Making the Most of:

REDCap
Research Electronic Data Capture

All About Surveys

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SURVEY DESIGN

Keep Surveys:

- Brief!
- Clear!
- Consistent!
SEMINAR TOPICS

• Creating Surveys
• Distributing Surveys
• Tracking Surveys
• Survey Termination
• Advanced Survey Features
• Survey User Rights
WHAT IS A SURVEY?

REDCap Definition: a survey is a “public” version of an instrument that is completed by a study participant without having to log in. It can also be used by the study team as a data entry form when logged into REDCap.
SURVEY RESPONDENTS vs PROJECT USERS

SURVEY PARTICIPANTS

People who submit data through a survey.

Can only submit data via survey links.

Can never see one another’s data.

PROJECT USERS

Must login to see what was submitted by participants.

Can send surveys links.

Can track who has or has not responded.
CREATING SURVEYS

• Creating a Survey
  • Enabling the Survey
  • Survey Settings
  • Testing Surveys
• Multiple Surveys
• Longitudinal Surveys
Creating a Survey

1. Enable the survey feature (on the Project Setup tab).

2. Create the instrument first as a form.

3. Enable the form as a survey.
Survey Settings

Set the status, title, and opening instructions.

- **Survey Status**: Set the survey to active or offline.
- **Survey Title**: Enter the title that will be displayed to participants.
- **Survey Instructions**: Provide opening instructions to participants.

Example instructions:

*Please complete the survey below.*

*Thank you!*
Survey Settings

Add a logo, customize the text and survey color theme.
Survey Settings

Select question numbering, display format, and other settings.

Survey Customizations:

- **Question Numbering**
  - Custom numbered
  
  Question numbers will not display correctly if using auto numbering if some questions have branching logic employed. Question auto numbering has been automatically disabled because some of your survey questions use branching logic.

- **Question Display Format**
  - All on one page
  
  (One page or multiple pages?)

  - 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)

- **For 'Required' fields, display the red 'must provide value' text on the survey page?**
  - Yes
  
  If 'No', then it will NOT display the following text beneath all 'Required' fields: * must provide value

- **Allow survey respondents to view aggregate survey results after completing the survey?**
  - Disabled

  After completing the survey, participants can view ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent's answers will be highlighted in the results.

  **Additional settings:**
  - Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).
  - Do not show plots for questions lacking diversity in response values? (What does this mean?)
Set an expiration date, set the Save&Return option, and allow participants to modify completed surveys.
Survey Settings

Set what happens after survey is submitted by participant.

Survey Termination Options:

- (Optional) Auto-continue to next survey: Automatically start the next survey instrument after finishing this survey.

- OR -

- Redirect to a URL
  (Redirect to a webpage when survey is completed)

  Provide a full URL, e.g. http://www.example.com/mypage.html

  How to use Piping here

- Survey Completion Text
  (Displayed after survey is completed as ‘thank you’ text or as acknowledgement text)

  Thank you for taking the survey.
  Have a nice day!

  How to use Piping here
Send an optional confirmation email.

- **From:** jacevedo@bsd.uchicago.edu
- **Subject:**
- **Attachment:**
To edit your survey settings, click on **Survey Settings** under **Survey-related options**.
About Testing...

- Testing is **CRITICAL**!
- To test your survey, send a link to yourself in the same method as you plan to send a link to a respondent.
- Take your survey a few times to make sure the instructions, format, and termination options work as needed. Your experience in Development mode is exactly the same as your participants’ experience in Production mode.
- Once testing is complete, request the project be moved to production.
## Multiple Surveys

Create multiple survey instruments in the same project.

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.

<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>Screening Survey</td>
<td>25</td>
<td></td>
<td></td>
<td>Choose action</td>
<td>Survey settings + Automated Invitations</td>
</tr>
<tr>
<td>Month 1 Survey</td>
<td>18</td>
<td></td>
<td></td>
<td>Choose action</td>
<td>Survey settings + Automated Invitations</td>
</tr>
<tr>
<td>Month 2 Survey</td>
<td>18</td>
<td></td>
<td></td>
<td>Choose action</td>
<td>Survey settings + Automated Invitations</td>
</tr>
<tr>
<td>Month 3 Survey</td>
<td>18</td>
<td></td>
<td></td>
<td>Choose action</td>
<td>Survey settings + Automated Invitations</td>
</tr>
<tr>
<td>Completion Survey</td>
<td>5</td>
<td></td>
<td></td>
<td>Choose action</td>
<td>Survey settings + Automated Invitations</td>
</tr>
</tbody>
</table>
Longitudinal Surveys

Instead of creating the same survey as multiple instruments, the survey can be made repeatable via the longitudinal feature.

1. Setup the survey instruments.

2. Enable the longitudinal feature.
3. Setup the events.

4. Assign the surveys to the events.
DISTRIBUTING SURVEYS

• Public Survey Link vs Participant List
• Public Survey Link
• Participant List
  • Participant Identifiers
  • Adding Participants
• Designate an Email Field
• Compose Survey Invitations
• Non-Response Reminders
• Field Data Piping
<table>
<thead>
<tr>
<th>Public Survey Link vs Participant List</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>PUBLIC SURVEY LINK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participants unknown beforehand.</td>
</tr>
<tr>
<td>Participants all use the same link, and they can use it multiple times.</td>
</tr>
<tr>
<td>Great for listservs or posting on flyers or websites.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PARTICIPANT LIST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participants known beforehand.</td>
</tr>
<tr>
<td>Each participant receives their own, one-time use unique link.</td>
</tr>
<tr>
<td>Emails sent through REDCap to participant email address.</td>
</tr>
<tr>
<td>Can track who has or has not responded.</td>
</tr>
</tbody>
</table>
The **Public Survey Link** is the simplest and fastest way to distribute a survey.

The link can be published on a webpage, social media platforms, flyers, or sent in an email to a large group.
The Participant List allows for emailing the survey to your participants. It helps keep track of responses/non-responses.