Introduction to REDCap

Research Electronic Data Capture

THE UNIVERSITY OF CHICAGO MEDICINE & BIOLOGICAL SCIENCES

CENTER FOR RESEARCH INFORMATICS

Presenter: Julissa Acevedo
Senior Systems Analyst / REDCap Administrator
SEMINAR SERIES

Introduction to REDCap 11/19/19

Beyond the REDCap Basics 2/20/20

All About REDCap Surveys 4/14/20

http://cri.uchicago.edu/seminar-series/
Intro → Topics → Demos → Wrap Up

Questions
WHO IS THE CRI?

ACQUIRE DATA
Explore clinical data available for research and make a data request.
Clinical Research Data Warehouse
Cohort Discovery

ANALYZE DATA
We offer high-performance computing and advanced bioinformatics analysis for the most complex datasets.
Bioinformatics Core
High Performance Computing
Computing Resources

STORE DATA
Our storage is secure, standards-compliant, and backed up daily.
CRI Data Storage

MANAGE DATA
Manage studies, surveys, and databases for research.
REDCap
Clinical Trials Informatics

FIND A CUSTOM SOLUTION
Learn more about the CRI’s tailor-made research solutions.
Custom Applications

cri.uchicago.edu
WHAT IS REDCAP?

Web-based software used to create and manage research databases and participant surveys.

Developed as a tool to help researchers collect and manage data effectively and responsibly.
REDCAP HISTORY

**THEN**
- 2004: Created at Vanderbilt
- 2006: Global consortium
- 2011: University of Chicago
- 2011: CRI Created
- 2012: REDCap at UChicago

**NOW**
- Worldwide: 3,700 institutions
- 131 countries
- 793,000 projects
- 1,000,000 users
- UChicago: 5,400 projects
- 5,600 users
WHAT ARE THE ADVANTAGES?

Accessible
- web-based access (on and off campus)
- access for multi-site collaborations

Customizable
- fast and flexible to design
- modifications at anytime

Accurate
- ensures consistent and accurate data entry
- data quality checks to look for errors

Secure
- user authentication against BSDAD or UCHAD
- nightly backups, weekly vulnerability scans

Free!
- includes training, design guidance, troubleshooting
SEMINARS TOPICS

Project Setup
- Creating a project
- Adding and editing fields
- Optional modules and customizations
- Testing your project
- Moving to production

Using Surveys
- Enabling surveys
- Settings & customizations
- Public link vs private links

Applications & Tools
- Record status dashboard
- Project change log
- Exports and reports
- Data dictionary
- File repository
Project Setup
WHERE IS REDCAP?

cri.uchicago.edu

cri.uchicago.edu/redcap

redcap.uchicago.edu

NEW USERS:
Log in with either your BSDAD or UCHAD account (use only one account). If you do not have either account, a sponsor may request an account for you by filling out the CRI Collaborator Account Request Form. Please follow up with our CRI Help Desk on this request. Also, CNET accounts DO NOT allow access to REDCap.

EXTERNAL ACCOUNTS:
To request accounts for external collaborators from other institutions, fill out the CRI Collaborator Account Request Form. Please follow up with our CRI Help Desk on this request.

ADDING A USER TO A PROJECT:
Please do not add the user’s email address to the project’s User Rights page, as this will not work. The user first needs to log into REDCap to register their account. You can then add them to your project’s User Rights page at that point. Contact the CRI REDCap Administrator for further help.

SUSPENDED ACCESS:
If REDCap states your account is suspended upon log in, contact the CRI REDCap Administrator to have your access unsuspended. Access is suspended after one year of no login activity.

