

# CLINICAL & TRANSLATIONAL SCIENCE INSTITUTE

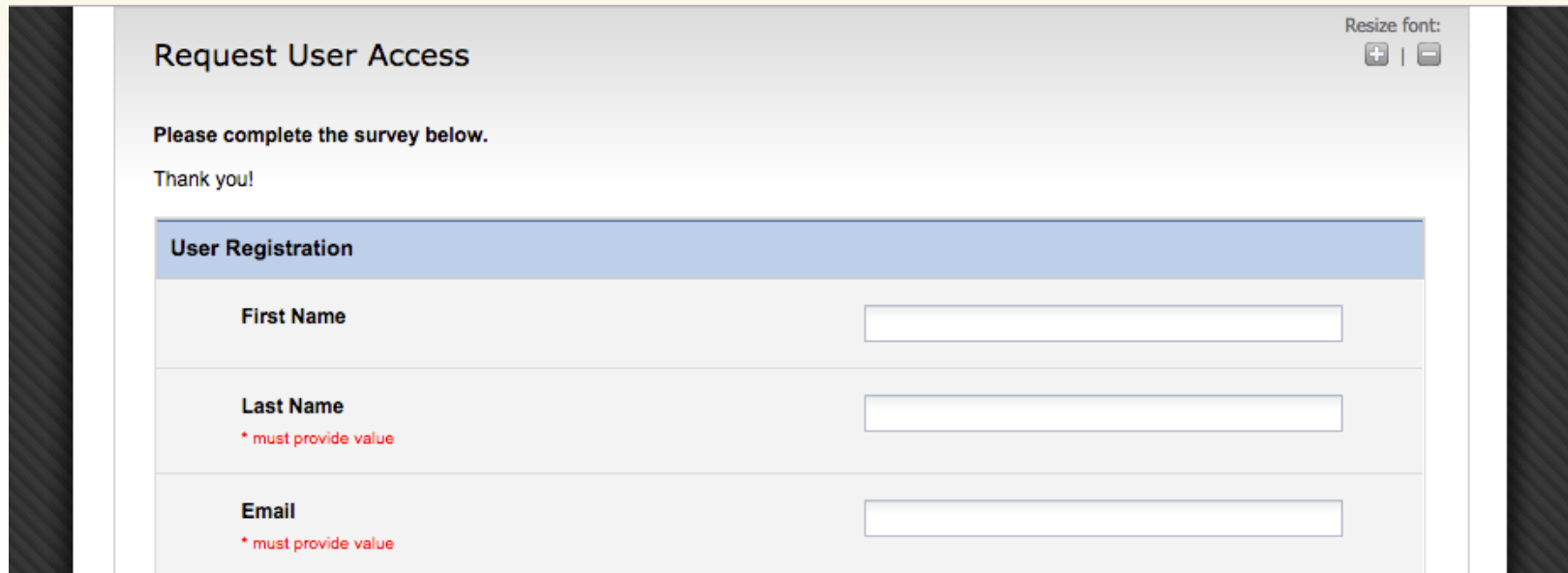
## REDCap Surveys - Advanced Features

# Topics

- Surveys vs Forms
- Creating a Survey
- Survey Settings
- REDCap Shared Library
- Distributing a Survey
- Surveys in Longitudinal Projects
- Automated Survey Invitations
- Survey Queue
- Use Case

# What is a REDCap Survey?

In REDCap, a survey is a version of a data form that is completed by a study participant without logging into the REDCap system



The screenshot shows a web form titled "Request User Access" with a "Resize font:" control in the top right corner. Below the title, there is a message: "Please complete the survey below. Thank you!". The form is divided into a section titled "User Registration" which contains three input fields: "First Name", "Last Name", and "Email". The "Last Name" and "Email" fields have a red asterisk and the text "\* must provide value" below them, indicating they are required.

User Registration	
First Name	<input type="text"/>
Last Name <small>* must provide value</small>	<input type="text"/>
Email <small>* must provide value</small>	<input type="text"/>

# Surveys vs. Data Forms

## Surveys:

- Does not require participant login; data entry is performed by participant
- Can be used for anonymous or personalized data collection
- All completed surveys have a date and timestamp that can be included in reports and exports
- Easier to enter responses from a smartphone or tablet
- Sleek interface that can be customized with logos and instructions
- Configurable automated reminders for participants to complete survey(s)
- Optional notification when survey is completed

# Surveys vs. Data Forms

## Data Collection Forms:

- User must be authorized REDCap user; data entry is performed by study staff
- Each user must be granted access by the project owner
- Users entering data have the ability to see all data they've previously entered, edit previous responses, or check for updates
- Users not only have access to data entry, but all other REDCap features (reports/exports, Training Videos, File Repository, Data Quality checks, etc.)
- Data entry is audited
- User have the ability to give a form a status, marking it as “complete” or “incomplete” depending on what is most useful for workflow

# Creating a Survey

1. Within the Project Setup Checklist make sure your project is enabled for surveys

**Main project settings**

Enable  Use longitudinal data collection with repeating forms?

