REDCap
Research Electronic Data Capture
@Yale

REDCap Survey Development and Features

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Objectives

- Review how to set up a survey
- Learn about the options that are available for survey distribution
- Understand how to set up survey scheduling
- Learn how to track survey responses
- Demonstrate how to set your user rights

REDCap Survey

- In REDCap, a survey is a version of a data form that is completed by a study participant without logging into the REDCap system
- REDCap offers two survey options:

    1. Public
    2. Private

Public Survey

- **A public survey must be the first form in your project**.
- A new record is created each time a survey is submitted.
- You will generate **one survey link** for all participants.
- Responses can be anonymous *(if no identifying information is collected)*

Common use cases:

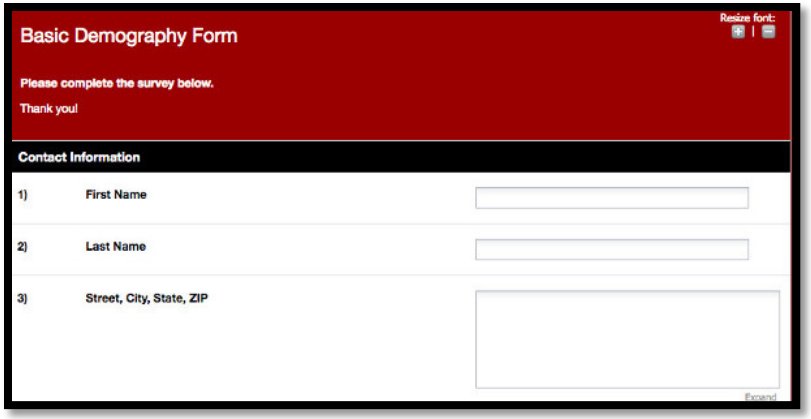
- Opinion survey
- Polling survey

Private Survey

- **A private survey does <u>not</u> need to be the first form of your project**.
- Responses **are linked to a participant record** where they can be tracked and identified.
- You will generate **a unique survey link for each participant**.
- The record can be created before a participant fills out the survey.
- You can designate an email field or use a participant list to send a survey invitation.

Common use cases:

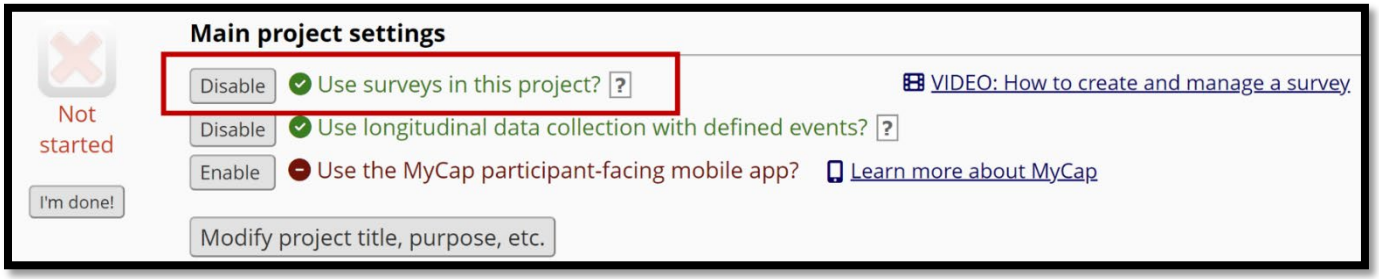
- Follow up survey
- Health History survey



