

# Working with REDCap Surveys

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# What Questions We Will Attempt to Answer Today?

- What makes surveys different from other REDCap data forms?
  - How do I make a data form into a survey?
  - When would I use a survey?
  - How do I get participants to take a survey?
  - How do I manage survey invitations and responses?
  - How do I customize surveys to handle special situations?
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# Agenda

- **What is a Survey in REDCap?** 
  - Creating Surveys
  - Survey Use Cases
  - Survey Invites
  - Survey Configuration
  - Authenticating Participants
  - Survey Responses
  - Survey Queue
-

# What is a REDCap Survey?

**Definition:** A **survey** is an investigation about the characteristics of a given population by means of collecting data from a sample of that population and estimating their characteristics through the systematic use of **statistical** methodology. Context:

OECD Glossary of Statistical Terms - Survey Definition

<https://stats.oecd.org...> Organisation for Economic Co-operation and Develo... ▼

- In REDCap a survey is a version of a data form that is completed by a study participant without logging into the REDCap system
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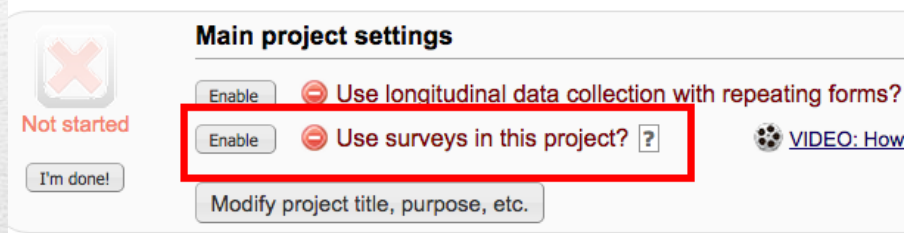
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- **Creating Surveys**
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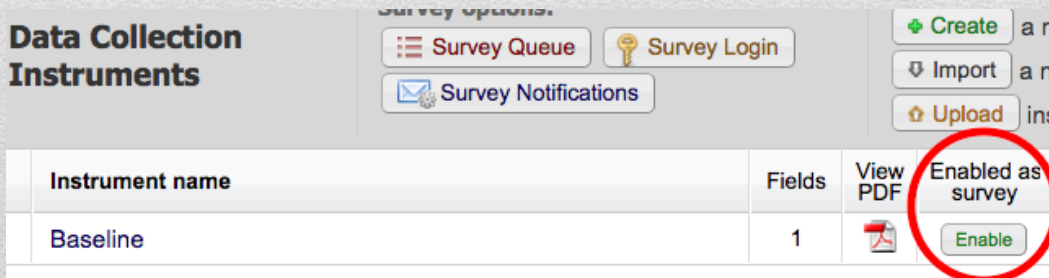
# Creating a Survey

1. Make sure project is enabled for surveys (from [Project Setup](#))
  - Requires the Project Design & Setup permission



The image shows the 'Main project settings' interface. On the left, there is a red 'X' icon and the text 'Not started' in red, with a button 'I'm done!'. The main area has a title 'Main project settings' and two toggle switches. The first toggle is labeled 'Enable' and is followed by the text 'Use longitudinal data collection with repeating forms?'. The second toggle is also labeled 'Enable' and is followed by the text 'Use surveys in this project?'. This second toggle and its text are highlighted with a red rectangle. To the right of the second toggle is a question mark icon and a link 'VIDEO: How'. At the bottom, there is a button 'Modify project title, purpose, etc.'.

2. Create the data form
3. Enable the data form as a survey (from [Edit instruments](#))



The image shows the 'Data Collection Instruments' interface. On the left, there is a section titled 'Data Collection Instruments'. To the right, there are buttons for 'Survey Queue', 'Survey Login', and 'Survey Notifications'. Further right, there are buttons for 'Create', 'Import', and 'Upload'. Below these buttons is a table with the following columns: 'Instrument name', 'Fields', 'View PDF', and 'Enabled as survey'. The first row of the table has the value 'Baseline' in the 'Instrument name' column, '1' in the 'Fields' column, and a PDF icon in the 'View PDF' column. The 'Enabled as survey' column for the 'Baseline' row has a green 'Enable' button, which is circled in red.

