REDCap Fundamentals

Surveys
Agenda

Online Designer
- Design Options
- Notifications
- Automated Invitations
- Queue
- Login

Manage Survey Participants
- Access Code & QR Code
- Invitation Log
- Participant List Identifiers
Online Designer

1. Design Options
2. Notifications
3. Automated Invitations
4. Queue
5. Login

<table>
<thead>
<tr>
<th>Instrument name</th>
<th>Fields</th>
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<th>Enabled as survey</th>
<th>Instrument actions</th>
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</tr>
</thead>
<tbody>
<tr>
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<td>5</td>
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<td></td>
<td>Rename, Delete</td>
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</tr>
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</tr>
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<td>Completion Data (to be entered by study personnel only)</td>
<td>7</td>
<td>Enable</td>
<td></td>
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</tr>
</tbody>
</table>
STOP Action

• Ends the survey if a participant selects a certain answer choice to a multiple choice field.

• Helps ensure accurate data collection. STOP actions are similar to branching logic and can be used with other features (e.g. required fields).
STOP Action

**Set up Stop Actions for this Survey Question**

**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.

**Gender**

- Female
- Male

[Select All] [Deselect All]

[Save] [Close]
STOP Action

• After triggering a stop action, the respondent can change their answer OR end the survey.
Section headers

- Section headers have special functionality when the survey’s Question Display Format setting is ‘One section per page’.

![Survey Customizations:]

- Question Numbering: Auto numbered
- Question Display Format: All on one page
  One section per page (multiple pages)
Section headers

- Headers define where a new page begins for your respondent.
Section headers

• Section headers enhance your respondents’ experience. They are especially useful for very long surveys.
Online Designer

1. Design Options
2. Notifications
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Notifications

• REDCap can send an email notification to any project user when a new survey response is received.

• This is particularly useful when your data is time-sensitive. This feature is best left disabled when you expect SEVERAL responses (especially in a short period of time).
Notifications

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.

<table>
<thead>
<tr>
<th>Survey</th>
<th>Recipient email address</th>
<th>Notifications Enabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Screening Survey</td>
<td>elliotvj (Veida Elliott)</td>
<td><a href="mailto:redcap@vanderbilt.edu">redcap@vanderbilt.edu</a> (Secondary)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>-- not selected --</td>
</tr>
<tr>
<td></td>
<td>red_0004 (REDCap User)</td>
<td>-- not selected --</td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="mailto:velda.elliott@vanderbilt.edu">velda.elliott@vanderbilt.edu</a> (Primary)</td>
</tr>
<tr>
<td>Hypertension Survey</td>
<td>elliotvj (Veida Elliott)</td>
<td>-- not selected --</td>
</tr>
<tr>
<td></td>
<td>red_0004 (REDCap User)</td>
<td>-- not selected --</td>
</tr>
</tbody>
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Online Designer

1. Design Options
2. Notifications
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<td>7</td>
<td></td>
<td>Enable</td>
<td></td>
<td>+ Automated Invitations</td>
</tr>
</tbody>
</table>
Automated Invitations

• Automated invitations are an advanced method of survey distribution.

• REDCap can automatically schedule and send survey invitations, based upon specific, pre-defined criteria (including email addresses).

• The Project Setup tab’s ‘Designated email field’ feature is commonly used with this feature. It builds your Participant List for you.
Online Designer: Automated 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. Automated survey invitations may be understood as a way to have invitations sent to your survey participants, but rather than sending or scheduling them manually via the Participant List, the invitations can be scheduled to be sent automatically (i.e. without a person sending the invitation) based upon specific conditions, such as if the participant completes another survey in your project or if certain data values for a record are fulfilled. Using the settings below, you may compose your survey invitation message, and then specify the conditions that must be met in order to send/schedule the invitation. You will also need to provide the time at which the invitation will be sent. Tell me more.

**Info**

**Survey title:** Follow-Up Survey

**Compose email message**

- **From:** Joe User (select any project user to be the 'Sender')
- **To:** [All participants who meet the conditions defined]
- **Subject:** Take Follow-Up Survey

**Conditions**

**Specify conditions for sending invitations:**

- **When the following survey is completed:**
  - Pre-Screening Survey
- **AND**
- **When the following logic becomes true:**
  - (e.g. [age] > 30 and [gender] = "1")
  - How do I use special functions?

**When to send invitations after conditions are met**

- Send immediately
- Send on next -- select -- at time 00:00
- Send after lapse of time: 0 days 0 hours 3 minutes
- Send at exact datetime: 01/01/2023 12:00 AM

**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
Automated Invitations

• Automated invitations **RELY ON DATA.** The Participant List is still best for scheduling invitations that must be sent REGARDLESS of what data exists.
Online Designer

1. Design Options
2. Notifications
3. Automated Invitations
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**Survey options:**
- Survey Queue
- Survey Login
- Survey Notifications

**Data Collection Instruments**

<table>
<thead>
<tr>
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Survey Queue

• The Queue has multiple functions. First, it is a **termination method**. (Unlike traditional termination methods, it is NOT in the settings.)

