

# REDCAP

## INTRO TO REDCap SURVEYS CLASS (204)



# ITHS Focus

- Speeding science to clinical practice for the benefit of patients and communities.
- Promotes translation of scientific discovery by:
  - ❑ Fostering innovative research
  - ❑ Cultivating multi-disciplinary partnerships
  - ❑ Training the next generation of researchers
- More information: [www.iths.org](http://www.iths.org)



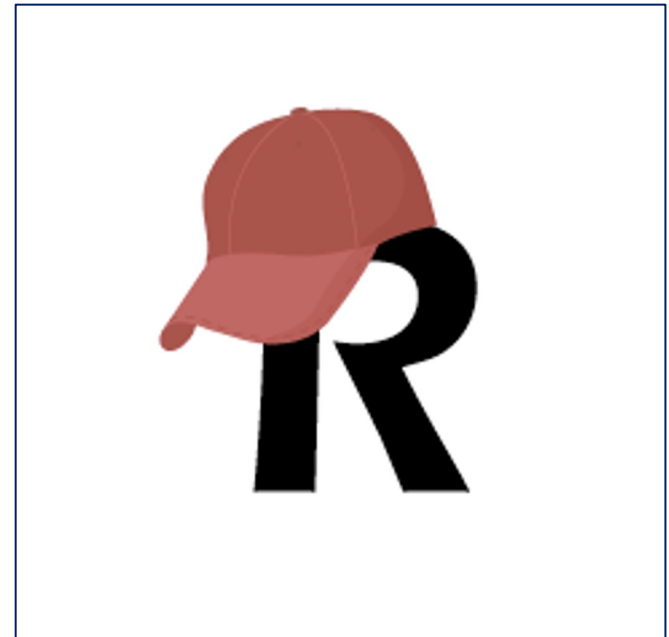
Laboratory

Clinic

Community

# Learning objectives

- Basic survey setup
- Distribution
- Management
- Example uses
- User rights



**AUTHORIZATION TO RELEASE PATIENT HEALTH INFORMATION**

Medical Record Number \_\_\_\_\_

Patient Name: \_\_\_\_\_ Date of Birth \_\_\_\_\_

I authorize Seattle Children's Hospital to release information to: \_\_\_\_\_ Attn: \_\_\_\_\_

Organization/Individual: \_\_\_\_\_ Zip \_\_\_\_\_

Address \_\_\_\_\_ State \_\_\_\_\_ Fax # (\_\_\_\_) \_\_\_\_\_

City \_\_\_\_\_

Phone # (\_\_\_\_) \_\_\_\_\_

☐ Check this box to receive the information requested in an electronic format on Compact Disc (CD). Otherwise paper copies will be sent to the recipient. Electronic records (with the exception of Radiology images) will be password protected. To have the password emailed to you please provide your email address. If no email address is provided the password will be mailed separately to the postal address above.

E-Mail Address: \_\_\_\_\_

**Information to be Released to Organization/Individual:**

Requesting records: from \_\_\_\_\_ to \_\_\_\_\_

☐ Discharge Summaries ☐ Operative Reports ☐ Radiology Reports ☐ Drug/Alcohol Abuse Records

☐ Lab/Pathology Reports ☐ Clinic Notes ☐ Radiology Images ☐ Emergency Department Records

☐ Other (please specify) \_\_\_\_\_ ☐ Other \_\_\_\_\_

There may be a charge for copying the patient record, see the reverse side.

**Purpose of Release:**

☐ Transfer to another provider (please specify) \_\_\_\_\_

What is a survey in REDCap terms?

A different way of doing data entry in your project

# General survey models

## Simple single survey

- *Quick and easy to setup*
  - *Single record per response*
  - *Great for getting started with surveys*
- 

## Chained surveys

- *Link multiple surveys together*
  - *"Skip" over certain surveys*
  - *Multiple survey responses linked to a single record*
- 

## Longitudinal surveys

*(Covered in Advanced REDCap Surveys - 304)*

- *Longitudinal mode turned on*
- *Repeat the same survey in multiple events*
- *Multiple survey responses per event per record*
- *Takes a bit more time and testing to setup*
- *Great for longer term studies*



