

Making the Most of



All About Surveys

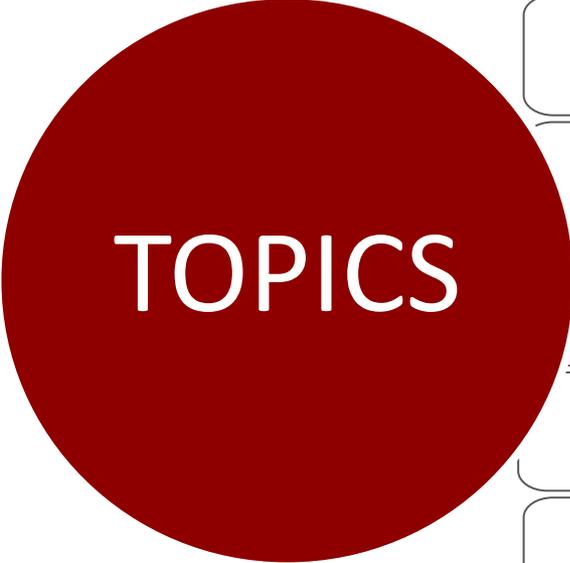


THE UNIVERSITY OF
CHICAGO MEDICINE &
BIOLOGICAL SCIENCES



CENTER FOR
RESEARCH
INFORMATICS

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TOPICS

History & Background

Survey Basics

Creating Surveys

Distributing Surveys

Tracking Surveys

Survey Termination

Advanced Features

Smart Devices

Wrap Up



**HISTORY &
BACK-
GROUND**

Who is the CRI?

What is REDCap?

REDCap History

CENTER FOR RESEARCH INFORMATICS



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



WEBSITE:

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

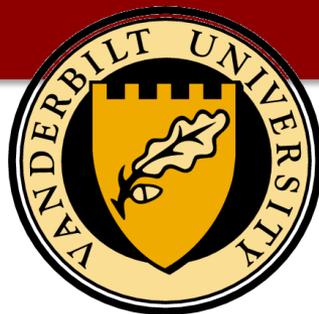
2004: Developed at
Vanderbilt

2006: Global consortium

2010: University of Chicago

2011: Center for Research
Informatics

2012: REDCap at UChicago



NOW

Worldwide:

3600 institutions

130 countries

727,000 projects

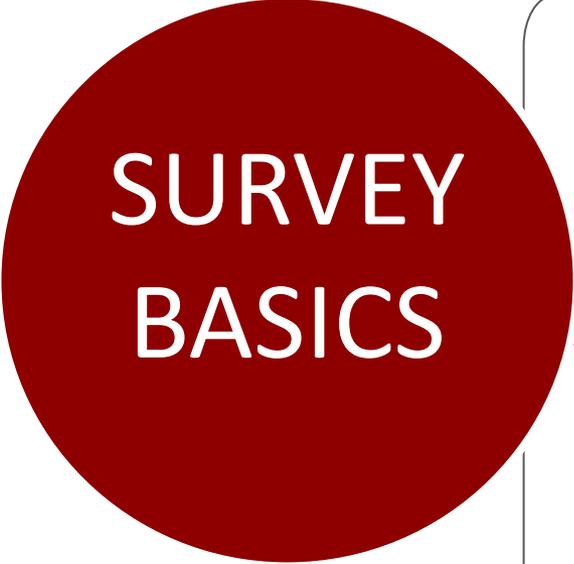
988,000 users

UChicago:

4,800 projects

5,100 users





**SURVEY
BASICS**

What is a Survey?

Survey Respondents
vs Project Users

Survey User Rights

WHAT IS A SURVEY?

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.

The screenshot shows a public survey form titled "Screening Survey". At the top right, there is a "Resize font" control with plus and minus icons. Below the title, the text reads "Please complete the survey below." and "Thank you!". The first question is "Have you given birth before?" with radio button options for "Yes" and "No". A "reset" link is located to the right of the "No" option. The second question is "Date of Birth", featuring a text input field, a calendar icon, a "Today" button, and the format "M-D-Y". At the bottom center, there is a "Submit" button.

The screenshot shows the REDCap data entry interface for the "Screening Survey" form. At the top, it says "Screening Survey" and "Adding new Record ID 1". The "Record ID" field contains the value "1". The "Have you given birth before?" question is displayed with radio button options for "Yes" and "No", and a "reset" link. The "Date of Birth" question is shown with a text input field, a calendar icon, a "Today" button, and the format "M-D-Y". The "Form Status" section is highlighted in yellow and contains a "Complete?" dropdown menu set to "Incomplete". Below this, there is a "Lock this record for this form?" section with a checkbox and a "Lock" button. A note states: "If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it." At the bottom, there are three buttons: "Save & Exit Form", "Save & ..." (with a dropdown arrow), and "-- Cancel --".

▶ SURVEY PARTICIPANTS 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.

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

To allow a study team member to manage surveys (add participants, send emails, etc), assign them the user right:

Manage Survey Participants

USER RIGHTS FOR EDITING SURVEYS

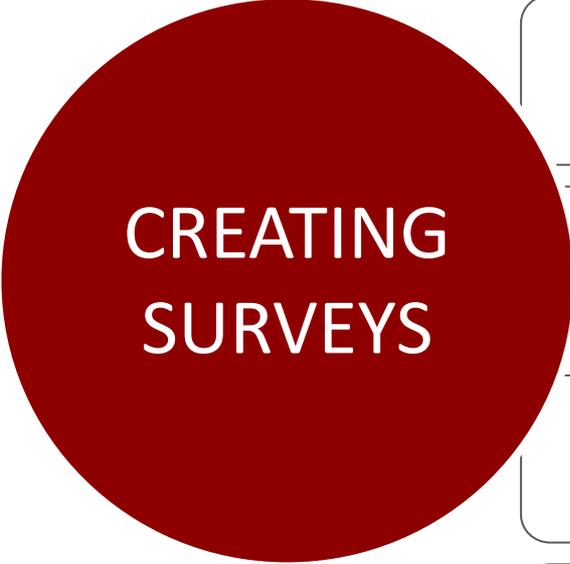
Data Entry Rights

*NOTE: The data entry rights *only* pertain to a user's ability to view or edit data on a web page in REDCap (e.g., data entry forms, reports). It has no effect on data imports or data exports.*

	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"/>

To allow a study team member to edit survey responses or delete surveys, assign them the user right called:

Edit Survey Responses



CREATING
SURVEYS

Creating a Survey

Enabling the Survey

Survey Settings

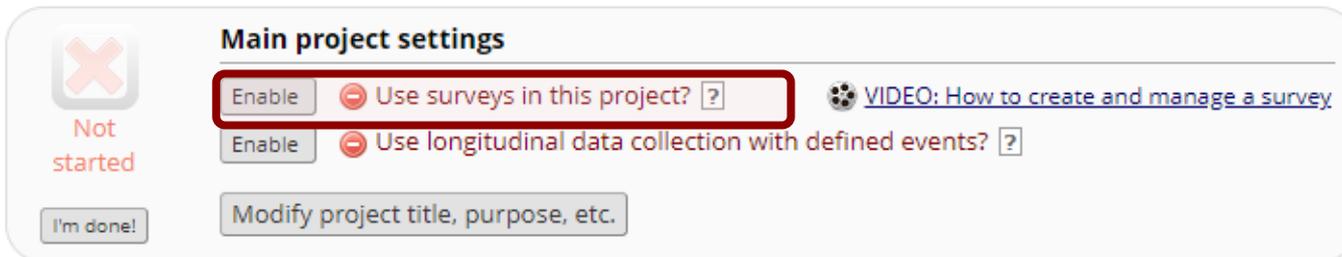
Testing Surveys

Multiple Surveys

Longitudinal Surveys

CREATING AND ENABLING A SURVEY

1 Enable the survey feature (Project Setup tab).



2 Create the instrument first.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screening	3		Enable	Choose action	

3 Enable the instrument as a survey.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screening	3			Choose action	Survey settings + Automated Invitations

▶ SURVEY SETTINGS

Set the status, title, and opening instructions.

Survey Status Survey Active
Survey Offline Participants will not be able take the survey.

Basic Survey Options:

 **Survey Title**
Title to be displayed to participants at the top of the survey page

 **Survey Instructions**
(Displayed at top of survey after title)

Please complete the survey below.

Thank you!



 [How to use Piping here](#)

▶ SURVEY SETTINGS – DESIGN OPTIONS

Add a logo, customize the text and survey theme.

Survey Design Options:

 **Logo**
(Optional: display an image above the survey title)

Add new logo:

(Images wider than 600 pixels will be downsized to fit page.)

If using a logo, hide survey title on survey page?

 **Use enhanced radio buttons and checkboxes?**
(Includes Yes/No and True/False fields)

 **Size of survey text**

 **Font of survey text**

 **Survey theme**

Survey design preview (sample survey): [Expand](#)

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the survey, as well as what to expect once they have completed the survey. Below is a listing of various question types that will be displayed on your survey.

This is a section header to divide the survey page into sections.

▶ SURVEY SETTINGS – CUSTOMIZATIONS

Select various survey customizations, as needed:

Survey Customizations:

Question Numbering Auto numbered ▼

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

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.

This option will not be available if the Survey Auto-continue or Survey Queue auto-start option is enabled. Also, if a field utilizes the @HIDDEN action tag, it will not be displayed in the PDF.

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 as descriptive statistics. Also, the individual respondent's answers will be highlighted in the results.

Additional settings:

10 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?](#))

Text-To-Speech functionality Disabled ▼
(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 SETTINGS – ACCESS

Set response limits, completion time limits, expiration date, and the Save&Return options.

Survey Access:

STOP 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 ▼

Custom text to display to respondent on survey when limit is 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 **07/10/2019 13:43**.

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

▼

Allow respondents to return without needing a return code ?

Allow respondents to return and modify completed responses ?

▶ SURVEY SETTINGS – TERMINATION

Set what happens after survey is submitted.

Survey Termination Options:

(Optional) Auto-continue to next survey: Automatically start the next survey instrument after finishing this survey [?](#)

— OTHERWISE —

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](#)

— OR —

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!

B *I* U ABC ab

[How to use Piping here](#)

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.

Disabled
 Enabled

Send confirmation email (optional)?

(Email the respondent when they complete the survey)

No

▶ SURVEY SETTINGS – CONFIRMATION

Send an optional confirmation email.

