



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

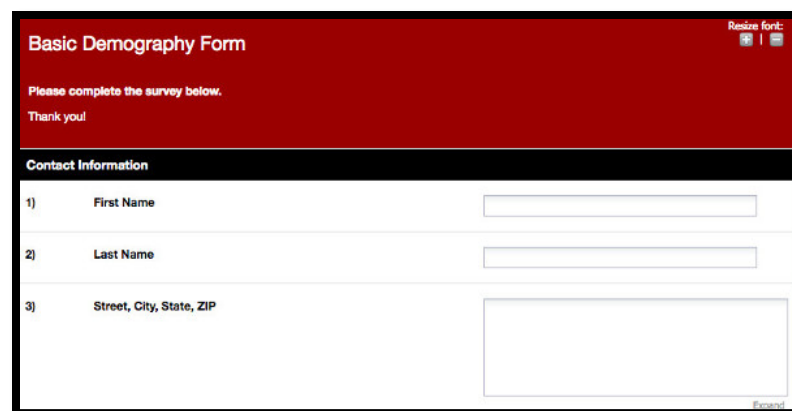


Private Survey

- A private survey does not 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



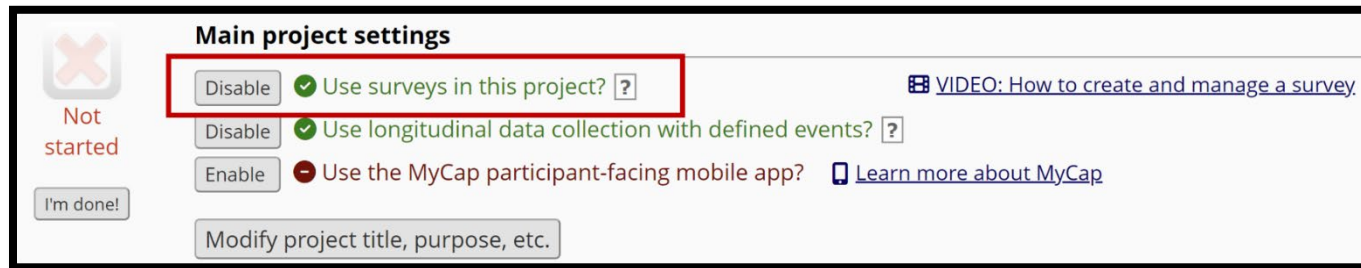
The screenshot shows a web form titled "Basic Demography Form" with a red header. Below the header, there is a message: "Please complete the survey below. Thank you!". The form is divided into a section titled "Contact Information" which contains three rows of input fields:

Contact Information		
1)	First Name	<input type="text"/>
2)	Last Name	<input type="text"/>
3)	Street, City, State, ZIP	<input type="text"/>