# Simple single survey

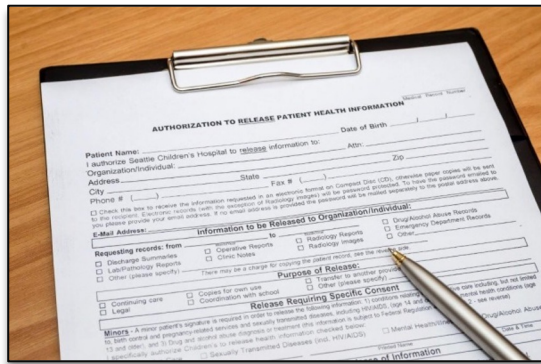
## Uses

## Setup

## Distribution

## Example uses for a single survey

- Registration survey
  - Classes
  - Events
- Enrollment survey
- Consent survey
- Feedback survey
- Part of a recurring data collection
  - Copy and change date model



# Simple single survey

Uses

Setup

Turn on survey mode

Enable surveys

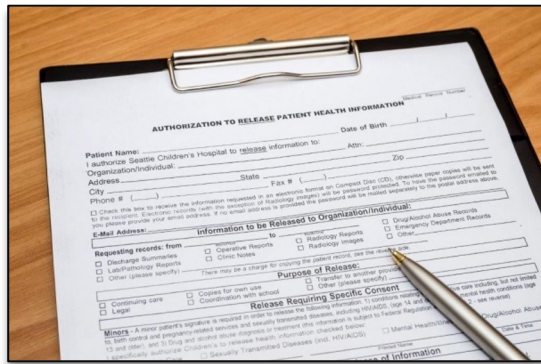
Survey settings

Distribution

## Setup steps for a single survey

- Turn on survey mode for the entire project
- Enable the desired instruments as surveys
- Configure survey settings for your surveys

**You MUST do these in the right order!**



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# Simple single survey

Uses

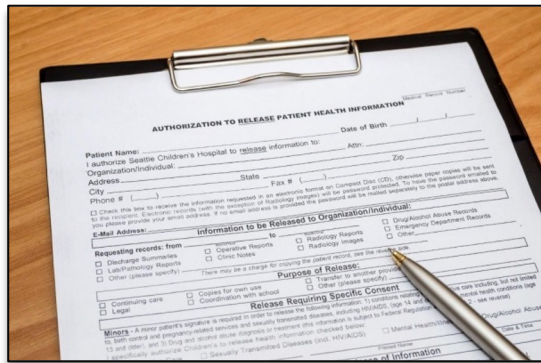
Setup

Turn on survey mode

Enable surveys

Survey settings

Distribution



## Turning on the survey feature

- Hit the “Enable” button to turn on survey mode
  - Found in the project setup page
  - Disable survey mode hides features
    - Can only be done in development
    - Will suspend all active surveys

The image shows two screenshots of the "Main project settings" form. In both, a green arrow points to the "Enable" button. The top screenshot shows the "Enable" button being clicked, with the "Use surveys in this project?" checkbox becoming checked. The bottom screenshot shows the "Enable" button being clicked, with the "Use surveys in this project?" checkbox becoming checked. Both screenshots also show the "Use longitudinal data collection with defined events?" checkbox checked and a link to a video: "VIDEO: How to create and manage a survey".

**Main project settings**

☒ Complete ☐ Not complete?

☒ Use surveys in this project? [VIDEO: How to create and manage a survey](#)

☒ Use longitudinal data collection with defined events? [VIDEO: How to create and manage a survey](#)

**Main project settings**

☒ Complete ☐ Not complete?

☒ Use surveys in this project? [VIDEO: How to create and manage a survey](#)

☒ Use longitudinal data collection with defined events? [VIDEO: How to create and manage a survey](#)



# Simple single survey

## Uses

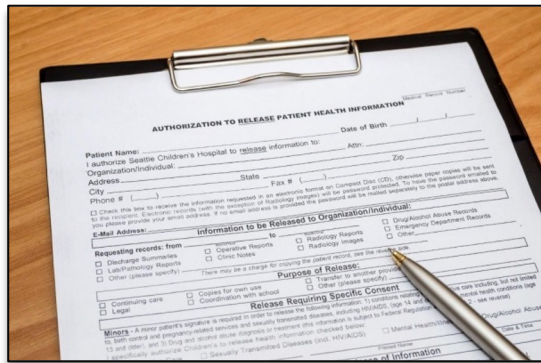
## Setup

Turn on survey mode

Enable surveys

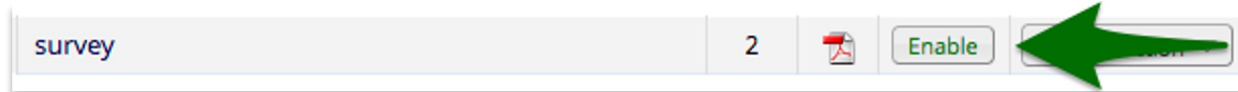
Survey settings

## Distribution



## Enable instruments as surveys

- Found in the online designer
- Hit the "Enable" button next to each instrument



- You must do this for each instrument you want to distribute as a survey
- Hitting the enable button will take you directly to the survey settings for that instrument
- Each instrument that's a survey can still be filled out as a normal instrument