PASSWORD HELP:
If you need password help, contact the appropriate help desk below and ask for a password reset for either your BSDAD, UCHAD, or CRI collaborator account:

<table>
<thead>
<tr>
<th>BSDAD/UCHAD Accounts</th>
<th>CRI Collaborator Accounts</th>
</tr>
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<tbody>
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</tr>
<tr>
<td><a href="mailto:help@bsd.uchicago.edu">help@bsd.uchicago.edu</a></td>
<td><a href="mailto:crihelpdesk@cri.uchicago.edu">crihelpdesk@cri.uchicago.edu</a></td>
</tr>
<tr>
<td>773-702-3456</td>
<td>773-834-8475</td>
</tr>
</tbody>
</table>

Please log in with your username and password. If you are having trouble logging in, please contact University of Chicago REDCap Support.
LOGGING INTO REDCAP

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<td><a href="mailto:access@rt.cri.uchicago.edu">access@rt.cri.uchicago.edu</a></td>
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Please log in with your user name and password. If you are having trouble logging in, please contact University of Chicago REDCap Support.
ACCESS EXPLAINED

PROJECT A
USER 1
USER 2
USER 3
PROJECT B
PROJECT C
Welcome to REDCap!

REDCap is a mature, secure web application for building and managing online surveys and databases. Using REDCap's stream-lined process for rapidly developing projects, you may create and design projects using 1) the online method from your web browser using the Online Designer; and/or 2) the offline methods by constructing a 'data dictionary' template file in Microsoft Excel, which can be later uploaded into REDCap. Both surveys and databases (or a mixture of the two) can be built using these methods.

REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, ad hoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

Learn more about REDCap by watching a brief summary video (4 min). If you would like to view other quick video tutorials of REDCap in action and an overview of its features, please see the Training Resources page.

Please note that any publication that results from a project utilizing REDCap should cite grant support (NIH CTSA UL1 TR000430).

NOTICE: If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact University of Chicago REDCap Support.

REDCap Features

Build online surveys and databases quickly and securely - Create and design your project rapidly using secure web authentication from your browser. No extra software is required.

Fast and flexible - Conception to production-level survey/database in less than one day.

Export data to common data analysis packages - Export your data to Microsoft Excel, PDF, SAS, Stata, R, or SPSS for analysis.

Ad Hoc Reporting - Create custom queries for generating reports to view or download.

Scheduling - Utilize a built-in project calendar and scheduling module for organizing your events and appointments.

Easily manage a contact list of survey respondents or create a simple survey link - Build a list of email contacts, create custom email invitations, and track who responds, or you may also create a single survey link to email out or post on a website.
## TRAINING VIDEOS

**REDCap Training Videos**

### Just Getting Started?
Explore these overviews of fundamental concepts and features.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Watch Video</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brief Overview</td>
<td>A quick summary of what REDCap is and what it can do.</td>
<td>4 minutes</td>
</tr>
<tr>
<td>Detailed Overview</td>
<td>This video provides an overview of basic functions and features within a REDCap project. It will serve as a starting point for learning about the basic concepts of REDCap, what REDCap projects are, how to create them, and how to use them.</td>
<td>14 minutes</td>
</tr>
<tr>
<td>Data Entry Overview</td>
<td>A focused exploration of basic data entry workflow. Suitable for training data entry staff.</td>
<td>19 minutes</td>
</tr>
</tbody>
</table>

### Building a Project
Learn how to build and modify data collection instruments.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Watch Video</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction to Instrument Development</td>
<td>An introduction to the Online Designer and Data Dictionary methods of instrument development.</td>
<td>6 minutes</td>
</tr>
<tr>
<td>Online Designer</td>
<td>This online tool is the quickest and most intuitive method for making instrument modifications.</td>
<td>5 minutes</td>
</tr>
</tbody>
</table>

* Use Chrome, not IE or Firefox.*
CREATE A 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 that are displayed on the 'My Projects' page.

**Start project from scratch or begin with a template?**
- Create an empty project (blank slate)
- Upload a REDCap project XML file (CDISC ODM format)
- 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 (sorted by 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>
</tbody>
</table>

**Create Project**
PROJECT SETUP STEPS

Training Project

Project status: Development

Main project settings
- Enable Use surveys in this project?
- Enable Use longitudinal data collection with defined events?

