s information with the clinic in a secure manner, please follow the steps outlined in **section 5.2**
3. Once the patient has been verified, the RA can select “Yes” under “Patient Verified” in the Participant Database.
 - a. If the participant is not eligible, you can click on “ineligible” under “Not participating” in the participant database.
4. Refer to **section 3** “ENTERING PARTICIPANTS IN REDCap AND CONTACTING PARTICIPANTS”

COPRI Participant Database French/Français

Editing existing ID de l'enregistrement **1512-353**.

ID de l'enregistrement 1512-353

Université
 * Champ obligatoire
 McGill University Université de Laval Université de Montréal Université de Sherbrooke Annuler la réponse

Site de COPRI
 * Champ obligatoire UdeM - 15 - GMF-U Claude-David (du Sud de Annuler la réponse

COPRI_ID
 * Champ obligatoire 3-15-1512-353 View equation

Date d'ajout au REDCap : Aujourd'hui J-M-A

Date de recrutement : Aujourd'hui J-M-A

Recruté par :
 Médecin/personnel
 L'équipe COPRI
 Auto-saisine
 Autres Annuler la réponse

Prénom du participant
 * Champ obligatoire

Nom du participant
 * Champ obligatoire

Patient vérifié
 Oui Non Annuler la réponse

1.4. Verifying the eligibility of the participants with the clinic

Although we ask patients whether they are registered with a Family Medicine Group before proceeding with recruitment, there are cases where a patient may say yes when in reality they are not. Therefore, it is important to verify this with the clinic Co-Investigator or COPRI correspondent. This verification process can be done on-site after the recruitment session with the COPRI correspondent. If this is not an option, the RA can share the collected information with the Co-Investigator or COPRI correspondent online. For more information on how to communicate patient information with the clinic in a secure manner, please refer to **section 5.2**. Please note that sending patient information by email would be a breach of protocol.

It is useful to compare the information that was collected with the patient information on the EMR to verify for typos. It is common that the email provided to us by the participant and the one in the EMR is different, and in that case, the RA can proceed by using the email provided directly by the patient.


For the patients that were not found as registered at any of the participating clinics, delete their information. For those eligible, they are ready to be entered in the REDCap database and to be contacted by the RAs.

2. REDCap 101

2.1. REDCap instruments

When adding a new record, you will be shown all available REDCap instruments (i.e. forms). You can also see the available REDCap instruments on the left hand side when you are on a specific record. These REDCap instruments can be classified to forms used by RAs and staff to collect and manage participants, such as the Participant Database and Contact Log, and to surveys sent to participants, such as the Consent Form and Questionnaire.

ID de l'enregistrement 1512-1090 [Select other record](#)








Data Collection Instruments: 

- COPRI Participant Database**
- COPRI Contact Log
- COPRI ICF 24Jul2024 - McGill
- COPRI ICF 24Jul2024 - UdeM
- COPRI ICF 24Jul2024 - ULaval
- COPRI ICF 24Jul2024 - UdeS
- COPRI ICF Impartial 24Jul2024
- COPRI ICF Staff 24Jul2024
- COPRI ICF Witness 24Jul2024
- COPRI McGill CCOMTL Main ICF 20Jan2023
- COPRI McGill CISSS-AT Main ICF 20Jan2023
- COPRI McGill CISSS-MO Main ICF 20Jan2023
- COPRI McGill CISSS-O Main ICF 20Jan2023
- COPRI McGill COMTL Main ICF 20Jan2023
- COPRI UdeM CISSS-LAN Main ICF 20Jan2023
- COPRI UdeM CISSS-Laurentides Main ICF 20Jan2023
- COPRI Q2023 Wave 1 Version 24Jul2024
- COPRI E-transfer Wave 1

Data Collection Instrument	Status
COPRI Participant Database	<input type="radio"/>
COPRI Contact Log	<input type="radio"/>
COPRI ICF 24Jul2024 - McGill (survey)	<input type="radio"/>
COPRI ICF 24Jul2024 - UdeM (survey)	<input type="radio"/>
COPRI ICF 24Jul2024 - ULaval (survey)	<input type="radio"/>
COPRI ICF 24Jul2024 - UdeS (survey)	<input type="radio"/>
COPRI ICF Impartial 24Jul2024 (survey)	<input type="radio"/>
COPRI ICF Staff 24Jul2024 (survey)	<input type="radio"/>
COPRI ICF Witness 24Jul2024 (survey)	<input type="radio"/>
COPRI McGill CCOMTL Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI McGill CISSS-AT Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI McGill CISSS-MO Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI McGill CISSS-O Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI McGill COMTL Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI UdeM CISSS-LAN Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI UdeM CISSS-Laurentides Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI Q2023 Wave 1 Version 24Jul2024 (survey)	<input type="radio"/>
COPRI E-transfer Wave 1 (survey)	<input type="radio"/>

2.2. REDCap instrument icon color code

Legend for status icons:

 Incomplete	 Incomplete (no data saved) 
 Unverified	 Partial Survey Response
 Complete	 Completed Survey Response

2.2.1. Icons without checkmarks

Status icons indicate the status of a survey. The following icons are manually set by RAs and staff and can be modified at any time.

- A **grey icon** signifies a survey has not been modified by anyone (neither a RA or a participant).
- A **red icon** is automatically assigned to all surveys that have been modified i.e. a RA edited the survey and pressed Save & Exit Form or Save & Stay. These forms can be manually assigned **yellow** or **green** icons. These colors have no predefined meaning, allowing you to create your own color-coding system at your discretion.

2.2.2. Icons with checkmarks

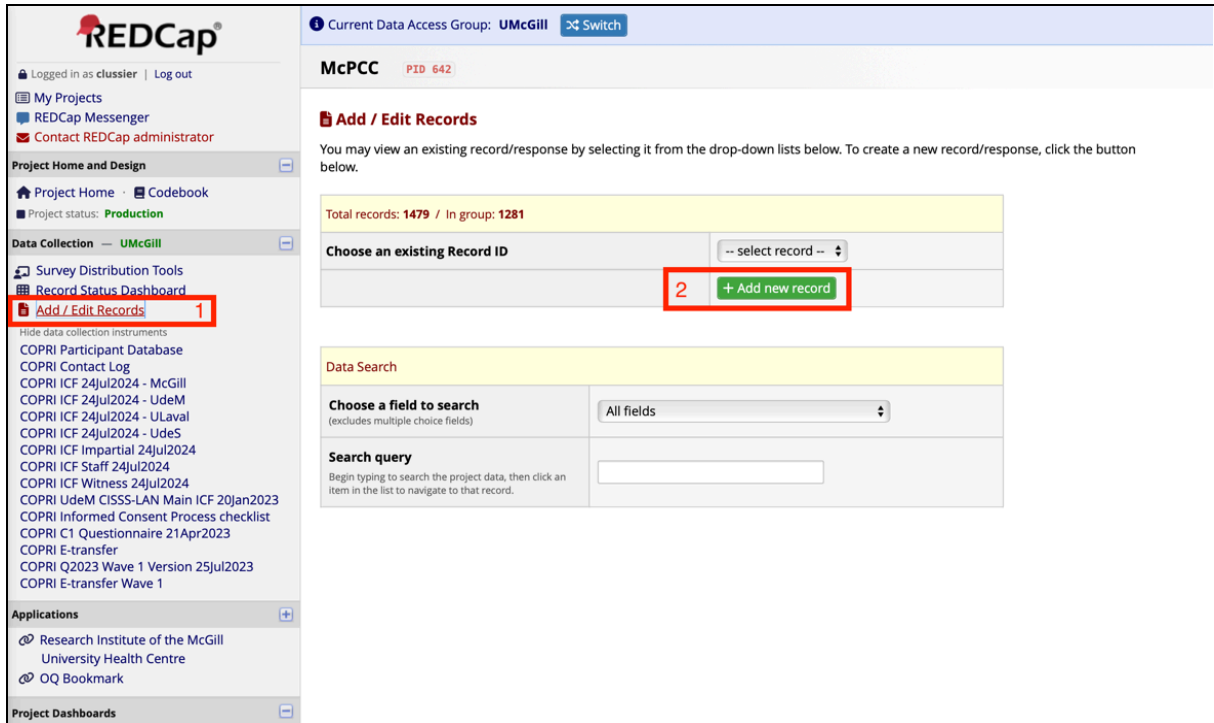
When a participant completes a survey such as the consent form or questionnaire, it will be displayed on our end with a **green checkmark** icon. Surveys that have been opened by a participant, but not submitted, or surveys partially completed, will have an **orange checkmark** icon.