# Simple single survey

Uses

## Setup – Survey settings

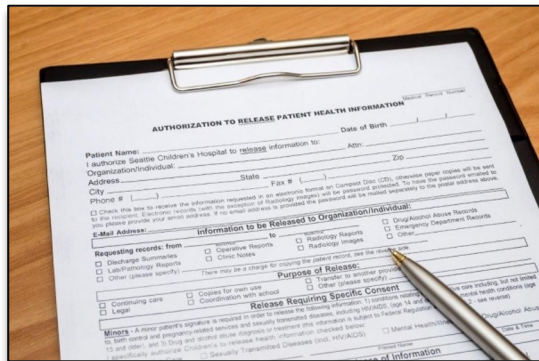
### Basic options

### Design options

### Survey access

### Termination options

### Distribution



## Survey settings – Basic options

- Survey Title
  - Can be different from instrument name
  - Allows for HTML
- Survey Instructions
  - Use this instead of an extra descriptive field
  - Allows for HTML
  - Has some formatting options build in
  - It is ok to leave this empty

# Simple single survey

Uses

## Setup – Survey settings

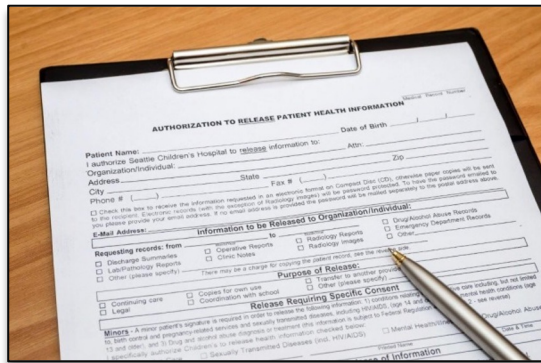
Basic options

Design options

Survey access

Termination options

Distribution



## Survey settings – Design options

### Survey Design

- Logo
- Enhanced buttons
  - Use for mobile centric surveys
- Size & Font
- Survey Theme
  - Preloaded theme
  - Build your own
    - Saving links theme to your account

### Survey Customization

- Default settings are fine for 90% of the surveys



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# Simple single survey

Uses

## Setup – Survey settings

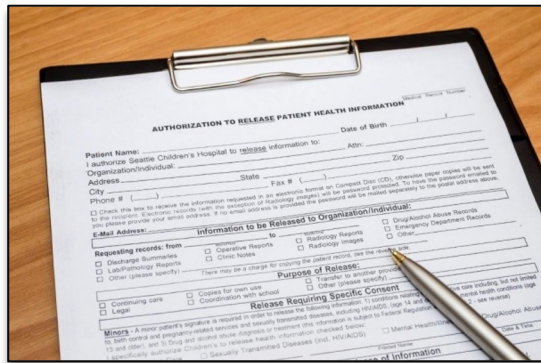
Basic options

Design options

Survey access

Termination options

Distribution



## Survey settings – Survey access

- Response limit
  - Great for registration surveys
- Time limit
  - Great for daily, weekly or monthly surveys
- Survey expiration
  - Completely deactivates a survey for all records
- "Save and Return"
  - Default is "No save and return"
  - Access codes can be time intensive
    - Located in each survey's record
  - Save and return after completion is risky
    - Can interfere with other features

# Simple single survey

Uses

## Setup – Survey settings

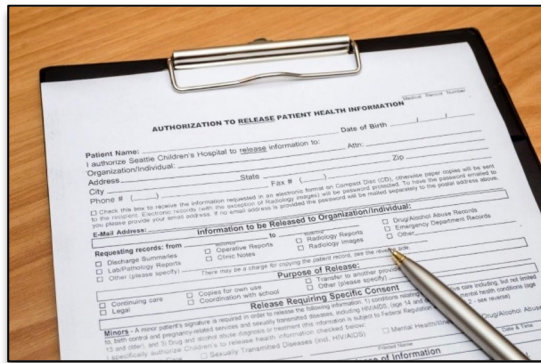
Basic options

Design options

Survey access

## Termination options

Distribution



## Survey settings – Termination options

- Auto-continue
  - Auto skip to the next survey upon submit
- URL redirect
  - Redirect to any website
- Thank-you message
  - Default option
  - Allows for custom text
  - HTML allowed
- Confirmation email
  - Send upon completion
  - Requires an email
  - Record email or temporary email