Design your data collection instruments
Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: Download PDF of all instruments OR Download the current Data Dictionary

Enable optional modules and customizations
- Enable Repeatable instruments
- Enable Auto-numbering for records
- Enable Scheduling module (longitudinal only)
- Enable Randomization module
- Enable Designate an email field for sending survey invitations
STEP 1: MAIN PROJECT SETTINGS

- Modify project title, purpose, etc.
- Enable surveys
- Enable longitudinal data collection
**STEP 2: DATA COLLECTION INSTRUMENTS**

- Online Designer
- Data Dictionary*
- Shared Library (Global)
- Special Features*
- Smart Variables
- Piping
- Action Tags

* (covered in next seminar)
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

**Add new instrument:**
- **Create** a new instrument from scratch
- **Import** a new instrument from the official REDCap Shared Library
- **Upload** instrument ZIP file from another project/user or external libraries

<table>
<thead>
<tr>
<th>Instrument name</th>
<th>Fields</th>
<th>View PDF</th>
<th>Instrument actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>My First Instrument</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Add instrument here]
Ready to add fields

You may now begin adding fields to your data collection instrument below using the Online Designer. Alternatively, you may build your fields in the Data Dictionary (offline method) by clicking its tab above.

This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the **Add Field** buttons. You can begin editing an existing field by clicking on the **Edit** icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the **Delete** icon. To reorder the fields, simply **drag and drop** a field to a different position within the form below. **NOTE:** While in development status, all field changes will take effect immediately in real time. **Are you using Action Tags yet?** If not, [learn about Action Tags here](#).

<table>
<thead>
<tr>
<th>Variable: record_id</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record ID</td>
</tr>
</tbody>
</table>

**NOTE:** The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.
FIELD TYPES

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

Add New Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the Field Types video (4 min).

Field Type:

--- Select a Type of Field ---
Text Box (Short Text, Number, Date/Time, ...)
Notes Box (Paragraph Text)
Calculated Field
Multiple Choice - Drop-down List (Single Answer)
Multiple Choice - Radio Buttons (Single Answer)
Checkboxes (Multiple Answers)
Yes - No
True - False
Signature (draw signature with mouse or finger)
File Upload (for users to upload files)
Slider / Visual Analog Scale
Descriptive Text (with optional Image/Video/Audio/File Attachment)
Begin New Section (with optional text)
FIELD DESIGN

Add New Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the Field Types video (4 min).

Field Type: Text Box (Short Text, Number, Date/Time, ...)

Field Label

Variable Name (utilized in logic, calcs, and exports)

Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use:

Smart Variables

Piping

Validation? (optional) ---- None ----

-- select ontology service --

Required?* ○ No ○ Yes

* Prompt if field is blank

Identifier? ○ No ○ Yes

Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV)

Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save Cancel
# Matrix of Fields

Variable: record_id

**Record ID**

Note: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

### How often do you eat the following flavors of ice cream?

<table>
<thead>
<tr>
<th>Flavor</th>
<th>Never</th>
<th>Rarely</th>
<th>Sometimes</th>
<th>Often</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chocolate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strawberry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vanilla</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Butter Pecan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mint Chocolate Chip</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• pencil = edit
• 2 papers = copy
• green arrows = branching logic
• paper w/arrow = move
• red x = delete
BRANCHING LOGIC

What is your favorite ice cream?

- Chocolate
- Strawberry
- Vanilla
- Other

If other, please specify:

Drag-N-Drop Logic Builder

Field choices from other fields
- record_id = (define criteria)
- first_name = (define criteria)
- fav_ice_cream = Chocolate (1)
- fav_ice_cream = Strawberry (2)
- fav_ice_cream = Vanilla (3)
- fav_ice_cream = Other (4)
- my_first_instrument_complete = Incomplete (0)
- my_first_instrument_complete = Unverified