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



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# Survey Use Cases

**(or what are you trying to accomplish?)**

Ways to use surveys...

1. Survey unknown people
  2. Recruit unknown people to be participants in a study
  3. Survey/recruit from a pool of know participants
  4. Survey existing study participants (e.g., for follow-up)
-



# Survey Use Cases

**(or what are you trying to accomplish?)**

Ways to use surveys...

- 1. Survey unknown people**

- Create survey as the only instrument in project and advertise the anonymous survey URL

2. Recruit unknown people to be participants in a study

3. Survey/recruit from a pool of know participants

4. Survey existing study participants (e.g., for follow-up)



# Survey Use Cases

**(or what are you trying to accomplish?)**

Ways to use surveys...

1. Survey unknown people
  - 2. Recruit unknown people to be participants in study**
    - Create survey as first instrument in project and advertise the anonymous survey URL
  3. Survey/recruit from a pool of know participants
  4. Survey existing study participants (e.g., for follow-up)
-



# Survey Use Cases

**(or what are you trying to accomplish?)**

Ways to use surveys...

1. Survey unknown people
  2. Recruit unknown people to be participants in a study
  - 3. Survey/recruit from a pool of know participants**
    - Invite pts to survey via one of the following...
      - a) Potential Participant list (ppl) with survey as first instrument
      - b) Enter ppl contact info into first instrument. Survey is 2<sup>nd</sup> instrument
      - c) Import ppl contact info into first instrument. Survey is 2<sup>nd</sup> instrument
  4. Survey existing study participants (e.g., for follow-up)
-

# Survey Use Cases

**(or what are you trying to accomplish?)**

Ways to use surveys...

1. Survey unknown people
  2. Recruit unknown people to be participants in a study
  3. Survey/recruit from a pool of know participants
  - 4. Survey existing study participants (e.g., for follow-up)**
    - Collect email address/text phone number via an instrument
    - Invite pts to follow-up survey via email invite
-



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# Survey Invites

- Public Survey Link
  - Participant Lists
  - Compose Survey Invitations
  - Automated Survey Invites
-




# Public Survey Link

**Different ways to copy public URL**

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:

<https://cdsweb07.fhcrc.org/redcap/surveys/?s=DJAF...>

 Copy to clipboard



Open public survey



Send me URL via email



Survey Access Code or  QR Code

**Start survey immediately (testing)**

**Get generic survey URL + code –or- QR code**

# What is a Participant List?

- A useful oddity of REDCap
  - A way to define a list of potential participants to invite to a survey
  - But, the participant list data is kept separate from the actual data in the project
  - The participant list data is only used for inviting people to take a survey
-



# Adding Participants to Participant List

1. **Add** email addresses directly into the participant list
    - Or cut and paste into the box
  2. **Designate an email field** (text box field with validate = email) on another instrument to funnel participants into participant list as data is collected and either...
    - a) Enter data into this instrument
    - b) Import data into this instrument
-

# Creating Survey Invitations

1. At Participant List tab, first **select the survey**
  2. Click **Compose Survey Invitations**
    - a) When should the emails be sent
      - Now or at specific date/time
    - b) Enable reminders
      - Only used if pt doesn't respond
    - c) Compose message
      - Remember to **select correct From Email** address
      - Can use piping to customize message
      - Survey link will be automatically added to end of message
    - d) Select participants
  3. Click **Send Invitations**
-



[Send Invitations](#) [Cancel](#)

# Creating Survey Invitations

- Example Projects
    - Paul Survey Tracked – Public Survey
      - Participants added to Pt List via designated email on survey
    - Paul Survey Tracked - Pt List
      - Participants manually added or pasted into Pt List
    - Paul Survey Tracked - Designated Email
      - Participants added to Pt List via designated email on data form –or– when data imported into form
-