# Simple single survey

Uses

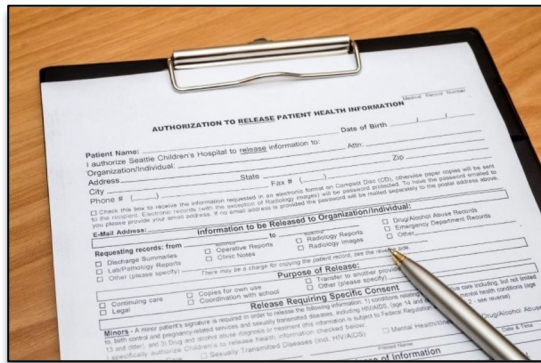
Setup – Survey settings

Distribution

Public Link

Participant list

Survey invitation log



## Distribution – Public link

- Found under "Survey Distribution Tools"
  - Auto-generated by REDCap
  - Alternatives:
    - Shortened link – great for tweets/text
    - Custom link – Human readable
    - QR code – scan with a smartphone
    - Web embedding code
    - Short code
      - Very temporary (1 hour)
- \* In-clinic use

### 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



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# Simple single survey

Uses

Setup – Survey settings

Distribution

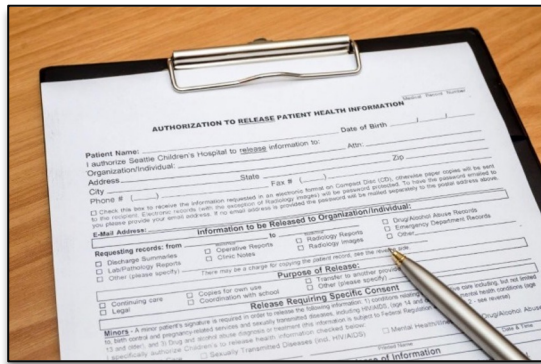
Public Link

Participant list

Survey invitation log

## Distribution – Participant link

- One unique link per participant
- Add participants
  - Email plus optional name
    - One email per line
  - De-identified mode possible
- Compose survey invitations
  - Send date/time
  - Reminders
  - Subject and message
  - Recipients
  - Hit send!





# Simple single survey

Uses

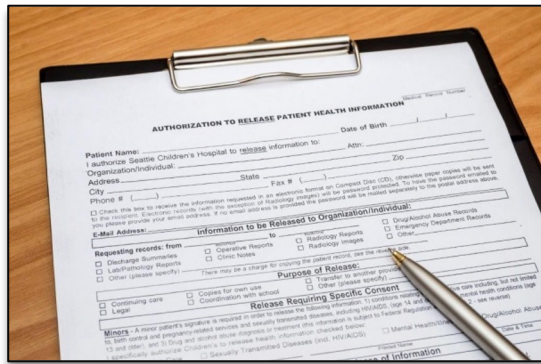
Setup – Survey settings

Distribution

Public Link

Participant list

Survey invitation log



## Distribution – Survey Invitation log

- View all past and future survey invites
  - Filter on various aspects
  - Past versus future
  - Reminders
- Allows for editing of timing of future invites
  - Hit little pencil next to each invite
- Allows for deletions of future invites
  - Hit little red x next to each invite
- Edits/deletes will need to be done for each invite and reminder separately
- Take this into account when setting up

# Chained surveys

## Uses

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## Setup

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## Distribution

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## Example uses for chained surveys

- Consent models
- Enabling "paging" in surveys
  - Mobile device optimization
- Multiple workflow surveys
  - Parent vs child surveys
  - Male vs female surveys
  - Limited randomization uses
- Simplifying
  - Instruments
  - Branching logic

# Chained surveys

Uses

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Setup

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Auto-continue

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Survey queue

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Best practices

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Distribution

## Setup steps for chained surveys

- Same as a simple single survey
- Enable multiple desired instruments as surveys
- Setup the chain