 **Send confirmation email (optional)?**
(Email the respondent when they complete the survey)

Yes

Provide email subject, email message, and (optionally) an attachment to be sent to respondent when they complete the survey. [How to use Piping here](#)

From:

Subject:

[Send test email](#)

We have received your information and will contact your shortly.
Attached is a copy of you completed survey.

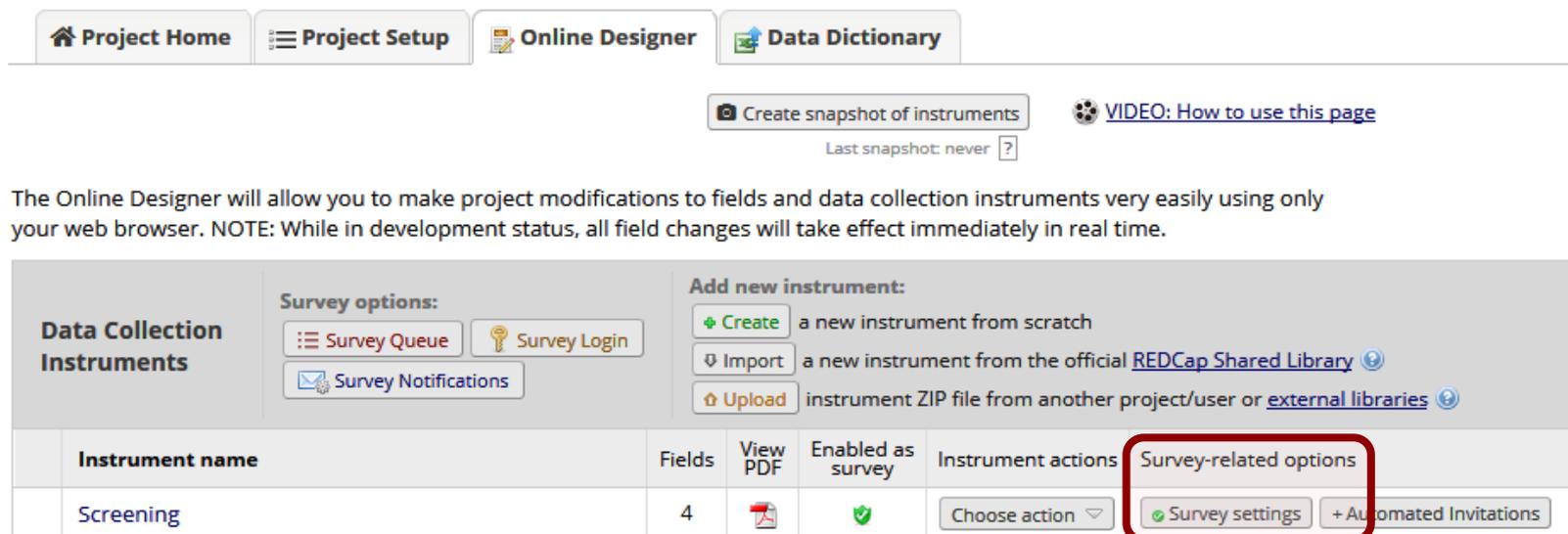
 Attachment:

Include PDF of completed survey as attachment

⚠ WARNING: Since email is not considered a secure form of communication, the PDF attachment option is NOT recommended if the survey contains questions asking for identifying information (e.g., PHI).

EDITING SURVEY SETTINGS

To edit your survey settings, click on **Survey Settings** under **Survey-related options**.



The screenshot shows the REDCap Online Designer interface. At the top, there are navigation tabs: Project Home, Project Setup, Online Designer, and Data Dictionary. Below these, there are buttons for 'Create snapshot of instruments' and a video link 'VIDEO: How to use this page'. The main content area is divided into 'Data Collection Instruments' and 'Add new instrument:' sections. The 'Add new instrument:' section has three options: 'Create', 'Import', and 'Upload'. Below this is a table of instruments. The 'Survey-related options' column for the 'Screening' instrument is highlighted with a red box, showing a 'Survey settings' button and a '+ Automated Invitations' button.

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.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screening	4			Choose action ▾	Survey settings + Automated Invitations

▶ 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.
- Export test data to check on data analysis, and modify survey questions if needed.
- Once testing is complete, request the project be moved to production.
- DO NOT send out survey until then!



MULTIPLE SURVEYS

Create multiple surveys in the same project.



 [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

Survey options:

-  Survey Queue
-  Survey Login
-  Survey Notifications

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
Screening Survey	25			Choose action ▾	 Survey settings + Automated Invitations
Month 1 Survey	18			Choose action ▾	 Survey settings + Automated Invitations
Month 2 Survey	18			Choose action ▾	 Survey settings + Automated Invitations
Month 3 Survey	18			Choose action ▾	 Survey settings + Automated Invitations
Completion Survey	5			Choose action ▾	 Survey settings + Automated Invitations



LONGITUDINAL SURVEYS

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

1 Setup the survey instruments.

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

2 Enable the longitudinal feature.

Project Home | Project Setup | Other Functionality | Project Revision History | Edit project

Project status: Development Completed steps 6 of 8

Main project settings

In progress VIDEO: How to create and manage a survey

Disable Use longitudinal data collection with repeating forms?

Disable Use surveys in this project?

LONGITUDINAL SURVEYS

3 Setup the events.

Arm 1: Screening +Add New Arm

Arm name: **Screening**

	Event #	Event Name	Unique event name (auto-generated)
 	1	Screening	screening_arm_1
 	2	Month 1	month_1_arm_1
 	3	Month 2	month_2_arm_1
 	4	Month 3	month_3_arm_1
 	5	Completion	completion_arm_1

Descriptive name for this event

4 Assign the surveys to the events.

Data Collection Instrument	Screening (1)	Month 1 (2)	Month 2 (3)	Month 3 (4)	Completion (5)
Screening Survey (survey)	✓				
Monthly Survey (survey)		✓	✓	✓	
Completion Survey (survey)					✓



DISTRIBUTING
SURVEYS

Public Survey Link
vs Participant List

How to use the
Public Survey Link

How to use the
Participant List

▶ PUBLIC SURVEY LINK VS PARTICIPANT LIST

PUBLIC SURVEY LINK

Participant emails unknown beforehand.

Participants all use the same survey link.

Emails sent via Outlook, not within REDCap.

Great for listservs or posting on flyers or websites.

PARTICIPANT LIST

Participants emails known beforehand.

Each participant receives unique, one time use link.

Emails sent through REDCap to participant email address.

Can track who has or has not responded.

▶ PUBLIC SURVEY LINK

The **Public Survey Link** is the simplest and fastest way to collect survey responses.

🔗 Public Survey Link 👤 Participant List 📧 Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

Public Survey URL: 

Link Actions

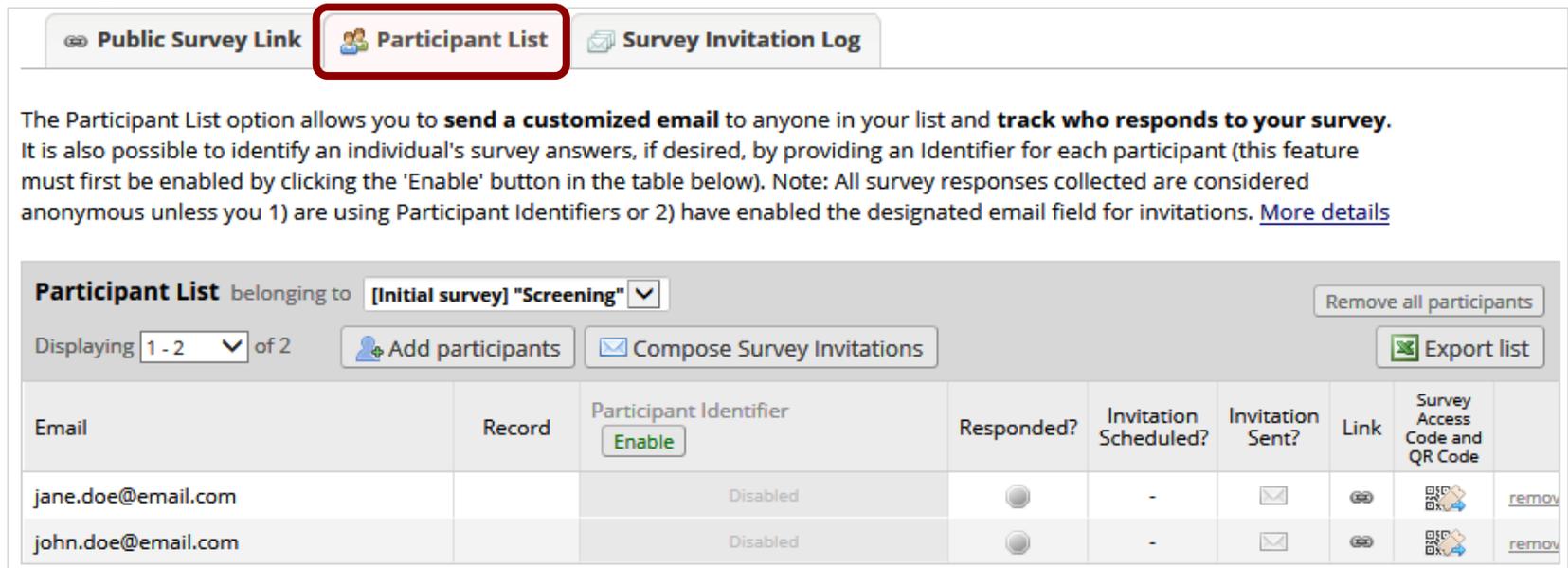
-  Open public survey
-  Open public survey +  Log out
-  Send me URL via email
-  Survey Access Code or  QR Code

Link Customizations

-  Get Short Survey Link
-  Create Custom Survey Link
-  Get Embed Code

▶ PARTICIPANT LIST

The **Participant List** allows for emailing the survey to your participants, and keeping track of responses.