Survey Setup

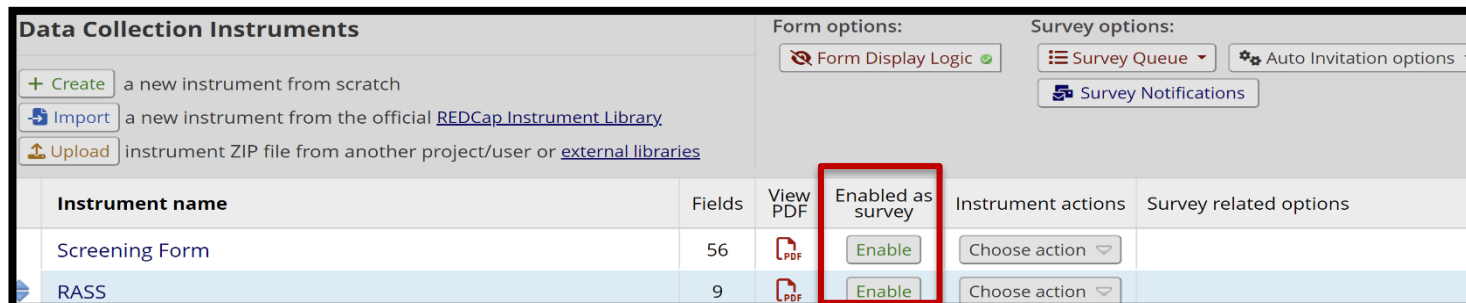
Enable a Survey

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



The screenshot shows the 'Main project settings' interface. A red box highlights the 'Use surveys in this project?' setting, which is currently enabled (indicated by a green checkmark). Other settings include 'Use longitudinal data collection with defined events?' (enabled) and 'Use the MyCap participant-facing mobile app?' (disabled). A 'VIDEO: How to create and manage a survey.' link is also visible.

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



The screenshot shows the 'Data Collection Instruments' interface. A table lists instruments with columns for 'Instrument name', 'Fields', 'View PDF', 'Enabled as survey', 'Instrument actions', and 'Survey related options'. The 'Enabled as survey' column has a red box around the 'Enable' button for the 'RASS' instrument.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Screening Form	56		Enable	Choose action	
RASS	9		Enable	Choose action	

Basic Survey Options

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

The screenshot shows the 'Survey Setup' page for a data collection instrument named 'Screening Form'. The page is titled '+ Set up my survey for data collection instrument "Screening Form"' and includes 'Save Changes' and 'Cancel' buttons. The 'Survey Status' section shows the survey is 'Active' with a green checkmark and a note: 'If offline, respondents will not be able take the survey.' Below this is a field for 'Custom text to display on survey page when offline:' with an 'Add offline message' button. The 'Basic Survey Options' section includes: 'Survey Title' set to 'Screening Form' (with a note: 'Title to be displayed to participants at the top of the survey page'); 'Survey Instructions' set to 'Please complete the survey below. Thank you!' (with a note: '(Displayed at top of survey after title)') and a rich text editor toolbar; and a link for 'How to use Piping here'. The 'Survey Design Options' section includes: 'Width of survey on page' set to 'Fixed width (default)' (with a note: 'Set a custom width as a percentage of the webpage that the survey will take up.' and 'Note: The percentage page width settings are fully dependent on the participant's screen size. This setting will not be applied when viewing the survey on mobile devices.'). At the bottom, there is a 'Logo' section with an 'Add new logo:' label, a 'Choose File' button, and the text 'No file chosen'.

Survey Customization Options*

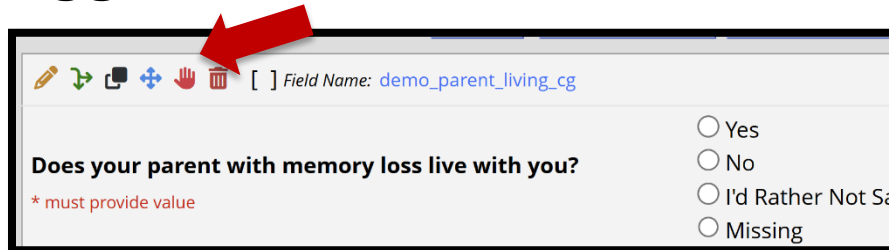
Examples include:

- 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

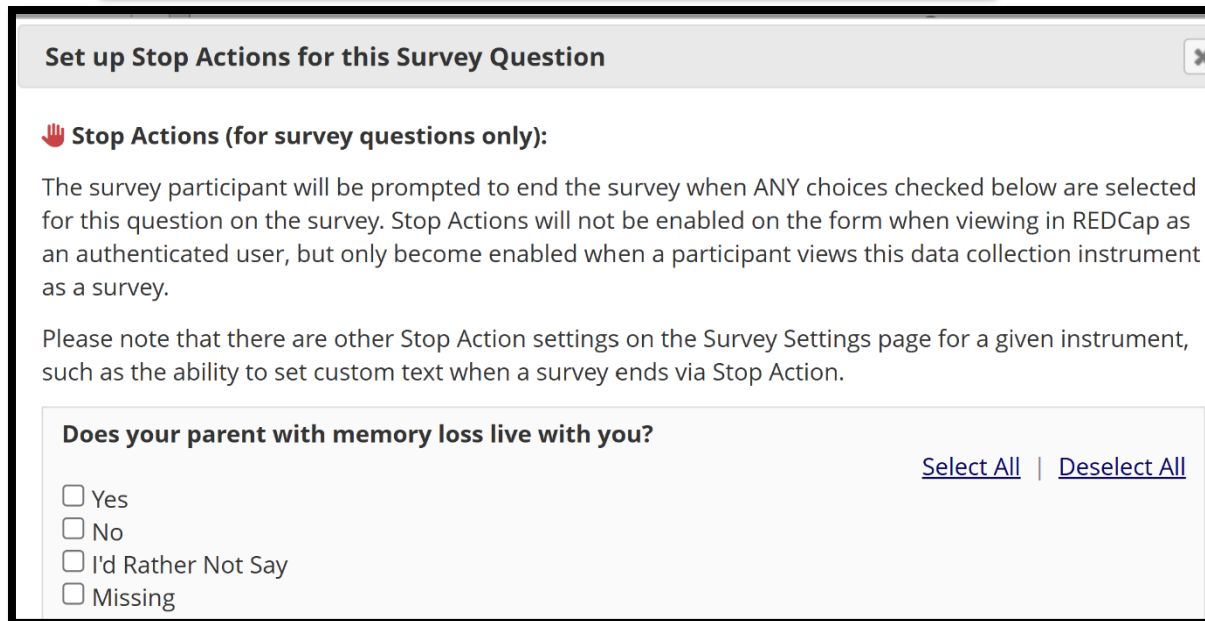
- ‘Stop Actions’ will end a survey if a participant selects the stop trigger condition



Field Name: demo_parent_living_cg

Does your parent with memory loss live with you?
* must provide value

Yes
 No
 I'd Rather Not Sa
 Missing



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.

Please note that there are other Stop Action settings on the Survey Settings page for a given instrument, such as the ability to set custom text when a survey ends via Stop Action.

Does your parent with memory loss live with you?

Yes
 No
 I'd Rather Not Say
 Missing

[Select All](#) | [Deselect All](#)

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 enable ASI as an optional module and customization in the Project Setup

Enable optional modules and customizations

Modify Repeating instruments and events [?](#)

Disable Auto-numbering for records [?](#)

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

Enable Randomization module [?](#)

Enable Designate an email field for communications (including survey invitations and alerts) [?](#)

[Additional customizations](#)

Settings displayed to Administrators only:

Enable Twilio SMS and Voice Call services for surveys and alerts [?](#)

Enable Mosio SMS services for surveys and alerts [?](#)

Enable SendGrid Template email services for Alerts & Notifications [?](#)

[Learn about Data Collection Strategies for Repeating Surveys](#)

Choose an email field to use for invitations to survey participants:

-- select a field --



You can capture email addresses for sending invitations to your survey participants by designating a field in your project. If a field is designated for that purpose, then any records in your project that have an email address captured for that particular field will have that email address show up as the participant's email address in the Participant List (unless an email address has already been entered for that participant in the Participant List directly).

Using the designated email address field can be especially valuable when your first data collection instrument is not enabled as a survey while one or more other instruments have been enabled as surveys. Since email addresses can only be entered into the Participant List directly for the first data collection instrument, the designated email field provides another opportunity to capture the email address of survey participants.

Please be aware that designating an email field means that survey responses can NEVER BE ANONYMOUS because of the fact that the participant's email address can be viewed on a data entry form, which means it is easy to identify the record/response to which the email address belongs.

