

ADVANCED SURVEY FEATURES

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

Survey Stop Action

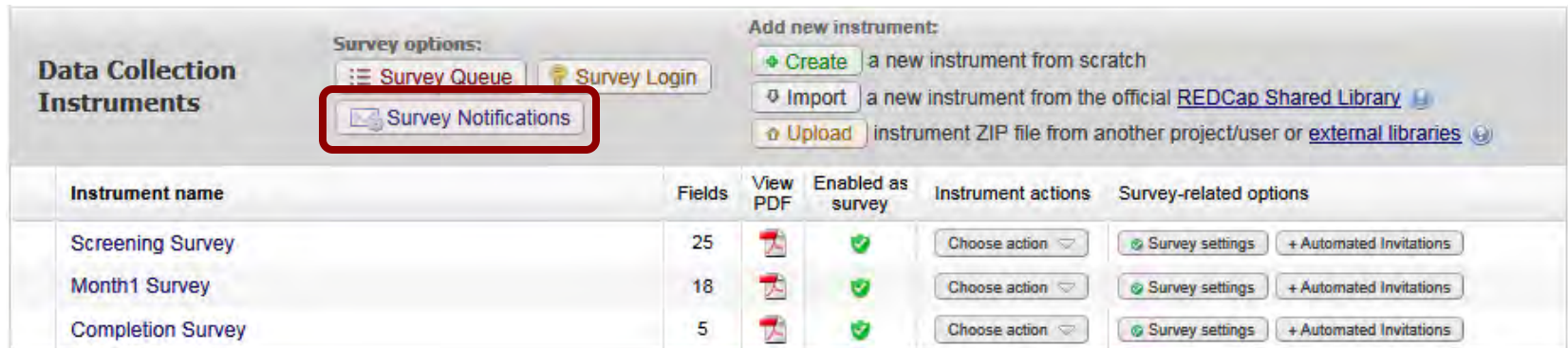
Stop Actions prompt the participant to end the survey when certain field choices are selected. Only selection fields have this option.

The screenshot shows the REDCap interface for editing a survey question. The question is "Has the patient given birth before?" with radio button options for "Yes" and "No". A red box highlights the "STOP" icon in the top toolbar. A dialog box titled "Set up Stop Actions for this Survey Question" is open, showing the same question and options. The "No" option is selected. The dialog box also includes "Select All" and "Deselect All" links and "Save" and "Close" buttons.

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

Survey Notifications

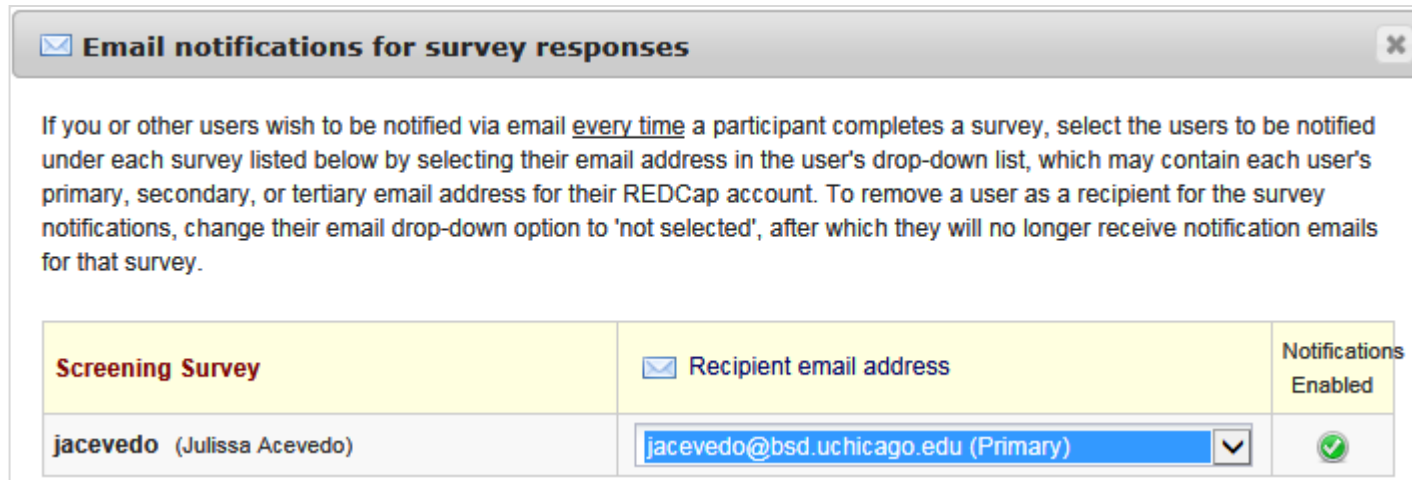
1. Go to **Online Designer** and click on **Survey Notifications**.