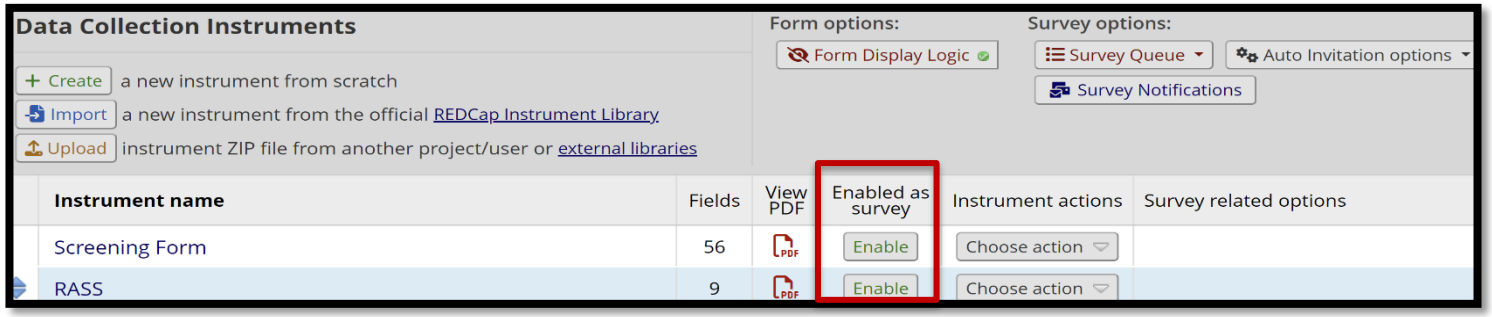
Survey Setup

Enable a Survey

1. In *Main Project Settings*, **Enable** the setting *Use surveys in this project?*

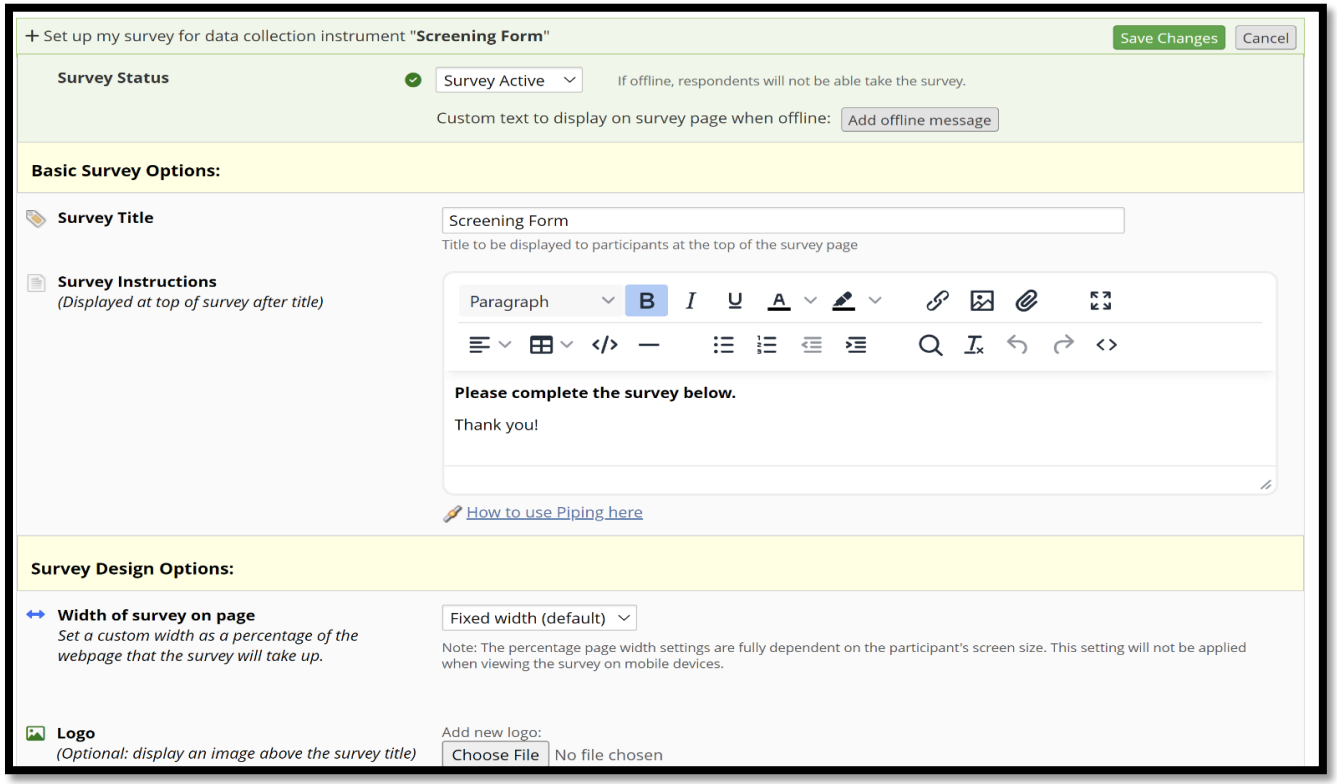


2. In the *Online Designer,* you can now enable specific instruments as surveys



Basic Survey Options

3. Clicking ‘Enable’ on the Online Designer page will bring you to the survey setup page for that specific instrument.



Survey Customization Options*

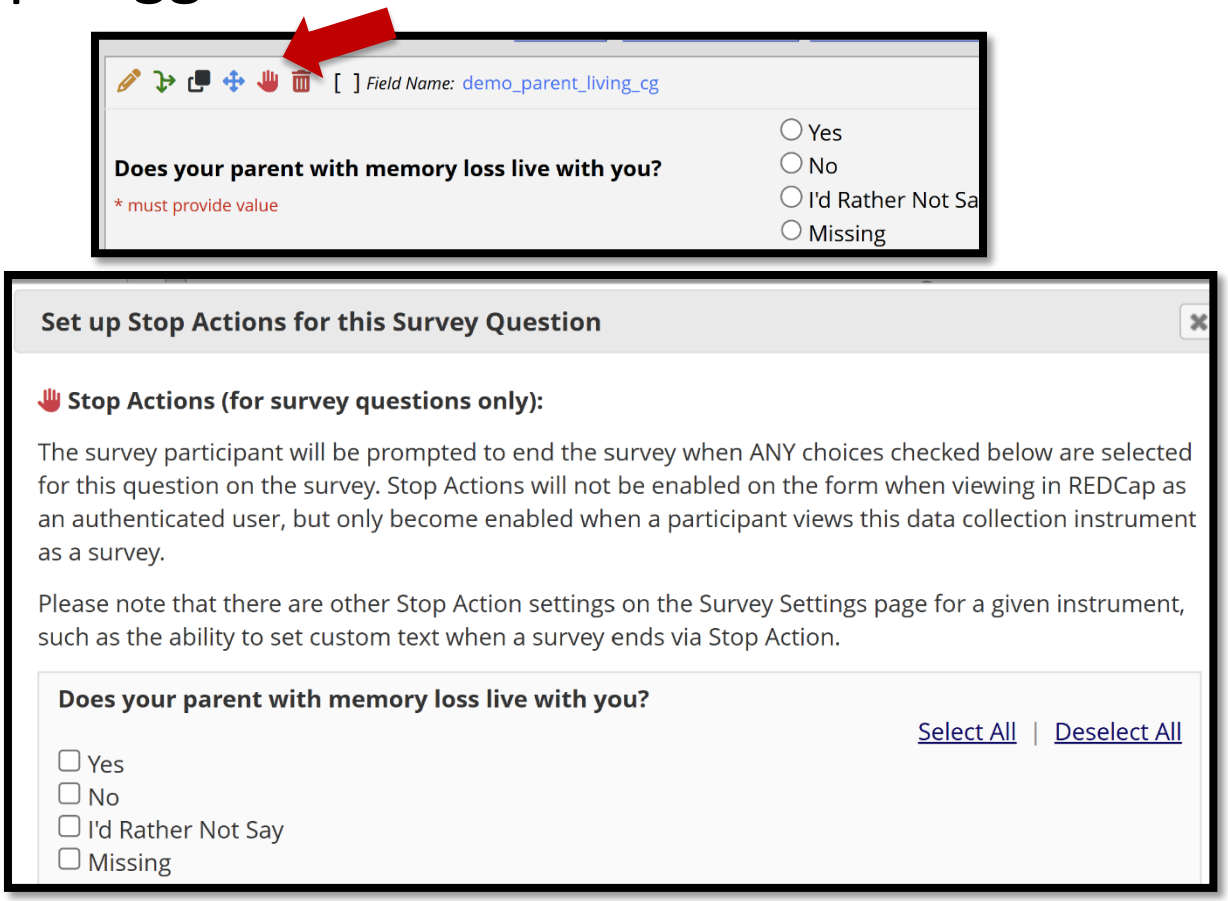
Examples include:

- Pagination
  - Single page / one section per page
- Allow save and return option
  - Allow respondents to leave the survey and return later
- Auto-continue to the next survey
  - Automatically start the next survey instrument after finishing this survey
- Options related to survey stop actions
  - Save or discard survey responses when stop action is triggered

** Refer to slides 47 -50 for a complete list of survey customization options*

Set Up Stop Action from Online Designer

- ‘Stop Actions’ will end a survey if a participant selects the stop trigger condition



Questions?

Survey Distribution

Survey Distribution Options

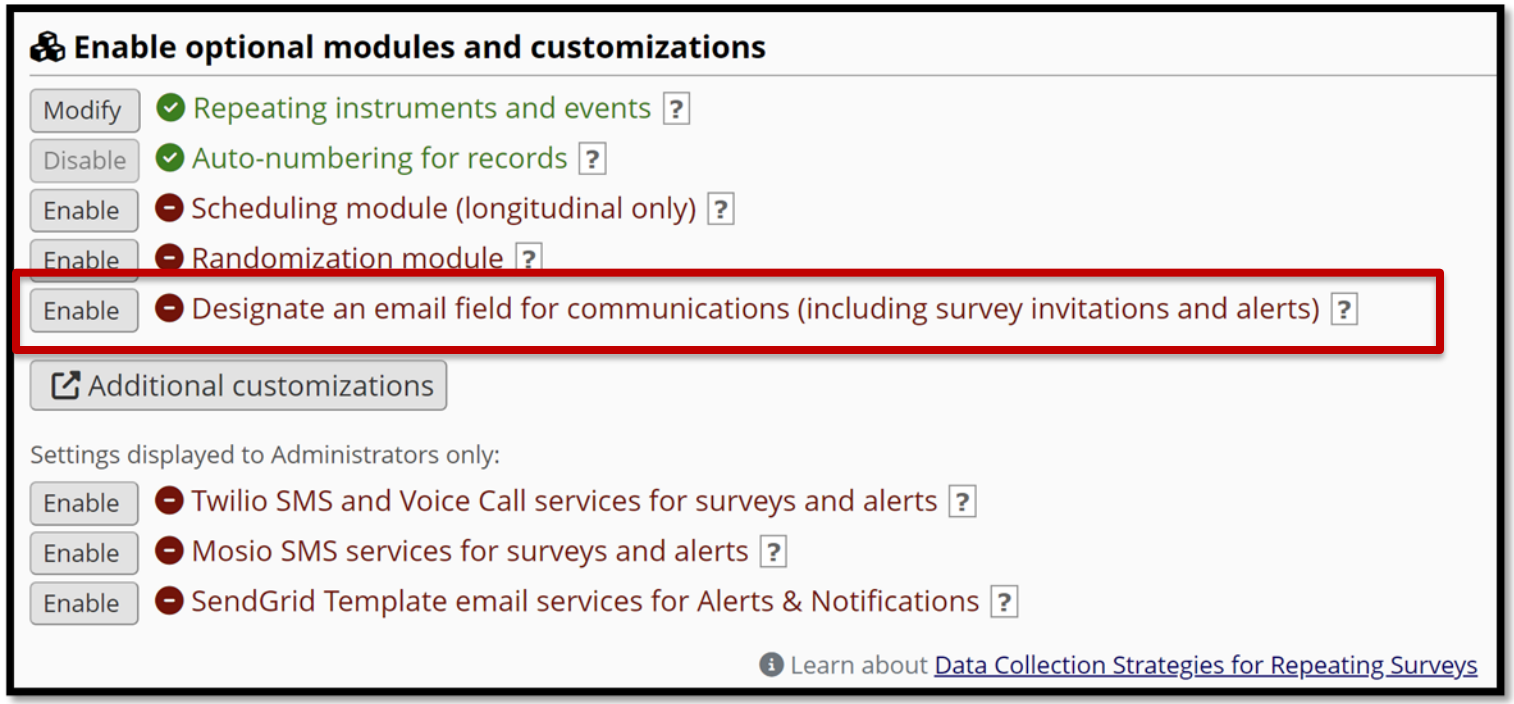
1. Automatic Survey Invitation (ASI)
2. Survey Queue
3. Participant list -> Compose Survey Invitation
4. Alert and Notification
5. Compose survey invitation option on the data entry form

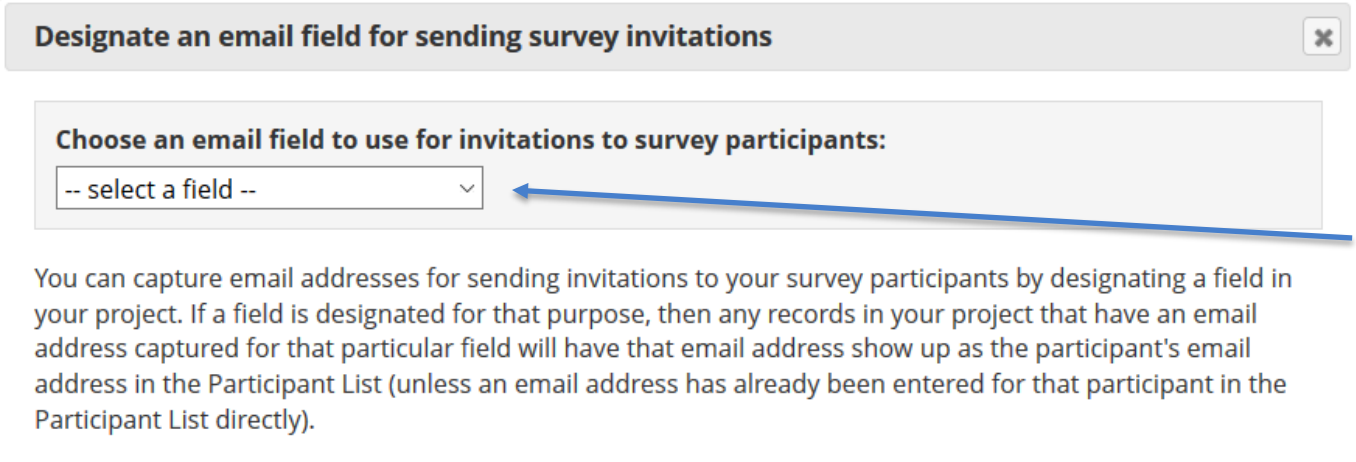
Option 1: Automatic Survey Invitations (ASI)

- Survey 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
  - If certain data values for a record are fulfilled.
- This option requires that you designate an email field for sending the survey invitation.