• It can automatically open a new survey for the respondent after they click ‘submit’.

• That new survey is actually their unique link from their Participant List, so it is still linked to their record.
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. Surveys can be set to appear in the Survey Queue based upon 1) if the participant has completed a particular survey, and/or 2) if certain conditions are met (based upon data values). If any surveys have been activated in the Survey Queue, they will be displayed to the participant after completing a survey (displayed below the survey acknowledgement text on the page). The participant will only see in their queue the surveys they have already completed and the surveys that they are being requested to take next (based upon the criteria defined below). The setup options below allow you to set the conditions that determine when each survey will be displayed in the queue, and (optionally) you can provide custom text to display at the top of every participant’s survey queue, in which you may customize the styling of the text with HTML tags or even utilize Piping to inject data values. Additionally, the ‘auto start’ feature is optional and can be used to take the participant immediately to the first incomplete survey in the queue if ‘auto start’ is enabled for that survey, in which it allows for more rapid survey-taking if the participant is completing several surveys in one sitting.

NOTE: The first instrument survey is not displayed below because it does not have a survey that comes before it for which to set conditions.

Add custom text to display at top of survey queue

Display survey in the Survey Queue when...

- When the following survey is completed:
  - “Pre-Screening Survey”

And

- When the following logic becomes true:
  - How to use this
  - (e.g., [age] > 30 and [gender] = “1”)

Auto start?
Survey Queue

- The Survey Queue is also an actual webpage for the respondents. It lists all surveys to which they currently have access.

- This page is their to-do list or survey dashboard. It shows them which surveys they have already completed and which have not yet been started.

- They can go to their Queue at any time without logging in.
This participant has completed the pre-screening survey and hypertension survey. They can now begin the morale questionnaire whenever they wish.
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

NOTE: The first instrument survey is not displayed below because it does not have a survey that comes before it for which to set conditions.

Add custom text to display at top of survey queue

<table>
<thead>
<tr>
<th>Activated?</th>
<th>Survey Title</th>
<th>Display survey in the Survey Queue when...</th>
<th>Auto start?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activated</td>
<td>&quot;Hypertension Survey&quot;</td>
<td>When the following survey is completed: &quot;Pre-Screening Survey&quot;</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td></td>
<td>AND</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>When the following logic becomes true:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(e.g., [age] &gt; 30 and [gender] = &quot;1&quot;)</td>
<td></td>
</tr>
<tr>
<td>Activated</td>
<td>&quot;Patient Morale Questionnaire&quot;</td>
<td>When the following survey is completed: &quot;Hypertension Survey&quot;</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>AND</td>
<td></td>
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Survey Queue

• The Queue can be used as a **distribution** method.

• Each participant could be sent their Queue link **MANUALLY** (i.e. outside of REDCap – through Outlook). This does require creating their record within REDCap first.

• Defining the Queue does **NOT** automatically sent out survey links. The public link, Participant List, and Automated Invitations are defined separately.
Survey Queue

• The Survey Queue personalizes your respondent’s experience based on the data they’ve entered on a previous survey OR based on data that you have entered in their record.

• The Queue is a powerful feature that can be very personalized. The combination of auto-starts, automated invitations, and piping can greatly enhance it.
Online Designer

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[Table of Data Collection Instruments]

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Survey Login

- Surveys normally require no login. Participants can simply click a link to open the survey and submit data.

- The Login is an optional feature which requires participants to login before their survey page loads. It only applies to their personalized link (through whichever method the link is distributed).

- This additional step is sometimes useful for certain studies (or sponsors).
Survey Login

- **Their login is always **DATA FROM THEIR EXISTING RECORD.** This is usually data from text boxes (e.g. date of birth, phone number, or a unique ID assigned at a study visit)

- The login information they enter is checked against **EXISTING** project data.

- If they match, the survey opens and can be taken as usual.
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. The respondent will log in to the survey by entering one or more known values for fields in the project (up to three) - e.g., last name, date of birth. These values must already be saved in the respondent’s record in the project. Those values may have been entered or uploaded by a user in the project or may have been entered on a previous survey by the respondents themselves. If Survey Login has been enabled and a record does not exist yet for the respondent (e.g., if they are beginning a Public Survey), then the survey page will be displayed normally and the login page will not be displayed for them. However, once the record exists, the respondent will always be prompted to log in to the survey (with the exception of a Public Survey, which is the only place where Survey Login cannot be used).