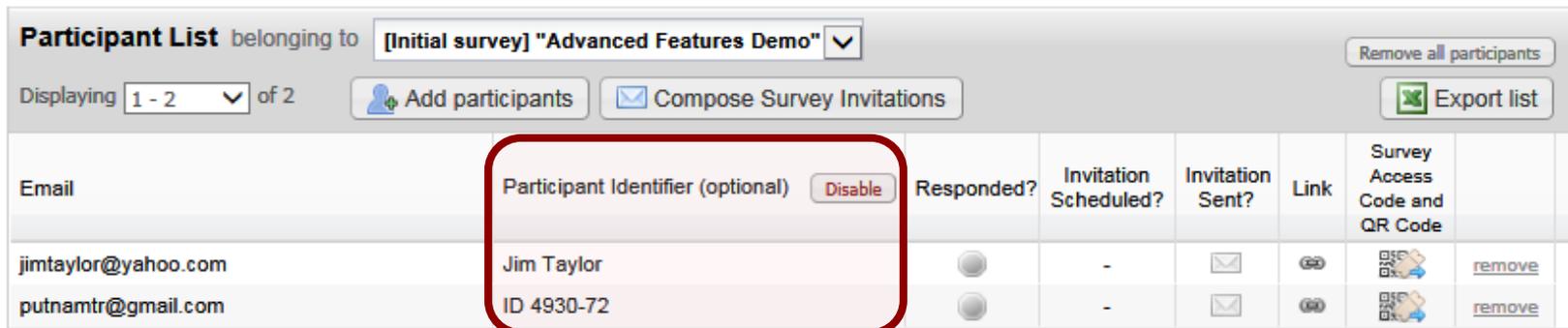
The screenshot shows the 'Participant List' interface. At the top, there are three tabs: 'Public Survey Link', 'Participant List' (highlighted with a red box), and 'Survey Invitation Log'. Below the tabs is a descriptive paragraph: 'The Participant List option allows you to **send a customized email** 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). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)'

Below the text is a control bar for the 'Participant List' belonging to '[Initial survey] "Screening"'. It includes a dropdown for 'Displaying 1 - 2 of 2', buttons for 'Add participants', 'Compose Survey Invitations', and 'Export list', and a 'Remove all participants' button.

Email	Record	Participant Identifier <input type="button" value="Enable"/>	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
jane.doe@email.com		Disabled	<input type="radio"/>	-	<input type="checkbox"/>			remov
john.doe@email.com		Disabled	<input type="radio"/>	-	<input type="checkbox"/>			remov

▶ PARTICIPANT IDENTIFIERS

- To keep the survey anonymous, **don't** enable the **Participant Identifier** feature.
- To make the survey non-anonymous, enable the **Participant Identifier** feature.
- The **Participant Identifier** may be the participant's name, an ID number, or whatever you would like.
- It is **not the same** as the project's main primary identifier (Record Number, Record ID, Study ID, MRN).
- The **Participant Identifier** is can be exported along with the data.



Participant List belonging to [Initial survey] "Advanced Features Demo" Remove all participants

Displaying 1 - 2 of 2 Add participants Compose Survey Invitations Export list

Email	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
jimtaylor@yahoo.com	Jim Taylor	<input type="radio"/>	-	<input type="checkbox"/>			remove
putnamtr@gmail.com	ID 4930-72	<input type="radio"/>	-	<input type="checkbox"/>			remove

▶ ADDING PARTICIPANTS TO PARTICIPANT LIST

There are different ways of adding participants' email addresses to the **Participant List**:

- 1 For few participants, manually type in.
- 2 For many participants, cut-and-paste in.

Add Emails to Participant List ✕

Copy and paste your list of participant email addresses, **one per line**. If you are importing Identifiers for any participant, separate them by commas following the guidelines below.

jimtaylor@yahoo.com
putnamtr@gmail.com

Each participant starting on a new line

Field Order: Email, Participant Identifier (optional)

Example #1: john.williams@hotmail.com
Example #2: jimtaylor@yahoo.com, Jim Taylor
Example #3: putnamtr@gmail.com, ID 4930-72

DESIGNATE AN EMAIL FIELD

- 1 Setup the email field with **email validation**.

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:

Field Label: [How to use Piping](#)

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

Validation? (optional)

- 2 Enable the feature on the **Project Setup** tab.

Enable optional modules and customizations

 **Complete!**

[Not complete?](#)

- Auto-numbering for records [?](#)
- Scheduling module (longitudinal only) [?](#)
- Randomization module [?](#)
- Designate an email field to use for invitations to survey participants [?](#)

COMPOSE SURVEY INVITATIONS

Send a Survey Invitation to Participants

Info
Survey title: Advanced Features Demo

1 When should the emails be sent?

Immediately
 At specified time: M/D/Y H:M
The time must be for the time zone America/Chicago, in which the current time is 01/26/2017 12:52.

2 **Enable reminders**

Re-send invitation as a reminder if participant has not responded by a specified time?

3 **Compose message**

From:
To:
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](#)

4 **Participant List**
(those who have not responded completely)

Actions: -- check/uncheck participants --

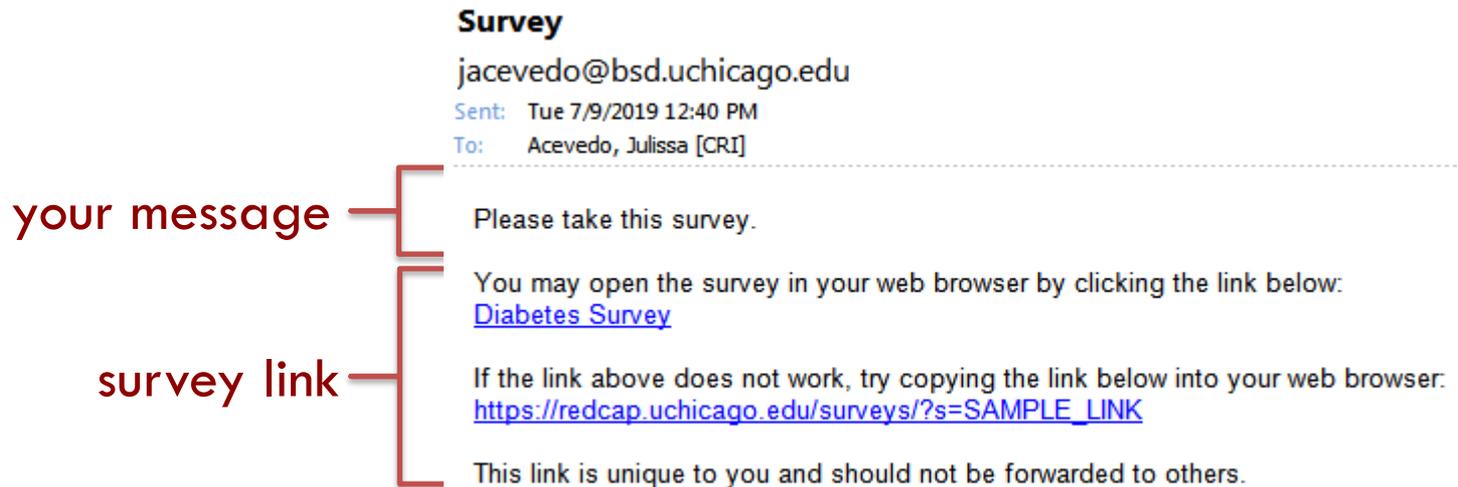
<input checked="" type="checkbox"/>	Email (2 selected)	Participant Identifier	Scheduled?	Sent?	Respond
<input checked="" type="checkbox"/>	jimtaylor@yahoo.com	Jim Taylor	-	<input type="checkbox"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	putnamtr@gmail.com	ID 4930-72	-	<input type="checkbox"/>	<input type="radio"/>

5

1. Specify when emails should be sent.
2. Enable reminders for non-responses.
3. Compose the email message.
4. Select participants from the list.
5. Send the invitations.

▸ SURVEY INVITATION MESSAGE AND LINK

A section for the unique survey link will be appended to the end of your email message:



NOTE: You may modify or remove any text you wish above but make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.

NON-RESPONSE REMINDERS

- 1 Survey reminders can only be setup while composing survey invitations.
- 2 They cannot be setup after invitations have been sent.
- 3 They can be sent on specific days of the week, or every X days, or at an exact date/time.
- 4 Up to 2-5 reminders can be scheduled.

 **Enable reminders**

Re-send invitation as a reminder if participant has not responded by a specified time? (Times below refer to AFTER original invitation time.)

Send every at time  H:M

Send every days hours minutes

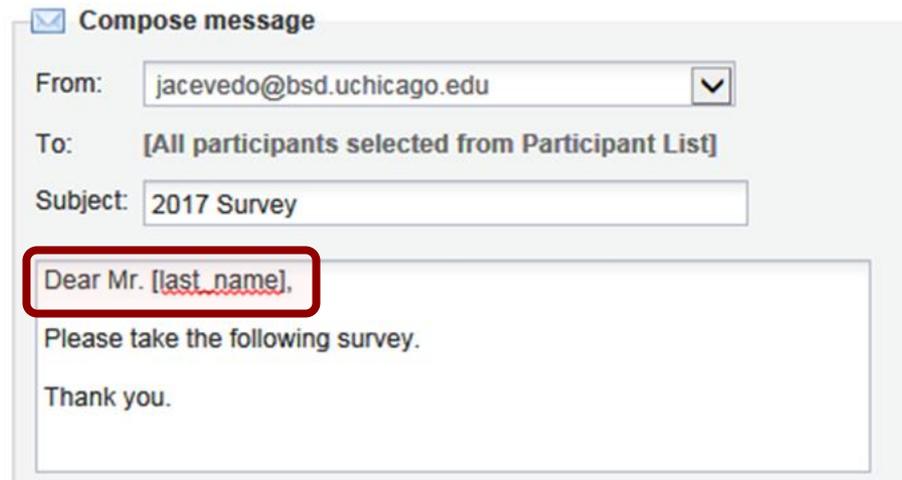
Send at exact date/time:   M/D/Y H:M

– AND –

Recurrence:

FIELD PIPING

The Piping feature allows you to pipe previously collected data to customize the survey invitation greeting...



Compose message

From:

To: [All participants selected from Participant List]

Subject:

Please take the following survey.

Thank you.

...or the survey completion text.

<p><input checked="" type="radio"/> Survey Completion Text (Displayed after survey is completed as 'thank you' text or as acknowledgement text)</p>	<p>Thank you for taking the survey, Mr. [last_name].</p> <p>Have a nice day!</p>
--	---



**TRACKING
SURVEYS**

Participant List

Survey Log

Partial Responses

Editing Responses

Survey Timestamps

TRACKING SURVEYS VIA THE PARTICIPANT LIST

Surveys responses can be tracked on the **Participant List** according to:

- ✔ **Complete** – participant submitted the survey
- ⊙ **Incomplete** – participant started but hasn't submitted the survey
- **No Action** – participant has not started the survey

Participant List belonging to [Initial survey] "Advanced Features Demo" Remove all participants

Displaying 1 - 3 of 3 Add participants Compose Survey Invitations Export list

Email	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
jacevedo@bsd.uchicago.edu (ID 1)	JA1980-B	⊙	-	✉	🔗		
jimtaylor@yahoo.com	Jim Taylor	○	-	✉	🔗		remove
putnamtr@gmail.com (ID 2)	ID 4930-72	✔	-	✉	🔗		remove

TRACKING SURVEYS VIA THE SURVEY INVITATION LOG

- The **Survey Invitation Log** lists survey invitations that have already been sent or have been scheduled to be sent to survey participants.
- You may even view the invitation email itself by clicking the icon in the 'View Email' column.

