



Multiple Surveys



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▶ 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.

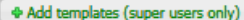
Project title:
Title to be displayed on project webpage

Purpose of this project: 
How will it be used?

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)


 Add templates (super users only)

<small>select template</small>	Template title (sorted by title)	Template description
<input type="radio"/>	Basic Demography	Contains a single data collection instrument to capture basic demographic information.
<input type="radio"/>	Classic Database	Contains six data entry forms, including forms for demography and baseline data, three monthly data forms, and concludes with a completion data form.
<input type="radio"/>	Human Cancer Tissue Biobank	Contains five data entry forms for collecting and tracking information for cancer tissue.
<input type="radio"/>	Longitudinal Database (1 arm)	Contains nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different events.
<input type="radio"/>	Longitudinal Database (2 arms)	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.



PROJECT SETUP CHECKLIST

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



Complete!

[Not complete?](#)

Main project settings

Disable


☒ Use longitudinal data collection with repeating forms? [?](#)

Disable

☒ Use surveys in this project? [?](#)

VIDEO: How to create and manage a survey

Modify project title, purpose, etc.




Complete!

[Not complete?](#)


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 the Online 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](#) OR [Download the current Data Dictionary](#)

Go to

 Online Designer


 or

 Data Dictionary

You may also browse for pre-built data collection instruments in the

REDCap Shared Library

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?



Complete!

[Not complete?](#)

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

 or

Designate Instruments for My Events



Complete!

[Not complete?](#)

Enable optional modules and customizations

Disable

☒ Auto-numbering for records [?](#)

Enable

☒ Scheduling module (longitudinal only) [?](#)

Enable

☒ Randomization module [?](#)

Enable

☒ Designate an email field to use for invitations to survey participants [?](#)

Additional customizations



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▶ MULTIPLE SURVEYS PER PROJECT

A data collection instrument can be enabled as a survey in the Online Designer tab.

◀ Project Setup Online Designer Data Dictionary [Edit project settings in Control Center](#)

🎥 [VIDEO: How to use this page](#)

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

Click to modify instrument
Add new fields/questions to the instrument or modify existing ones.

🔑 Survey Login

Options

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](#) ⓘ









Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Consent	8		Enable	Choose action ▼	
Demographics	12		Enable	Choose action ▼	
Diagnosis	7		Enable	Choose action ▼	
Medical History	19		Enable	Choose action ▼	
Medication Survey	2		✓	Choose action ▼	✓ Survey settings + Automated Invitations
Health Survey	4		✓	Choose action ▼	✓ Survey settings + Automated Invitations



LONGITUDINAL DATA COLLECTION

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).

Arm name: **Arm 1**

	Event #	Days Offset	Offset Range Min / Max	Event Name	Unique event name (auto-generated)
 	1	0	-0/+0	Baseline	baseline_arm_1
 	2	1	-0/+0	Month 1	month_1_arm_1
 	3	1	-0/+0	Month 2	month_2_arm_1
 	4	1	-0/+0	Month 3	month_3_arm_1
<div><div>Add new event</div><div><div><div></div> Days</div><div><div>-0</div><div>+0</div></div><div><div>Convert from other units</div></div></div><div></div><div>Descriptive name for this event</div></div>					

Data Collection Instrument	Baseline (1)	Month 1 (2)	Month 2 (3)	Month 3 (4)
Consent	✓			
Demographics	✓			
Diagnosis	✓			
Medical History	✓			
Medication Survey	✓	✓	✓	✓
Health Survey	✓	✓	✓	✓



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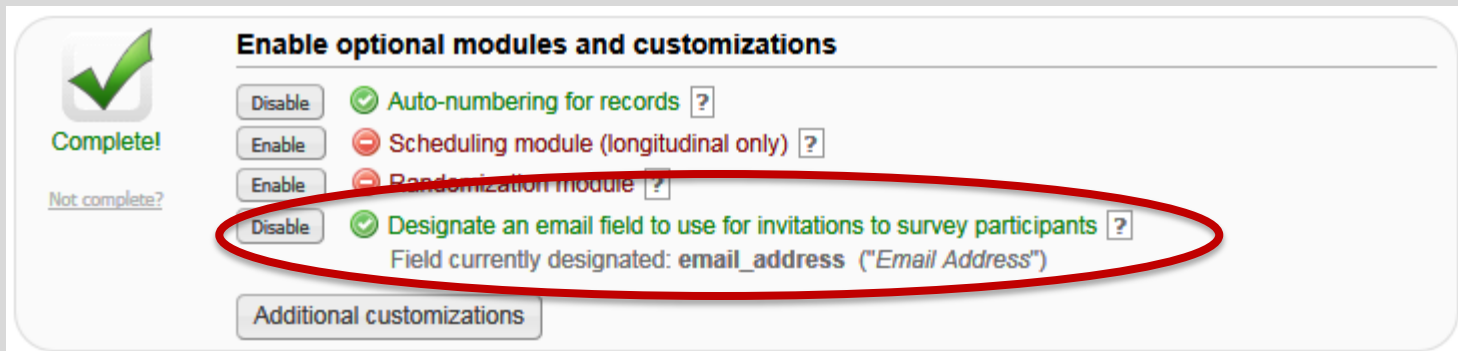



