


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?
-

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/...)

<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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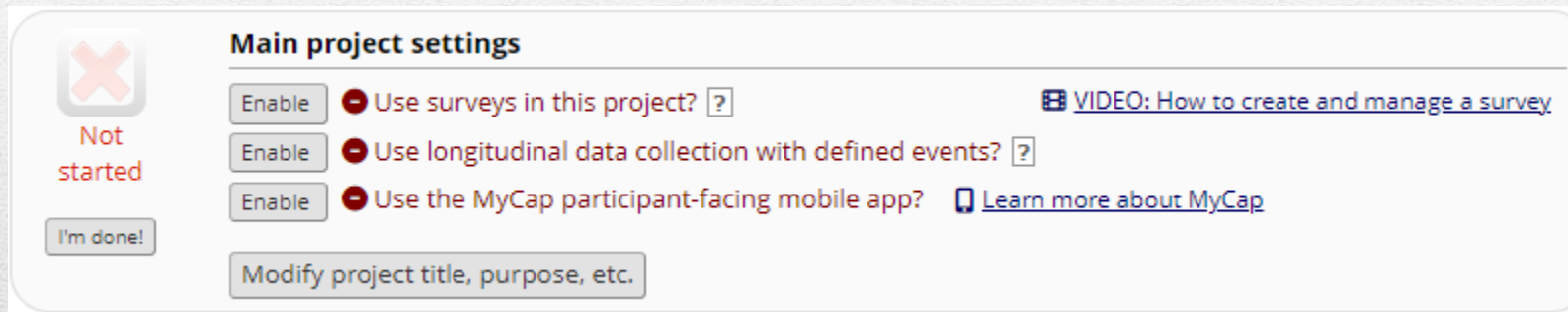
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- What is a Survey in REDCap?
- **Creating Surveys**
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Creating a Survey

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



Main project settings

Enable Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

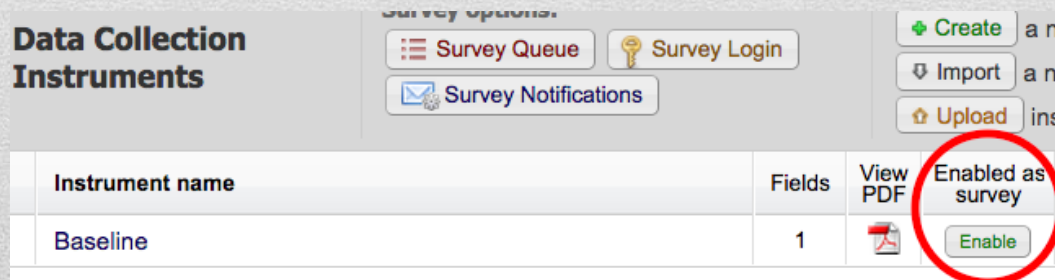
Enable Use longitudinal data collection with defined events? [?](#)

Enable Use the MyCap participant-facing mobile app? [Learn more about MyCap](#)

[I'm done!](#)

[Modify project title, purpose, etc.](#)

3. Enable the data form as a survey (from [Online Designer](#))



Data Collection Instruments

Survey options: [Survey Queue](#) [Survey Login](#) [Survey Notifications](#) [Create](#) [Import](#) [Upload](#)

Instrument name	Fields	View PDF	Enabled as survey
Baseline	1		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 known 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 2nd instrument
 - c) Import ppl contact info into first instrument. Survey is 2nd 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


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.



Public Survey URL: 


Protect the public survey using the Google reCAPTCHA feature 




Link Actions


 Open public survey


 Open public survey +  Log out


 Send me URL via email

 Survey Access Code or  QR Code

Link Customizations

 Get Short Survey Link

 Create Custom Survey Link

 Get Embed 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, each email address must be on a new line
 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**
-



Creating Survey Invitations

 **Send a Survey Invitation to Participants** ✕


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

 **When should the emails be sent?**


Immediately

At specified time:   M/D/Y H:M

The time must be for the time zone America/Los_Angeles, in which the current time is 02/21/2018 09:59.