Enable  Use surveys in this project? ? [VIDEO: How](#)

2. Create the data form
3. Enable the data form as a survey within Online Designer

**Data Collection Instruments**

Survey Queue Survey Login Survey Notifications

Instrument name	Fields	View PDF	Enabled as survey
Baseline	1		<input type="button" value="Enable"/>

# Survey Settings (1 of 2)

## Survey Status:

- Active or Offline

## Survey Design Options:

- Logo
- Survey instructions –
- can use piping

## Survey Customizations:

- Question Numbering
- All on one page / One section per page using Section Headers
- Required Fields – option to display **\*must provide value**
- Aggregate Results
- Text-to-speech

The screenshot shows the 'Modify survey settings' interface for a data collection instrument named 'Pre-Screening Survey'. The interface includes a navigation bar with tabs for 'Project Setup', 'Online Designer', 'Modify survey settings' (selected), and 'Edit project settings in Control Center'. Below the navigation bar, a message states: 'You may edit the survey's basic information by modifying the fields below and clicking the Save Changes button.' The main content area is titled 'Modify survey settings for data collection instrument "Pre-Screening Survey"' and includes a 'Cancel' button. The 'Survey Status' section shows 'Survey Active' with a green checkmark and a dropdown arrow, with a note: 'If offline, respondents will not be able take the survey.' The 'Survey Design Options' section includes three fields: 'Survey Title' (set to 'Pre-Screening Survey'), 'Logo' (with a 'Choose File' button and a note: 'No file chosen'), and 'Survey Instructions' (with a text area containing 'Dear [first\_name] [last\_name], Thank you for your participation in this research study. Please complete the survey below.').



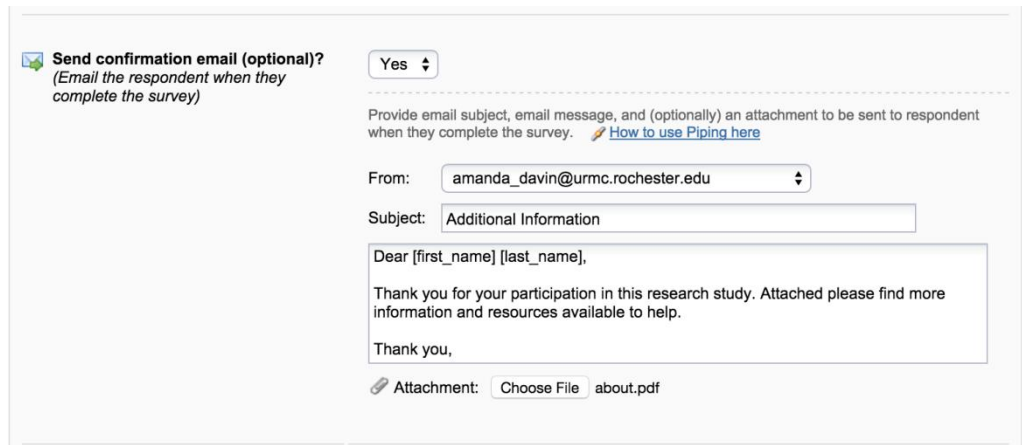
# Survey Settings (2 of 2)


## Survey Access:

- Expiration date and time
- Save and Return Later
  - Also, ability to return and modify a completed response

## Survey Termination Options:

- Auto-continue on to next survey – link surveys together
- Redirect to URL or Survey completion text
- Confirmation email



 **Send confirmation email (optional)?**  
*(Email the respondent when they complete the survey)*

Yes ▾

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Provide email subject, email message, and (optionally) an attachment to be sent to respondent when they complete the survey. [How to use Piping here](#)


From:

Subject:

Dear [first\_name] [last\_name],

Thank you for your participation in this research study. Attached please find more information and resources available to help.