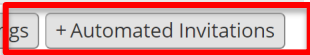
NOTE: If the participant's email address has already been captured directly in the Participant List, then that email address will supersede the value of the email field here when survey invitations are sent to the participant. Also, if the email invitation field exists on multiple longitudinal events, on a repeating instrument, or on a repeating event, the field's value will be synchronized across all instances/events so that changing it in one location will change the value across all events/instances where the field appears.

Survey-specific email invitation field: While the email invitation field discussed here is a project-level setting, it is helpful to know that there also exists a survey-level email invitation field option that can be utilized for particular surveys in the project (whereas the project-level field would be applied to ALL surveys). A survey-specific email invitation field can be enabled for any given survey, in which you can designate any email field in your project to use for sending survey invitations for that particular survey. Thus, you can collect several email addresses (e.g., for a student, a parent, and a teacher) and utilize each email for a different survey in the project. Then you can send each person an invitation to their own survey, after which all the survey responses get stored as one single record in the project. See the 'Survey Settings' page in the Online Designer for this survey-level setting.

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

Option 1: Automatic Survey Invitation

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Screening Form	56			Choose action ▾	<input checked="" type="checkbox"/> Survey settings <input checked="" type="checkbox"/> + Automated Invitations



Define Conditions for Automated Survey Invitations (ASI)

In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. [Tell me more](#)

Activate automated invitations for this survey?

Survey title: Screening Form

Event: Screening/ In-Hosp

"Active" must be selected in order for automated survey invitations to be triggered and sent using the conditions specified in this popup. You may make it Not Active (and vice versa) at any point in the future. [?](#)

Active Not Active

STEP 1: Compose message

From: ▾

(select any project user to be the 'Sender')

To: **[All participants who meet the conditions defined]**

Subject:

[Send test email](#)

Paragraph ▾ **B** *I* U A ▾ ▾

▾ ▾ ▾

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:

STEP 2: Conditions

Specify conditions for sending invitations:

When the following survey is completed:

AND ▾

When the following logic becomes true:

(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")

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

Test logic with a record:

Ensure logic is still true before sending invitation? [?](#)

[How to use "stop logic" to disable an automated invite](#)

STEP 3: When to send invitations AFTER conditions are met

Send immediately

Send on next at time H:M

Send the invitation days hours minutes

▾ ▾ [?](#)

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

Save

Save & Copy to...

Cancel

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.

Data Collection Instruments

Form options: Form Display Logic

Survey options: Survey Queue Auto Invitation options Survey Login

a new instrument from scratch

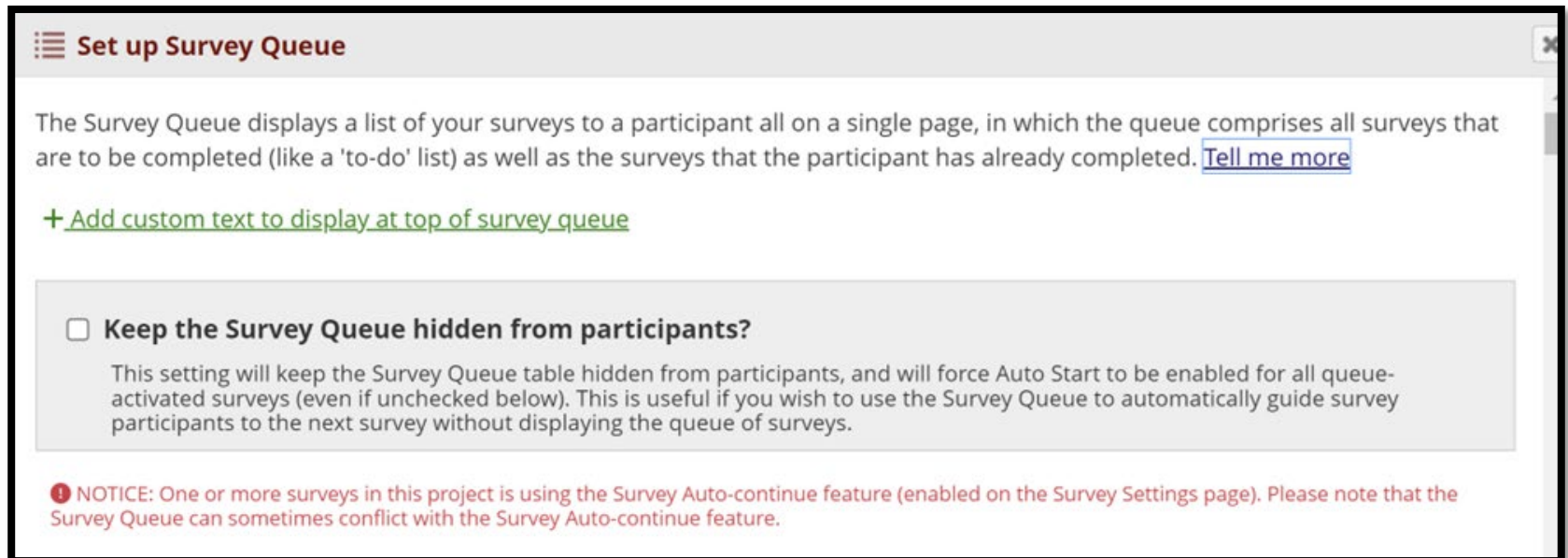
a new instrument from the official [REDCap Instrument Library](#)

instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Caregiver Demographics	38		<input checked="" type="checkbox"/> ↓	Choose action	<input checked="" type="checkbox"/> Survey settings + Automated Invitations
Caregiver Health	41		<input checked="" type="checkbox"/> ↓	Choose action	<input checked="" type="checkbox"/> Survey settings + Automated Invitations
PANAS	24		<input checked="" type="checkbox"/> ↓	Choose action	<input checked="" type="checkbox"/> Survey settings + Automated Invitations

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.



Set up Survey Queue

The Survey Queue displays a list of your surveys to a participant all on a single page, in which the queue comprises all surveys that are to be completed (like a 'to-do' list) as well as the surveys that the participant has already completed. [Tell me more](#)

[+ Add custom text to display at top of survey queue](#)

Keep the Survey Queue hidden from participants?

This setting will keep the Survey Queue table hidden from participants, and will force Auto Start to be enabled for all queue-activated surveys (even if unchecked below). This is useful if you wish to use the Survey Queue to automatically guide survey participants to the next survey without displaying the queue of surveys.

NOTICE: One or more surveys in this project is using the Survey Auto-continue feature (enabled on the Survey Settings page). Please note that the Survey Queue can sometimes conflict with the Survey Auto-continue feature.

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.

Set up Survey Queue

NOTICE: One or more surveys in this project is using the Survey Auto-continue feature (enabled on the Survey Settings page). Please note that the Survey Queue can sometimes conflict with the Survey Auto-continue feature.

Activated?	Survey Title	Display survey in the Survey Queue when...	Auto start?
Visit 1			
Not activated Activate	"FACT-AD Adult Child Survey" - Visit 1	<input type="checkbox"/> When the following survey is completed: --- select a survey --- AND <input type="checkbox"/> When the following logic becomes true: How to use this <input type="text" value=""/> (e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1") Test logic with a record: -- select a record --	<input type="checkbox"/>
Activated Deactivate	"Your Health" - Visit 1	<input checked="" type="checkbox"/> When the following survey is completed: "FACT-AD Adult Child Survey" [Caregiver Demographics] ... AND <input type="checkbox"/> When the following logic becomes true: How to use this [demo_parent_living_cg] = 1 (e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1") Test logic with a record: -- select a record --	<input type="checkbox"/>

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.

Close survey queue

Survey Queue

Get link to my survey queue

Listed below is your survey queue, which lists any other surveys that you have not yet completed. To begin the next survey, click the 'Begin survey' button next to the title.