 **Enable reminders**

Re-send invitation as a reminder if participant has not responded by a specified time?

 **Compose message**

From: ▼

To: **[All participants selected from Participant List]**

Subject:

[Send test email](#)











NOTE: The survey link will be automatically included in the email message.

You may use HTML formatting in the email message: bold, <u> underline, <i> italics, link, etc.

[How to use Piping in the survey invitation](#)

Load message box with text from a previous email?

Participant List Actions: -- check/uncheck participants --
(those who have not responded completely)

<input type="checkbox"/>	Email (4 selected)	Participant Identifier	Scheduled?	Sent?	Responded?
<input checked="" type="checkbox"/>	paul@thelitwin.com (ID 3)		-		
<input checked="" type="checkbox"/>	1) paul@thelitwins.com (ID 2)		-		
<input checked="" type="checkbox"/>	plitwin@fhcrc.org (ID 8)		-		
<input checked="" type="checkbox"/>	1) plitwin@fredhutch.org (ID 1)		-		
<input type="checkbox"/>	4) plitwin@fredhutch.org (ID 10)		-		

Creating Survey Invitations

- Example Projects
 - RC202 Survey – Survey unknown people
 - Participants anonymously surveyed
 - RC202 Survey – Survey/recruit from a pool using ppl
 - Participants surveyed using participant list
 - RC202 Survey – Survey/recruit from a pool using instrument
 - 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...
 - An 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 (ASI)

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](#)

Activate automated invitations for this survey?

Survey title: "REDCap Participation Survey" [Foo Survey]

"Active" must be selected in order for automated survey invitations to be triggered and sent using the conditions specified in this popup. You may make it Not Active (and vice versa) at any point in the future. [?](#)

Active Not Active


STEP 1: Compose message

From: [▼](#)
(select any project user to be the "Sender")

To: **[All participants who meet the conditions defined]**

Subject:

[Send test email](#)

Open Sans [▼](#) Paragraph [▼](#) 10pt [▼](#) **B** *I* U ~~S~~ **A** [▼](#)  [▼](#)

Dear [first_name],

Please take the foo survey.

Etc.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:
[survey-url]

This link is unique to you and should not be forwarded to others.

NOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.

[How to use Piping in the survey invitation](#)

Reminder: Never pipe private info (e.g., PII, PHI) into emails.

STEP 2: Conditions

Specify conditions for sending invitations:

When the following survey is completed:

AND [▼](#)

When the following logic becomes true:

(e.g., [age] > 30 and [sex] = "1")

[How do I use special functions?](#)

Test logic with a record:

Ensure logic is still true before sending invitation? [?](#)

[How to use "stop logic" to disable an automated invite](#)

STEP 3: When to send invitations AFTER conditions are met

Send immediately

Send on next at time H:M

Send the invitation after time lapse of 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?

Save

Save & Copy to...

Cancel

ASI Example

- RC202 Survey - ASI
-

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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
-

Multi-Page Surveys

- On **Survey Settings**, under **Pagination**, select **Multiple pages (display one section per page)**
- Option to display page numbers at the top of each survey page
- Option to hide “<< Previous Page” button
- **Partial responses** are saved when user navigates past page one without completing the survey
- Example project: **RC202 Survey - Multi-page survey**



Pagination

One page or multiple pages? Section headers, which begin new sections on the instrument, will serve as the page break in a multi-page survey, in which each page will begin with a section header.

Multiple pages (display one section per page) ▾

- Display page numbers at top of survey page
- Hide the 'Previous Page' button (i.e., Back button) on the survey page (prevents respondents from going back to previous pages)

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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.