3. ENTERING PARTICIPANTS IN REDCap AND CONTACTING PARTICIPANTS

Once the participants have been recruited and verified, their information must be entered into REDCap and they must be contacted by the RAs.

3.1. COPRI participant database

- a. The first step of entering the data in REDCap is to create a new record (1-2).



- b. Then, the RA must fill in the necessary components of the COPRI participant database (3).

My Projects

- REDCap Messenger
- Contact REDCap administrator

Project Home and Design

- Project Home · Codebook
- Project status: **Production**

Data Collection — UMcGill

- Survey Distribution Tools
- Record Status Dashboard
- Add / Edit Records

Record ID **1512-972** [Select other record](#)

- COPRI Participant Database
- COPRI Contact Log
- COPRI ICF 24Jul2024 - McGill
- COPRI ICF 24Jul2024 - UdeM
- COPRI ICF 24Jul2024 - ULaval
- COPRI ICF 24Jul2024 - UdeS
- COPRI ICF Impartial 24Jul2024
- COPRI ICF Staff 24Jul2024
- COPRI ICF Witness 24Jul2024
- COPRI UdeM CISSS-LAN Main ICF 20Jan2023
- COPRI Informed Consent Process checklist
- COPRI C1 Questionnaire 21Apr2023
- COPRI E-transfer
- COPRI Q2023 Wave 1 Version 25Jul2023
- COPRI E-transfer Wave 1

Applications

- Research Institute of the McGill University Health Centre
- OQ Bookmark

Project Dashboards

1) Questionnaire completed by race/ethnicity (Wave 1)

Record Home Page

Record "1512-972" is a new Record ID. To create the record and begin entering data for it, click any gray status icon below.

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.

Legend for status icons:

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response

NEW Record ID 1512-972

Data Collection Instrument	Status
COPRI Participant Database	<input type="radio"/> 3
COPRI Contact Log	<input type="radio"/>
COPRI ICF 24Jul2024 - McGill (survey)	<input type="radio"/>
COPRI ICF 24Jul2024 - UdeM (survey)	<input type="radio"/>
COPRI ICF 24Jul2024 - ULaval (survey)	<input type="radio"/>
COPRI ICF 24Jul2024 - UdeS (survey)	<input type="radio"/>
COPRI ICF Impartial 24Jul2024 (survey)	<input type="radio"/>
COPRI ICF Staff 24Jul2024 (survey)	<input type="radio"/>
COPRI ICF Witness 24Jul2024 (survey)	<input type="radio"/>
COPRI UdeM CISSS-LAN Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI Informed Consent Process checklist (survey)	<input type="radio"/>
COPRI C1 Questionnaire 21Apr2023 (survey)	<input type="radio"/>
COPRI E-transfer (survey)	<input type="radio"/>
COPRI Q2023 Wave 1 Version 25Jul2023 (survey)	<input type="radio"/>
COPRI E-transfer Wave 1 (survey)	<input type="radio"/>

c. Note that the COPRI ID will be entered automatically by the database.

The following information must be entered:

- (4) University
- (5) COPRI site
- (6) Date added and date recruited
- (7) Recruited by
- (8) Participant's first name + Participant's last name
- (9) Phone number and/or email
- (10) Language
- (11) Other important notes
- (12) Save to register the new participant in the database.

Contact REDCap administrator

COPRI Participant Database

Editing existing Record ID 1512-972.

Record ID: 1512-972

University: McGill University Université de Laval Université de Montréal Université de Sherbrooke

COPRI site: McGill - 1 - CLSC Côte-des-Neiges

COPRI ID: 1-1-1512-972

Date added to REDCap: 26-11-2024

Date recruited: 21-11-2024

Recruited by: Physician/staff COPRI Team Self-referral Other

Participant's first name: Test

Participant's last name: TEST

Not Participating

4

5

6

7

8

12) Closed - test records
 13) Closed - refusal or no response
 14) Closed - completed questionnaires
 15) Closed - payment submitted or refused
 16) IDing test records
 17) x To be paid by cheque
 18) Not test and participating
 19) COPRI McGill questionnaires completed
 20) Questionnaires completed, to be paid (incl declined)
 21) Questionnaires completed, to be paid
 22) ICPChecklists to sign
 23) All recruited (not test)
 24) Descriptive-completed
 25) Partially completed questionnaires
 26) COPRI Recruits and Questionnaires Complete
 27) Physician/staff Recruit and Questionnaires complete
 28) NAPCRG Recruits and Consents Complete
 29) Wave 1 quest completed
 30) Shuang COPRI NAPCRG
 31) Language spoken to HCP
 32) Immigrant status
 33) Recruited
 34) Participants recruited and ICF signed
 35) Participants that removed themselves from study
 36) Participants consented but no ICF process checklist
 37) Tests
 38) Eligible and did not complete questionnaire
 39) Consented but did not complete questionnaire
 40) Paid by cheque

UdeM
 1) UdeM backlog (survey not complete)
 2) U de M questionnaires completed

McGill
 1) Vallée de l'Or completes

COPRI Wave 1 Questionnaire

Send COPRI Questionnaire Wave 1 Version 25Jul2023

Street address, unit number: 123, boul Saint-Laurent, Apt. 1

Municipality: Châteauguay, Gatineau, Laval, Montréal, Westmount, etc.

Postal code: A1A 1A1

Phone number: [Redacted]

Email: test@email.com

Preferred means of contact 1: [Redacted]

Preferred means of contact 2: [Redacted]

Preferred means of contact 3: [Redacted]

Date of birth: [Redacted]

RAMQ: [Redacted]

Language preferred for interview: French

9

10

The screenshot shows a REDCap form with the following sections:

- ICF version**: Provide date (e.g., 01Jan2022) with a date input field containing '24Jul2024'. Entered by interviewer.
- Date ICF was administered and signed**: Date input field with a calendar icon and 'Today' button. Entered by interviewer.
- Agreed to be contacted for other studies**: Radio buttons for 'Yes' and 'No'. Entered by interviewer (answer to be taken from completed ICF). A 'reset' button is visible.
- E-transfer authorization signed**: Radio buttons for 'Yes' and 'No'. Entered by interviewer. A 'reset' button is visible.
- Questionnaire version**: Provide date (e.g., 01Jan2022) with a date input field containing '24Jul2024'. Entered by interviewer.
- Date questionnaire was administered and signed**: Date input field. Entered by interviewer.
- Payment submitted**: Date input field with a calendar icon and 'Today' button.
- Payment completed**: Date input field with a calendar icon and 'Today' button.
- Not Participating**: Radio buttons for 'Declined to participate', 'No response (5 attempts)', and 'Other' with a text input field. A 'reset' button is visible.
- Notes**: A large text area at the bottom right.

Annotations in the image:

- A red arrow labeled '12' points to the 'Save & Stay' button in the top right corner.
- A red arrow labeled '11' points to the 'Notes' field at the bottom right.

3.2. Sending a survey

The following is enabled by the REDCap Survey Invitation feature explored in **Section 3.5.1**.

3.2.1. Using the **buttons** in *Participant Database*

Once the contact information is entered in the database, the RA must send the appropriate survey to that participant. This can be the ICF (13), or the questionnaire (14). Selecting the buttons in the COPRI participant database will send the surveys with 1 weekly reminder (i.e. **2 times in total**) with a standardized message. To send the survey, click on the button and press *Save & Exit Form* or *Save & Stay* (15).