The screenshot shows the 'Data Collection Instruments' page in REDCap. Under 'Survey options', the 'Survey Notifications' button is highlighted with a red box. To the right, under 'Add new instrument:', there are buttons for 'Create', 'Import', and 'Upload'. Below these is a table of existing surveys.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screening Survey	25			Choose action	Survey settings + Automated Invitations
Month1 Survey	18			Choose action	Survey settings + Automated Invitations
Completion Survey	5			Choose action	Survey settings + Automated Invitations

2. Select the survey and select the email address.



The dialog box is titled 'Email notifications for survey responses'. It contains the following text: 'If you or other users wish to be notified via email every time a participant completes a survey, select the users to be notified under each survey listed below by selecting their email address in the user's drop-down list, which may contain each user's primary, secondary, or tertiary email address for their REDCap account. To remove a user as a recipient for the survey notifications, change their email drop-down option to 'not selected', after which they will no longer receive notification emails for that survey.'

Screening Survey	Recipient email address	Notifications Enabled
jacevedo (Julissa Acevedo)	jacevedo@bsd.uchicago.edu (Primary)	

*(*To stop, unselect the email address.)*

‡ Action Tags

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.

Edit 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, ...) ▼

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)
Date subject signed consent

Field Annotation (optional) [Learn about Action Tags](#)

Explanatory notes - not displayed on any page ?

Variable Name (utilized during data export)
 Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

Validation? (optional) Date (Y-M-D) ▼
Minimum:
Maximum:
– or –
Enable searching within a biomedical ontology ?
-- choose ontology to search -- ▼

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.

The screenshot shows the REDCap Online Designer interface. At the top, there are navigation tabs: Project Home, Project Setup, Online Designer (selected), and Data Dictionary. Below the tabs, there is a video link: VIDEO: How to use this page. A text block explains that the Online Designer allows for project modifications to fields and data collection instruments via a web browser, with a note that field changes take effect immediately. The main content area is divided into 'Data Collection Instruments' and 'Add new instrument:'. The 'Add new instrument:' section includes buttons for 'Create' (new instrument from scratch), 'Import' (new instrument from the official REDCap Shared Library), and 'Upload' (instrument ZIP file from another project/user or external libraries). Below this is a table of instruments:

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screening Survey	25			Choose action ▾	Survey settings + Automated Invitations
Month1 Survey	18			Choose action ▾	Survey settings + Automated Invitations
Completion Survey	5			Choose action ▾	Survey settings + Automated Invitations

The '+ Automated Invitations' button for the 'Month1 Survey' row is highlighted with a red box.

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](#)

Info
Survey title: Month1 Survey

1 STEP 1: Compose message

From: (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](#)

2 STEP 2: Conditions

Specify conditions for sending invitations:

When the following survey is completed:

AND

When the following logic becomes true:

(e.g., [age] > 30 and [gender] = "1") [How do I use special functions?](#)

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 -- 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?

4 STEP 4: Activated?

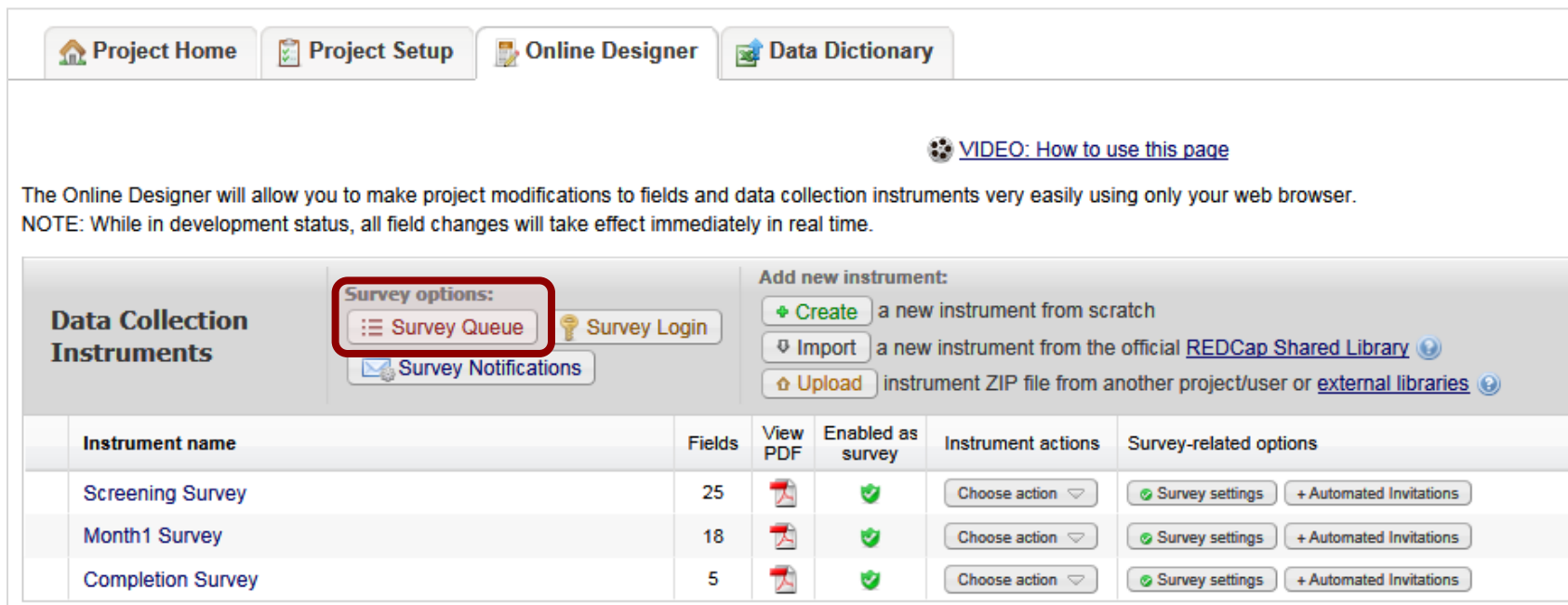
Activate these automated invitations? In order for automated survey invitations to be sent using these specified conditions, it must be set to Active. You may make them Not Active (and vice versa) at any point in the future.

