


How to Use the Consent Tool

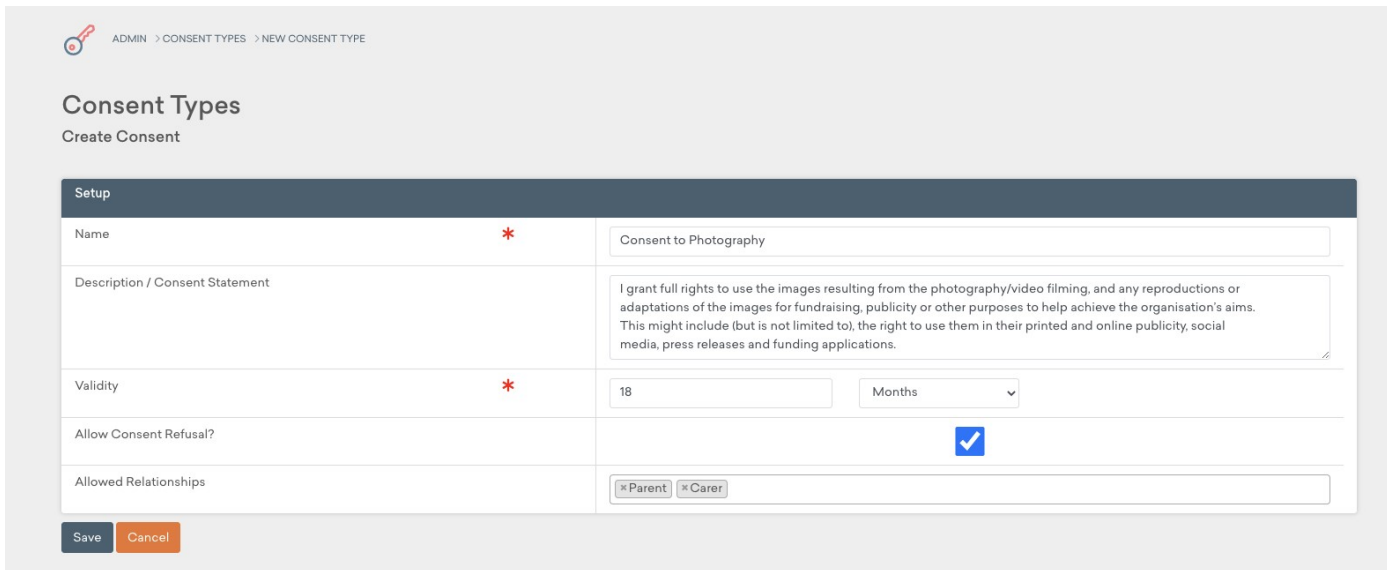
The Consent tool can be used to record and monitor the consent that has been provided by your contacts. You can determine how consent is collected, how frequently this is done and for what purpose. Consent may need to be collected for different types of interaction, such as 'Consent to be Photographed', or for specific projects, such as 'Consent to Attend Climbing Project'. Consent can be collected directly via electronic forms, or it can be collected on paper and then added to the system. The Intelligence area can be used to analyse the consent data that has been recorded.

How to Create a Consent Type

Each type of consent needs to be created in the Administration section:

- Hover over **My Account** and click on **Administration**
- Select **Consent Types** in the **Tools** menu
- Click on the **Plus** icon 
- Enter the **Name** of the consent type and the **Description/Statement** of consent
- In the **Validity** field, specify how long the consent type is valid for. Consent can be valid for a given period from the date collected (e.g. 'expire consent after 18 Months') or it can be valid until a **Specific Date** (e.g. 'expire consent on 01/01/2026')
- In the **Allow Consent Refusal?** field, enter a tick if the consent type can be refused by a person completing an electronic form. If you do not want a person to complete a form if they refuse consent, leave the field blank

- In the **Allowed Relationships*** field, select the types of people that can provide consent for this contact, such as 'Parent' or 'Guardian'. If the consent relationship does not need to be defined, leave the field blank



ADMIN > CONSENT TYPES > NEW CONSENT TYPE


Consent Types

Create Consent


Setup	
Name *	Consent to Photography
Description / Consent Statement	I grant full rights to use the images resulting from the photography/video filming, and any reproductions or adaptations of the images for fundraising, publicity or other purposes to help achieve the organisation's aims. This might include (but is not limited to), the right to use them in their printed and online publicity, social media, press releases and funding applications.
Validity *	18 Months
Allow Consent Refusal?	<input checked="" type="checkbox"/>
Allowed Relationships	<input type="text" value="Parent Carer"/>

Save Cancel

How to Add Consent Relationships

- Hover over **My Account** and click on **Administration**
- Select **Value Lists** from the sections on the left-hand side
- Click on the **Pencil** icon to the right of **Consent Relationship** 




*See the **How to Add Consent Relationships** section for instructions on how to populate this list

- Click on the **Plus** icon 
- Enter a new relationship (e.g. 'Parent') and click **Submit**

Manually Recording Consent

If consent is collected on paper, this can be manually added to a contact:

- Hover over **Contacts** and click on **Participants**
- Click on the name of the relevant person
- Select **Consent** from the sections on the left-hand side
- Click on the **Plus** icon 
- Choose the **Consent Type** and click **Next**
- Enter the details of the consent. In the **Evidence** field, a scanned consent form, or other piece of evidence can be uploaded


Details	
Consent Date *	31/01/2022 
Consent	Yes 
Evidence	<input type="button" value="Choose file"/> Consent to Photography.png
Consented By (person name)	Joe Bloggs
Relationship to Participant	Parent 

- Click **Save**

Recording Consent via External Forms[†]