The screenshot shows a RedCap application interface. On the left, there is a sidebar with sections: Applications (Research Institute of the McGill University Health Centre, OQ Bookmark), Project Dashboards (Questionnaire completed by race/ethnicity, legal status, university), and Reports (Participant Database, Questionnaires McPCC FR/EN, COPRI C1, Open - all, Open - to make initial contact, Open - to follow up for consent, Open - to complete questionnaire, Open - to pay - e-transfer C1, Open - to pay - e-transfer W1, Open - to pay - alternate payment C1, Open - to pay - alternate payment W1, Closed - all, Closed - test records, Closed - refusal or no response, Closed - completed questionnaires, Closed - payment submitted or refused, IDing test records). The main area shows a list of reports with radio buttons and 'reset' links. A 'Save & Exit Form' button is visible in the top right corner, with a red arrow pointing to it and the number 15. Another red arrow points to the 'Send ICF (Version 24Jul2024)' item, and another points to the 'Send COPRI Questionnaire Wave 1 Version 25Jul2023' item.

For example, below is a screenshot of the email that participants will receive when you click on the “Send COPRI Questionnaire Wave 1 Version 25Jul2023”

The screenshot shows an email titled "Questionnaire: Cohorte en soins primaires" from "Cohorte en soins primaires <mcgill@copri.ca>". The email is dated Thursday, December 5, 2024 at 8:59 AM and is addressed to Maysaloun Mokaddam (CUSM). The email content is in French and includes the following text:

(English text will follow)

Bonjour

Nous vous remercions de confirmer votre participation à l'étude de Cohorte en soins primaires (COPRI)!

Ce lien ouvrira le questionnaire: <https://portal.rimuhc.ca/cim/redcap/surveys/?s=GJH8IL175JGdqTv9>

Vous pouvez changer de langue en cliquant sur le bouton << French/Français >> dans le coin supérieur droit du formulaire et en choisissant parmi les options qui apparaissent. Ce lien vous est propre et ne doit pas être transmis à d'autres personnes.

Si vous avez des questions ou si vous préférez remplir le questionnaire avec un assistant de recherche, n'hésitez pas à répondre à cet courriel.

Cordialement,

3.2.2. Using Survey Invitation in the respective survey

If the RA wishes to send a personalised email, the surveys can be sent through the survey page (16) with the *Survey Invitation* icon (17).

Record ID 1512-972 successfully added.

Record ID 1512-972

Data Collection Instrument	Status
COPRI Participant Database	
COPRI Contact Log	
COPRI ICF 24Jul2024 - McGill (survey)	
COPRI ICF 24Jul2024 - UdeM (survey)	
COPRI ICF 24Jul2024 - ULaval (survey)	
COPRI ICF 24Jul2024 - UdeS (survey)	
COPRI ICF Impartial 24Jul2024 (survey)	
COPRI ICF Staff 24Jul2024 (survey)	
COPRI ICF Witness 24Jul2024 (survey)	
COPRI UdeM CISSS-LAN Main ICF 20Jan2023 (survey)	
COPRI Informed Consent Process checklist (survey)	
COPRI C1 Questionnaire 21Apr2023 (survey)	
COPRI E-transfer (survey)	
COPRI Q2023 Wave 1 Version 25Jul2023 (survey)	
COPRI E-transfer Wave 1 (survey)	

Contact REDCap administrator

Project Home and Design

Project Home Codebook

Project status: Production

Data Collection — UMcGill

Survey Distribution Tools

Record Status Dashboard

Add / Edit Records

Record ID 1512-972 Select other record

Data Collection Instruments:

- COPRI Participant Database
- COPRI Contact Log
- COPRI ICF 24Jul2024 - McGill**
- COPRI ICF 24Jul2024 - UdeM
- COPRI ICF 24Jul2024 - ULaval
- COPRI ICF 24Jul2024 - UdeS
- COPRI ICF Impartial 24Jul2024
- COPRI ICF Staff 24Jul2024
- COPRI ICF Witness 24Jul2024
- COPRI UdeM CISSS-LAN Main ICF 20Jan2023
- COPRI Informed Consent Process checklist
- COPRI C1 Questionnaire 21Apr2023
- COPRI E-transfer
- COPRI Q2023 Wave 1 Version 25Jul2023
- COPRI E-transfer Wave 1

Applications

- Research Institute of the McGill University Health Centre
- OQ Bookmark

COPRI ICF 24Jul2024 - McGill

Invitation status: Survey options English

Editing existing Record ID 1512-972.

Record ID 1512-972

UNIVERSITÉ McGill Université de Montréal UDS Université de Sherbrooke UNIVERSITÉ LAVAL

Centre universitaire de santé McGill McGill University Health Centre

INFORMED CONSENT FORM

Research Study Title:	Cohort in Primary Care (COPRI)
Investigator responsible for the research study:	Dr. Alexandra de Pokomandy Research Institute McGill University Health Centre McGill University Health Centre - Glen Site 1001 Decarie Blvd, Rm D02-4110, Montreal, QC H4A 3J1
Principal investigator at the Université de Montreal:	Dr. Isabel Rodrigues Département de médecine de famille et de médecine d'urgence Faculté de médecine, Université de Montréal C.P. 6128, succursale Centre-ville

Project Home and Design

- Project Home · Codebook
- Project status: **Production**

Data Collection — UMcGill

- Survey Distribution Tools
- Record Status Dashboard
- Add / Edit Records
- Record ID 1512-972 [Select other record](#)
- Data Collection Instruments:
 - COPRI Participant Database
 - COPRI Contact Log
 - COPRI ICF 24Jul2024 - McGill**
 - COPRI ICF 24Jul2024 - UdeM
 - COPRI ICF 24Jul2024 - ULaval
 - COPRI ICF 24Jul2024 - UdeS
 - COPRI ICF Impartial 24Jul2024
 - COPRI ICF Staff 24Jul2024
 - COPRI ICF Witness 24Jul2024
 - COPRI UdeM CISSS-LAN Main ICF 20Jan2023
 - COPRI Informed Consent Process checklist
 - COPRI C1 Questionnaire 21Apr2023
 - COPRI E-transfer
 - COPRI Q2023 Wave 1 Version 25Jul2023
 - COPRI E-transfer Wave 1

Applications

- Research Institute of the McGill University Health Centre
- OQ Bookmark

COPRI ICF 24Jul2024 - McGill

Invitation status: [dropdown] Survey options [dropdown] English [dropdown]

Editing existing Record ID 1512-972.

Record ID 1512-972

INFORMED CONSENT FORM

Research Study Title:	Cohort in Primary Care (COPRI)
Investigator responsible for the research study:	Dr. Alexandra de Pokomandy Research Institute McGill University Health Centre McGill University Health Centre - Glen Site 1001 Decarie Blvd, Rm D02-4110, Montreal, QC H4A 3J1
Principal investigator at the Université de Montreal:	Dr. Isabel Rodrigues Département de médecine de famille et de médecine d'urgence Faculté de médecine, Université de Montréal C.P. 6128, succursale Centre-ville

The RA can: schedule the email to be sent at a specific time, add weekly reminders, specify the sender and recipient of the message, set the email title, and compose the message content. It is important to include [survey-link] and/or [survey-url] in the message to ensure the form is accessible to the recipient.

When using the Survey Invitation method to send a survey, we usually emulate the button by sending the email with 1 weekly reminder (i.e. **2 times in total**), and by using the standardized messages in the COPRI Email Guide as a reference.

REDCap

logged in as **clussier** | Log out

My Projects

REDCap Messenger

Contact REDCap administrator

Project Home and Design

- Project Home · Codebook
- Project status: **Production**

Data Collection — UMcGill

- Survey Distribution Tools
- Record Status Dashboard
- Add / Edit Records
- Record ID 1512-972 [Select other record](#)
- Data Collection Instruments:
 - COPRI Participant Database
 - COPRI Contact Log
 - COPRI ICF 24Jul2024 - McGill**
 - COPRI ICF 24Jul2024 - UdeM
 - COPRI ICF 24Jul2024 - ULaval
 - COPRI ICF 24Jul2024 - UdeS
 - COPRI ICF Impartial 24Jul2024
 - COPRI ICF Staff 24Jul2024
 - COPRI ICF Witness 24Jul2024
 - COPRI UdeM CISSS-LAN Main ICF 20Jan2023
 - COPRI Informed Consent Process checklist
 - COPRI C1 Questionnaire 21Apr2023
 - COPRI E-transfer

Send Survey Invitation to Participant "1512-972"

Info

Survey title: COPRI ICF 24Jul2024 - McGill University

When should this email be sent?