Option 1: Automatic Survey Invitations (ASI) Set Up

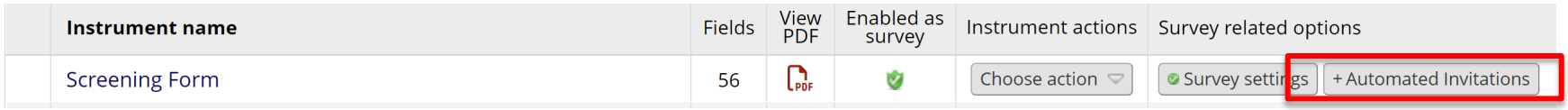
- You can designate an email field for sending automatic survey invitations under 'Enable Optional Module and Customizations' in the Project Setup

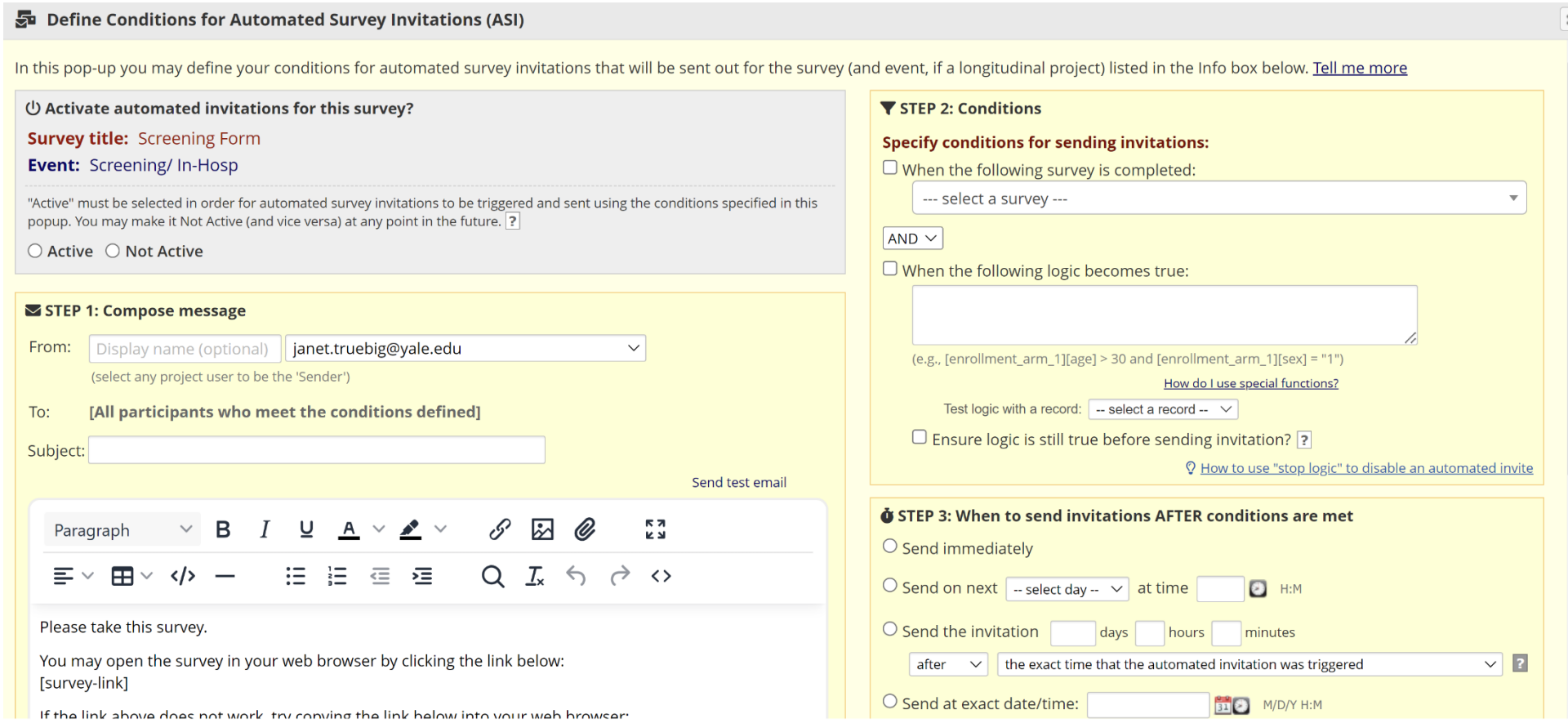




Only fields with email validation will be listed in this dropdown box

Option 1: Automatic Survey Invitation





Option 1: Automatic Survey Invitation (ASI) Tips and Tricks

1. Use piping to personalize the invitation message

2. If you are using a study email address to send the invitation, add the email address as a secondary email in your profile (link on top right of 'My Project' page). The email address will be available in the 'From' dropdown box on the ASI set up page.

3. If you delete the default text in the compose box, make sure to include the smart variables, [survey-link] or [survey-url], in the message that you compose.

4. You can format using HTML code or the rich text editor

Option 1: Automatic Survey Invitation (ASI) Tips and Tricks

5. If applicable, add a condition for stop logic
   - For example, if you would like the project to stop sending a scheduled invitation if the patient withdraws from the study, you can include in the condition [withdraw] <>1 and check the box '*Ensure logic is still true before sending invitation*'.
6. How to test if the ASI logic is set up correctly
   - You can test the ASI logic in the 'Data Quality' module. Add a custom quality rule with your ASI logic and check how many records do not fulfill the condition.

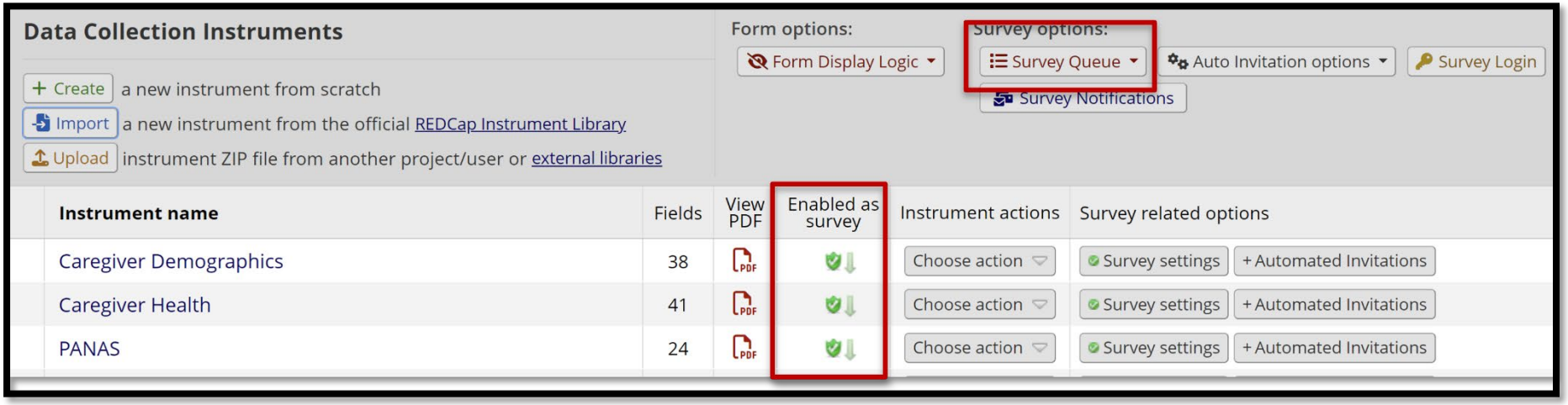
Questions?

Option 2: Survey Queue

- Displays a list of your surveys to a participant all on a single page.
- Lists 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
    2) if certain conditions are met (based upon data values)
- One link for all surveys in the survey queue.