Enable Survey Login?	Enabled
Fields to display on the survey login form	
Login field #1 Add another login field	dob "What is your date of birth?"
Customizations for survey login	
Minimum number of fields above that are required for login	1
Apply the survey login to all surveys in project?	All surveys
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. EXAMPLE: "If you have any trouble logging in to the survey, please contact survey_admin@myinstitution.edu for help."	Please enter your correct date of birth to continue. HTML may be used in order to add links or to add style to text.
Security settings for survey login (optional)	


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

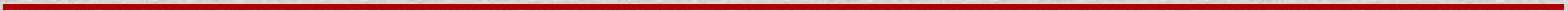
Log In 

Authenticating Example

- RC202 Survey - Survey Login
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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 **Online Designer**, click **Survey Notifications**
 - ❑ Select email for each user to be notified for each survey
 - ❑ Example Project: **RC202 Survey – Multi-page 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
rmerrill (Ryan Merrill)	rmerrill@fredhutch.org (Primary) ▼	✔
Follow-up Survey	✉ Recipient email address	Notifications Enabled
rmerrill (Ryan Merrill)	-- not selected -- ▼	○

Close

For more sophisticated alerting needs you can use *Alerts & Notifications*.


Monitoring Invites

- You can monitor emails using the **Survey Invitation Log**
- Click on **Survey Distribution Tools** and **Survey Invitation Log** tab
- By default, you will see future email in the queue to be sent
- Click on **View past invitations** to see prior emails or use date/time and other dropdowns & buttons to filter view of invite log

 **Manage Survey Participants**

[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/Los_Angeles", in which the current time is 08/15/2018 9:49am.

 **Survey Invitation Log**
(in ascending order by time sent)

[View past invitations](#) [View future invitations](#)

Displaying **1 - 2** of 2

Begin time: 08/15/2018 09:48 End time: (M/D/Y H:M)
Display All invitation types and All response statuses
Display All surveys
Display All records
 Display invitation reminders?
[Apply filters](#) [Reset](#) [Download log \(as seen below\)](#) [Delete](#)

Invitation send time	View Invite	Participant Email	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)
08/15/2018 1:55pm   			942		Shared Resources User Satisfaction			
08/17/2018 10:45am   			944		Shared Resources User Satisfaction			

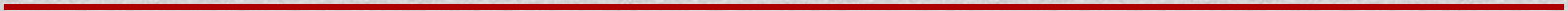
Survey Invitation Log

Example

- RC202 Survey - Survey Queue
-

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Survey Queue

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

Keep the Survey Queue hidden from participants?
This setting will keep the Survey Queue table hidden from participants, and will force Auto Start to be enabled for all queue-activated surveys (even if unchecked below). This is useful if you wish to use the Survey Queue to automatically guide survey participants to the next survey without displaying the queue of surveys.

Activated?	Survey Title	Display survey in the Survey Queue when...	Auto start?
<input checked="" type="checkbox"/> Activated Deactivate	"Followup Survey"	<input type="checkbox"/> When the following survey is completed: --- select a survey --- AND <input checked="" type="checkbox"/> When the following logic becomes true: How to use this [email_address] <> " <small>(e.g. [age] > 30 and [sex] = "1")</small> Test logic with a record: -- select a record --	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Activated Deactivate	"Washington Questionnaire"	<input checked="" type="checkbox"/> When the following survey is completed: "Followup Survey" AND <input checked="" type="checkbox"/> When the following logic becomes true: How to use this [washington] = 1 <small>(e.g. [age] > 30 and [sex] = "1")</small> Test logic with a record: -- select a record --	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Activated Deactivate	"Out of State Questionnaire"	<input checked="" type="checkbox"/> When the following survey is completed: "Followup Survey" AND <input checked="" type="checkbox"/> When the following logic becomes true: How to use this [washington] = 2 <small>(e.g. [age] > 30 and [sex] = "1")</small> Test logic with a record: -- select a record --	<input checked="" type="checkbox"/>

Survey Queue Example

- RC202 Survey - Survey Queue
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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?
-

More Information

- <http://redcap.fredhutch.org>
 - <http://www.fredhutch.org/cds>
 - Or email redcaphelp@fredhutch.org
 - Also...
 - <http://project-redcap.org> (Vanderbilt REDCap site)
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Thank you

