REDCap
Intro to Surveys (RC-204)
Learning objectives

• Basic survey setup
• Distribution
• Management
• Example of 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

<table>
<thead>
<tr>
<th>Uses</th>
<th>Example uses for a single survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup</td>
<td>Registration survey</td>
</tr>
<tr>
<td></td>
<td>Classes</td>
</tr>
<tr>
<td></td>
<td>Events</td>
</tr>
<tr>
<td>Distribution</td>
<td>Enrollment survey</td>
</tr>
<tr>
<td></td>
<td>Consent survey</td>
</tr>
<tr>
<td></td>
<td>Feedback survey</td>
</tr>
<tr>
<td></td>
<td>Part of a recurring data collection</td>
</tr>
<tr>
<td></td>
<td>Copy and change date model</td>
</tr>
</tbody>
</table>
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 have to 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

Main project settings

Complete

Enable
Use surveys in this project? ?

Modify project title, purpose, etc.

Disable
Use longitudinal data collection with defined events? ?

Main project settings

Complete

Disable
Use surveys in this project? ?

Modify project title, purpose, etc.

Disable
Use longitudinal data collection with defined events? ?
Simple single survey

Enable instruments as surveys

- Found in the online designer
- Hit the "Enable" button behind each instrument
- You have to 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
  - 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

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 "Manage survey participants"
► 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

Uses
Setup – Survey settings
Distribution
Public Link
Participant list
Survey invitation log
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!

Uses
Setup – Survey settings
Distribution
  Public Link
Participant list
Survey invitation log
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
► Allow 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 invites
► Edits/deletes will need to be done for each invite and reminder separately
► Take this into account when setting up
## Chained surveys

### Uses

<table>
<thead>
<tr>
<th>Setup</th>
<th>Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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

Setup steps for chained surveys

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

► You have to 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
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

► Customization copy (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 sent and invite for
- Ideal for sending new invites for "broken" surveys
- Use the "incomplete" or "non-responders" selector
User Rights

Ability to manage survey invitations
• Allows access to the "Manage survey invitations" 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)
  • Custom emails / invitations
• Best practices
  • Fire & forget
  • Fuzzy triggers
  • Kill switches
  • Interplay with repeatable forms
  • Gift card models
• Texting & robo-calling
• Action tags