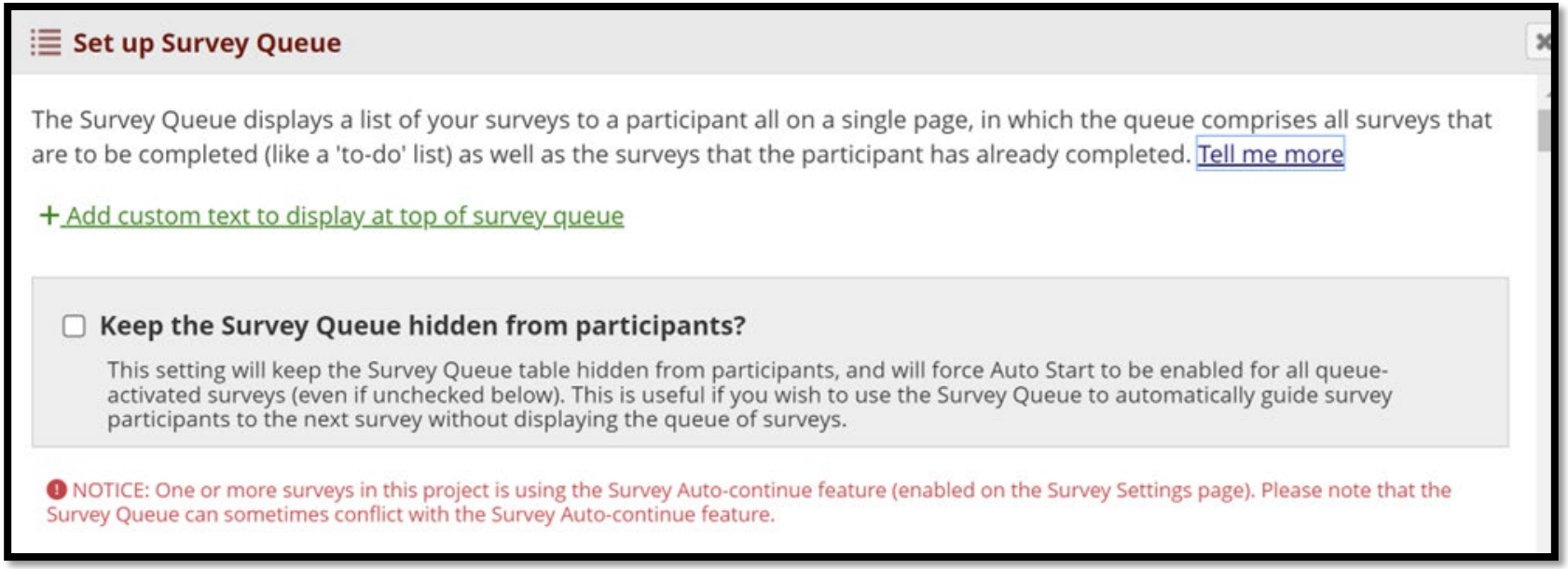
Option 2: Survey Queue Setup

- Ensure desired instruments are enabled as surveys, then click ‘Survey Queue’, then ‘Edit Survey Queue’ in the pull down.



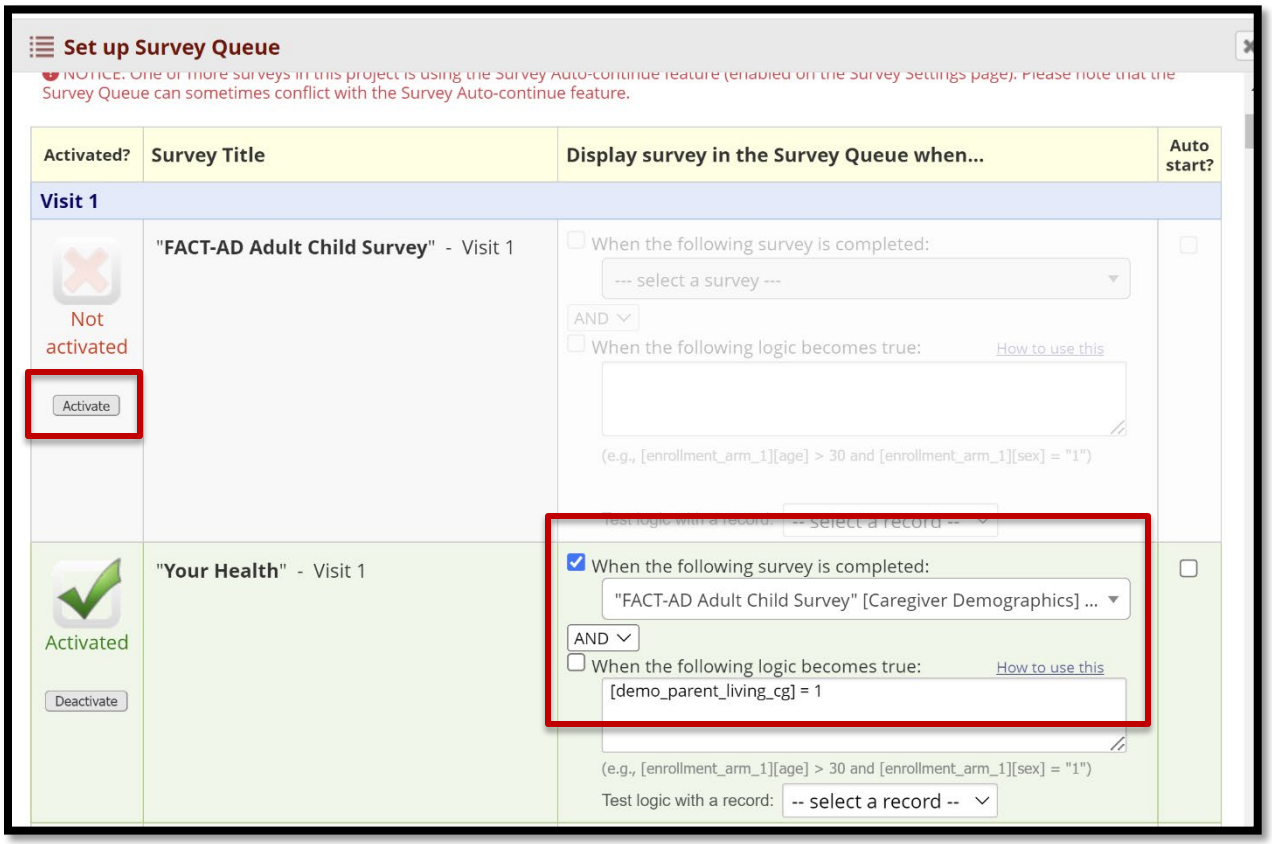
Option 2: Survey Queue Setup

- The survey queue can be customized, including adding text at the top of the survey queue page.
- Note: the *Survey Auto-continue* and the *Survey Queue* conflict.



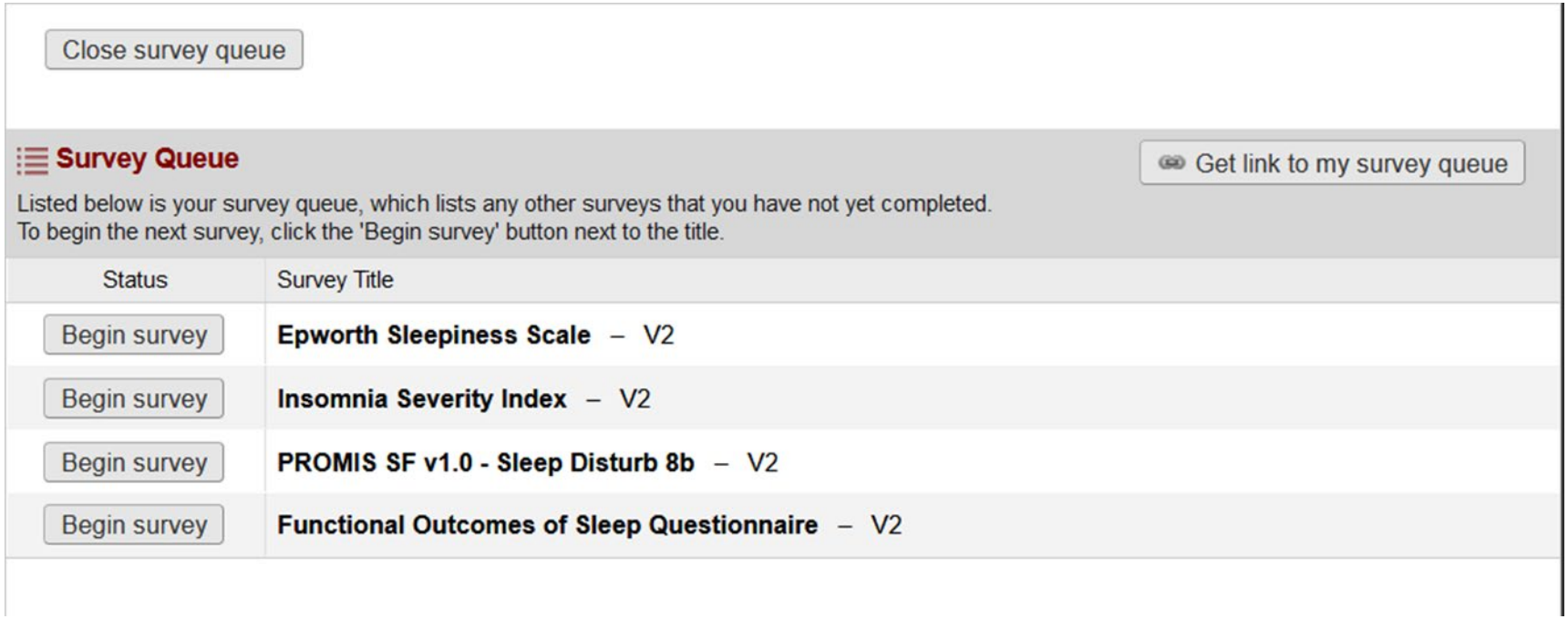
Option 2: Survey Queue Setup

- Click ‘Activate’ to add a survey to the survey queue. You can then add conditional logic for when the survey will appear.