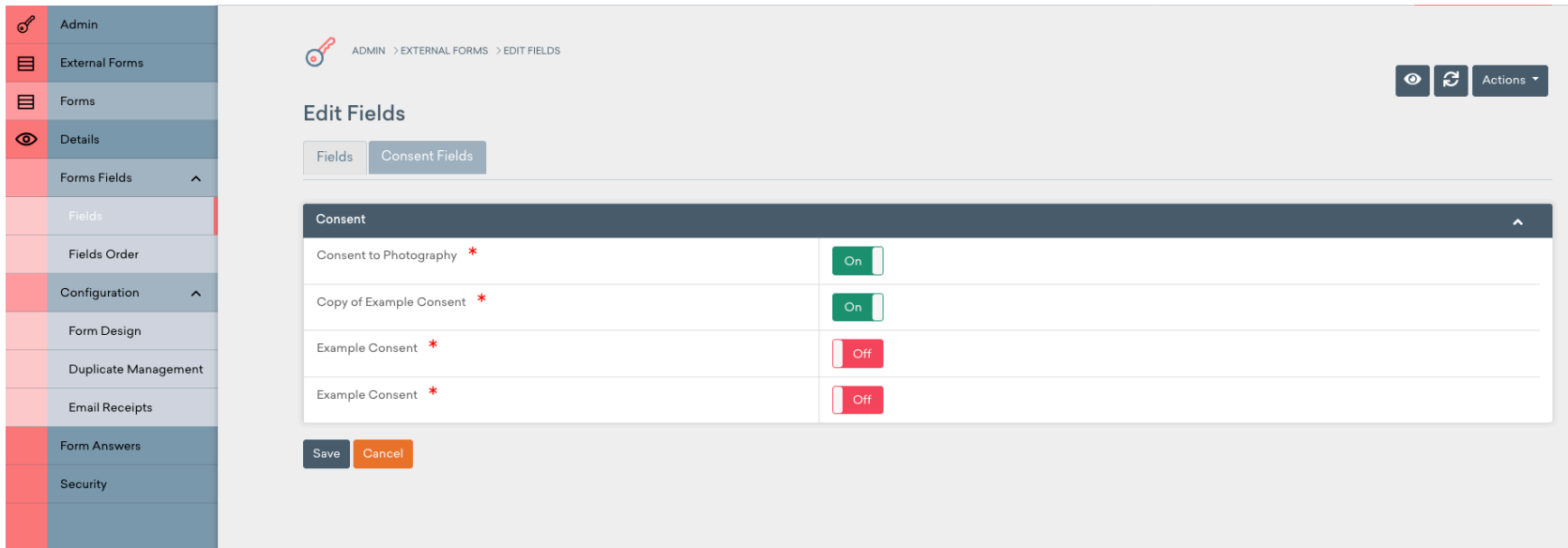
The External Forms tool can be used to create online forms for people to register as a contact on Views. You can review completed forms within your Views account and use these to create new contact records or update existing records. External Forms can also be used to collect consent data for your contacts, including electronic signatures.

To add consent fields to an external form:

- Hover over **My Account** and click on **Administration**
- Select **External Forms** from the sections on the left-hand side
- Click on the **eye** icon directly to the right of the form 

[†] Full details on using the External Forms functionality, including how to create and add styling to forms, can be found in the **How to Use the External Forms Tool** guide, available at <https://www.substance.net/administration-section/>

- Select **Forms Fields - Fields** from the sections on the left-hand side
- Click on the **Consent Fields** tabs from the options at the top of the form
- Select **On** for the Consent types you wish to add to the form
- Click **Save**



Consent	
Consent to Photography *	<input checked="" type="checkbox"/> On
Copy of Example Consent *	<input checked="" type="checkbox"/> On
Example Consent *	<input type="checkbox"/> Off
Example Consent *	<input type="checkbox"/> Off

- The Consent information will be added to the bottom of the external form:

Photographic Consent

Test	
Forename	<input type="text"/>
Surname	<input type="text"/>
Consent	
Consent to Photography *	<p>I grant full rights to use the images resulting from the photography/video filming, and any reproductions or adaptations of the images for fundraising, publicity or other purposes to help achieve the organisation's aims. This might include (but is not limited to), the right to use them in their printed and online publicity, social media, press releases and funding applications.</p> <p>Yes <input type="radio"/> No <input type="radio"/></p> <p>Full name of person providing consent</p> <input type="text"/> <p>Relationship to Participant</p> <input type="text"/> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p><input type="button" value="Clear"/></p>
<input type="button" value="Submit"/>	


Reviewing and Reporting on Consent

To review all instances of consent that have been collected:

- Hover over **Contacts** and select **Consent**
- In the **Filters** box, consent types can be filtered by **Consent Type** and **Consent Date**

- Select the **Eye**  icon to view a consent record, and the **Pencil**  icon to edit


To report on the consent data for specific projects and demographics:

- Hover over **Contacts** and select **Consent**
- Click on the **Plus** icon 
- Enter a **Report Name** and choose the **Consent Types** to include in the report
- Enter at least one **Work** or **Participant** filter to narrow the search to specific projects or demographics
- Click **Save**

All Participants that meet the criteria will be listed. For each **Consent Type**, an icon will be displayed:

 = Consent has been given and has not expired

 = Consent has been collected but refused


 = Consent has been given but expired

 = Consent has not been collected

- Click on an icon to view or edit the consent

Enabling Consent for User Groups

To access Consent, a user needs to belong to a User Group that has the Consent tool enabled. To give a User Group access to the tool:

- Hover over **My Account** and click on **Administration**
- Select **Security** from the sections on the left-hand side
- Select **User Groups** from the sections on the left-hand side
- Click on the **Cog** icon to the right of the relevant User Group 
- In the **Configure** column, set **Consent** as **ENABLED**
- Enter your user password and click **Save**