# Automated Survey Invites (ASIs)

- Instead of the emails being sent at a specific date/time in batches (based on current participants in pt list), they occur automatically when either...
    - A earlier survey is completed, and/or
    - An expression (calculation based on collected fields) is satisfied
  - Perfect for rolling enrollment scenarios or follow-up surveys
  - Click **Automated Invitations** at **Edit Instruments** screen (to right of survey for which to send invite under Survey-related options )
-

# Automated Survey Invites (ASIs)

### Define Conditions for Automated Survey Invitations

**Instructions:** In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. [Tell me more](#)

**Info**  
**Survey title:** RED Lip Participation Survey

**STEP 1: Compose message**  
 From:  (select any project user to be the "Sender")  
  
 To: [All participants who meet the conditions defined]  
  
 Subject:   
  

Dear [first\_name],  
  
 Please take the foo survey.  
  
 Etc.

**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:  

-- select a survey --

  
AND  
☒ When the following logic becomes true:  

[email\_address] != ""

  
(e.g., [age] > 30 and [gender] = "1")  
[How do I use special functions?](#)  
 Test logic with a record: -- select record --  
☐ 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: days hours 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?

**STEP 4: Activated?**  
 Activate these automated invitations? In order for automated survey invitations to be sent using these specified conditions, it must be set to Active. You may make them Not Active (and vice versa) at any point in the future.  
☒ Active ☐ Not Active



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# Survey Settings (1 of 2)

- Numerous settings, including...
    - Survey Status (Survey Active/Survey Offline)
    - Survey Title/Instructions – displayed at top of survey
    - Other design options (logo, theme, font, enhanced buttons and checkboxes, etc.)
    - Survey Customizations
      - Question numbering
      - Question display format (All on one page; One section per page)
      - Allow participants to download PDF of their responses
      - Display "must provide value" for required fields
      - Allow survey respondents to view aggregate survey results
-



# Survey Settings (2 of 2)

- Numerous settings, including...
    - Survey Access
      - Response limit – limit total # of responses
      - Time limit – total time respondent has to complete survey in days/hours/minutes
      - Survey expiration – absolute date/time expiration
      - Allow "save & return later"
    - Survey Termination Options
      - One of the following:
        - Auto-continue to next survey – simple alternative to survey queue
        - Redirect to a URL
        - Survey completion text
      - Send confirmation email
-



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# Authenticating Participants

- From Edit Participants screen, click **Survey Login**

 **Survey Login** 


You may enable a Survey Login page on one or more surveys that will force your survey respondents to authenticate (log in) on your surveys before they are allowed to view and complete the survey. [Tell me more](#)

Below, select the fields that you wish to serve as the login fields for the respondent to enter, as well as several other settings that control how the survey login is applied to the surveys in your project. NOTE: Once a respondent has logged in to a survey, they will not be prompted to enter their login credentials again if they return to that survey or begin another survey using the survey login within the following 30 minutes.

 <b>Enable Survey Login?</b>	Enabled 
<b>Fields to display on the survey login form</b>	
<b>Login field #1</b> <a href="#">Add another login field</a>	dob "What is your date of birth?" 
<b>Customizations for survey login</b>	
<b>Minimum number of fields above that are required for login</b>	1 
<b>Apply the survey login to all surveys in project?</b>	All surveys 
<b>Custom error message: Provide a custom error message that will be displayed on the survey login form for when the user experiences issues, such as not being able to log in successfully, so that they may contact you for help.</b>  EXAMPLE: "If you have any trouble logging in to the survey, please contact <a href="mailto:survey_admin@myinstitution.edu">survey_admin@myinstitution.edu</a> for help."	<div>Please enter your correct date of birth to continue.</div> <div>HTML may be used in order to add links or to add style to text.</div>
<b>Security settings for survey login (optional)</b>	


Save Cancel

# Starting Survey with Login


 **Survey Login** x

Survey title: **"Followup Survey"**

Before beginning or continuing this survey, you must first log in by successfully entering the correct values below. **You must successfully enter a value for the field below.** Please note that the login is \*not\* case sensitive.

 **ERROR:** The login was not successful because the value entered was not correct. Try again.  
Please enter your correct date of birth to continue.

What is your date of birth?