Thank you,

 Attachment:  about.pdf



# REDCap Shared Library (1 of 2)

Repository for REDCap forms that can be used by researchers at REDCap partner institutions

Newer features - PROMIS, Adaptive Tests, Auto Scoring Instruments

Project Setup

Online Designer

Data Dictionary

[Edit project settings in Control Center](#)

[VIDEO: How to use this page](#)

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

**Data Collection Instruments**

**Survey options:**

- Survey Queue
- Survey Login
- Survey Notifications

**Add new instrument:**

- Create a new instrument from scratch
- Import a new instrument from the official [REDCap Shared Library](#)
- Upload instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Pre-Screening Survey	5			Choose action	Survey settings + Automated Invitations
Participant Info Survey	9			Choose action	Survey settings + Automated Invitations
Participant Morale Questionnaire	6			Choose action	Survey settings + Automated Invitations
Completion Data (to be entered by study personnel only)	7		Enable	Choose action	

# REDCap Shared Library (2 of 2)

- **[Adaptive Instrument]** indicates that the instrument is adaptive with scoring, and can only be implemented in survey format as one question at a time.
- **[Auto-Scoring Instrument]** indicates that the instrument contains scoring that is automatically performed and saved after being completed. The instrument is static (not adaptive), and can only be implemented in survey format as one question at a time.

## Subject Survey View:

Neuro-QOL Ped SF v1.0 - Anxiety

Please complete the survey below.  
Thank you!

In the past 7 days  
I felt afraid to go out alone

Never  
 Almost Never  
 Sometimes  
 Often  
 Almost Always

Next Page >>

Acknowledgment: David Cella, Assessment Center™, and the PROMIS Health Organization on behalf of the National Institute for Neurological Disorders and Stroke (NINDS) View full acknowledgment

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## Add/Edit Records:

**Auto-scoring Instrument**  
This instrument is an auto-scoring instrument. It can only be taken in survey form, and all fields below are thus permanently locked and uneditable.

**FINAL RESULTS**

T-score: 61.7

Standard Error: 2.1

**NQEMNped22**

In the past 7 days  
I felt afraid to go out alone

Never  
 Almost Never  
 Sometimes  
 Often  
 Almost Always


**NQEMNped23**


# Distributing the Survey (1 of 2)


## Public Survey Link

- Publish to a website or send via email
- Anonymous (unless the survey asks for identifying data from the participant)
- **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be desired in some cases

### Manage Survey Participants


 Public Survey Link

 Participant List


 Survey Invitation Log


Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

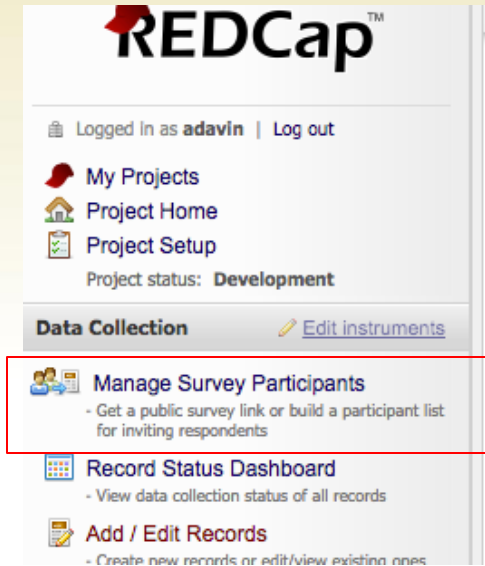
To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey. [Get shorter survey link](#) or [Get embed code to place link on a webpage](#).

Public Survey URL:  

 Open public survey




 Send me URL via email

 Survey Access Code or  QR Code




**REDCap™**


Logged in as **adavin** | Log out


-  My Projects
-  Project Home
-  Project Setup

Project status: **Development**

**Data Collection** [Edit instruments](#)

 **Manage Survey Participants**  
- Get a public survey link or build a participant list for inviting respondents

 **Record Status Dashboard**  
- View data collection status of all records


 **Add / Edit Records**  
- Create new records or edit/view existing ones

# Distributing the Survey (2 of 2)


## Participant List

- Sends customized email to participants in list
- Participant can complete survey one time
- Configurable reminders
- Tracks responses
- Option to identify responses
- Use Survey Invitation Log to view invitations that have been sent or are scheduled to be sent

### Manage Survey Participants

 Public Survey Link

 Participant List




 Survey Invitation Log








The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Unless an Identifier is used, all survey responses collected are considered anonymous. [More details](#)