Survey Invitation Log
(in ascending order by time sent)

Displaying 1 - 1 of 1

Begin time: End time: 01/26/2017 15:12 (M/D/Y H:M)

Display All invitation types and All response statuses

Display All surveys

Display invitation reminders?

[Apply filters](#) [Reset](#) [Download log \(as seen below\)](#)

Invitation send time	View Invite	Participant Email	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)
01/26/2017 2:46pm		jacevedo@bsd.uchicago.edu	JA1980-B	Advanced Features Demo			

▶ PARTIAL RESPONSES

For **Partial Responses**, you can use **Compose Survey Invitations** from the **Participant List** to send them a reminder email.

Participant List belonging to [Initial survey] "Advanced Features Demo" Remove all participants

Displaying 1 - 3 of 3 Add participants Compose Survey Invitations Export list

Email	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
jacevedo@bsd.uchicago.edu (ID 1)	JA1980-B		-				
jimtaylor@yahoo.com	Jim Taylor		-				remove
putnamtr@gmail.com	ID 4930-72		-				remove

If participants don't remember their **Save-and-Return** code, you can retrieve it from their survey record.

Survey response is editable Edit response Survey options

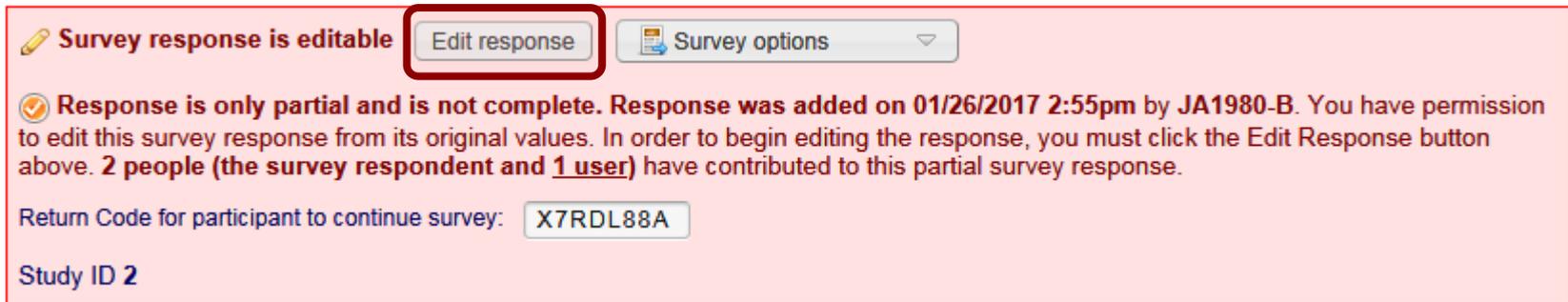
Response is only partial and is not complete. Response was added on 01/26/2017 2:55pm by JA1980-B. You have permission to edit this survey response from its original values. In order to begin editing the response, you must click the Edit Response button above. 2 people (the survey respondent and 1 user) have contributed to this partial survey response.

Return Code for participant to continue survey: X7RDL88A

Study ID 2

EDITING RESPONSES

- 1 User must have **Edit Survey Responses** user rights.
- 2 To edit a response, open record and click **Edit Response** at top of survey.



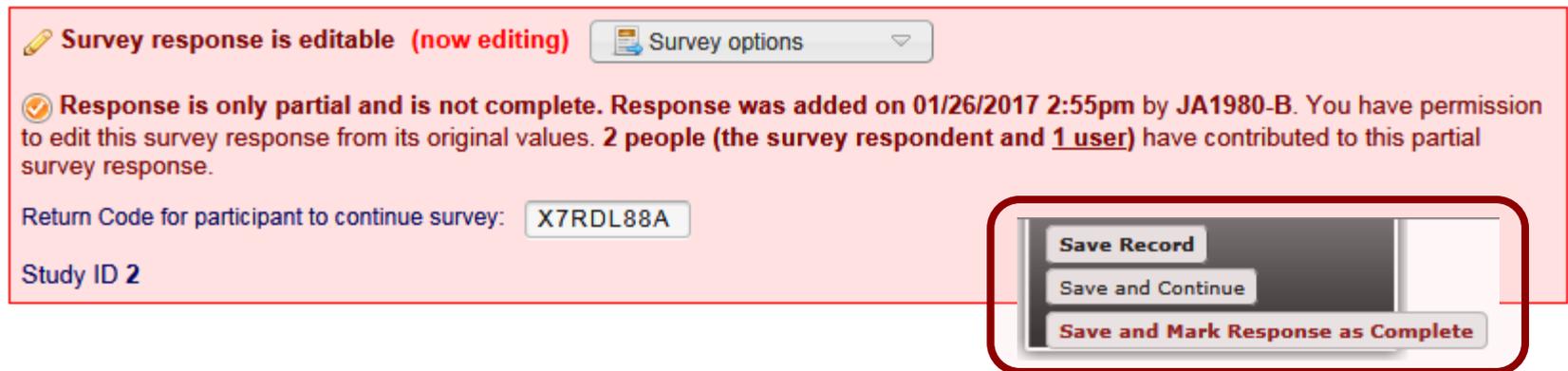
 Survey response is editable **Edit response** 

 Response is only partial and is not complete. Response was added on 01/26/2017 2:55pm by JA1980-B. You have permission to edit this survey response from its original values. In order to begin editing the response, you must click the Edit Response button above. **2 people (the survey respondent and 1 user)** have contributed to this partial survey response.

Return Code for participant to continue survey:

Study ID 2

- 3 Make the changes, and **save** the record.



 Survey response is editable **(now editing)** 

 Response is only partial and is not complete. Response was added on 01/26/2017 2:55pm by JA1980-B. You have permission to edit this survey response from its original values. **2 people (the survey respondent and 1 user)** have contributed to this partial survey response.

Return Code for participant to continue survey:

Study ID 2

Save Record
Save and Continue
Save and Mark Response as Complete

▶ SURVEY TIMESTAMPS

Survey responses get timestamped when the survey's **Submit** button is clicked on by the participant.

Complete Responses (6)	<input type="text" value="-- select response --"/> <input type="text" value="-- select response --"/> 1 2 - 2014-08-06 12:07pm
-------------------------------	---

 **Survey response is editable**

[Edit response](#)

 [Survey options](#)

 **Response is only partial and is not complete.** Response was added on 01/26/2017 2:55pm by JA1980-B. You have permission to edit this survey response from its original values. In order to begin editing the response, you must click the Edit Response button above. **2 people (the survey respondent and 1 user)** have contributed to this partial survey response.

Return Code for participant to continue survey:

Study ID 2



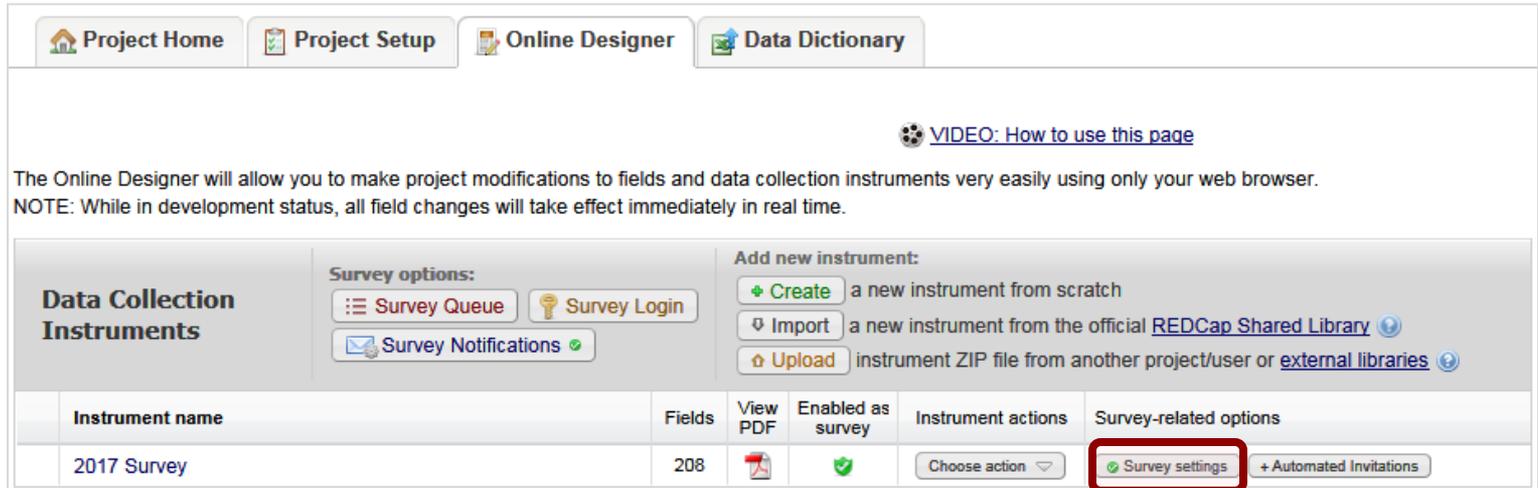
SURVEY
TERMINATION

Inactivate a Survey

Inactivate a Project

INACTIVATE A SURVEY

- 1 At Online Designer, click on Survey Settings.