Immediately

At specified time: [dropdown] [dropdown] [dropdown] Y-M-D H:M

The time must be for the time zone **America/Toronto**, in which the current time is 2024-11-15 10:30.

Enable reminders

Re-send invitation as a reminder if participant has not responded by a specified time? (Times below refer to AFTER original invitation time.)

Send every [dropdown] at time [dropdown] [dropdown] H:M

Send every [dropdown] days [dropdown] hours [dropdown] minutes

Send at exact date/time: [dropdown] [dropdown] [dropdown] Y-M-D H:M

— AND —

Recurrence: Send only once

Compose message

From: [dropdown] info@copri.ca

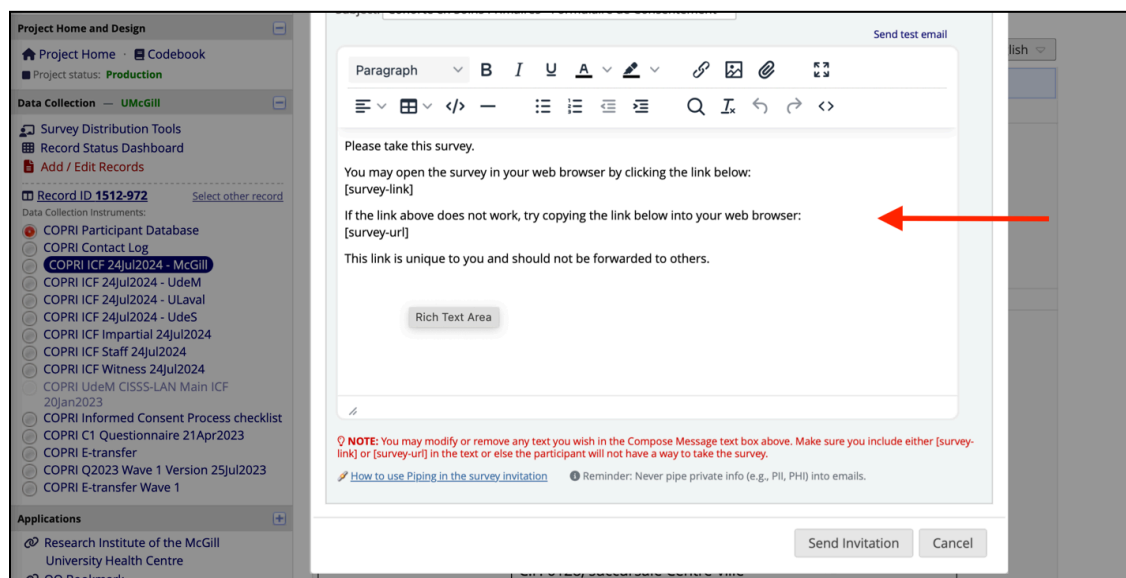
(select any project user to be the 'Sender')

To: test@email.com (from Email field)

Or provide another email: [input]

(NOTE: Any email address manually entered above will be used only this one time when sending a survey invitation. Any other invitations sent out at other times will instead go to the email address found in the Participant List for this participant.)

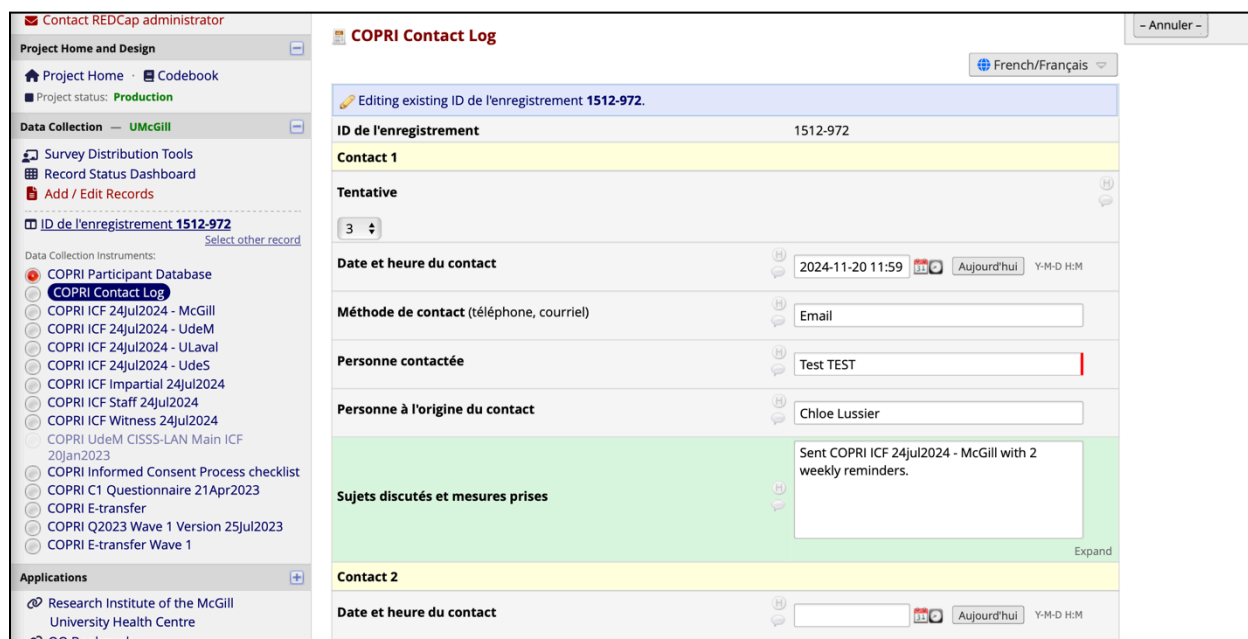
Subject: Cohorte en Soins Primaires - Formulaire de Consentement



Then, *Save and Exit Form*.

3.3. Contact Log

After entering the participant's information in the COPRI participant database and sending the appropriate survey to the participant, the RA must write these actions down in the *Contact Log*. Do not forget to *save* the form.



3.4. Procedures Following ICF Completion

After a participant signs the ICF on REDCap, they are automatically sent the questionnaire, with a standardized message, with 1 weekly reminder (i.e. 2 times in total). This is enabled by the REDCap Alerts feature explored in **Section 3.5.2**.

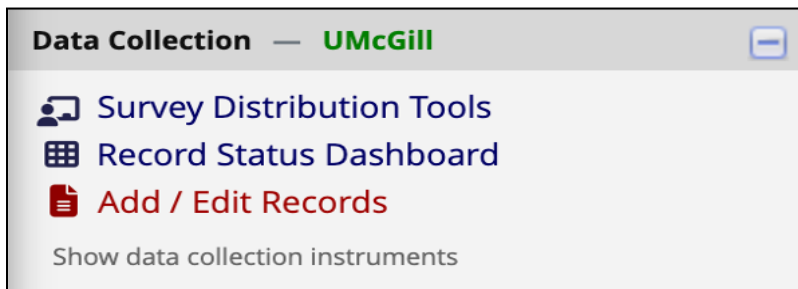
3.5. Tracking sent surveys

Although the Contact Log provides a general overview of how, when, and why a participant was contacted by a RA, it is manually entered by the RA and therefore prone to errors. For a more reliable log, you can directly check REDCap, which tracks all surveys sent to a participant. The following sections dive into the different types of emails that REDCap sends out, and where you can track these emails.

3.5.1. Survey Distribution Log

An Automated Survey Invitation (ASI) is a REDCap feature that allows us to automatically send surveys to participants based on predefined conditions. It is this feature that allows us to send a survey, with a standardized message, to a participant with 1 weekly reminder (i.e. 2 times in total), as seen in **Sections 3.2.1** and **3.2.2**.

To keep track of surveys sent using ASI, you can click on **Survey Distribution Tools**, followed by **Survey Invitation Log**.



In **Survey Invitation Log**, filters can be applied based on Record-ID, survey and specify whether you want to view past or future invitations (i.e. past sent surveys or future scheduled surveys).