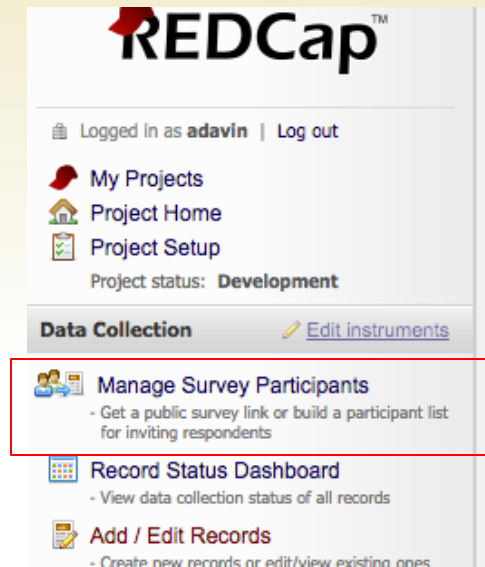
Participant List belonging to [Initial survey] "Pre-Screening Survey" - Initial Data

Remove all participants

Displaying 1 - 2 of 2


 Add participants  Compose Survey Invitations  Export list


Email	Participant Identifier <input type="checkbox"/> Enable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
amanda_davin@urmc.rochester.edu (ID 1)	Disabled		-		-	-	
carrie_irvine@urmc.rochester.edu	Disabled		-				




REDCap™


Logged in as **adavin** | Log out


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# Surveys in Longitudinal Projects

## Design:

The project may have a mixture of surveys and/or data entry forms.

## Notes:

- If the first instrument is a survey, add the list of email addresses to the participant list. Send the survey invitation from the 'Participant List' section or by defining an automated invitation.
- If the first instrument is a data entry form, create a text field with validation = email in the first instrument to enter the email address of participants. In project setup, designate the email field to use for invitations to survey participants.

**Enable optional modules and customizations**

Optional

I'm done!

Disable	<input checked="" type="checkbox"/>	Auto-numbering for records ?
Enable	<input type="checkbox"/>	Scheduling module (longitudinal only) ?
Enable	<input type="checkbox"/>	Randomization module ?
Disable	<input checked="" type="checkbox"/>	Designate an email field to use for invitations to survey participants ? Field currently designated: pemail ("P. email")

Additional customizations



# Automated Survey Invitations

The survey invite is sent automatically when either...

- A earlier survey is completed, -or-
- An expression is satisfied (i.e., the value of one or more fields on data forms/surveys satisfies the entered expression)

The screenshot shows a web-based configuration interface for automated survey invitations. The window title is "Define Conditions for Automated Survey Invitations".

**Info:** Survey title: Patient Morale Questionnaire; Event: Week 1.

**STEP 1: Compose message**

From: amanda\_davin@urmc.rochester.edu (select any project user to be the 'Sender')

To: [All participants who meet the conditions defined]

Subject: Patient Morale Questionnaire

Message body: <b>Dear [first\_name] [last\_name],</b> Below you will find the link for the Patient Morale Questionnaire. <i>Please reply to this email if you have any questions.</i> Thank you, Studv Staff

**NOTE:** The survey link will be automatically included in the email message. You may use HTML formatting in the email message: <b> bold, <u> underline, <i> italics, <a href="..."> link, etc. [How to use Piping in the survey invitation](#)

**STEP 2: Conditions**

Specify conditions for sending invitations:

- When the following survey is completed: "Follow-Up Survey" - Initial Data
- AND
- When the following logic becomes true: [consent]="1" (e.g., [enrollment\_arm\_1][age] > 30 and [enrollment\_arm\_1][gender] = "1") [How do I use special functions?](#)
- Ensure logic is still true before sending invitation? [?](#)

**STEP 3: When to send invitations AFTER conditions are met**

- Send immediately
- Send on next -- select day -- at time H:M
- Send after lapse of time: 7 days 0 hours 0 minutes
- Send at exact date/time: M/D/Y H:M

**OPTIONAL: 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 Monday at time 08:00 H:M
- Send every 0 days 0 hours 0 minutes
- Send at exact date/time:

Buttons: Save, Cancel

Configurable on Online Designer page

# Survey Queue (1 of 2)

Used for sending one invitation for multiple surveys. Participants see a “to-do” list of surveys they need to complete.

Surveys will appear in the Survey Queue if:

1. The participant has completed a particular survey, and/or
2. Certain conditions are met

The screenshot shows a web interface titled "Set up Survey Queue". It includes a header with a menu icon and the title. Below the header is a descriptive paragraph: "The Survey Queue displays a list of your surveys to a participant all on a single page, in which the queue comprises all surveys that are to be completed (like a 'to-do' list) as well as the surveys that the participant has already completed. [Tell me more](#)".

Below the text is a green link: "Add custom text to display at top of survey queue".