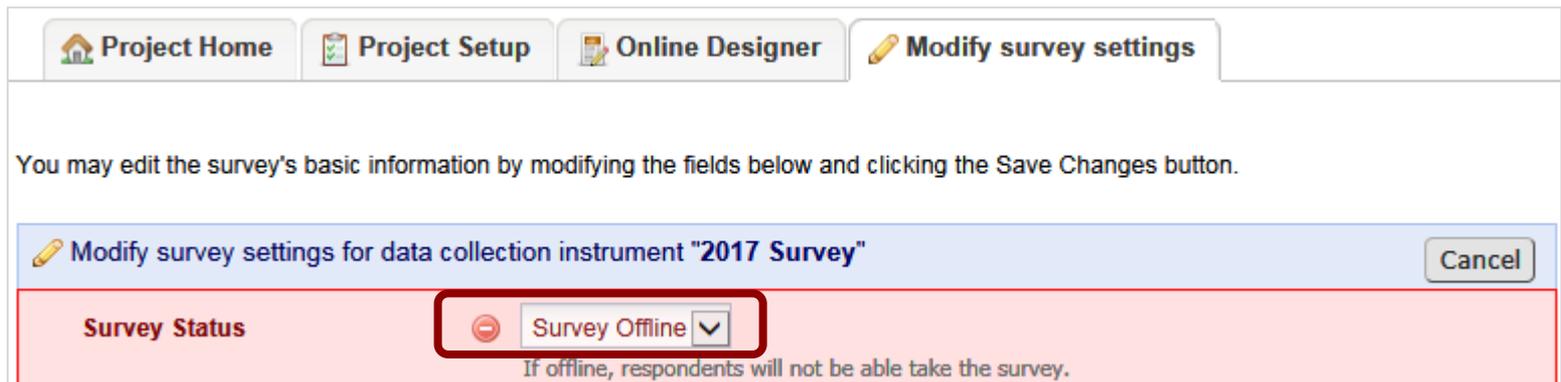


The screenshot shows the 'Online Designer' tab selected in the top navigation bar. Below the navigation bar, there is a video link 'VIDEO: How to use this page' and a paragraph of text: 'The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.'

Below the text, there are three sections: 'Data Collection Instruments', 'Survey options', and 'Add new instrument:'. The 'Survey options' section contains buttons for 'Survey Queue', 'Survey Login', and 'Survey Notifications'. The 'Add new instrument:' section contains buttons for 'Create', 'Import', and 'Upload'.

At the bottom, there is a table with the following columns: 'Instrument name', 'Fields', 'View PDF', 'Enabled as survey', 'Instrument actions', and 'Survey-related options'. The table has one row for '2017 Survey' with 208 fields. The 'Survey-related options' column for '2017 Survey' contains a 'Survey settings' button, which is highlighted with a red box, and a '+ Automated Invitations' button.

- 2 At Survey Status, set to Survey Offline.



The screenshot shows the 'Modify survey settings' tab selected in the top navigation bar. Below the navigation bar, there is a paragraph of text: 'You may edit the survey's basic information by modifying the fields below and clicking the Save Changes button.'

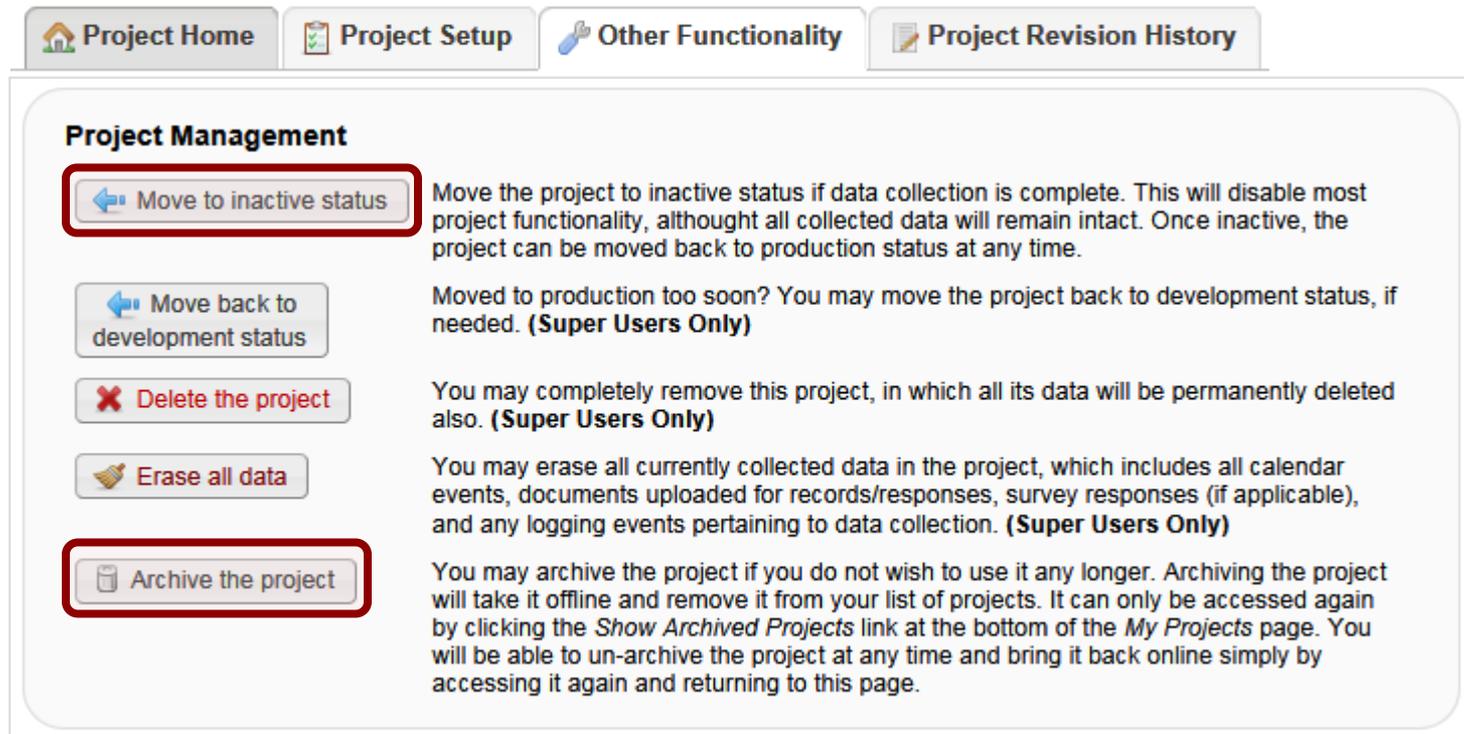
Below the text, there is a blue header bar with the text 'Modify survey settings for data collection instrument "2017 Survey"' and a 'Cancel' button on the right.

Below the header bar, there is a red box containing the 'Survey Status' label and a dropdown menu. The dropdown menu is set to 'Survey Offline' and is highlighted with a red box. Below the dropdown menu, there is a note: 'If offline, respondents will not be able take the survey.'

▶ INACTIVATE OR ARCHIVE A PROJECT

Go to **Other Functionality** tab, and either:

- Move to inactive status – data collection over, remains visible
- Archive the project – entire study is over, remains hidden



The screenshot shows a navigation bar with four tabs: 'Project Home', 'Project Setup', 'Other Functionality', and 'Project Revision History'. Below the tabs is a 'Project Management' section with five buttons and their corresponding descriptions:

Button	Description
Move to inactive status	Move the project to inactive status if data collection is complete. This will disable most project functionality, although all collected data will remain intact. Once inactive, the project can be moved back to production status at any time.
Move back to development status	Moved to production too soon? You may move the project back to development status, if needed. (Super Users Only)
Delete the project	You may completely remove this project, in which all its data will be permanently deleted also. (Super Users Only)
Erase all data	You may erase all currently collected data in the project, which includes all calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection. (Super Users Only)
Archive the project	You may archive the project if you do not wish to use it any longer. Archiving the project will take it offline and remove it from your list of projects. It can only be accessed again by clicking the <i>Show Archived Projects</i> link at the bottom of the <i>My Projects</i> page. You will be able to un-archive the project at any time and bring it back online simply by accessing it again and returning to this page.



ADVANCED
FEATURES

Stop Actions

Notifications

Action Tags

Automated Surveys

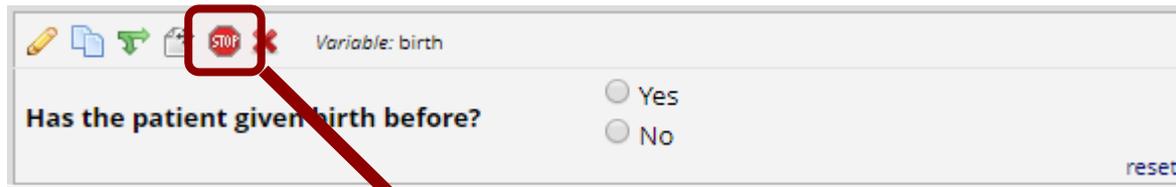
Survey Queue

Survey Logins

Survey Wizard

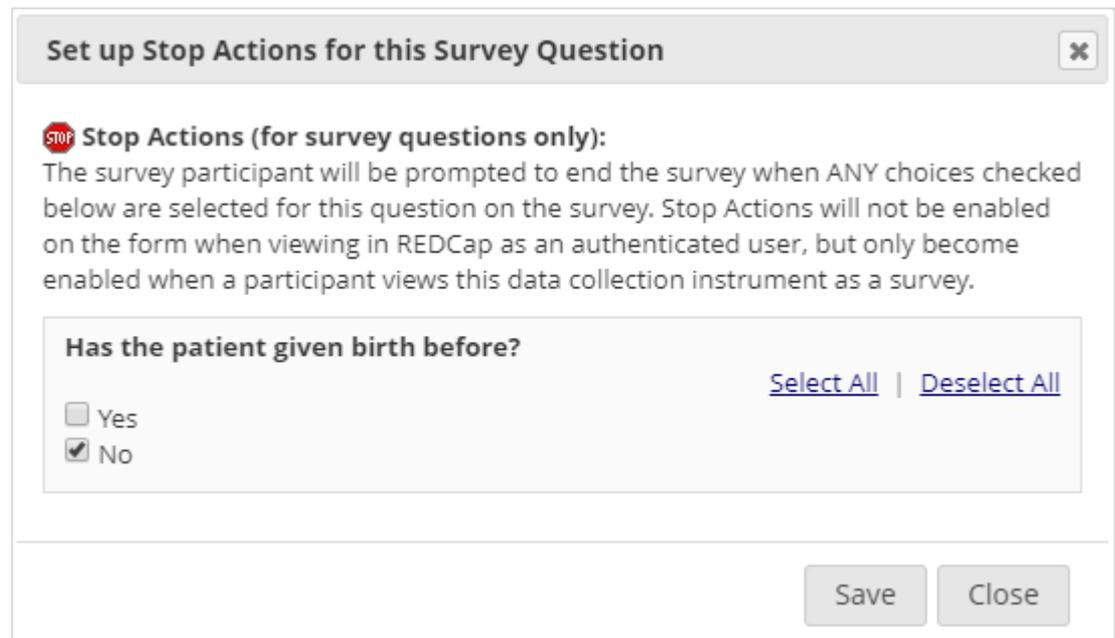
▶ SURVEY STOP ACTION

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 icon** and select the stop choice.