Option 2: Survey Queue

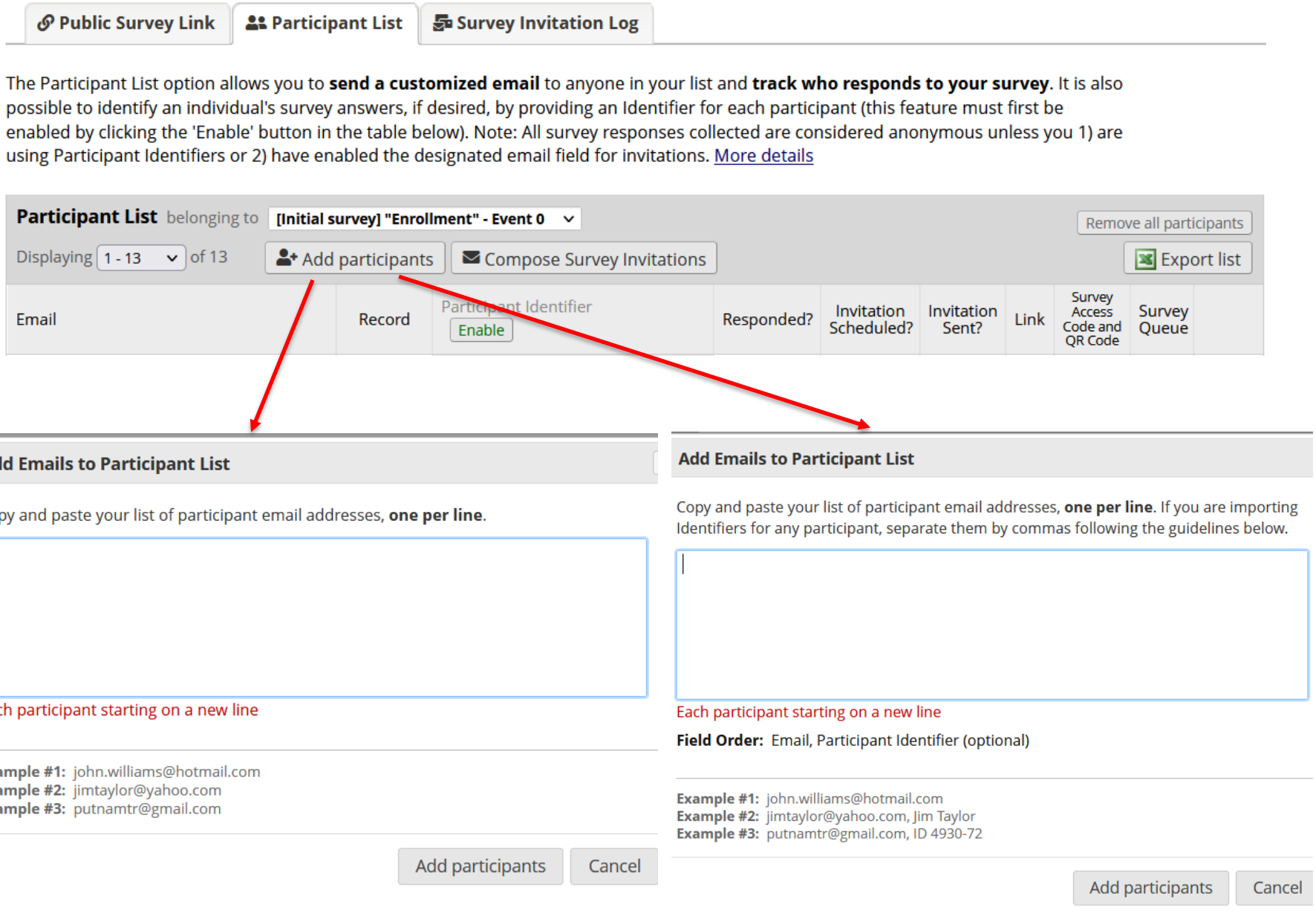
Participants with access to their survey queue will be able to view the list of surveys they have left to do, based on the conditional logic you created.



Questions?

Option 3: Participant List

- If you do not designate an email field for sending a survey, you can add participant emails directly to the participant list.
- To use this option, the first instrument of your project must be a survey.
- This is useful for a project that involves a one-time survey from a list of participants.
- There is also the option to enable a participant identifier.



Participant identifier not enabled

Participant identifier enabled

Option 4: Alert and Notification

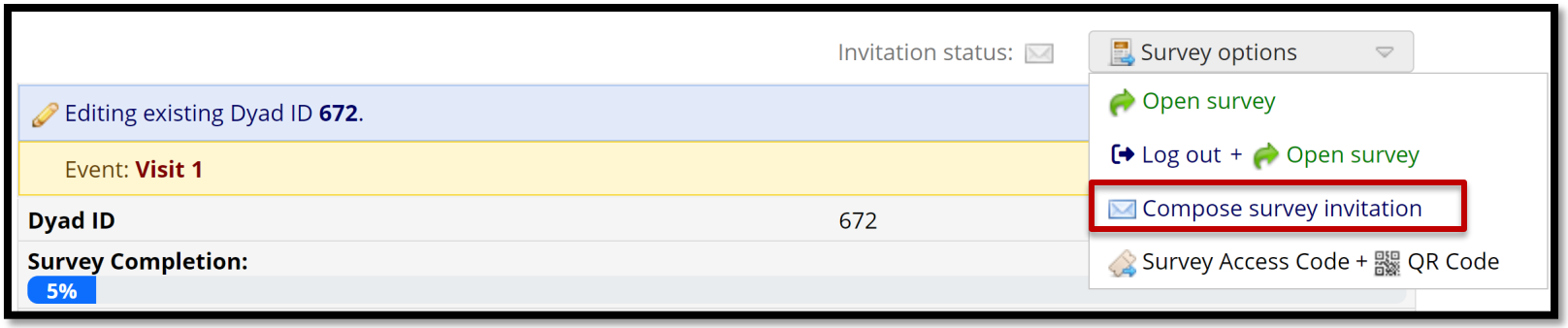
- Can be used to send survey link to participants.
- Participant email should be collected in a project field.
- Can set up trigger condition.
- To send a survey link or survey queue link, include the relevant survey smart variable in the message.
- Refer to REDCap Training 201 slides and FAQ for instructions on how to set up alerts and notifications.