Show the field ONLY if...
- ALL below are true
- ANY below are true

fav_ice_cream = Other (4)
**STEP 3: OPTIONAL MODULES & CUSTOMIZATIONS**

- Repeatable Instruments*
- Auto-numbering IDs
- Scheduling (Longitudinal)*
- Randomization*
- Designate an email for survey invitations*

* (covered in next seminar)
STEP 4: PROJECT BOOKMARKS (OPTIONAL)

- Custom bookmarks
- Appear in Applications menu on the left
- Accessible by all project users
- Example:
  - Department website
  - Study survey
  - External website
STEP 5: USER RIGHTS

Add users to your project with custom user rights

Data Access Groups*  
*(covered in next seminar)
STEP 5: ADDING USERS

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

Add new users: Give them custom user rights or assign them to a role.

Create new roles: Add new user roles to which users may be assigned.
## STEP 6: TEST YOUR PROJECT

### Main project settings
- Use surveys in this project?
- Use longitudinal data collection with defined events?
  - Modify project title, purpose, etc.

### Design your data collection instruments
Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: Download PDF of all instruments OR Download the current Data Dictionary.

- Go to [Online Designer](#) or [Data Dictionary](#)
- Explore the [RedCap Shared Library](#)

Have you checked the Check For Identifiers page to ensure all Identifier fields have been tagged?

Learn how to use:
- Smart Variables
- Plots
- Action Tabs

### Enable optional modules and customizations
- Repeatability
- Auto-numbering for records
- Scheduling module (longitudinal only)
- Randomization module
- Designate an email field for sending survey invitations
- Additional customizations

### Set up project bookmarks (optional)
You may create custom bookmarks to webpages that exist inside or outside of RedCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

- Go to Add or edit bookmarks

### User Rights and Permissions
You may grant other users access to this project or edit the user privileges of current users on this project by navigating to the User Rights page. Additionally, if you wish to limit user access to certain records/responses for this project, you may want to use Data Access Groups, in which only users within a given Data Access Group can access records created by users within that group.

- Go to User Rights or Data Access Groups

### Test your project thoroughly
It is important to test the essential components of your project before moving it into production. Try creating a few test records and entering some data for each to ensure that your data collection instruments look and behave how you expect, especially branching logic and calculations. Then review your test data by creating reports and exporting your data to view in Excel or a statistical analysis package. If you have surveys, complete the surveys as if you were a participant by using the Public Survey Link or Participant List by sending a survey invitation to yourself. If other project modules will be used regularly, test them out a bit too. The best way to test your project is to use it as if you were entering real production data, and it is always helpful to have colleagues (especially team members) take a look at your project to get a fresh set of eyes looking at it.

### Move your project to production status
Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real-time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a RedCap administrator before taking effect.

- Go to Move project to production
STEP 7: MOVE TO PRODUCTION

• Delete test data
• Wait for confirmation email from Administrator before collecting real data!
**PROJECT TIMELINE AND MODES**

- **Development Mode**
  - Build and test a project
  - TEST DATA

- **Production Mode**
  - Enter and review data
  - REAL DATA

- **Draft Mode**
  - Update project setup
  - REAL DATA CONTINUES

- **Inactive Mode**
  - View and analyze data
  - NO DATA ENTRY

- ** Archived Mode**
  - Project is closed
  - DATA ANALYSIS FINALIZED

* *Draft Protocol
* *Final Protocol
* *Protocol Amendment
* *if IRB approval required
Using Surveys
A **REDcap survey** is a “public” version of a (form) instrument that is completed by a study participant without having to log into REDCap.

That same instrument can also be used by the study team as a data entry form when logged into REDCap.
CREATING AND ENABLING A SURVEY

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

2. Create the instrument first.

3. Enable the instrument as a survey.
**Survey Settings**

- **Survey Status**: Survey Active
- **Survey Title**: Sleep Study Survey
- **Survey Instructions**: Please complete the survey below.
  Thank you!
SURVEY CUSTOMIZATIONS

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)

- **Allow participants to download a PDF of their responses at end of survey?**
  - No
  - Display a button for the participant to download a PDF file of their responses for the survey they just completed.