Variable: birth

Has the patient given birth before? Yes No [reset](#)



Set up Stop Actions for this Survey Question [X]

STOP Stop Actions (for survey questions only):
The survey participant will be prompted to end the survey when ANY choices checked below are selected for this question on the survey. Stop Actions will not be enabled on the form when viewing in REDCap as an authenticated user, but only become enabled when a participant views this data collection instrument as a survey.

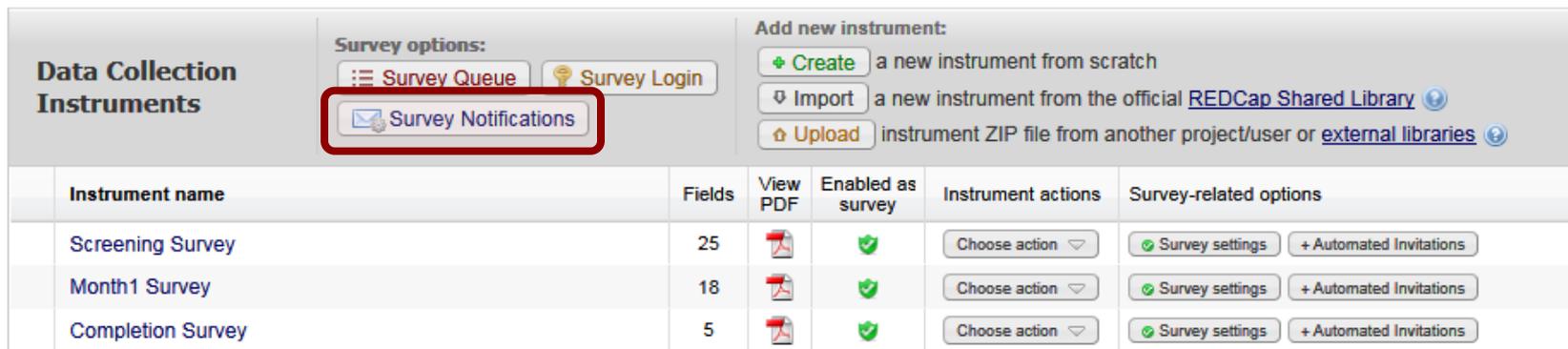
Has the patient given birth before? [Select All](#) | [Deselect All](#)

Yes
 No

[Save](#) [Close](#)

▶ SURVEY NOTIFICATIONS

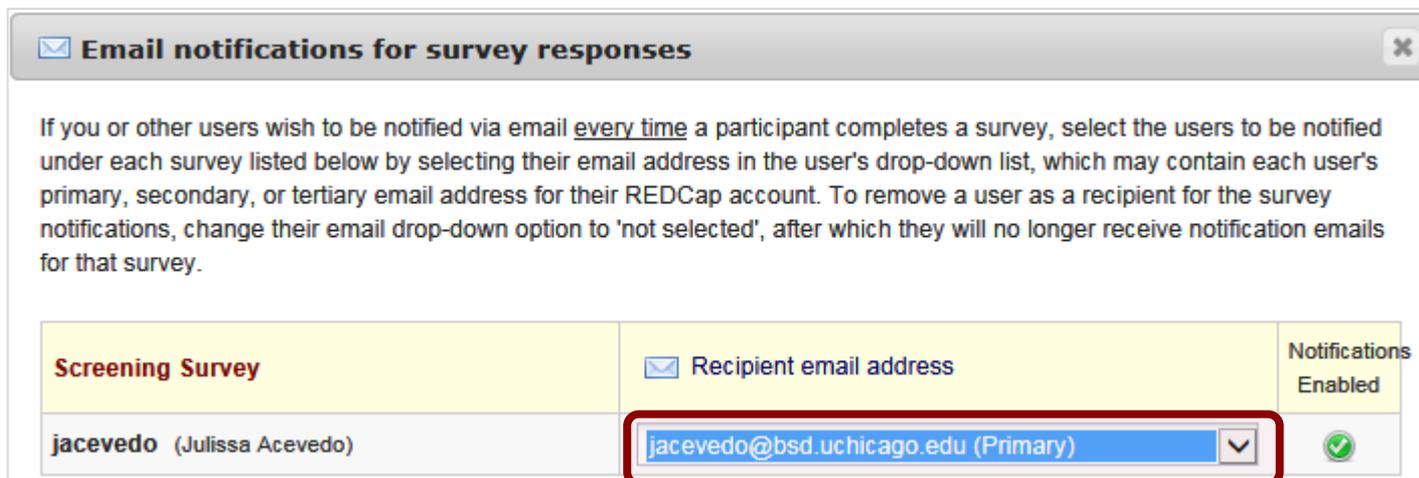
- 1 Go to **Online Designer** and click on **Survey Notifications**.



The screenshot shows the 'Data Collection Instruments' section of the REDCap Online Designer. Under 'Survey options', the 'Survey Notifications' button is highlighted with a red box. To the right, there are options to 'Add new instrument' via 'Create', 'Import', or 'Upload'. 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

- 2 Select the survey and select the email address.



The screenshot shows a dialog box titled 'Email notifications for survey responses'. It contains instructions on how to select users for notifications. Below the text is a table with columns for 'Screening Survey', 'Recipient email address', and 'Notifications Enabled'. The 'Screening Survey' is selected, and the email address 'jacevedo@bsd.uchicago.edu (Primary)' is selected in the dropdown menu, which is highlighted with a red box.

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

‡ ACTION TAGS

Action Tags are special terms that begin with the '@' sign that can be placed inside a field's **Field Annotation** to add special functionality.

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

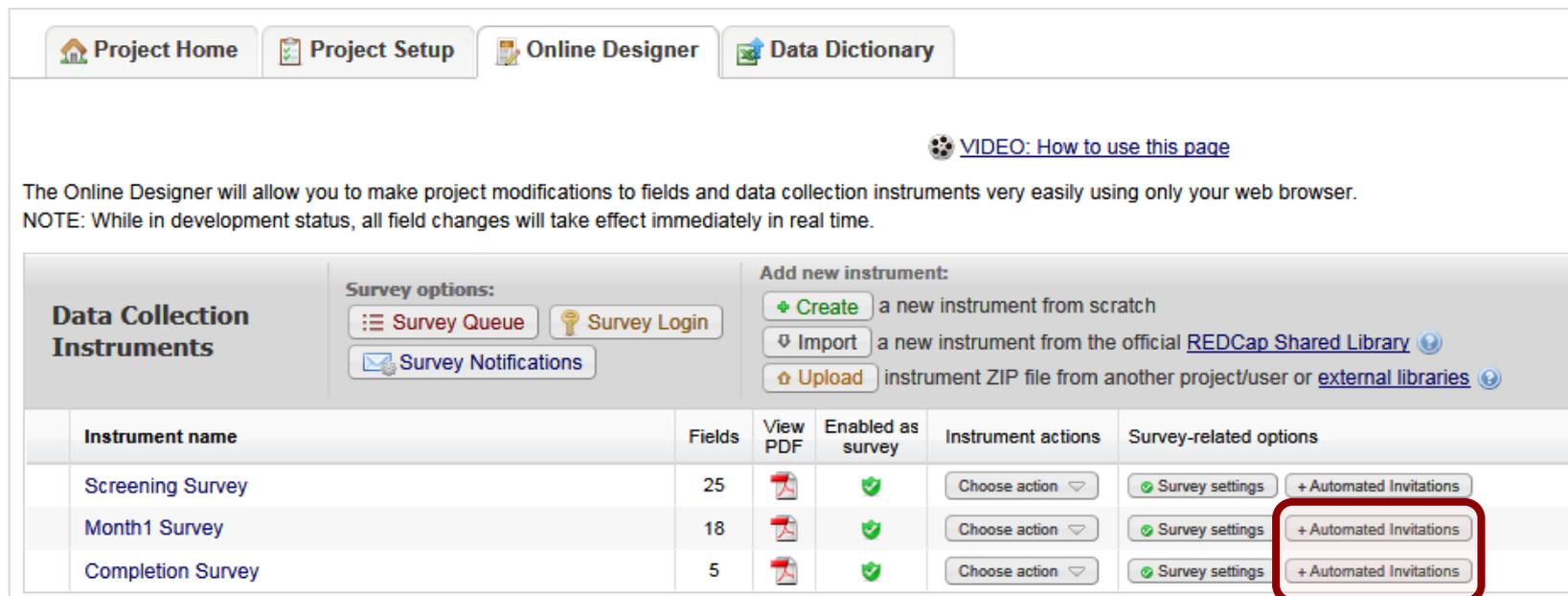
Validation? (optional) ▼
Minimum:
Maximum:
– or –

Enable searching within a biomedical ontology ?
 ▼

▶ AUTOMATED SURVEY INVITATIONS

ASIs are similar to composing email invitations, but instead the invites are sent automatically when:

- An earlier survey is completed -or-
- A condition is met



The screenshot shows the REDCap Online Designer interface. At the top, there are navigation tabs: Project Home, Project Setup, Online Designer, and Data Dictionary. Below the tabs, there is a video link: VIDEO: How to use this page. A paragraph explains that the Online Designer allows for easy project modifications. A note states that field changes take effect immediately. The main content area is divided into 'Data Collection Instruments' and 'Add new instrument:' sections. The 'Data Collection Instruments' section contains a table with columns for Instrument name, Fields, View PDF, Enabled as survey, Instrument actions, and Survey-related options. The 'Add new instrument:' section has buttons for Create, Import, and Upload. The 'Automated Invitations' buttons in the table are highlighted with a red box.