Survey Distribution Tools

Public Survey Link Participant List **Survey Invitation Log**

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. For each invitation it displays the participant email, participant identifier (if exists), survey name, and the date/time in which the invitation was (or will be) sent. You may even view the invitation email itself by clicking the icon in the "View Email" column. Please note that all times below correspond to the time zone "America/Toronto", in which the current time is 2024-12-13 17:19.

Survey Invitation Log
(in ascending order by time sent)

View past invitations View future invitations

Displaying 1 - 16 of 16

Begin time: 2024-12-13 17:19 End time: (Y-M-D H:M)

Display All invitation types (excluding deleted invitations) and All response statuses

Display All surveys

Display All records

Display invitation reminders?

Apply filters Reset Download log (as seen below) Delete all selected

Invitation send time	View Invite	Participant Email	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)	
----------------------	-------------	-------------------	--------	------------------------	--------	-------------	------------	-----------------	--

For example, to view past contacts for the ICF survey associated with a specific Record-ID, the following filters are applied, and the results are displayed accordingly.

Survey Distribution Tools

Public Survey Link Participant List **Survey Invitation Log**

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. For each invitation it displays the participant email, participant identifier (if exists), survey name, and the date/time in which the invitation was (or will be) sent. You may even view the invitation email itself by clicking the icon in the "View Email" column. Please note that all times below correspond to the time zone "America/Toronto", in which the current time is 2024-12-12 09:17.

Survey Invitation Log
(in ascending order by time sent)

View past invitations View future invitations

Displaying 1 - 3 of 3

Begin time: End time: 2024-12-12 09:1 (Y-M-D H:M)

Display All invitation types (excluding deleted invitations) and All response statuses

Display "COPRI ICF 24Jul2024 - McGill University"

Display 1512-1002

Display invitation reminders?

Apply filters Reset Download log (as seen below) Delete all selected

Invitation send time	View Invite	Participant Email	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)	
2024-11-26 17:23			1512-1002		COPRI ICF 24Jul2024 - McGill Univer				
2024-12-03 16:22 (1)			1512-1002		COPRI ICF 24Jul2024 - McGill Univer				
2024-12-10 16:22 (2)			1512-1002		COPRI ICF 24Jul2024 - McGill Univer				

Survey invitations, including reminders, can be canceled in the Survey Invitation Log by clicking the red "X" icon.

Survey Invitation Log
(in ascending order by time sent)

View past invitations View future invitations

Displaying 1 - 11 of 11

Begin time: 2025-03-28 16:38 End time: (Y-M-D H:M)

Display All invitation types (excluding deleted invitations) and All response statuses

Display All surveys

Display All records

Display invitation reminders?

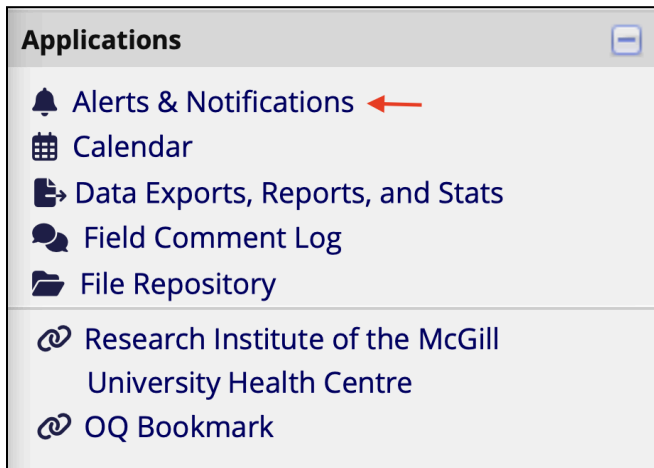
Apply filters Reset Download log (as seen below) Delete all selected

Invitation send time	View Invite	Participant Email	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)	
2025-03-31 09:00					COPRI ICF 24Jul2024 - McGill Univer				<input type="checkbox"/>
2025-03-31 09:00 (1)					COPRI ICF 24Jul2024 - McGill Univer				<input type="checkbox"/>
2025-03-31 09:00 (2)					COPRI ICF 24Jul2024 - McGill Univer				<input type="checkbox"/>

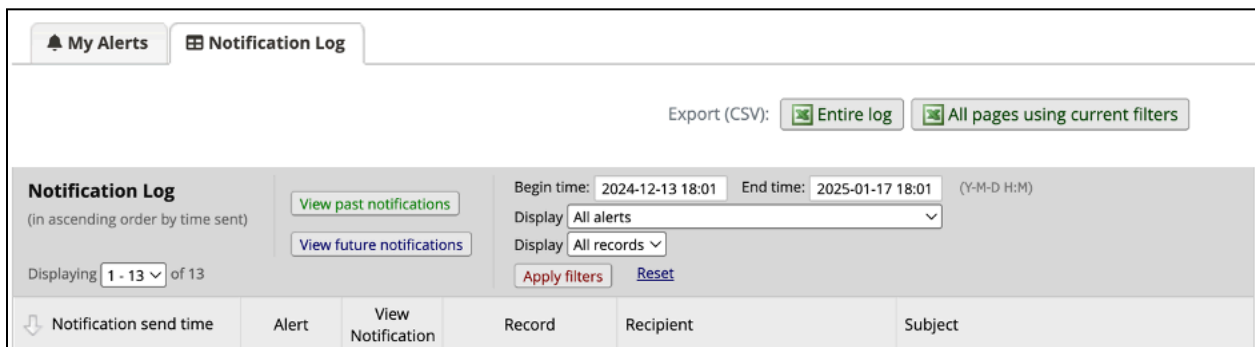
3.5.2. Alerts & Notifications

As of November 2024, we started to use the alerts REDCap feature in order to automatically send a questionnaire to participants after they self-sign the ICF.

To keep track of questionnaires sent after a participant has signed and completed a self-serve ICF, click on “**Alerts and Notifications**”.



Click on **Notification Log** to keep track of questionnaires sent to participants who completed the self-serve ICF on REDCap.



4. FOLLOWING UP WITH PARTICIPANTS – 5 CONTACTS MAXIMUM

After adding participants on REDCap following recruitment and following the steps outlined in Section 2, the RA has **3 more contacts**. If a phone number is available, it is best to alternate between phone calls and emails when following up with participants.

RAs can follow up with participants who have not answered at all, which will appear as a grey icon, or have started to complete a survey and have not finished it, which will appear as an orange checkmark icon.

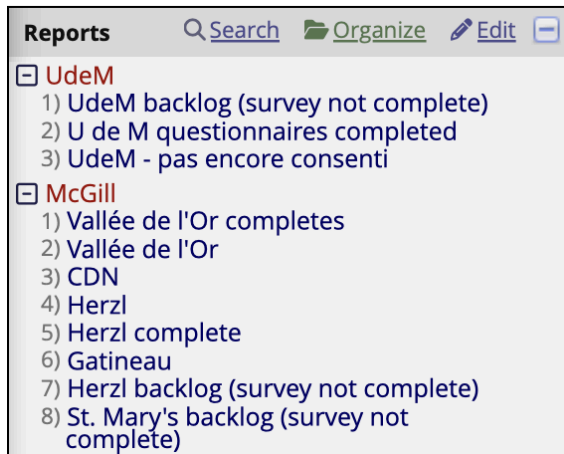
For recontacting the participants, simply follow the same instructions as for the first contact. Additionally, you could use the survey invitation method to modify the template message to inform participants that you are doing a follow up.

4.1. Use of reports for managing contacts with participants

To view quickly who needs to be recontacted, the RA can use existing reports or create new ones. Reports allow us to filter participants based on specific conditions.