Survey Smart Variables

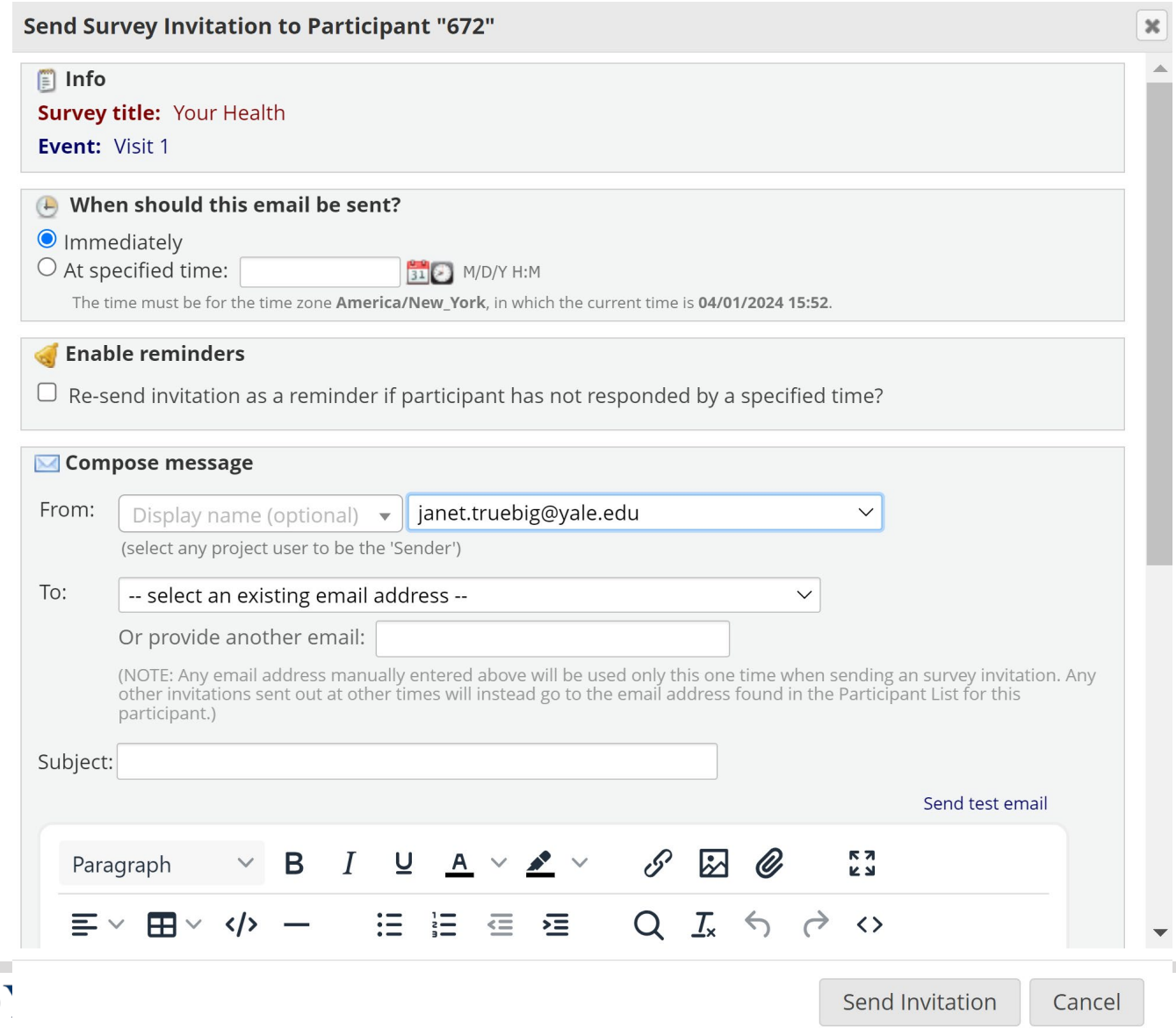
[is-survey]	Detects if the current instrument is being administered as a survey (returns 1 for True, 0 for False), as opposed to a form.	`[is-survey]`	0
[survey-url:instrument]	The web address (URL) of the specified survey for the current record/event/instance. The format must be [survey-url] or [survey-url:instrument], in which 'instrument' is the unique form name of the desired instrument. This can be used simply as [survey-url] inside the content of a survey invitation, in which 'instrument' is assumed to be the current survey instrument.	`[survey-url:followup_survey]`	https://poa-redcap.med.yale.edu/surveys/?s=fake
		`[previous-event-name][survey-url:followup_survey]`	https://poa-redcap.med.yale.edu/surveys/?s=fake
[survey-link:instrument:Custom Text]	The HTML web link that, when clicked, will navigate to the specified survey for the current record/event/instance. The format must be [survey-link], [survey-link:instrument], or [survey-link:instrument:Custom Text], in which 'instrument' is the unique form name of the desired instrument. 'Custom Text' is an optional parameter whereby you can specify the visible link text, and if it is not provided, it defaults to the survey title of the survey. The format [survey-link:Custom Text] can also be used if the instrument is assumed, such as when viewing a form or in a survey invitation. Also, it can be used simply as [survey-link] inside the content of a survey invitation, in which 'instrument' is assumed to be the current survey instrument.	`[survey-link:followup_survey]`	Follow-up Survey
		`[next-event-name][survey-link:followup_survey]`	Follow-up Survey
		`[survey-link:prescreening:Take the pre-screening survey]`	Take the pre-screening survey
[survey-access-code:instrument]	The Survey Access Code of the specified survey for a given record/event/instance. The format must be [survey-access-code] or [survey-access-code:instrument], in which 'instrument' is the unique form name of the desired instrument. This can be used simply as [survey-access-code] inside the content of a survey invitation, in which 'instrument' is assumed to be the current survey instrument.	`[survey-access-code:followup_survey]`	LDNP3EW7W
		`[previous-event-name][survey-access-code:followup_survey]`	DDFRLCTCR
[survey-return-code:instrument]	The Survey Return Code of the specified survey for a given record/event/instance in order to allow a participant to return to a completed or partially completed survey response when using the 'Save & Return Later' survey feature. The format must be [survey-return-code] or [survey-return-code:instrument], in which 'instrument' is the unique form name of the desired instrument. This can be used simply as [survey-return-code] inside the content of a survey invitation, in which 'instrument' is assumed to be the current survey instrument.	`[survey-return-code:followup_survey]`	TFX4E4YN
		`[previous-event-name][survey-return-code:followup_survey]`	HEJNFHD4

Option 5: Compose survey invitation option on the data entry form

A survey invite can be sent for a particular record and instrument. Open the instrument for the record and the ‘survey options’ pull down bar is in the upper right corner.



Option 5: Compose survey invitation option on the data entry form

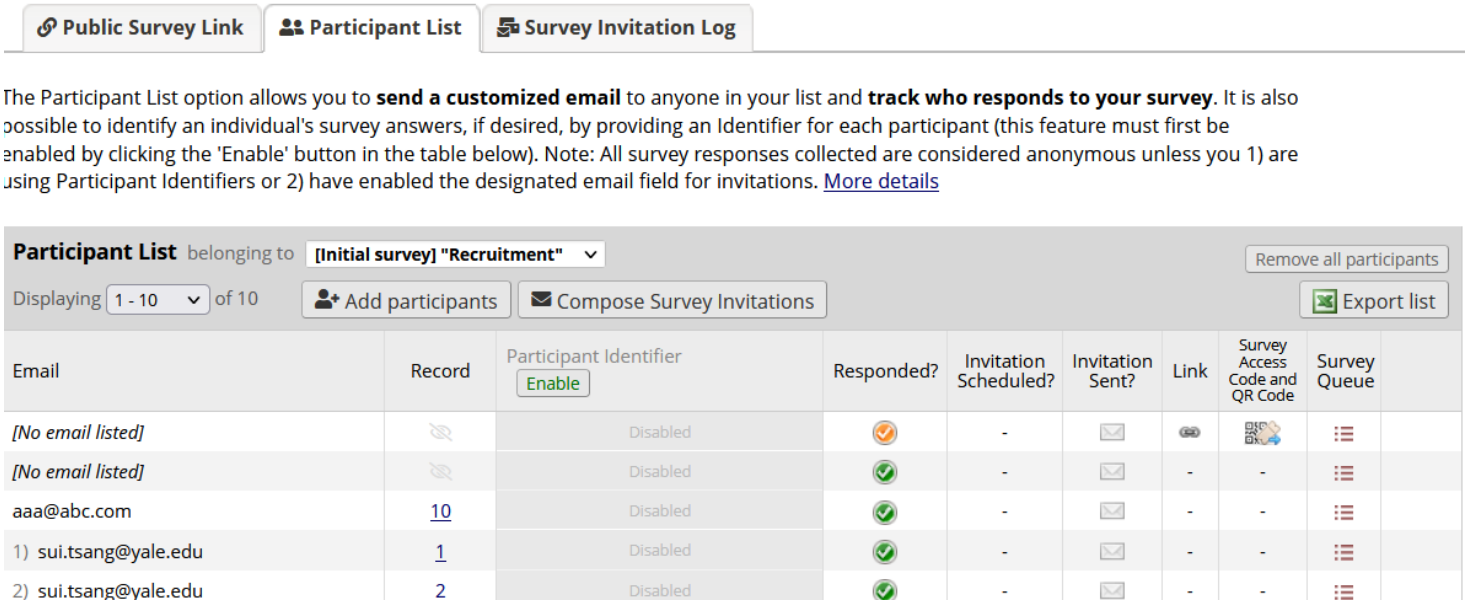


Questions?

How do I track survey responses?