Data Collection Instruments

Survey options:

- Survey Queue
- Survey Login
- Survey Notifications

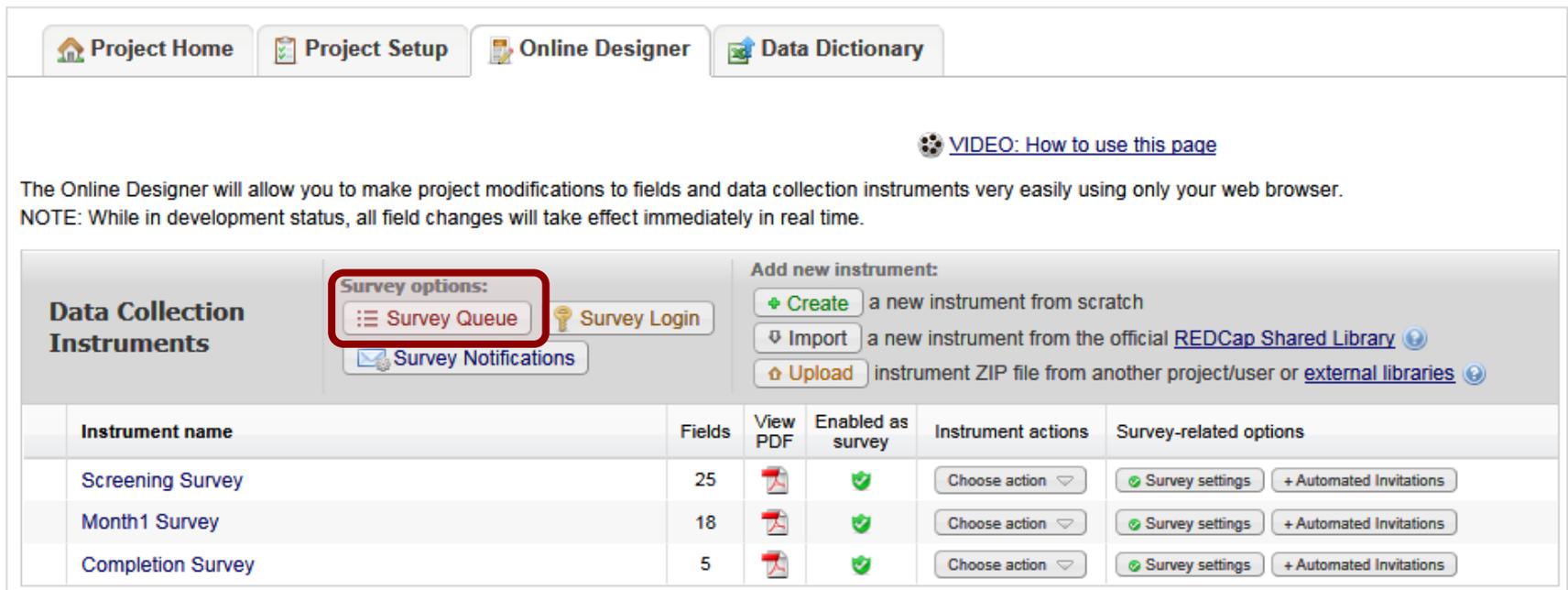
Add new instrument:

- 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
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

The **Survey Queue** is a survey packaging option. It allows for chaining together multiple surveys like a to-do list (using optional logic too).



The screenshot shows the REDCap Online Designer interface. At the top, there are navigation tabs: Project Home, Project Setup, Online Designer, and Data Dictionary. Below the tabs, there is a video link: VIDEO: How to use this page. A paragraph explains that the Online Designer allows for easy project modifications. A note states that field changes take effect immediately. The main content area is titled 'Data Collection Instruments' and features a 'Survey options:' menu with 'Survey Queue' highlighted in a red box. Other options include 'Survey Login' and 'Survey Notifications'. To the right, there are buttons for 'Add new instrument': 'Create', 'Import', and 'Upload'. Below this is a table listing 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

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

Project Home Project Setup Online Designer Data Dictionary

[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

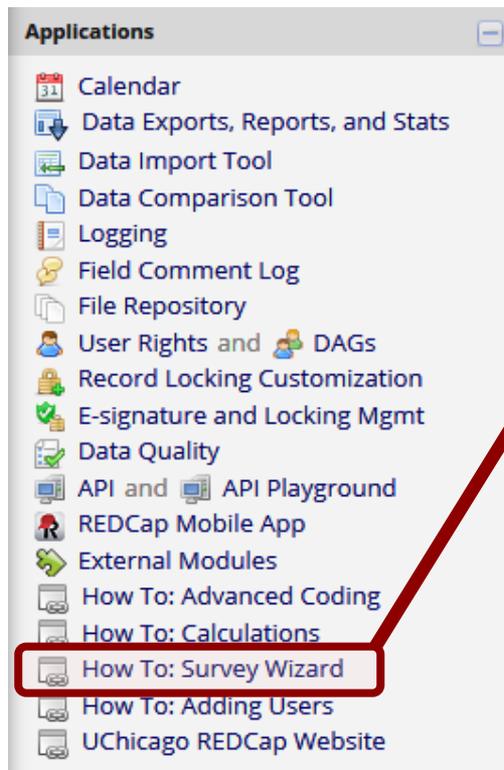
Survey options:
Survey Queue **Survey Login**
Survey Notifications

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
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 WIZARD

The **Survey Wizard** is located under the Applications menu. This survey is designed to help you work through the steps of setting up and selecting the right distribution model of survey.



A screenshot of the REDCap 'Survey Wizard: The Basics V1' interface. The interface is white with a red REDCap logo at the top left. Below the logo, the title 'Survey Wizard: The Basics V1' is displayed. The main content area is divided into sections with blue headers. The first section is 'Determining if the survey function is required for your project'. Below this header, there is a green background area containing text and two radio button options. The second section is 'Model-Specific Information'. At the bottom of the form, there is a 'Submit' button.

REDCap

Survey Wizard: The Basics V1

This survey is designed to help you work through the steps of setting up and selecting the right distribution model of survey. Please note: this survey was developed on REDCap version 7.3.6. Some features might not be available in all versions. Once you've completed the process and clicked the "Submit" button you will have the opportunity to download a PDF of your responses **and the instructions**.

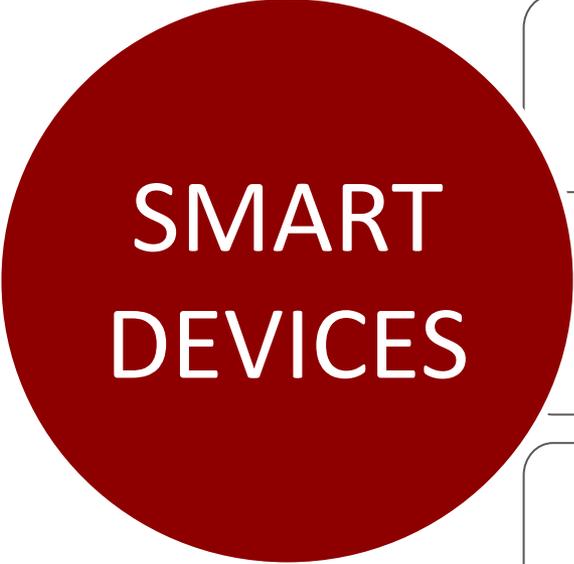
Determining if the survey function is required for your project

By selecting the response below that best answers the question: "Who will be entering data directly into the REDCap project?" you can determine if enabling the survey feature is required for your project

- Everyone who will enter data will have username and password access [example: participant answers paper survey or via phone and someone on study team enters the data]
- Not everyone who will enter data into REDCap will have username and password access [example: participant gets mailed a link or text and directly enters their own data, personnel without database access will be assisting by entering participant data via link] reset

Model-Specific Information

To view/save a PDF of the instructions provided in this survey, click on 'Submit' below and then on the confirmation screen, click on the Download button.



**SMART
DEVICES**

Smart Phones

Tablets

Mobile App

SMART DEVICES



REDCap is compatible with:

- Phones: Android and iPhone
- Tablets: Android and iPads
- Simply go to <https://redcap.uchicago.edu/>

MOBILE APP

Offline data collection (no internet)