**You MUST do these in the right order!**



# Chained surveys

Uses

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Setup

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**Auto-continue**

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Survey queue

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Best practices

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Distribution



## Setup – Auto-Continue

- Found in the survey settings
- Will need to be enabled for each survey
- Makes the survey continue to the next survey automatically
  - Does nothing for last survey in line
  - Enable a different termination option for the last survey
- Does not play nice with the survey queue

# Chained surveys

Uses

Setup

Auto-continue

**Survey queue**

Best practices

Distribution



## Setup – Survey Queue

- Found in the online designer
- Populates based on instruments and events
- Setup after defining your instruments
- First survey will always be missing
- Enable survey based on:
  - Survey completion
  - Branching logic
  - Both
- Auto-start
  - Immediately start next survey
  - Go to survey queue overview first
- Order of instruments determines who wins the "tie"

# Chained surveys

Uses

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Setup

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Auto-continue

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Survey queue

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Best practices

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Distribution



## Setup – Best practices

- Design copy option (found in survey settings)
- Notifications (found in the online designer)
  - Do not trigger for each survey
  - Great for keeping an eye on low activity projects
- Termination options
  - Think about the workflow of your survey participants
  - Use survey queue if you expect "broken" entry

# Chained surveys

Uses

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Setup

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Distribution

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Return codes vs login

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Participant list

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## Return codes versus survey login

- First survey will be distributed like a simple survey
- Return codes
  - "Save and return" turned on
  - 6-digit alpha-numeric code (*Optional*)
  - Survey specific
  - Lookup in the survey response
    - Not ideal for anonymous surveys
- Survey login
  - Setup in online designer
  - Up to 3 variables can be selected
  - Won't work for first survey
  - Pick an easy to remember variable



# Chained surveys

Uses

Setup

Distribution

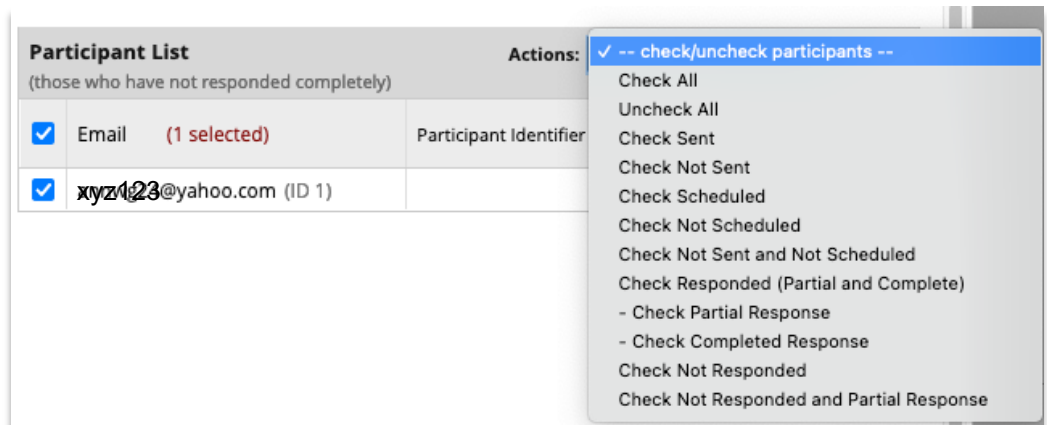
Return codes vs login

Participant list



## Participant list "Plus"

- Multiple surveys will make a survey selector popup
- Select the survey you want to send an invite for
- Ideal for sending new invites for "broken" surveys
- Use the "partial" or "not responded" selector



# User Rights

## Ability to manage survey invitations

- *Allows access to the "Survey Distribution Tools" menu*
  - *Make 1 person responsible plus 1 or 2 back ups*
- 

## Ability to edit existing surveys

- *Needs to be set by instrument*
- *Allows for modification of a completed survey*
  - *Handy for updating email address or other info*
- *Only distribute this right to people who need it*
  - *Everything gets logged anyway, but it prevents confusion*

# Advanced Survey Functionality

## Covered in the 304-level class

- *Longitudinal surveys:*
  - *Automatic Survey Invitations (ASI)*
  - *Alerts and Notifications*
  - *Custom emails / invitations*
- *Best practices:*
  - *Fire & forget*
  - *Fuzzy triggers*
  - *Kill switches*
  - *Interplay with repeatable forms*
  - *Gift card models*
- *Texting & robo-calling*
- *Action tags*



Thank You!

Questions?

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