▶ DESIGNATE EMAIL ADDRESS

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.



 **Complete!**
[Not complete?](#)


Enable optional modules and customizations

<input type="button" value="Disable"/>	<input checked="" type="checkbox"/> Auto-numbering for records ?
<input type="button" value="Enable"/>	<input type="checkbox"/> Scheduling module (longitudinal only) ?
<input type="button" value="Enable"/>	<input type="checkbox"/> Randomization module ?
<input type="button" value="Disable"/>	<input checked="" type="checkbox"/> Designate an email field to use for invitations to survey participants ? Field currently designated: email_address ("Email Address")

MANAGE SURVEY PARTICIPANTS

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).

Manage Survey Participants

 Public Survey Link

 Participant List

 Survey Invitation Log


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). [More details](#)

Participant List belonging to

Displaying 1 - 1 of 1

"Medication Survey" - Baseline
"Health Survey" - Baseline
"Medication Survey" - Month 1
"Health Survey" - Month 1
"Medication Survey" - Month 2
"Health Survey" - Month 2
"Medication Survey" - Month 3
"Health Survey" - Month 3

Survey Invitations

 Export list

Email

Responded?

Invitation
Scheduled?

Invitation
Sent?

Link

Survey
Access
Code and
QR Code

No participants have been added



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 **REDCap**
Research Electronic Data Capture

▶ AUTOMATIC SURVEY INVITATIONS

Step 1: Compost 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.

Define Conditions for Automated Survey Invitations

Info

Survey title: Medication Survey
Event: Month 1

STEP 1: Compose message

From: jacevedo@bsd.uchicago.edu
(select any project user to be the 'Sender')

To: [All participants who meet the conditions defined]

Subject:

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](#)

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

☒ 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 H:M

☐ Send after lapse of time: 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?

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

Save

Cancel



▶ SURVEY INVITATION LOG

Lists participants who have:

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

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

Survey Invitation Log
(in ascending order by time sent)

[View past invitations](#)

[View future invitations](#)

Displaying 1 - 77 of 77

Begin time: End time: 09/22/2015 11:26 (M/D/Y H:M)
Display All invitation types and All response statuses
Display All surveys
☐ Display invitation reminders?
[Apply filters](#) [Reset](#)

Invitation send time	View Invite	Participant Email	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)
08/25/2015 8:25am		[undisclosed email address]		Student Credentialing	-		
08/25/2015 8:25am		[undisclosed email address]		Student Credentialing	-		
08/25/2015 8:25am		eibezue@csu.edu		Student Credentialing			









▶ RECORD STATUS DASHBOARD

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.

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.

Legend for status icons:

-  Incomplete
-  Unverified
-  Complete
-  Incomplete (no data saved) ?
-  Partial Survey Response
-  Completed Survey Response

Displaying record "1" through "1" of 1 records

Displaying: [Instrument status only](#) | [Lock status only](#) | [E-signature status only](#) | [Lock and E-signature status](#) | [All status types](#)

Subject ID	Consent Baseline	Demographics Baseline	Diagnosis Baseline	Medical History Baseline	Medication Survey Baseline	Health Survey Baseline	Medication Survey Month 1	Health Survey Month 1	Medication Survey Month 2	Health Survey Month 2	Medication Survey Month 3	Health Survey Month 3
1												



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▶ SUMMARY OF SENDING SURVEY INVITATIONS

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

<i>First DCI* is a survey</i>	Participant list	Ability to schedule invitations	Survey invitation log
Automated invitations	Y	Y	Y
Compose survey invitation	Y	Y	Y

**DCI = Data Collection Instrument*



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▶ FOR FURTHER **HELP**

website

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

email

- redcap@rt.cri.chicago.edu



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