- **Survey-specific email invitation field**
  - Designate an email field for sending survey invitations for this survey only
  - -- select a field --
  - Note: This option will override the project-level email invitation field (if enabled on the Project Setup page) and will also override any email address originally entered into the Participant List. Also, if this field has no value and the project-level email field is enabled, then the project-level email field's value will be used instead.

- **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 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?)
  - Disabled

*Text-To-Speech functionality* (Allows text on survey page to be read audibly to participants.)

- When enabled, icons will be displayed next to all text on the survey page, and when clicked, the text will be read out loud to the participant (must have computer speakers turned on).
  - NOTICE: All text that is spoken is sent to a service hosted at Vanderbilt University that utilizes the IBM Watson Text to Speech API service. Be advised that if the survey utilizes piping for privacy concerns, data piped from Identifier fields will *not* be sent to the service with the rest of the text but will instead be redacted.

*Administrators: How to disable this feature*
Survey Access:

Response Limit (optional)
(Maximum number of responses to collect. Prevents respondents from starting the survey after a set number of responses have been collected.)

- (e.g., 150) If left blank, the response limit will not be enforced.

Will include: partial and completed responses

Custom text to display to respondent on survey when limit is reached:
Thank you for your interest; however, the survey is closed because the maximum number of responses has been reached.

Time Limit for Survey Completion (optional)
(The amount of time that each respondent has to complete the survey based on when they were initially sent the survey invitation. Note: This feature excludes public survey links.)

- days
- hours
- minutes

If the respondent loads the survey after this time has passed, it will not allow them to begin or continue the survey. (If all are left blank, the time limit will not be enforced.)

Survey Expiration (optional)
(Time after which the survey will become inactive.)

- M/D/Y H:M

The time must be for the time zone America/Chicago, in which the current time is 11/15/2019 15:53.

Allow 'Save & Return Later' option for respondents?
(Allow respondents to leave the survey and return later.)

- No

- Allow respondents to return without needing a return code
- Allow respondents to return and modify completed responses
### Survey Termination Options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🟢 (Optional) Auto-continue to next survey</td>
<td>Automatically start the next survey instrument after finishing this survey.</td>
</tr>
<tr>
<td>🟢 Redirect to a URL</td>
<td>(Redirect to a webpage when survey is completed)</td>
</tr>
<tr>
<td>(Display text)</td>
<td>(Displayed after survey is completed as 'thank you' text or as acknowledgement text)</td>
</tr>
</tbody>
</table>

#### Survey Completion Text
- **Thank you for taking the survey.**
- **Have a nice day!**

### PDF Auto-Archiver
- **Upon survey completion, a compact PDF copy of the survey response will be automatically stored in the project's File Repository, from which the archived PDFs can be downloaded at any time.**

### Send confirmation email (optional)?
- **No**
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.

![Public Survey Link](https://redcap.uchicago.edu/surveys/?s=nMJDfL4Zcq)

*Public Survey URL: [https://redcap.uchicago.edu/surveys/?s=nMJDfL4Zcq](https://redcap.uchicago.edu/surveys/?s=nMJDfL4Zcq)*
The **Participant List** allows for emailing the survey to your participants. It helps keep track of responses and non-responses.

The Participant List option allows you to send a customized email to anyone in your list and track who responds to your survey. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Unless an Identifier is used, all survey responses collected are considered anonymous. [More details](#)

<table>
<thead>
<tr>
<th>Email</th>
<th>Participant Identifier (optional)</th>
<th>Link</th>
<th>Invitation Scheduled?</th>
<th>Invitation Sent?</th>
<th>Responded?</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:arodrigu1@bsd.uchicago.edu">arodrigu1@bsd.uchicago.edu</a></td>
<td></td>
<td><img src="image" alt="" /></td>
<td>-</td>
<td>-</td>
<td>remove</td>
</tr>
<tr>
<td><a href="mailto:braumann@bsd.uchicago.edu">braumann@bsd.uchicago.edu</a> (ID 2)</td>
<td></td>
<td><img src="image" alt="" /></td>
<td>-</td>
<td>-</td>
<td>remove</td>
</tr>
<tr>
<td><a href="mailto:braumann@ci.uchicago.edu">braumann@ci.uchicago.edu</a> (ID 3)</td>
<td></td>
<td><img src="image" alt="" /></td>
<td>-</td>
<td>-</td>
<td>remove</td>
</tr>
</tbody>
</table>
TESTING IS CRITICAL!