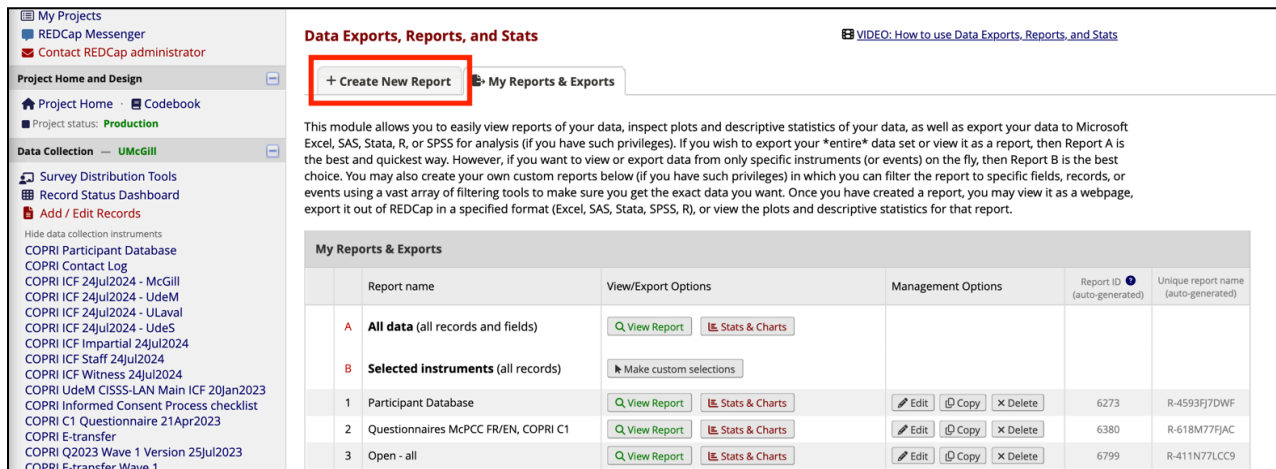
For example, you can choose to display participants from a certain participating clinic who have not completed the questionnaire. In that case, you can:

- Look in the already existing reports OR;
- Create a new report for the specific condition that you want



You will find existing reports under the Reports heading on the left hand side of REDCap.

To create a report, click on “Edit” in the Reports section, then click on “Create new report”.



Enter a name, a short description, the fields that you want to see and the filters you want to put. The fields and filters have a drop-down menu with all the variables of each instrument on REDCap. Make sure to verify that these filters are producing the right report because it is easy to make a mistake while creating new reports.

Project Home and Design

- Project Home · Codebook
- Project status: **Production**
- Data Collection — **UMcGill**
 - Survey Distribution Tools
 - Record Status Dashboard
 - Add / Edit Records
- Hide data collection instruments
 - COPRI Participant Database
 - COPRI Contact Log
 - COPRI ICF 24Jul2024 - McGill
 - COPRI ICF 24Jul2024 - UdeM
 - COPRI ICF 24Jul2024 - ULaval
 - COPRI ICF 24Jul2024 - UdeS
 - COPRI ICF Impartial 24Jul2024
 - COPRI ICF Staff 24Jul2024
 - COPRI ICF Witness 24Jul2024
 - COPRI UdeM CISSS-LAN Main ICF 20Jan2023
 - COPRI Informed Consent Process checklist
 - COPRI C1 Questionnaire 21Apr2023
 - COPRI E-transfer
 - COPRI Q2023 Wave 1 Version 25Jul2023
 - COPRI E-transfer Wave 1
- Applications
 - Research Institute of the McGill University Health Centre
 - OQ Bookmark
- Project Dashboards
 - 1) Questionnaire completed by race/ethnicity (Wave 1)
 - 2) Questionnaire completed by legal status (Wave 1)
 - 3) Questionnaires completed by university

Create New Report | My Reports & Exports

You may create a new report by selecting the fields/variables below that you want to include in the report. You may add as many fields to your report as you wish, and you can choose which users may view this report. You will also need to provide a name for your report, which will then be displayed on the project's left-hand menu for anyone to whom you have given access. You can filter the results returned in the report in a variety of ways, including using complex AND/OR logic. When you are finished, click the Save Report button at the bottom. The new report will then be added to your list of reports, after which you may immediately begin viewing them or exporting them.

Name of Report: Jardins-Roussillon (survey not complete)

Set as "public": Enabling this feature below will auto-generate a public link for viewing the report without needing to log in to REDCap.
 Report is publicly viewable by anyone with the public link

Description (optional): Displayed on page below report name

Paragraph | B | I | U | A | [Color] | [Link] | [Image] | [Table] | [Code]

Report that shows participants who have signed the ICF but have not completed the questionnaire.

STEP 1

User Access: Choose who can edit and view this report

View Access: Choose who sees this report on their left-hand project menu [?]

All users — OR — Custom user access (Choose specific users, roles, or data access groups who will have access)

Edit Access: Choose who can edit, copy, or delete this report (requires user to have 'Add/Edit/Organize Reports' privileges)

All users — OR — Custom user access (Choose specific users, roles, or data access groups who will have access)

STEP 2

Fields to include in report + Quick Add Add all fields from selected instrument: -- choose instrument --

Field	Field Name	Instrument	Action
Field 1	record_id "Record ID"	COPRI Participant Database	X
Field 2	datetime "Date and time of contact"	COPRI Contact Log	X
Field 3	content "Subjects discussed and action ta"	COPRI Contact Log	X
Field 4	datetime_2 "Date and time of contact"	COPRI Contact Log	X
Field 5	content_2 "Subjects discussed and action"	COPRI Contact Log	X
Field 6	datetime_3 "Date and time of contact"	COPRI Contact Log	X
Field 7	content_3 "Subjects discussed and action"	COPRI Contact Log	X
Field 8	datetime_4 "Date and time of contact"	COPRI Contact Log	X
Field 9	content_4 "Subjects discussed and action"	COPRI Contact Log	X
Field 10	Type variable name or field label	Instrument:	

1) Participant Database
2) Questionnaires McPCC FR/EN, COPRI C1
3) Open - all
4) Open - to make initial contact
5) Open - to follow up for consent
6) Open - to complete questionnaire
7) Open - to pay - e-transfer C1
8) Open - to pay - e-transfer W1
9) Open - to pay - alternate payment C1
10) Open - to pay - alternate payment W1
11) Closed - all
12) Closed - test records
13) Closed - refusal or no response
14) Closed - completed questionnaires
15) Closed - payment submitted or refused
16) IDing test records
17) X To be paid by cheque
18) Not test and participating
19) COPRI McGill questionnaires completed
20) Questionnaires completed, to be paid (incl declined)
21) Questionnaires completed, to be paid
22) ICPChecklists to sign
23) All recruited (not test)
24) Descriptive-completed
25) Partially completed questionnaires
26) COPRI Recruits and Questionnaires Complete
27) Physician/staff Recruit and Questionnaires complete
28) NAPCRG Recruits and Consents Complete
29) Wave 1 quest completed
30) Shuang COPRI NAPCRG
31) Language spoken to HCP
32) Immigrant status
33) Recruited
34) Participants recruited and ICF signed

In reports created for following up with participants that have not reached the 5 maximum contacts or have not responded to a survey, make sure to exclude the participants who refused to participate and the test record from your reports as shown by the arrows.

The screenshot shows the REDCap filter configuration interface. On the left is a sidebar with a list of filters and a 'Help & Information' section. The main area is titled 'STEP 3' and shows a list of filters under the heading 'Filters (optional)'. Each filter row includes a filter name, a variable name, an operator, and a value. Red arrows point to the 'X' delete icons for Filter 1 and Filter 4.

Filter	Variable	Operator	Value	Action
Filter 1	test_record ""	not =	Test Record	X
Filter 2	site "COPRI site"	=	McGill - 5 - GMF-U je	X
Filter 3	copri_c1_questionnaire_21apr2023_cc	=	Incomplete	X
Filter 4	declined_interview "Not Participating"	=		X
Filter 5	x_mcpcc_c1_eng_questionnaire_15jun	=	Incomplete	X
Filter 6	x_mcpcc_c1_fra_questionnaire_15jun2	=	Incomplete	X
Filter 7	copri_q2023_wave_1_version_25jul20	=	Incomplete	X
Filter 8	Type variable name or field label	=		

4.2. Participant refusal/no response after 5 contacts

If the participant doesn't answer after 5 contacts or informs the team that they are no longer interested in participating, this must be entered in the participant database.

