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
Learning objectives

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

**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

**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!
Simple single survey

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
Simple single survey

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

Survey settings – Basic options

• Survey Title
  o Can be different from instrument name
  o Allows for HTML

• Survey Instructions
  o Use this instead of an extra descriptive field
  o Allows for HTML
  o Has some formatting options build in
  o It is ok to leave this empty
Simple single survey

**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
Simple single survey

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

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

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
Simple single survey

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

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
# Categorized surveys

## Example uses for chained surveys

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Chained surveys

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

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

Uses

Setup

Auto-continue

Survey queue

Best practices

Distribution

[Image of chain]

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Chained surveys

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

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

**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

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
  o Handy for updating email address or other info
• Only distribute this right to people who need it
  o 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!

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