ADVANCED SURVEY FEATURES

• Survey Stop Action
• Survey Notifications
• Action Tags
• Automated Survey Invitations
• Survey Queue
• Survey Logins
Survey Stop Action

Stop Actions prompt the participant to end the survey when certain field choices are selected. Only selection fields have this option.

Click the **Stop Sign** and select the choices for ending the survey.
Survey Notifications

1. Go to **Online Designer** and click on **Survey Notifications**.

2. Select the survey and select the email address.

   (*To stop, unselect the email address.*)
Action Tags are special terms that begin with the '@' sign that can be placed inside a field's Field Annotation. For example, to hide a field on a survey, use @HIDDEN-SURVEY in the field's Field Annotation text box. The field will be hidden on the survey, but visible when viewing the survey as a data entry form.
Automated Survey Invitations

ASIs are similar to composing email invitations, but instead the invites are sent automatically when either:
- An earlier survey is completed -or-
- A condition is met

Go to the **Online Designer** and click **Automated Invitations** under **Survey-related options** to the right of the surveys to be automated.
Automated Survey Invitations

**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]

1. **STEP 1: Compose message**
   - **From:** jacevedo@bsd.uchicago.edu
   - **To:** [All participants who meet the conditions defined]
   - **Subject:** Monthly Survey
   - **Message:** Please take this month's survey. Thank you.

2. **STEP 2: Conditions**
   - Specify conditions for sending invitations:
     - **When the following survey is completed:** "Screening Survey"
     - **AND**
     - **When the following logic becomes true:** (e.g., [age] > 30 and [gender] = "1")
     - **Ensure logic is still true before sending invitation?**

3. **STEP 3: When to send invitations AFTER conditions are met**
   - **Send immediately**
   - **Send on next:** select day and time
   - **Send after lapse of time:** days hours minutes
   - **Send at exact date/time:**

4. **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** or **Not Active**
The **Survey Queue** is a survey packaging option. It allows for chaining together multiple surveys using optional logic. Go to the **Online Designer** and click on **Survey Queue**.
Survey Queues

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

<table>
<thead>
<tr>
<th>Activated?</th>
<th>Survey Title</th>
<th>Display survey in the Survey Queue when...</th>
<th>Auto start?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activated</strong></td>
<td>&quot;Followup Survey&quot;</td>
<td>- When the following survey is completed: [email_address] &lt;&gt; &quot;*&quot; (e.g., [age] &gt; 30 and [gender] = &quot;1&quot;)</td>
<td></td>
</tr>
<tr>
<td><strong>Activated</strong></td>
<td>&quot;Female Questionnaire&quot;</td>
<td>- When the following survey is completed: &quot;Followup Survey&quot;</td>
<td></td>
</tr>
<tr>
<td><strong>Activated</strong></td>
<td>&quot;Male Questionnaire&quot;</td>
<td>- When the following survey is completed: [gender] = &quot;2&quot; (e.g., [age] &gt; 30 and [gender] = &quot;1&quot;)</td>
<td></td>
</tr>
</tbody>
</table>

Save  Cancel
The **Survey Login** requires participants to log into the survey before viewing it and completing it.

Go to the **Online Designer** and click on **Survey Login**.
Survey Logins

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.

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 120 minutes.

### Enable Survey Login?
- **Enabled**

### Fields to display on the survey login form
- **Login field #1**
- **Add another login field**
- **telephone “Phone number”**

### 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 <a href="mailto:johndoe@uchicago.edu">johndoe@uchicago.edu</a> for help.”

### Security settings for survey login (optional)
- **Number of failed login attempts before respondent is locked out for a specified amount of time, which is set below.**
- **0**
- **0 = Disabled**
- **Amount of time respondent will be locked out after having failed login attempts exceeding the limit set above.**
- **0**
- **Minutes, 0 = Disabled**
SURVEY USER RIGHTS

- Survey Managers
- Edit Survey Responses
In order for the study team to be able to manage surveys (add participants, send emails, etc), assign them the user right called Manage Survey Participants.
In order to edit survey responses or delete surveys, assign the user rights called **Edit Survey Responses**.
Last Thoughts...

- It takes three steps to enable surveys:
  - Enable the survey feature (under Project Setup)
  - Enable the survey (under Online Designer)
  - Set your Survey Settings

- After enabling surveys, there are two pages to help you manage them:
  - Online Designer (to edit survey settings)
  - Manage Survey Participants (to send and manage surveys)
Help Resources

- https://cri.uchicago.edu/redcap

- redcap@rt.cri.chicago.edu
Thank you!