REDCap

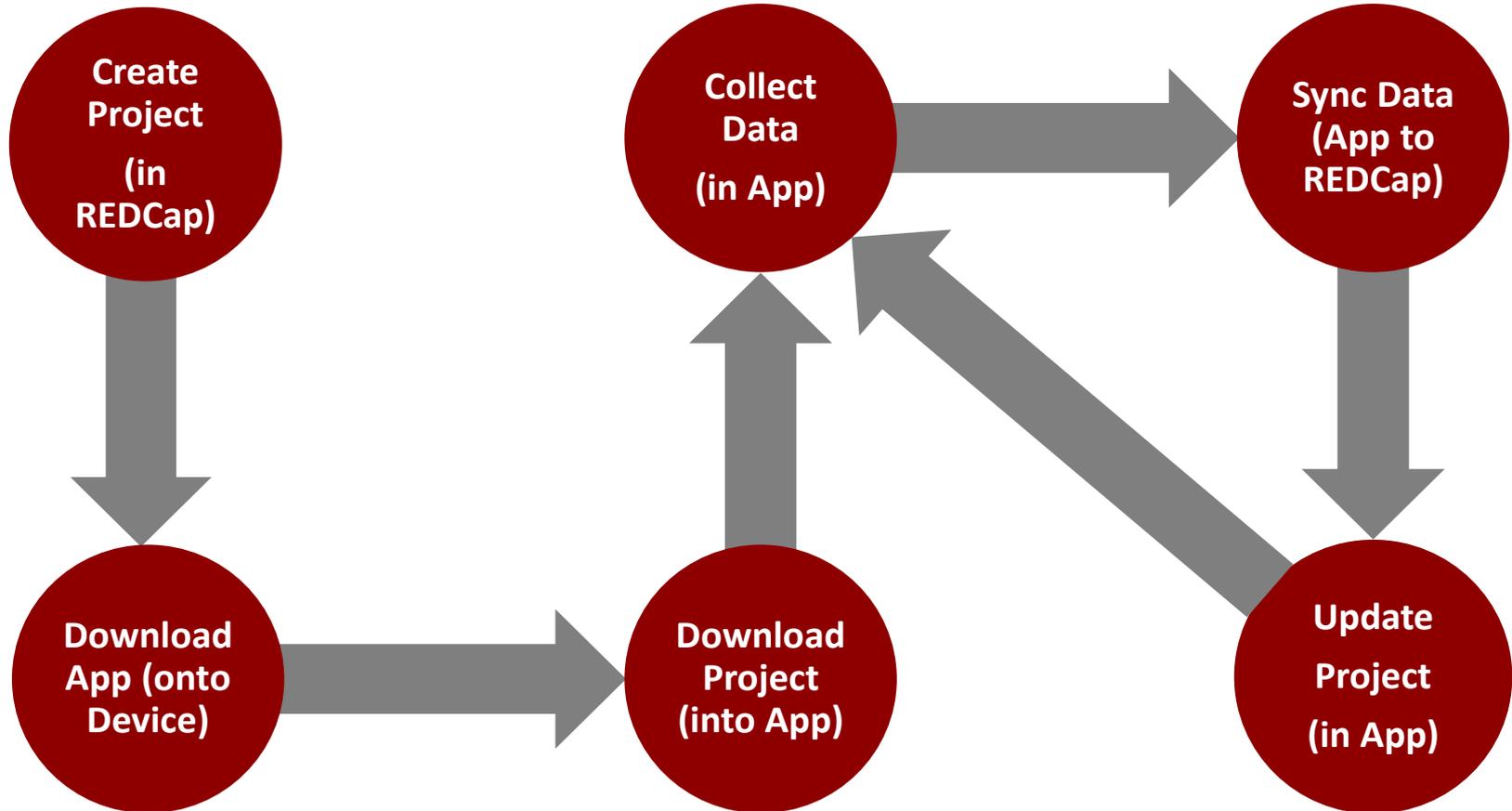


App Store

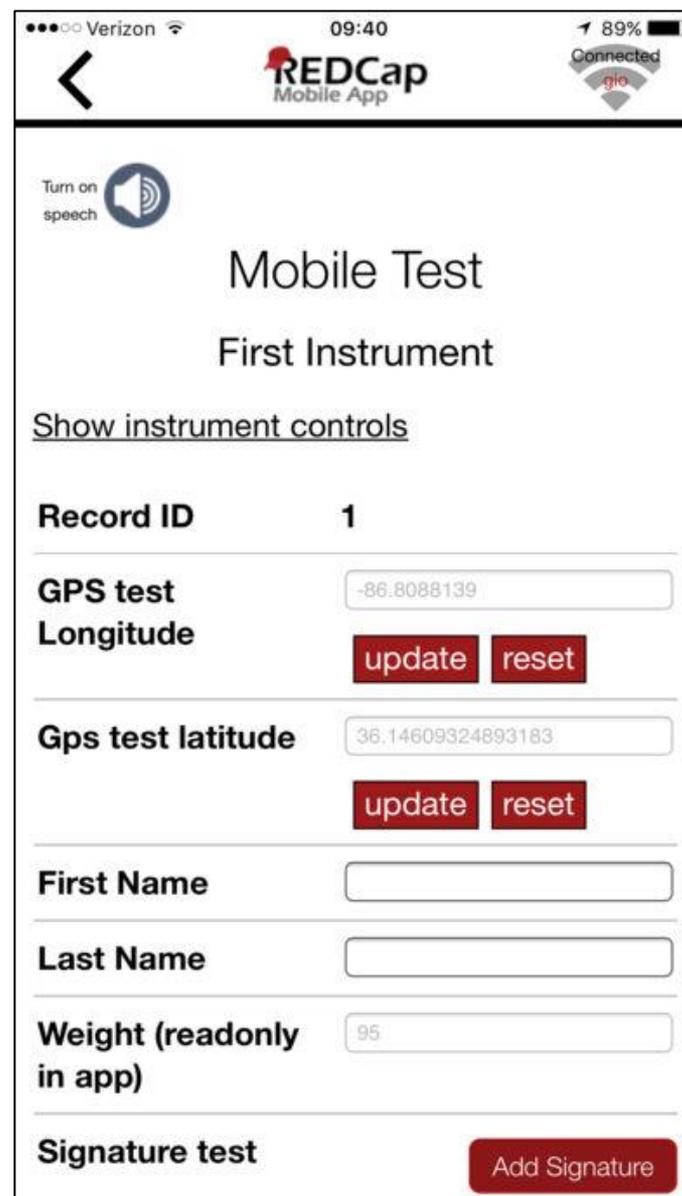


Google play

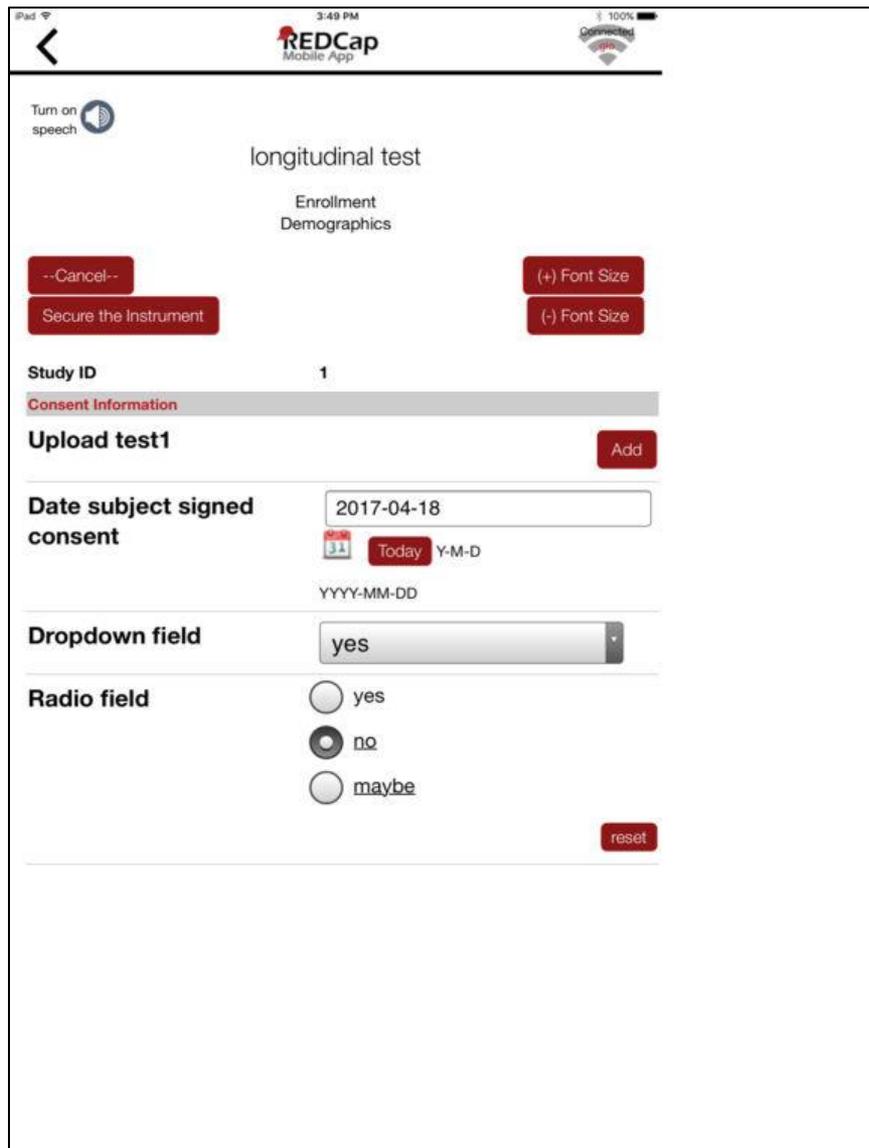
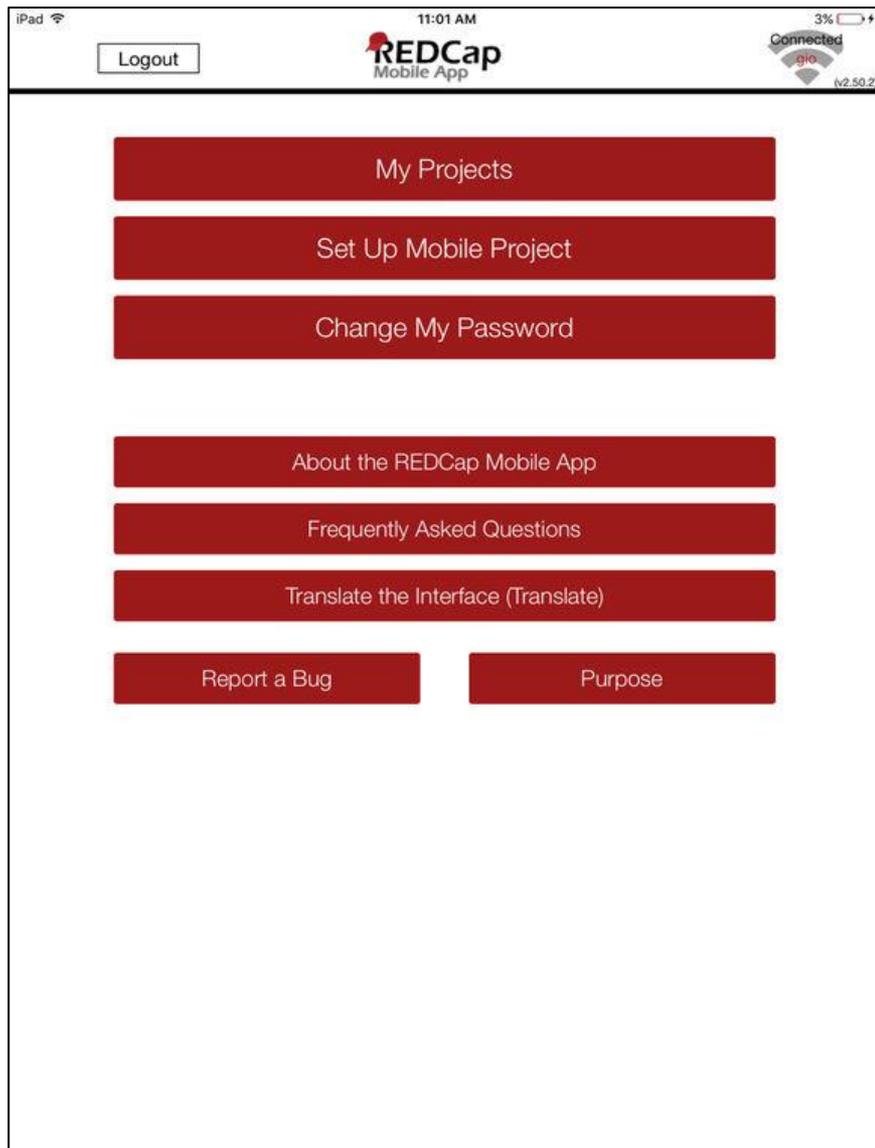
MOBILE APP - PROCESS



MOBILE APP - IPHONE



MOBILE APP - IPAD





WRAP
UP

Help Resources

Response Rates

▶ RESPONSE RATE ADVICE

- Keep instructions simple!
- Keep your wording brief!
- Include contact info!
- Use more select fields than text boxes!
- Keep them interested!
- Offer incentives!



HELP RESOURCES

Inside of REDCap:



Outside of REDCap:

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

redcap@rt.cri.chicago.edu