CREATING THE SURVEY PROJECT

Select project title, purpose, project notes, and choice of blank slate or template from list:

Create a new REDCap Project

You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.

Project title:
Title to be displayed on project webpage

Purpose of this project:
How will it be used?
---- Select One ----

Project notes (optional):
Comments describing the project's use or purpose for documentation purposes only.

Start project from scratch or begin with a template?
- Create an empty project (blank slate)
- Use a template (choose one below)

Choose a project template
(comes pre-filled with fields, forms/surveys, and other settings)

<table>
<thead>
<tr>
<th>Template title</th>
<th>Template description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Demography</td>
<td>Contains a single data collection instrument to capture basic demographic information.</td>
</tr>
<tr>
<td>Classic Database</td>
<td>Contains six data entry forms, including forms for demography and baseline data, three monthly data forms, and concludes with a completion data form.</td>
</tr>
<tr>
<td>Human Cancer Tissue Biobank</td>
<td>Contains five data entry forms for collecting and tracking information for cancer tissue.</td>
</tr>
<tr>
<td>Longitudinal Database (1 arm)</td>
<td>Contains nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different events.</td>
</tr>
<tr>
<td>Longitudinal Database (2 arms)</td>
<td>Contains nine data entry forms (beginning with a demography form) for collecting data on two different arms (Drug A and Drug B) with each arm containing eight different events.</td>
</tr>
</tbody>
</table>

Create Project  Cancel
There are many features and options available when setting up project:

### Main project settings
- **Use longitudinal data collection with repeating forms**
- **Use surveys in this project**
  - ![Video](https://example.com/video.png) How to create and manage a survey
  - Modify project title, purpose, etc.

### Design your data collection instruments & enable your surveys
- Add or edit fields on your data collection instruments (survey and forms). This may be done by either using theOnline Designer (online method) or by uploading a Data Dictionary (offline method), in which you may use either method or both. You may then enable your instruments to be used as surveys in the Online Designer. Quick links:
  - Download PDF of all data collection instruments
  - Download the current Data Dictionary
- Go to [Online Designer](https://example.com) or [Data Dictionary](https://example.com)
- You may also browse for pre-built data collection instruments in the [REDCap Shared Library](https://example.com)
- Have you checked the [Check For Identifiers](https://example.com) page to ensure all identifier fields have been tagged?

### Define your events and designate instruments for them
- Create events for re-using data collection instruments and/or set up scheduling.
  - Go to [Define My Events](https://example.com) or [Designate Instruments for My Events](https://example.com)

### Enable optional modules and customizations
- **Auto-numbering for records**
- **Scheduling module (longitudinal only)**
- **Randomization module**
- **Designate an email field to use for invitations to survey participants**
- Additional customizations
A data collection instrument can be enabled as a survey in the Online Designer tab.

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

<table>
<thead>
<tr>
<th>Instrument name</th>
<th>Fields</th>
<th>View PDF</th>
<th>Enabled as survey</th>
<th>Instrument actions</th>
<th>Survey-related options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consent</td>
<td>8</td>
<td></td>
<td>Enable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demographics</td>
<td>12</td>
<td></td>
<td>Enable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diagnosis</td>
<td>7</td>
<td></td>
<td>Enable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical History</td>
<td>19</td>
<td></td>
<td>Enable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medication Survey</td>
<td>2</td>
<td></td>
<td>Enable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Survey</td>
<td>4</td>
<td></td>
<td>Enable</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
If the project is using longitudinal data collection, then after enabling an instrument as a survey, data may be collected via survey for ANY event for which the instrument has been designated, thus allowing them to collect survey data longitudinally over multiple events (and arms).
Capture a participant's email address by designating a field in the project to be the survey participant email field. Once designated, if an email address is entered into that field for any given record, users will then be able to use that email address in any given survey in the project to send survey invitations.

Use for projects that:

• have surveys in which the first data collection instrument is not a survey

OR

• Have used a Public Survey Link as the first survey and other surveys follow it.

![Image of REDCap interface showing the option to designate an email field for survey invitations.](image-url)
Participant List may be used to send emails to many participants at once. There is one participant list per survey. And each drop-down choice is one survey (per event if longitudinal).
**Step 1: Compose message**
Draft your message with from, to, and email body.