Active Not Active



Survey Queues

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**.



The screenshot shows the REDCap Online Designer interface. At the top, there are navigation buttons for Project Home, Project Setup, Online Designer, and Data Dictionary. Below these, there is a video link: VIDEO: How to use this page. A note states: 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.

The main content area is divided into two sections. On the left, under 'Data Collection Instruments', there are three options: Survey Queue (highlighted with a red box), Survey Login, and Survey Notifications. On the right, under 'Add new instrument:', there are three options: Create (a new instrument from scratch), Import (a new instrument from the official REDCap Shared Library), and Upload (instrument ZIP file from another project/user or external libraries).




Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screening Survey	25			Choose action ▾	Survey settings + Automated Invitations
Month1 Survey	18			Choose action ▾	Survey settings + Automated Invitations
Completion Survey	5			Choose action ▾	Survey settings + Automated Invitations

Survey Queues

Set up Survey Queue

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](#)

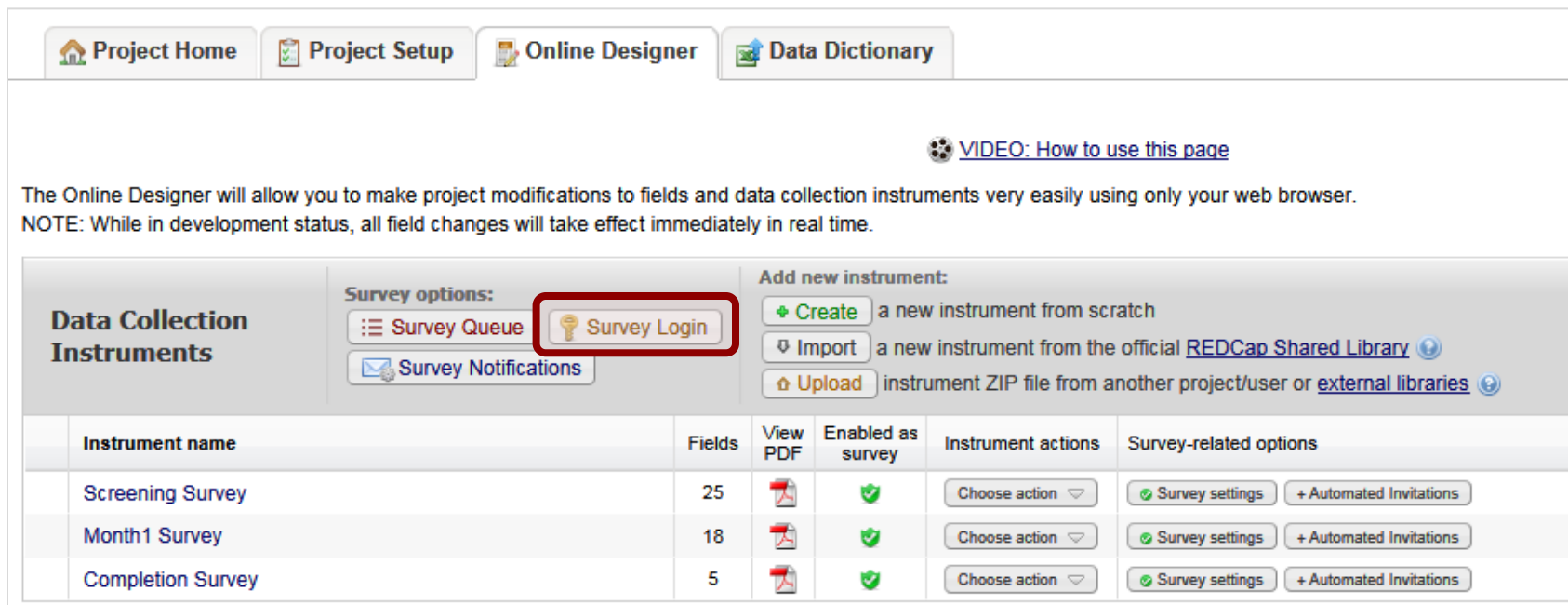
Activated?	Survey Title	Display survey in the Survey Queue when...	Auto start?
 Activated <input type="button" value="Deactivate"/>	"Followup Survey"	<input type="checkbox"/> When the following survey is completed: --- select a survey --- AND <input checked="" type="checkbox"/> When the following logic becomes true: How to use this [email_address] <> " (e.g., [age] > 30 and [gender] = "1")	<input type="checkbox"/>
 Activated <input type="button" value="Deactivate"/>	"Female Questionnaire"	<input checked="" type="checkbox"/> When the following survey is completed: "Followup Survey" AND <input checked="" type="checkbox"/> When the following logic becomes true: How to use this [gender] = 1 (e.g., [age] > 30 and [gender] = "1")	<input type="checkbox"/>
 Activated <input type="button" value="Deactivate"/>	"Male Questionnaire"	<input checked="" type="checkbox"/> When the following survey is completed: "Followup Survey" AND <input checked="" type="checkbox"/> When the following logic becomes true: How to use this [gender] = 2 (e.g., [age] > 30 and [gender] = "1")	<input type="checkbox"/>