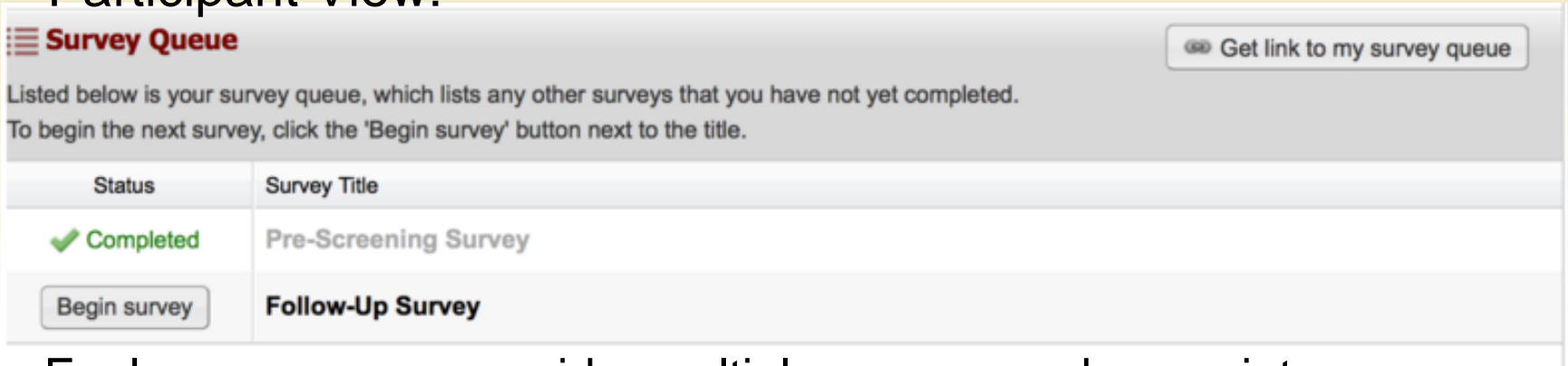
The main content is a table with four columns: "Activated?", "Survey Title", "Display survey in the Survey Queue when...", and "Auto start?".

Activated?	Survey Title	Display survey in the Survey Queue when...	Auto start?
<b>Initial Data</b>			
<input checked="" type="checkbox"/> Activated <a href="#">Deactivate</a>	"Participant Info Survey" - Initial Data	<input type="checkbox"/> When the following survey is completed: --- select a survey --- <b>AND</b> : <input checked="" type="checkbox"/> When the following logic becomes true: <a href="#">How to use this</a> <code>[e.g., [enrollment_arm_1][age] &gt; 30 and [enrollment_arm_1][gender] = "1"]</code> <small>(e.g., [enrollment_arm_1][age] &gt; 30 and [enrollment_arm_1][gender] = "1")</small>	<input type="checkbox"/>
<b>Week 1</b>			
<input checked="" type="checkbox"/> Activated <a href="#">Deactivate</a>	"Patient Morale Questionnaire" - Week 1	<input checked="" type="checkbox"/> When the following survey is completed: "Participant Info Survey" - Initial Data <b>AND</b> : <input checked="" type="checkbox"/> When the following logic becomes true: <a href="#">How to use this</a> <code>[initial_data_arm_1][consent]="1"</code> <small>(e.g., [enrollment_arm_1][age] &gt; 30 and [enrollment_arm_1][gender] = "1")</small>	<input checked="" type="checkbox"/>
<b>Week 2</b>			



# Survey Queue (2 of 2)

## Participant View:



**Survey Queue** [Get link to my survey queue](#)

Listed below is your survey queue, which lists any other surveys that you have not yet completed. To begin the next survey, click the 'Begin survey' button next to the title.

Status	Survey Title
✓ Completed	Pre-Screening Survey
<a href="#">Begin survey</a>	Follow-Up Survey

- For long surveys – consider multiple surveys and group into survey queue, with the auto-start option: surveys will appear to participants as one survey only. Advantages: data will be saved at the completion of each survey; there will be less chance to lose data in case of poor Internet connection.
- Survey queues may also be used as ‘branching logic’ at a survey level. For example, if there is a set of questions that are specific to a given gender, instead of adding a branching logic to each question, create a survey with this set of questions only and specify the condition in the survey queue e.g. [gender] = “1”.

# Use Case

Classic project with mix of surveys and data entry forms.

Instrument Name	Type	Comments
Demographics	Data Form	Contains email type field to capture subject's email address
Screening	Survey	Triggered when email is entered on Demographics form
Consent	Survey	Survey Queue - displayed when screening is complete and if eligibility criteria are met
Initial Data	Survey	Survey Queue – displayed if consent is completed and subject has provided consent
Randomization	Data Form	
Follow up	Survey	Automated Invite sent 6 months after Initial Data is completed and if subject is randomized