• **Send** yourself the survey just as you would sent it to your participants.

• Make sure all the **settings** and **format** are correct.

• Export the test data to preview your **data analysis**, and modify the survey questions if needed.

• Once testing is complete, request the project be moved to **production**.

• **DO NOT SEND SURVEY EMAILS UNTIL PROJECT HAS BEEN MOVED TO PRODUCTION!**
Applications & Tools
RECORD STATUS DASHBOARD

ECE Pilot Study

Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

<table>
<thead>
<tr>
<th>Record ID</th>
<th>ECE Screener</th>
<th>Consent Form</th>
<th>Randomization</th>
<th>Modules Complete</th>
<th>Theories of Intelligence</th>
<th>Module Knowledge</th>
<th>Speak22 item</th>
<th>Theories of Intelligence</th>
<th>Module Knowledge</th>
<th>Speak22 item</th>
<th>Pd Experience Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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</tr>
</tbody>
</table>

Legend for status icons:
- Incomplete
- Incomplete (no data saved)
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response

Dashboard displayed: [Default dashboard] ▼
Displaying record Page 1 of 1: "1" through "29" of 27 records
Create custom dashboard
Displaying: Instrument status only ▼ Lock status only ▼ All status types

Table not displaying errors
## Training Project

### Logging

This module lists all changes made to this project, including data exports, data changes, and the creation or deletion of users.

Filter by event: All event types (excluding page views)  
Filter by user name: All users  
Filter by record: All records  
Filter by time range from: to:  
Displaying events (by most recent): 1 - 100 (Page 1 of 4)

<table>
<thead>
<tr>
<th>Time / Date</th>
<th>Username</th>
<th>Action</th>
<th>List of Data Changes OR Fields Exported</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/10/2019 6:55pm</td>
<td>jacevedo</td>
<td>Manage/Design</td>
<td>Modify project settings</td>
</tr>
<tr>
<td>07/10/2019 6:55pm</td>
<td>jacevedo</td>
<td>Updated Record 1002</td>
<td>test_complete = '2'</td>
</tr>
<tr>
<td>07/10/2019 6:54pm</td>
<td>jacevedo</td>
<td>Updated Record 1001</td>
<td>test_complete = '2'</td>
</tr>
<tr>
<td>07/10/2019 6:54pm</td>
<td>jacevedo</td>
<td>Deleted Record 999</td>
<td>record_id = '999'</td>
</tr>
<tr>
<td>06/10/2019 4:33pm</td>
<td>[survey respondent]</td>
<td>Created Response 1004</td>
<td>mon = '1'; tue = '1'; wed = '1'; thu = '1'; fri = '1'; mon = '1'; tue = '1'; wed = '1'; thu = '1'; fri = '1'; record_id = '1004'; test_complete = '0'</td>
</tr>
<tr>
<td>06/10/2019 4:32pm</td>
<td>jacevedo</td>
<td>Manage/Design</td>
<td>Modify survey info</td>
</tr>
<tr>
<td>06/10/2019 4:32pm</td>
<td>[survey respondent]</td>
<td>Created Response 1003</td>
<td>mon = '1'; tue = '1'; wed = '1'; thu = '1'; fri = '1'; record_id = '1003'; test_complete = '0'</td>
</tr>
<tr>
<td>06/10/2019 4:24pm</td>
<td>jacevedo</td>
<td>Manage/Design</td>
<td>Modify survey info</td>
</tr>
<tr>
<td>06/10/2019 4:23pm</td>
<td>[survey respondent]</td>
<td>Updated Response 1002</td>
<td>mon = '2'</td>
</tr>
<tr>
<td>06/10/2019 4:22pm</td>
<td>[survey respondent]</td>
<td>Created Response 1002</td>
<td>mon = '1'; tue = '1'; wed = '1';</td>
</tr>
</tbody>
</table>
DATA EXPORTS, REPORTS, AND STATS