Survey Logins

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**.



The screenshot shows the REDCap Online Designer interface. At the top, there are navigation buttons for Project Home, Project Setup, Online Designer, and Data Dictionary. Below these is a video link: VIDEO: How to use this page. A note states: "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." The main content area is divided into "Data Collection Instruments" and "Add new instrument:". Under "Survey options:", the "Survey Login" button is highlighted with a red box. The "Add new instrument:" section includes "Create", "Import", and "Upload" options. Below this is a table of existing instruments.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screening Survey	25			Choose action ▾	Survey settings + Automated Invitations
Month1 Survey	18			Choose action ▾	Survey settings + Automated Invitations
Completion Survey	5			Choose action ▾	Survey settings + Automated Invitations

Survey Logins

Survey Login

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 survey_admin@myinstitution.edu for help."	If you have any trouble logging in to the survey, please contact johndoe@uchicago.edu for help. HTML may be used in order to add links or to add style to text.
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

▶ User Rights for Managing Surveys


Basic Rights

 Expiration Date (M/D/Y)
(if applicable)


Highest level privileges:


-  Project Design and Setup
-  User Rights
-  Data Access Groups

Privileges for data exports (including PDFs and API exports), reports, and stats:









 Data Exports No Access
 De-Identified*
 Remove all tagged Identifier fields
 Full Data Set

* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.

 Add / Edit Reports
Also allows user to view ALL reports (but not necessarily all data in the reports)

 Stats & Charts

Other privileges:

-  Manage Survey Participants
-  Calendar
-  Data Import Tool
-  Data Comparison Tool
-  Logging
-  File Repository
-  Data Quality Create & edit rules
[What is Data Quality?](#) Execute rules
-  API API Export
[What is the REDCap API?](#) API Import/Update

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**.

▶ User Rights for Editing Surveys

In order to edit survey responses or delete surveys, assign the user rights called **Edit Survey Responses**.

	No Access	Read Only	View & Edit	Edit survey responses
Screening Survey (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Monthly Survey (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Completion Survey (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>

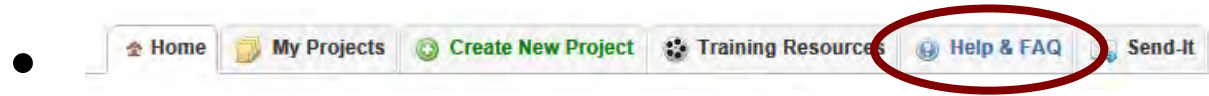
‡ Last Thoughts...

- ❑ 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>

- A blue button with a white envelope icon and the text 'Contact REDCap administrator'.

- redcap@rt.cri.chicago.edu



Thank you!