Contact REDCap administrator

Project Home and Design

Project Home Codebook

Project status: **Production**

Data Collection — UMcGill

Survey Distribution Tools

Record Status Dashboard

Add / Edit Records

ID de l'enregistrement 1512-972

Select other record

Data Collection Instruments:

- COPRI Participant Database**
- COPRI Contact Log
- COPRI ICF 24Jul2024 - McGill
- COPRI ICF 24Jul2024 - UdeM
- COPRI ICF 24Jul2024 - ULaval
- COPRI ICF 24Jul2024 - UdeS
- COPRI ICF Impartial 24Jul2024
- COPRI ICF Staff 24Jul2024
- COPRI ICF Witness 24Jul2024
- COPRI UdeM CISSS-LAN Main ICF 20Jan2023
- COPRI Informed Consent Process checklist
- COPRI C1 Questionnaire 21Apr2023
- COPRI E-transfer
- COPRI Q2023 Wave 1 Version 25Jul2023
- COPRI E-transfer Wave 1

Applications

- Research Institute of the McGill University Health Centre
- OQ Bookmark

COPRI Participant Database

French/Français

Save & Exit Form

Save & Stay

- Annuler -

Editing existing ID de l'enregistrement 1512-972.

ID de l'enregistrement 1512-972

Université

* Champ obligatoire

McGill University Université de Laval Université de Montréal Université de Sherbrooke

Annuler la réponse

Site de COPRI

* Champ obligatoire

McGill - 1 - CLSC Côte-des-Neiges

COPRI_ID

* Champ obligatoire

1-1-1512-972 View equation

Date d'ajout :

14-11-2024 Aujourd'hui J-M-A

Prénom du participant

* Champ obligatoire

Test

Nom du participant

* Champ obligatoire

TEST

Ne pas participer

Refus de participer

Pas de réponse

Non vérifié

Non éligible

Autre

Annuler la réponse

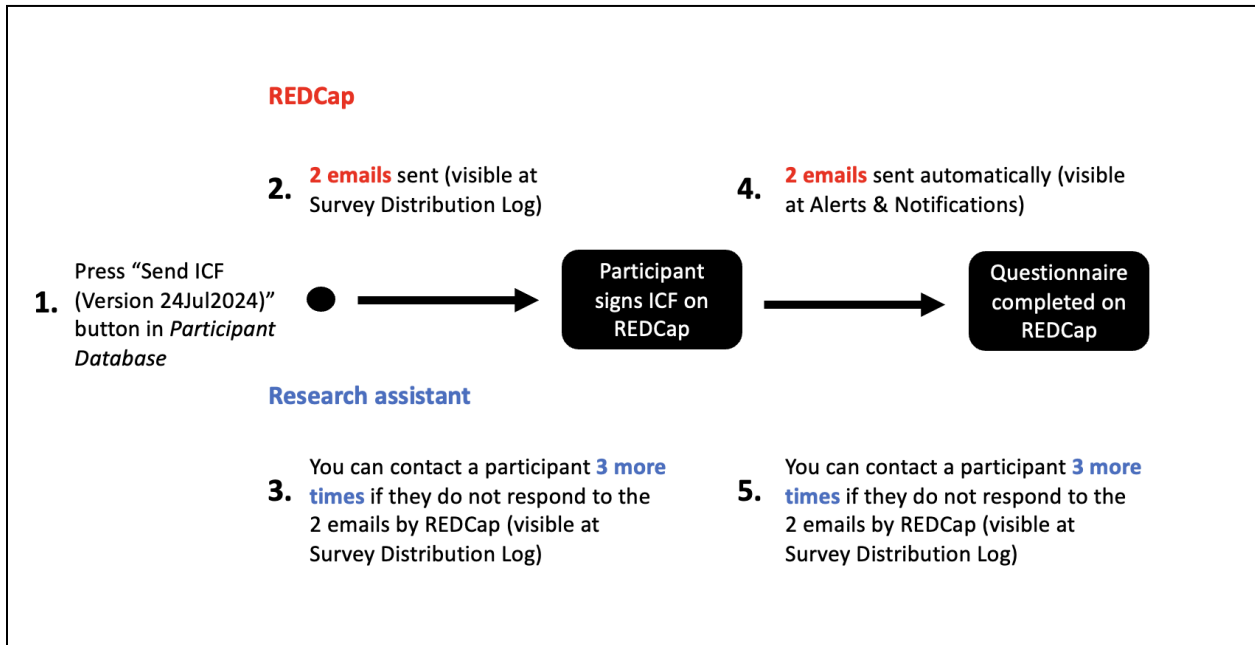
It can also be indicated in the participant database that if a participant declines to take part in the current wave of the study, but is interested in participating in future waves of the study

Refused to participate in wave 1, but interested in future waves of the study

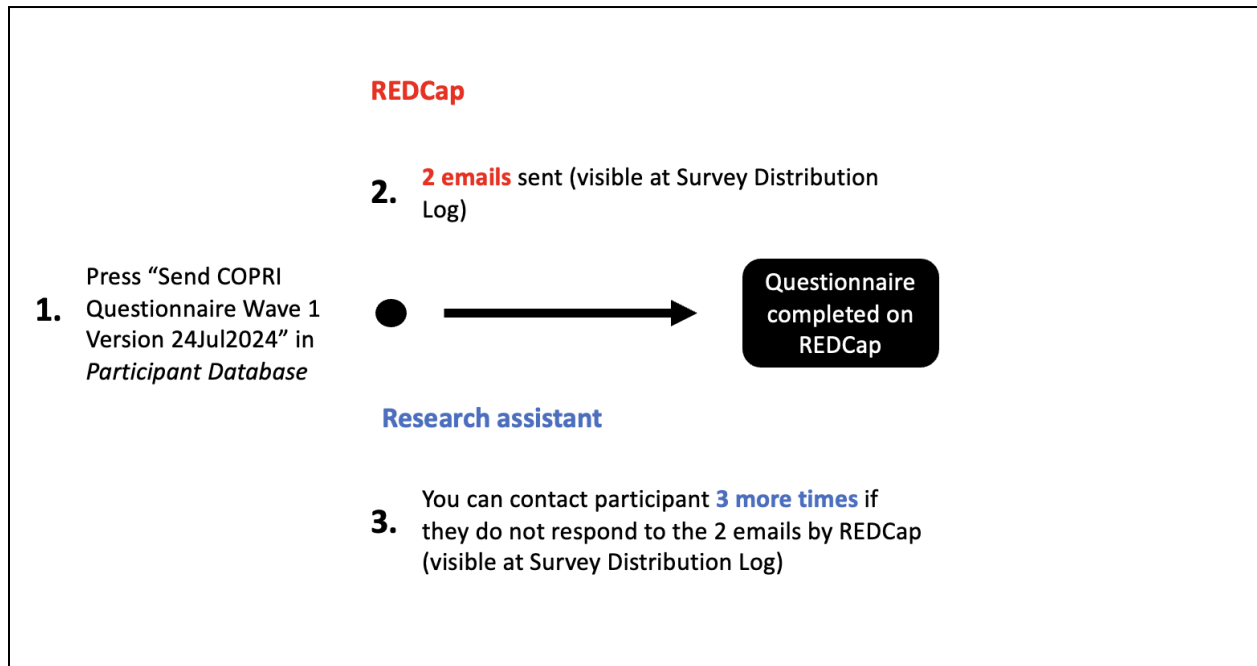
reset

5. SUMMARY OF PROCEDURES

5.1. A participant who has not consented is added to REDCap



5.2. A participant who has already signed consent form on-site is added to REDCap



6. SPECIAL CASES

There may be instances where participants are unable to complete the consent form or questionnaire independently due to various reasons, including but not limited to:

- Lack of access to the internet, a computer, or email.
- Inability to communicate in English or French.
- Difficulty with reading or writing.

In such cases, the consent process and questionnaire may be completed in person at the participant's clinic, the RA's affiliated clinic, or remotely over the phone.

If done remotely over the phone, a practical way to handle this is by setting up a phone call with the participant and having the impartial witness present to observe the consent process. The impartial witness can either be present in person (e.g., a colleague at your research institute if you are both onsite) or participate remotely through a videoconference platform such as Teams or Zoom.

6.1. Verbal consent

The participant would need to verbally consent to participating in the study as they are unable to read and sign the consent form independently. An impartial witness is needed to attest that the participant understood the study and agreed to participate. The impartial witness can be anyone who is not affiliated with the COPRI study, such as the participant’s family member, or a colleague at your research centre. In the case of a language barrier, the impartial witness would be a translator.