 M-D-Y

You will need to re-enter this value on the follow-up survey

Log In



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# Multi-Page Surveys

- On **Survey Settings**, under **Question Display Format**, select **One section per page (multiple pages)**
  - **Partial responses** are saved when user navigates past page one without completing the survey
-





# Editing Responses

- User must have **Edit Survey Responses** permission for each survey they wish to edit
  - Then to edit a response, open data form from Record Status Dashboard and click **Edit Response** at top of survey
-




# Survey Notifications

*Notifying study staff when survey is completed*




- ❑ On **Edit Instruments**, click **Survey Notifications**
- ❑ Select email for each user to be notified for each survey

 **Email notifications for survey responses** 

If you or other users wish to be notified via email every time a participant completes a survey, select the users to be notified under each survey listed below by selecting their email address in the user's drop-down list, which may contain each user's primary, secondary, or tertiary email address for their REDCap account. To remove a user as a recipient for the survey notifications, change their email drop-down option to 'not selected', after which they will no longer receive notification emails for that survey.

Public Survey	 Recipient email address	Notifications Enabled
plitwin (Paul Litwin)	plitwin@fhcrc.org (Primary) 	

Follow-up Survey	 Recipient email address	Notifications Enabled
plitwin (Paul Litwin)	-- not selected -- 	

Close



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# Survey Queue

- Survey packaging option. Allows for chaining together multiple surveys using optional logic
- On **Edit Instruments**, click **Survey Queue**

### Set up Survey Queue

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](#)

[Add custom text to display at top of survey queue](#)

Activated?	Survey Title	Display survey in the Survey Queue when...	Auto start?
<div> Activated <a href="#">Deactivate</a></div>	Followup Survey	<div><input type="checkbox"/> When the following survey is completed: --- select a survey ---</div> <div>AND</div> <div><input checked="" type="checkbox"/> When the following logic becomes true: <a href="#">How to use this</a> [email_address] &lt;&gt; " (e.g., [age] &gt; 30 and [gender] = "1")</div>	<input type="checkbox"/>
<div> Activated <a href="#">Deactivate</a></div>	Female Questionnaire	<div><input checked="" type="checkbox"/> When the following survey is completed: "Followup Survey"</div> <div>AND</div> <div><input checked="" type="checkbox"/> When the following logic becomes true: <a href="#">How to use this</a> [gender] = 1 (e.g., [age] &gt; 30 and [gender] = "1")</div>	<input type="checkbox"/>
<div> Activated <a href="#">Deactivate</a></div>	Male Questionnaire	<div><input checked="" type="checkbox"/> When the following survey is completed: "Followup Survey"</div> <div>AND</div> <div><input checked="" type="checkbox"/> When the following logic becomes true: <a href="#">How to use this</a> [gender] = 2 (e.g., [age] &gt; 30 and [gender] = "1")</div>	<input type="checkbox"/>

[Save](#) [Cancel](#)

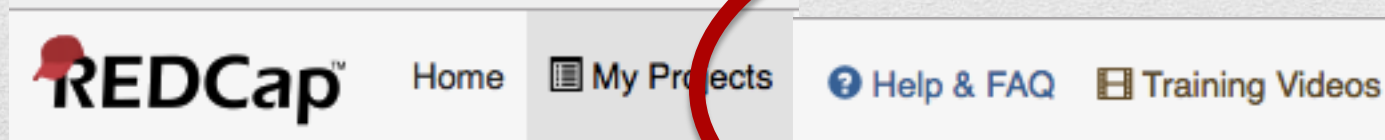


# What Have We Learned Today?

- What makes surveys different from other REDCap data forms?
  - How do I make a data form into a survey?
  - Different use cases for survey usage
  - How do I get participants to take a survey?
  - How do I manage survey invitations and responses?
  - How do I customize surveys to handle special situations?
-

# Training & Docs

- Right within REDCap...
  - Note: you must close any project and go to the Home or My Projects tab





# More Information

- Visit <http://redcap.fredhutch.org>
  - Or email [redcap@fredhutch.org](mailto:redcap@fredhutch.org)
  - Also...
    - <http://project-redcap.org> (Vanderbilt REDCap site)
-

# Thank you