Status	Survey Title
Begin survey	Epworth Sleepiness Scale – V2
Begin survey	Insomnia Severity Index – V2
Begin survey	PROMIS SF v1.0 - Sleep Disturb 8b – V2
Begin survey	Functional Outcomes of Sleep Questionnaire – V2

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.

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](#)

Participant List belonging to [Initial survey] "Enrollment" - Event 0 Remove all participants

Displaying 1 - 13 of 13 Add participants Compose Survey Invitations Export list

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	Survey Queue
		Enable						

Add Emails to Participant List

Copy and paste your list of participant email addresses, **one per line**.

Each participant starting on a new line

Example #1: john.williams@hotmail.com

Example #2: jimtaylor@yahoo.com

Example #3: putnamtr@gmail.com

Add participants

Cancel

Participant identifier not enabled

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.

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

Add participants

Cancel

Participant identifier enabled

Option 4: Alert and Notification

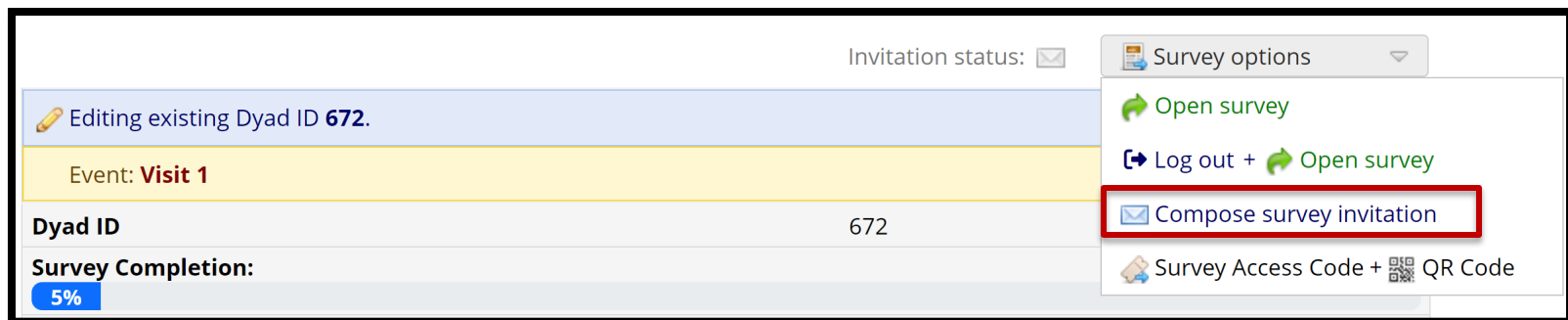
- Can be used to send survey link to participants.
- Participant email should be collected in a project field.
- Can set up trigger condition.
- To send a survey link or survey queue link, include the relevant survey smart variable in the message.
- Refer to [REDCap Training 201](#) slides and [FAQ](#) 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/survey/s/?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.	[previous-event-name][survey-url:followup_survey]	https://poa-redcap.med.yale.edu/survey/s/?s=fake
[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-link:followup_survey]	Follow-up Survey
[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.	[next-event-name][survey-link:followup_survey]	Follow-up 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-link:prescreening:Take the pre-screening survey]	Take the pre-screening survey
[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-access-code:followup_survey]	LDNP3EW7W
[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.	[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
[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.	[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.



The screenshot displays a data entry form for a record with Dyad ID 672. The form includes fields for 'Event: Visit 1', 'Dyad ID' (672), and 'Survey Completion' (5%). In the upper right corner, there is an 'Invitation status' field and a 'Survey options' dropdown menu. The dropdown menu is open, showing several options: 'Open survey', 'Log out + Open survey', 'Compose survey invitation' (highlighted with a red box), and 'Survey Access Code + QR Code'.