Data Collection Instrument	Status
COPRI Participant Database	<input type="radio"/>
COPRI Contact Log	<input type="radio"/>
COPRI ICF 24Jul2024 - McGill (survey) ← by RA	<input type="radio"/>
COPRI ICF 24Jul2024 - UdeM (survey)	<input type="radio"/>
COPRI ICF 24Jul2024 - ULaval (survey)	<input type="radio"/>
COPRI ICF 24Jul2024 - UdeS (survey)	<input type="radio"/>
COPRI ICF Impartial 24Jul2024 (survey) ← by impartial witness	<input type="radio"/>
COPRI ICF Staff 24Jul2024 (survey)	<input type="radio"/>
COPRI ICF Witness 24Jul2024 (survey) ← witness	<input type="radio"/>
COPRI McGill CCOMTL Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI McGill CISSS-AT Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI McGill CISSS-MO Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI McGill CISSS-O Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI McGill COMTL Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI UdeM CISSS-LAN Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI UdeM CISSS-Laurentides Main ICF 20Jan2023 (survey)	<input type="radio"/>
COPRI Q2023 Wave 1 Version 24Jul2024 (survey)	<input type="radio"/>
COPRI E-transfer Wave 1 (survey)	<input type="radio"/>

For the verbal consent process on REDCap, three forms need to be completed - one form by the RA, and two forms by the impartial witness.

The RA needs to complete the Consent Form on behalf of the participant. To do so in a manner that does not allow the form to be modified, you can go to the consent form, click on “Survey Invitation” and then “Open Survey”.

In the consent form, you would press “No” for “Written or Electronic consent”. You would then fill out the fields and press Submit.

COPRI ICF 24Jul2024 - McGill

Invitation status:

Survey options French/Français

Editing existing ID de l'enregistrement **1512-759**.

ID de l'enregistrement

Open survey ←
 Log out + Open survey
 Compose survey invitation
 Survey Access Code + QR Code

UNIVERSITÉ McGill
 Université de Montréal
 UDS
 Université de Sherbrooke
 UNIVERSITÉ LAVAL
 Centre universitaire de santé McGill
 McGill University Health Centre

FORMULAIRE DE CONSENTEMENT ÉCLAIRÉ

Titre de l'étude de recherche :	Cohorte en soins primaires (COPRI)
--	------------------------------------

Two forms need to be filled out by the impartial witness: the COPRI ICF Witness form and COPRI ICF Impartial form. You would need to send these forms to the impartial witness. This can be done by the Survey Invitation method described in **Section 3.2.2** where you can write the impartial witness's email in the "To" field. The Impartial Witness can complete and sign the forms, and as an RA you should verify that the form has a green checkmark.

COPRI ICF Impartial 24Jul2024 AAA
French/Français

Signature du témoin impartial

TÉMOIN IMPARTIAL :

1) Nom en lettres moulées du témoin impartial
* Champ obligatoire

2) Signature du témoin impartial
* Champ obligatoire
[Ajouter la signature](#)

3) Date
* Champ obligatoire

Aujourd'hui A-M-J

Page suivante >>

Powered by REDCap

AAA
French/Français

COPRI ICF Witness 20Jan2023

Please complete the form below.
Thank you!

SIGNATURE DU TÉMOIN
* Champ obligatoire

Oui Non Annuler la réponse

La signature d'un témoin est requise dans les cas suivants :

- Le témoin (impartial) qui signe ci-dessous atteste qu'il a lu le formulaire de consentement éclairé, que l'étude a été expliquée avec précision au participant et que ce dernier semble l'avoir comprise.
- Langue étrangère (le participant ne comprend pas la langue dans laquelle le formulaire de consentement éclairé a été rédigé) - Le signataire s'engage à servir d'interprète au participant tout au long du processus de consentement.
- Incapacité d'écrire (le participant est capable de donner son consentement, mais incapable d'écrire).

Nom du témoin

Signature
[Ajouter la signature](#)

Date
 Aujourd'hui A-M-J

Page suivante >>

Powered by REDCap

7. PROCEDURES FOLLOWING COMPLETION

Once the participant has completed the ICF and the questionnaire and the COPRI E-transfer form they will appear as a green checked dot. That means that their file is complete for this wave of the questionnaire.

It will be the central COPRI team that will handle the management of compensations as well as their distribution to participants. You can monitor the compensation status of your participants using a REDCap report to track whether the compensation has been sent to them or not, but the RA will not have any responsibilities related to sending compensation to participants.

QUESTIONNAIRE

Data Collection Instruments:	
<input checked="" type="checkbox"/>	COPRI Participant Database
<input type="checkbox"/>	COPRI Contact Log
<input checked="" type="checkbox"/>	COPRI ICF 24Jul2024 - McGill
<input type="checkbox"/>	COPRI ICF 24Jul2024 - UdeM
<input type="checkbox"/>	COPRI ICF 24Jul2024 - ULaval
<input type="checkbox"/>	COPRI ICF 24Jul2024 - UdeS
<input type="checkbox"/>	COPRI ICF Impartial 24Jul2024
<input type="checkbox"/>	COPRI ICF Staff 24Jul2024
<input type="checkbox"/>	COPRI ICF Witness 24Jul2024
<input type="checkbox"/>	COPRI UdeM CISSS-LAN Main ICF 20Jan2023
<input type="checkbox"/>	COPRI Informed Consent Process checklist
<input type="checkbox"/>	COPRI C1 Questionnaire 21Apr2023
<input type="checkbox"/>	COPRI E-transfer
<input checked="" type="checkbox"/>	COPRI Q2023 Wave 1 Version 25Jul2023
<input checked="" type="checkbox"/>	COPRI E-transfer Wave 1

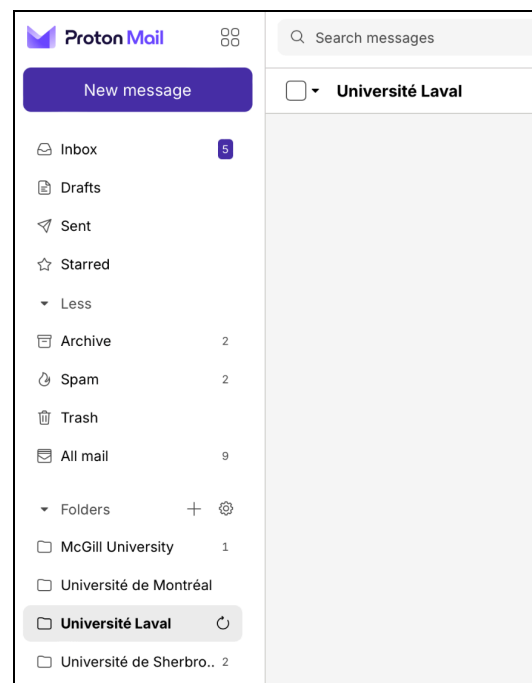
8. COMMUNICATING BEYOND REDCap: PROTON & NextCloud

8.1. Sending emails

We are using **Proton** as an email provider due to its secure and protected communication, which aligns with our priority to protecting patient information (for more information: <https://proton.me/mail/security>).

To access Proton:

1. Visit Proton Mail: <https://proton.me/mail>
2. Click on "Sign In"
3. Enter the email address: info@copri.ca and the password provided to you
4. Access your university-specific folder
 - a. any emails sent to YourUniversity@copri.ca will be found here, while emails sent to the general info@copri.ca will be found in Inbox



8.2. Communicating confidential patient information

The MUHC has a secure sharing system called **NextCloud**. The process of creating spreadsheets will be managed by the central McGill team - a NextCloud spreadsheet will be created for each clinic, and the corresponding links and passwords will be shared with you.

1. A clinic would like to send you patient information for you to add to REDCap and contact
2. Identify the NextCloud link corresponding the clinic
3. Send an email to the clinic containing the link to their specific NextCloud sheet
4. In a separate email, send the password for accessing the NextCloud sheet to ensure security
5. The clinic can add the patient information directly to the NextCloud sheet and you can observe the changes in real time