Training Project

Data Exports, Reports, and Stats

This module allows you to easily view reports of your data, inspect plots and descriptive statistics of your data, as well as export your data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your entire dataset or view it as a report, then Report A is the best and quickest way. However, if you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice. You may also create your own custom reports below (if you have such privileges) in which you can filter the report to specific fields, records, or events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created a report, you may view it as a webpage, export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics for that report.

My Reports & Exports

<table>
<thead>
<tr>
<th>Report name</th>
<th>View/Export Options</th>
<th>Management Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>A All data (all records and fields)</td>
<td>View Report, Export Data, Stats &amp; Charts</td>
<td></td>
</tr>
<tr>
<td>B Selected instruments (all records)</td>
<td>Make custom selections</td>
<td></td>
</tr>
</tbody>
</table>

+ Create New Report
### DATA EXPORTS, REPORTS, AND STATS

**Name of Report:** List of Participants Who Like Chocolate Ice Cream

**Description (optional):** Displayed on pages or views below report name. HTML may be used to add links or add style to text.

**User Access:** Choose who can see and view this report.

- **View Access:** Choose who can see this report on their left-hand project menu.
  - All users
  - Custom user access

**Edit Access:** Choose who can edit, copy, or delete this report (requiring user to have Add/Edit/Organize Reports privileges).

- **All users**
- **Custom user access**

**Fields to include in report**

<table>
<thead>
<tr>
<th>Field 1</th>
<th>Field 2</th>
<th>Field 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>record_id</td>
<td>record_id</td>
<td>record_id</td>
</tr>
<tr>
<td>First name</td>
<td>First name</td>
<td>First name</td>
</tr>
<tr>
<td>Last name</td>
<td>Last name</td>
<td>Last name</td>
</tr>
</tbody>
</table>

**Additional report options (optional):** Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages).

**Number of results returned:** 3

**Total number of records queried:** 5

**List of Participants Who Like Chocolate Ice Cream**

<table>
<thead>
<tr>
<th>Record ID</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Mary</td>
</tr>
<tr>
<td>3</td>
<td>John</td>
</tr>
<tr>
<td>5</td>
<td>Sue</td>
</tr>
</tbody>
</table>
DATA EXPORTS, REPORTS, AND STATS

Exporting "All data (all records and fields)"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and whether or not to perform de-identification on the data.

Choose export format:
- CSV / Microsoft Excel (raw data)
- CSV / Microsoft Excel (labels)
- SPSS Statistical Software
- SAS Statistical Software
- R Statistical Software
- STATA Statistical Software

De-identification options (optional):
- Remove all tagged identifier fields (tagged in Data Dictionary)
- Hash the Record ID field (converts record name to an unrecognizable value)
- Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.)
- Remove Notes/Essay box fields
- Date and datetime fields:
  - Remove all data and datetime fields
  - Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record)