Field	Value
Event	Visit 1
Dyad ID	672
Survey Completion	5%

Invitation status: [Envelope icon]

Survey options [Dropdown arrow]

- Open survey [Green arrow icon]
- Log out + Open survey [Logout icon]
- Compose survey invitation [Envelope icon]**
- Survey Access Code + QR Code [QR code icon]

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

Send Survey Invitation to Participant "672"

Info
Survey title: Your Health
Event: Visit 1

When should this email be sent?
 Immediately
 At specified time: M/D/Y H:M
The time must be for the time zone **America/New_York**, in which the current time is **04/01/2024 15:52**.

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

Compose message

From:
(select any project user to be the 'Sender')

To:
Or provide another email:

(NOTE: Any email address manually entered above will be used only this one time when sending an survey invitation. Any other invitations sent out at other times will instead go to the email address found in the Participant List for this participant.)

Subject:

[Send test email](#)

Rich Text Editor:
Paragraph **B** *I* U A

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

[Public Survey Link](#)
[Participant List](#)
[Survey Invitation Log](#)

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). 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](#)

Participant List belonging to **[Initial survey] "Recruitment"** Remove all participants

Displaying **1 - 10** of 10 Add participants Compose Survey Invitations Export list

Email	Record	Participant Identifier Enable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	Survey Queue
[No email listed]		Disabled		-				
[No email listed]		Disabled		-		-	-	
aaa@abc.com	10	Disabled		-		-	-	
1) sui.tsang@yale.edu	1	Disabled		-		-	-	
2) sui.tsang@yale.edu	2	Disabled		-		-	-	

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

[Public Survey Link](#)
[Participant List](#)
[Survey Invitation Log](#)

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. For each invitation it displays the participant email, participant identifier (if exists), survey name, and the date/time in which the invitation was (or will be) sent. You may even view the invitation email itself by clicking the icon in the 'View Email' column. Please note that all times below correspond to the time zone "America/New_York", in which the current time is 04/28/2022 8:23pm.

Invitation send time	View Invite	Participant Email	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)	
12/02/2019 3:58pm		sui.tsang@yale.edu	1		Demographic	-			
12/02/2019 4:13pm		sui.tsang@yale.edu	2		Demographic	-			
12/03/2019 3:43pm		sui.tsang@yale.edu	4		Demographic	-			

User Rights

User Rights

Basic Privileges

Role name:

Highest level privileges:

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

Other privileges:

- Survey Distribution Tools
- Calendar
- Add/Edit/Organize
- Reports
 - Also allows user to view ALL reports (but not necessarily all data in the reports)
- Stats & Charts
- Data Import Tool
- Data Comparison Tool
- Logging

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)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Caregiver Health (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
PANAS (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Caregiver CESD10 (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
NPI (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Caregiver ECR-RS (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

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.

Data Collection Instruments	Form options:	Survey options:	
+ Create a new instrument from scratch	Form Display Logic	Survey Queue	Auto Invitation options
Import a new instrument from the official REDCap Instrument Library		Survey Notifications	Survey Login

Enable Survey Login?	Disabled
Fields to display on the survey login form	
Login field #1	-- select a field --
Add another login field	for
	Visit 1
Customizations for survey login	
Minimum number of fields above that are required for login	1
Apply the survey login to all surveys in project?	All surveys

Survey Notifications

✉ Email notifications for survey responses

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.

Survey	Recipient email address	Notifications Enabled
Recruitment	✉ Recipient email address	Notifications Enabled
██████ (Sui Tsang)	-- not selected --	<input type="radio"/>
Demographic	✉ Recipient email address	Notifications Enabled
██████ (Sui Tsang)	-- not selected --	<input type="radio"/>
Female Survey	✉ Recipient email address	Notifications Enabled
██████ (Sui Tsang)	-- not selected --	<input type="radio"/>
Male Survey	✉ Recipient email address	Notifications Enabled
██████ (Sui Tsang)	-- not selected --	<input type="radio"/>

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	<ul style="list-style-type: none">• <u>Auto numbered</u> – Question number automatically added to each question. Cannot be used if there is branching logic.• <u>Custom numbered</u> – 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