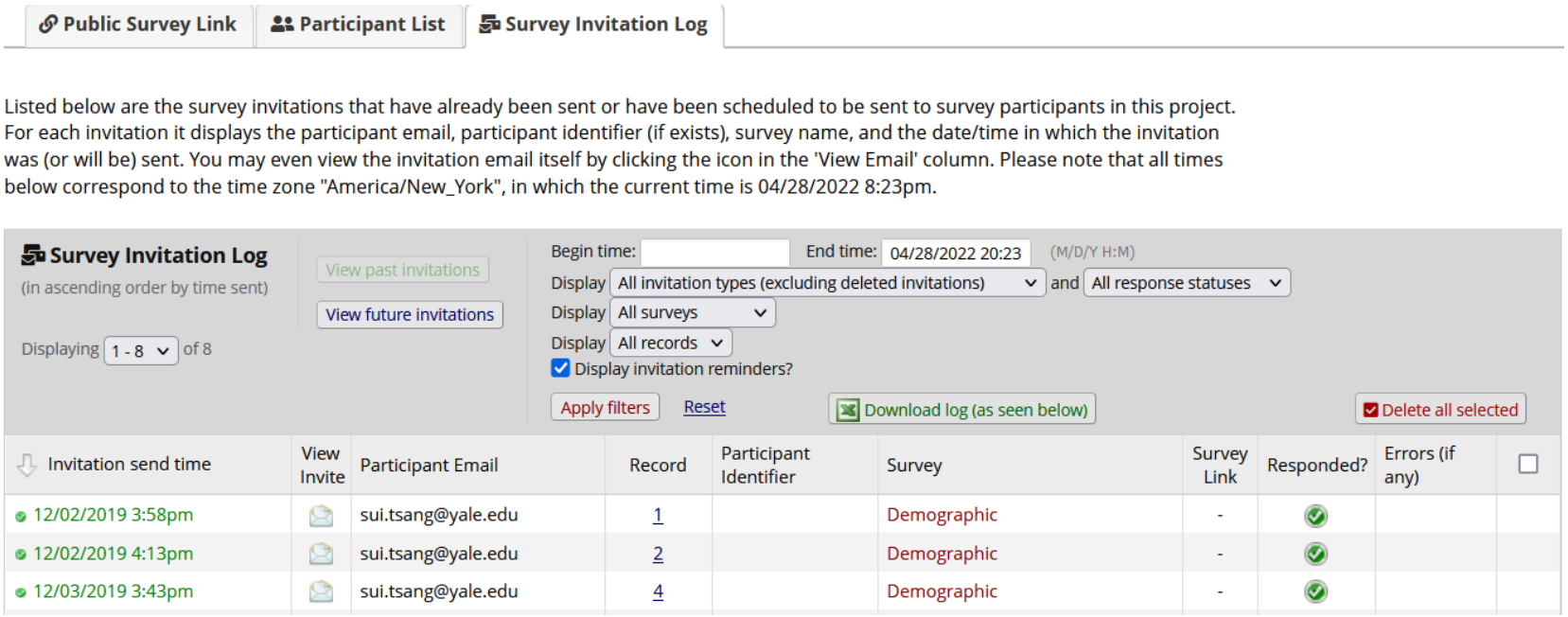
Survey Distribution Tools

- Participant List
  - Choose the survey from the drop-down box
  - List of participants for the selected survey will be shown
  - You can track who responded to your survey
  - You can send customized email to anyone on the list
  - You can click the links in the record and responded column to access the record



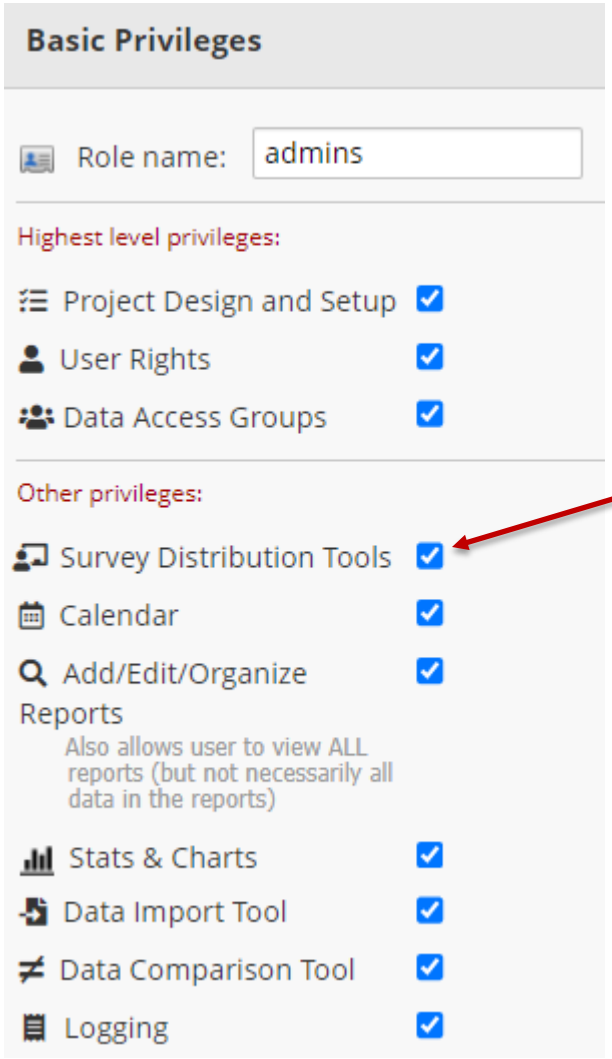
Survey Distribution Tools

- Survey Invitation Log
  - View past or future invitations (Default view is future invitations)
  - Log can be filtered by invitation types, surveys, records or response status
  - You can view the invitation email itself by clicking the icon in the 'View Email' column
  - Option to delete scheduled invitations



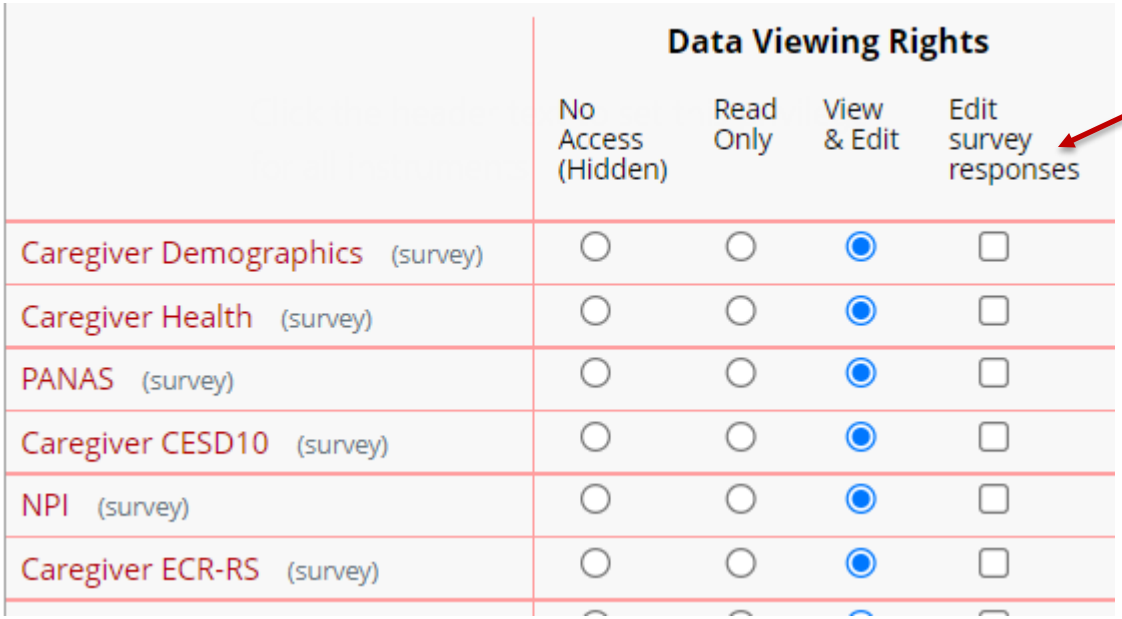
User Rights

User Rights



Survey Distribution Tools must be enabled in the user rights page in order to access participant log and survey invitation log

User Rights



	Data Viewing Rights			
	No Access (Hidden)	Read Only	View & Edit	Edit survey responses
Caregiver Demographics (survey)	○	○	◉	☐
Caregiver Health (survey)	○	○	◉	☐
PANAS (survey)	○	○	◉	☐
Caregiver CESD10 (survey)	○	○	◉	☐
NPI (survey)	○	○	◉	☐
Caregiver ECR-RS (survey)	○	○	◉	☐

Enable the 'Edit survey response' right if you need to edit data on completed survey.

Project Testing

Project Testing

1. Always test your project before collecting study data.
2. Add yourself as study participant.
3. Enter data to trigger any automatic survey invitations.
4. Confirm the survey invitation text and survey link are correct.
5. Enter survey data as study participant and confirm survey works as expected.
6. Have other study team members to test the surveys.

QUESTIONS?

Thank You!