Export Data Cancel
<table>
<thead>
<tr>
<th>#</th>
<th>Variable / Field Name</th>
<th>Field Label</th>
<th>Field Attributes (Field Type, Validation, Choices, Calculations, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>study_id</td>
<td>Study ID</td>
<td>text</td>
</tr>
</tbody>
</table>
| 2 | date_enrolled         | Section Header: Consent Information  
Date subject signed consent  
YYYY-MM-DD | text (date_ymd) |
| 3 | patient_document      | Upload the patient’s consent form | file |
| 4 | first_name            | Section Header: Contact Information  
First Name | text, Identifier |
| 5 | last_name             | Last Name   | text, Identifier |
| 6 | address               | Street, City, State, ZIP | notes, Identifier |
| 7 | telephone             | Phone number  
Include Area Code | text (phone), Identifier |
| 8 | email                 | E-mail      | text (email), Identifier |
| 9 | dob                   | Section Header: Demographics  
Date of birth | text (date_ymd), Identifier |
| 10| age                   | Age (years) | calc  
Calculation: rounddown(datediff([dob], today, 'y')) |
| 11| ethnicity             | Ethnicity   | radio  
0: Hispanic or Latino  
1: NOT Hispanic or Latino  
2: Unknown / Not Reported |
| 12| race                  | Race        | dropdown  
0: American Indian/Alaska Native  
1: Asian  
2: Native Hawaiian or Other Pacific Islander  
3: Black or African American  
4: White  
5: More Than One Race  
6: Unknown / Not Reported |
FILE REPOSITORY

Training Project

File Repository

This page may be used for storing and retrieving files and documents used for this project. You may upload files here to save for retrieval later, or you may download previously uploaded files in the file list below. Whenever a data export is performed, the resulting data and syntax files are stored here also.

<table>
<thead>
<tr>
<th>User Files</th>
<th>Data Export Files</th>
<th>Upload New File</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Filter by file type:</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL</td>
<td></td>
</tr>
</tbody>
</table>

**IRB Protocol current**
- File name: IRB49857479_Protocol.docx
- Date uploaded: 07/27/2010
- File size: 9.7 KB

**Consent Form**
- File name: Consent_Form_IRB40857470.docx
- Date uploaded: 07/27/2010
- File size: 9.7 KB
Welcome to REDCap!

REDCap is a mature, secure web application for building and managing online surveys and databases. Using REDCap's stream-lined process for rapidly developing projects, you may create and design projects using 1) the online method from your web browser using the Online Designer; and/or 2) the offline method by constructing a 'data dictionary' template file in Microsoft Excel, which can be later uploaded into REDCap. Both surveys and databases (or a mixture of the two) can be built using these methods.

REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, ad hoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

Learn more about REDCap by watching a brief summary video (4 min). If you would like to view other quick video tutorials of REDCap in action and an overview of its features, please see the Training Resources page.

Please note that any publication that results from a project utilizing REDCap should cite grant support (NIH CTSA UL1 TR000430).

NOTICE: If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact REDCap Support.
REDCap is compatible with:

- Tablets and smart phone (iOS and Android)
- implying go to https://redcap.uchicago.edu/

SMART DEVICES
Use for offline data collection
(where there is no/poor internet connectivity)
Live Demo
Help Resources
HELP RESOURCES

Inside of REDCap:

Outside of REDCap:

redcap@rt.cri.chicago.edu

https://cri.uchicago.edu/redcap
The CRI is proud to offer REDCap, a self-managed, secure, web-based solution designed to support data collection strategies for research studies.

Quick Links:
- About REDCap
- Where to Start
- Accounts & Passwords
- Training
- Request Help
- Grant & Cite Language
- News Archive

Log In To REDCap

News:
Jun 24

Announcing REDCap Office Hours

Want to discuss if REDCap is right for your study or project? Want another set of eyes to look over your project design? Need technical help with field or form problem?
FUTURE SEMINARS

FEBRUARY 20th

• Making the Most of REDCap: Beyond Basic Skills

APRIL 14th

• Making the Most of REDCap: All About Surveys

REGISTER

• https://cri.uchicago.edu/seminar-series/
The CRI’s offices in Peck are located in suite N161.

This suite is in the N corridor on the first floor of the Medical Center. If you are coming from the Wyler entrance, take the C corridor to head toward N; if you enter from Ellis, take the P corridor.

When you enter the N corridor, walk straight until you reach a glass door.

Once you go through the glass door, you’ll find the door to the CRI suite to your left.
THANK YOU!

REDCap
Research Electronic Data Capture

cri.uchicago.edu