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 30 minutes.
Take care to choose logins fields wisely. Birthdates, email addresses, and phone numbers are less desirable than non-public information – e.g. a unique study ID or password created by the user in a text box. Using multiple login fields is also recommended to enhance security.
# Survey Login

Security settings for survey login (optional)

<table>
<thead>
<tr>
<th>Description</th>
<th>Setting</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of failed login attempts before respondent is locked out for a specified amount of time, which is set below.</td>
<td></td>
<td>0 = Disabled</td>
</tr>
<tr>
<td>Amount of time respondent will be locked out after having failed login attempts exceeding the limit set above.</td>
<td></td>
<td>Minutes, 0 = Disabled</td>
</tr>
</tbody>
</table>
Manage Survey Participants

1. **Access Code & QR Code**

2. **Invitation Log**

3. **Participant List Identifiers**

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. Get shorter survey link or Get embed code to place link on a webpage.

**Public Survey URL:** [https://redcap.vanderbilt.edu/surveys/?s=HL93TJJEF9](https://redcap.vanderbilt.edu/surveys/?s=HL93TJJEF9)
Access Code & QR Code

• Access codes are an advanced distribution method. They are found on the Manage Survey Participants page and within individual records.

• Access codes are sometimes quicker to use than traditional email distribution methods.

• When emailing survey links, it doesn’t matter how long the URL is or what characters are used. But using **hard copy materials** or **face-to-face surveys** is challenging for email distribution.
Access Code & QR Code

Survey Access Code or QR Code

Survey title: "Pre-Screening Survey"

A Survey Access Code and a QR Code both allow respondents to begin a survey on another computer or device without someone having to email them an invitation. This is especially useful if the respondent is currently nearby or if you will be sending the survey invitation to a physical mailing address (i.e. 'snail mail'). You may click the Print button at the bottom if you wish to print out the instructions for the respondent.

Enter the Survey Access Code

To allow a respondent to begin this survey, have them navigate to the URL below and enter the survey access code. The code is permanent and will never change. (Note: The web address is the same for all projects and surveys, so you may bookmark the address on a computer or device to quickly return to it multiple times.)

1. Go to this web address:
   https://redcap.vanderbilt.edu/surveys/

2. Then enter this code:
   E9C8C7EYL

OR

Generate Short Code

Alternatively, you may generate a shorter, temporary code that will expire after only one use or after one hour has passed.

Generate Short Code

Scan the QR Code

The survey link has been converted into a QR code, which can now be scanned by a device that has an app capable of reading QR codes. Once the QR code below is scanned, it should take the respondent directly to the survey in a web browser.
Access Code & QR Code

• Access codes provide shorter links or more user-friendly methods to open the same survey links.

• Respondents can enter your survey’s unique code at redcap.vanderbilt.edu/surveys to open a survey (public link or Participant List).

• These codes must be provided to respondents individually and CANNOT be sent through REDCap.
Manage Survey Participants

1. Access Code & QR Code
2. Invitation Log
3. Participant List Identifiers

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 2014-09-16 12:46pm.
Manage Survey Participants

• The Survey Invitation Log records all invitations sent through REDCap – via Participant List AND automated invitations. It shows both past and future invitations, including the actual email message and tracking information.
Manage Survey Participants

• The Invitation Log is NOT a distribution method. It is complete and automatic documentation of all your scheduled and sent invitations.
Manage Survey Participants

1. Access Code & QR Code
2. Invitation Log
3. Participant List Identifiers

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></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:donald.duck@wdw.biz">donald.duck@wdw.biz</a></td>
<td>DU34</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td><a href="mailto:mick.e.mouse@orlandou.edu">mick.e.mouse@orlandou.edu</a></td>
<td>MO22</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
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</tr>
<tr>
<td><a href="mailto:pluto@disney.fl">pluto@disney.fl</a></td>
<td>PL95</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Participant Identifiers

• Identifiers create links between your Participant List email addresses and the records.

• Records can be opened from the List if:
  1) an Identifier was assigned before data was submitted
  2) the survey has been partially OR fully completed

• Identifiers must be enabled in development mode AND assigned before any data is submitted by the participant.
## Participant Identifiers

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
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<tbody>
<tr>
<td>[No email listed]</td>
<td></td>
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<td>[No email listed]</td>
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<td></td>
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</tr>
<tr>
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<td></td>
<td></td>
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<td></td>
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</table>
Other Survey-Specific Features

• The Data Exports, Reports, and Stats page has a tab called PDF & Other Export Options. Survey return codes can be exported there (along with other survey-specific data).

• When viewing a record, there are quick links to several survey options, such as opening the survey, finding the quick access codes or return codes, and sending a survey link to someone NOT on the List.
For help and questions:
redcap@vanderbilt.edu