**Step 2: Conditions**
Specify if when another survey is completed and/or when a specific logic is true.

**Step 3: When**
Schedule when to send after conditions are met.

**Optional: Reminders**
Set reminders for non-responders.

**Step 4: Activate**
can be set as “active” or “not active” at any time, either temporarily or indefinitely.

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**Define Conditions for Automated Survey Invitations**

- **Survey title:** Medication Survey
- **Event:** Month 1

**STEP 1: Compose message**

- **From:** lacvedo@bsd.uchicago.edu (select any project user to be the ‘Sender’)
- **To:** [All participants who meet the conditions defined]
- **Subject:**

**STEP 2: Conditions**

- **Specify conditions for sending invitations:**
  - When the following survey is completed:
    - "Medication Survey": Baseline
  - AND
  - When the following logic becomes true:
    - (e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][gender] = "1")
  - 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 [24H/M]
- Send after lap of time: [days hours minutes]
- Send at exact date/time: [MM/DD/YYYY]

**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
Lists participants who have:

- been scheduled to receive invitation
- received invitation
- responded to survey

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**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/Chicago", in which the current time is 09/22/2015 11:26am.)

<table>
<thead>
<tr>
<th>Invitation send time</th>
<th>View Invite</th>
<th>Participant Email</th>
<th>Participant Identifier</th>
<th>Survey</th>
<th>Survey Link</th>
<th>Responded?</th>
<th>Errors (if any)</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/25/2015 8:25am</td>
<td>[ undisclosed email address]</td>
<td>[ undisclosed email address]</td>
<td></td>
<td>Student Credentialing</td>
<td>-</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>08/25/2015 8:25am</td>
<td>[ undisclosed email address]</td>
<td>[ undisclosed email address]</td>
<td></td>
<td>Student Credentialing</td>
<td>-</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>08/25/2015 8:25am</td>
<td><a href="mailto:sibezeu@csu.edu">sibezeu@csu.edu</a></td>
<td><a href="mailto:sibezeu@csu.edu">sibezeu@csu.edu</a></td>
<td></td>
<td>Student Credentialing</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>
This page displays a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). When viewing this page, form-level privileges are utilized (i.e. cannot see a form's status if user does not have access to that form), and if the user belongs to a Data Access Group, they will only be able to view the records that belong to their group.

<table>
<thead>
<tr>
<th>Subject ID</th>
<th>Consent Baseline</th>
<th>Demographics Baseline</th>
<th>Diagnosis Baseline</th>
<th>Medical History Baseline</th>
<th>Medication Survey Baseline</th>
<th>Health Survey Baseline</th>
<th>Medication Survey Month 1</th>
<th>Health Survey Month 1</th>
<th>Medication Survey Month 2</th>
<th>Health Survey Month 2</th>
<th>Medication Survey Month 3</th>
<th>Health Survey Month 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><img src="image" alt="Green Square" /></td>
<td><img src="image" alt="Green Square" /></td>
<td><img src="image" alt="Green Square" /></td>
<td><img src="image" alt="Green Square" /></td>
<td><img src="image" alt="Green Square" /></td>
<td><img src="image" alt="Green Square" /></td>
<td><img src="image" alt="Green Square" /></td>
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<td><img src="image" alt="Green Square" /></td>
<td><img src="image" alt="Green Square" /></td>
<td><img src="image" alt="Green Square" /></td>
</tr>
</tbody>
</table>
# SUMMARY OF SENDING SURVEY INVITATIONS

<table>
<thead>
<tr>
<th>First DCI* is not a survey</th>
<th>Participant list</th>
<th>Ability to schedule invitations</th>
<th>Survey invitation log</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send the public link</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Survey participant email field</td>
<td>N</td>
<td>N</td>
<td>Y (for surveys triggered by this field only)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>First DCI* is a survey</th>
<th>Participant list</th>
<th>Ability to schedule invitations</th>
<th>Survey invitation log</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automated invitations</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Compose survey invitation</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

*DCI = Data Collection Instrument
FOR FURTHER HELP

- website: https://cri.uchicago.edu/redcap
- email: redcap@rt.cri.chicago.edu