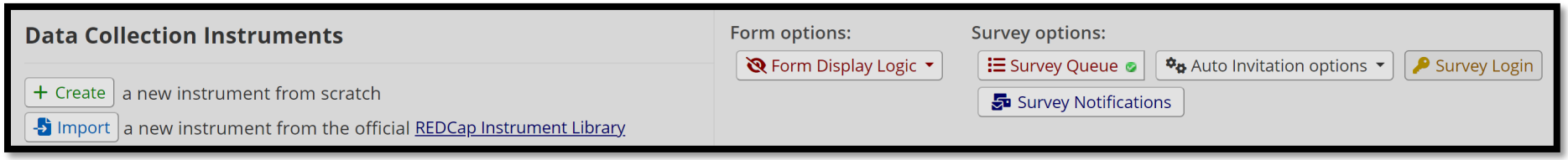
Contact us at REDCap@yale.edu

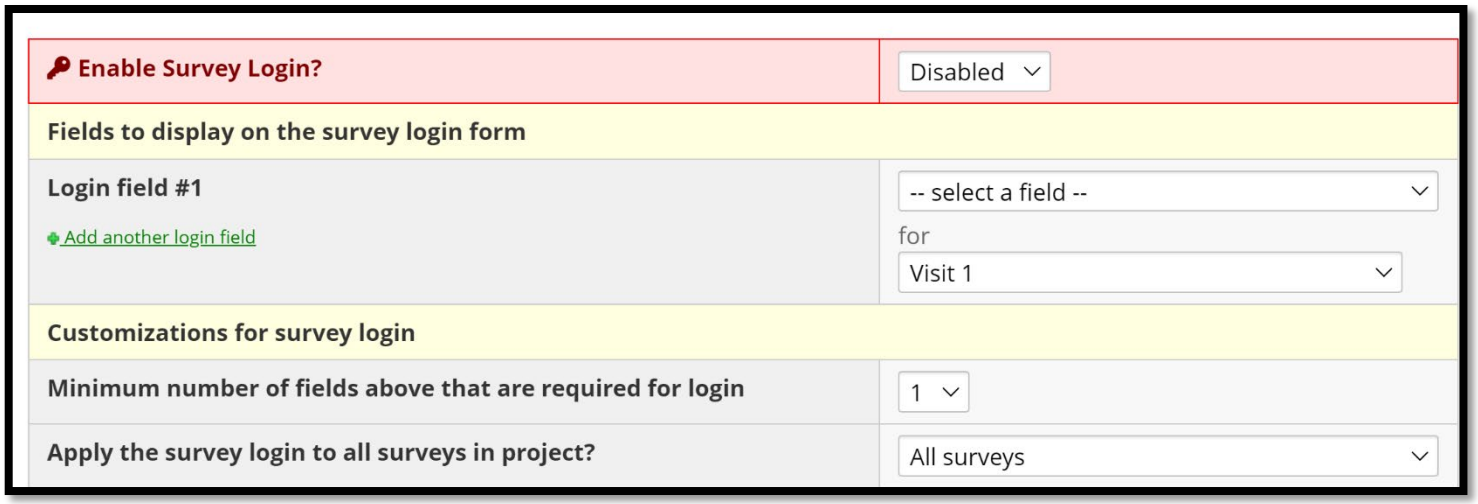
Additional Reference Material

Other Survey Features

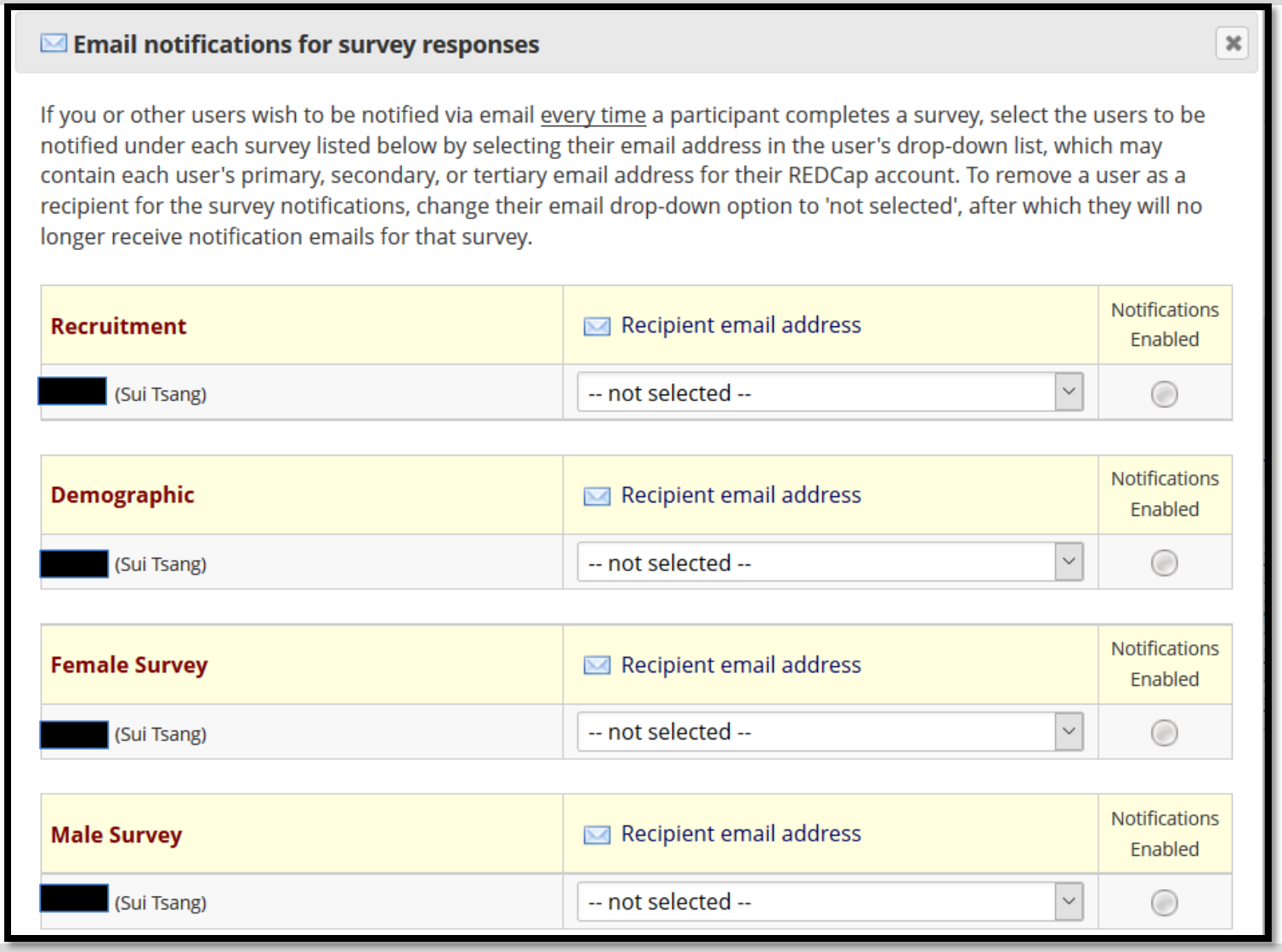
Survey Login

- Select field(s) that you wish to serve as the login fields for the respondent to enter.





Survey Notifications



Survey Settings

Setting	Description
Survey Title	Title to be displayed at the top of the survey page
Survey Instructions	Text displayed at top of survey after title. Can use the rich text editor to format the text
Logo	Optional, display an image above the survey title. If using logo, you can choose to hide survey title on survey page
Enhanced radio buttons and checkboxes	Larger buttons and checkboxes. Color will change when selected
Size of survey text	Normal, large, very large
Font of survey text	18 choices of fonts to choose from
Survey theme	11 themes to choose from. You can also create your own custom theme
Survey design preview	Preview your survey in the preview box. If using enhanced button, try clicking the buttons to see the color change

Survey Settings

Setting	Description
Question Numbering	• Auto numbered – Question number automatically added to each question. Cannot be used if there is branching logic. • Custom numbered – REDCap will not add any question number but you can include the question number in the question label.
Question Display Format	All on one page or one section per page
Allow participants to download a PDF of their responses at end of survey	This option will not be available if the auto-continue or survey queue auto-start option is enabled
Save a PDF of completed survey response to a File Upload field	A PDF copy of the survey response will be immediately stored in the field specified in this setting whenever a participant completes this survey.
Survey-specific email invitation field	If using different email fields for sending different surveys, this setting can be used to specify which email field to use for each survey

Survey Settings

Setting	Description
For 'Required' fields, display the red 'must provide value' text on the survey page	Default is yes, option to suppress the display by choosing no
Allow survey respondents to view aggregate survey results after completing the survey	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.
Text-To-Speech functionality	Allows text on survey page to be read audibly to participants.
Response Limit (optional)	Maximum number of responses to collect. Prevents respondents from starting the survey after a set number of responses have been collected.
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

Survey Settings

Setting	Description
Survey Expiration (optional)	Time after which the survey will become inactive.
Allow 'Save & Return Later' option for respondents?	Allow respondents to leave the survey and return later.
Auto-continue to next survey (Optional)	Automatically start the next survey instrument after finishing this survey
Redirect to a URL	Redirect to a webpage when survey is completed
Survey Completion Text	Displayed after survey is completed as 'thank you' text
Prevent survey responses from being saved if the survey ends via Stop Action?	If a Stop Action triggers the end of the survey, you may choose to keep the submitted responses or to prevent them from being saved as data in the project.
e-Consent Framework	For use with eConsent
Send confirmation email (optional)	Email the respondent when they complete the survey