# REDCAP INTRO TO REDCap SURVEYS CLASS (204)

# **Institute of Translational Health Sciences** Accelerating Research. Improving Health.



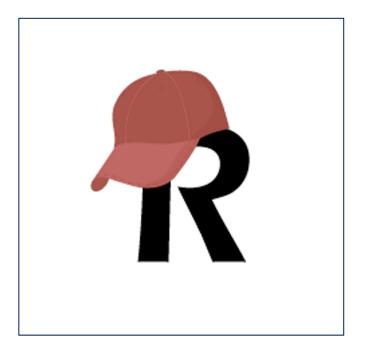
### **ITHS Focus**

- 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: <u>www.iths.org</u>



## Learning objectives

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



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#### 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**

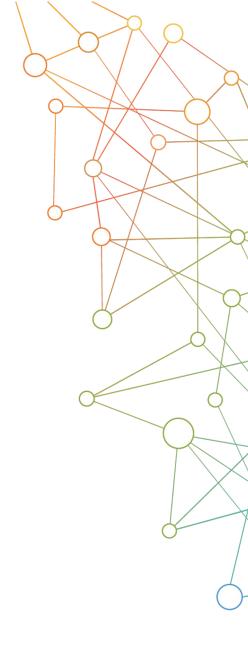
- Link multiple surveys together
- "Skip" over certain surveys
- Multiple survey responses linked to a single record

#### 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





Uses

Distribution

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#### **Example uses for a single survey**

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

Uses

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Turn on survey mode

Enable surveys

Survey settings

Distribution



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#### 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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Turn on survey mode

Enable surveys

Survey settings

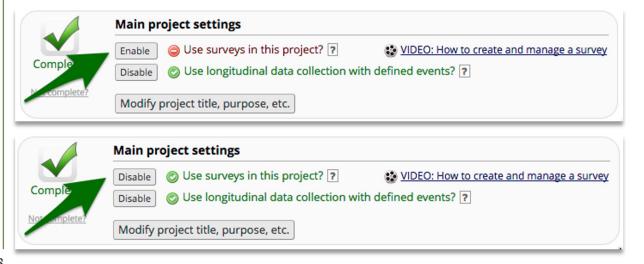
Distribution



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#### **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



Uses

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Turn on survey mode

**Enable surveys** 

Survey settings

Distribution

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#### **Enable instruments as surveys**

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

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				_	

- 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

Uses

#### Setup – Survey settings

**Basic options** 

**Design options** 

Survey access

**Termination options** 

#### Distribution

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#### **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
  - o It is ok to leave this empty

Uses

Setup – Survey settings

**Basic options** 

**Design options** 

Survey access

**Termination options** 

#### Distribution

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#### **Survey settings – Design options**

Survey Design

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

Survey Customization

• Default settings are fine for 90% of the surveys

Uses

#### **Setup – Survey settings**

**Basic options** 

**Design options** 

Survey access

**Termination options** 

#### Distribution

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#### 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
  - $\circ$   $\,$  Save and return after completion is risky
    - Can interfere with other features

Uses

#### **Setup – Survey settings**

**Basic options** 

**Design options** 

Survey access

#### **Termination options**

#### Distribution

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#### **Survey settings – Termination options**

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

Uses

Setup – Survey settings

Distribution

**Public Link** 

Participant list

Survey invitation log

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#### **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
  - o Short code
    - Very temporary (1 hour)
      - \* In-clinic use

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Uses

Setup – Survey settings

Distribution

**Public Link** 

**Participant list** 

Survey invitation log

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#### **Distribution – Participant link**

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

Uses

Setup – Survey settings

Distribution

**Public Link** 

Participant list

Survey invitation log

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#### **Distribution – Survey Invitation log**

- View all past and future survey invites
  - Filter on various aspects
  - o Past versus future
  - o Reminders
- Allows for editing of timing of future invites
  - $\circ~$  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

Uses

Setup
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Distribution



#### **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
  - o Instruments
  - Branching logic



Uses

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Auto-continue

Survey queue

**Best practices** 

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!

Uses

**Auto-continue** 

Survey queue

**Best practices** 

Distribution





- 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

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Auto-continue

Survey queue

**Best practices** 

Distribution



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#### 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
  - o Branching logic
  - o Both
- Auto-start
  - Immediately start next survey
  - $\circ$   $\,$  Go to survey queue overview first  $\,$
  - Order of instruments determines who wins the "tie"

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Auto-continue

Survey queue

**Best practices** 

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

Uses

Setup
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Distribution

Return codes vs login

Participant list





#### **Return codes versus survey login**

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

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Distribution

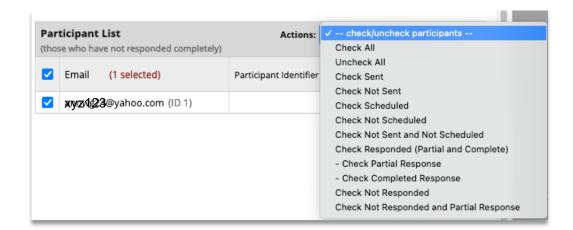
Return codes vs login

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



# Thank You!

# **Questions?**

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#### Access

Members gain access the different research services, resources, and tools offered by ITHS, including the ITHS Research Navigator.

#### **Education and Training**

Members can access a variety of workforce development and mentoring programs and apply for formal training programs.

#### Funding

Members can apply for local and national pilot grants and other funding opportunities. ITHS also offers letters of support for grant submissions.

#### Collaboration

Members can connect with collaborators across the CTSA consortium.

