REDCap Intro to Surveys (RC-204)

REDCap Research Electronic Data Capture

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Learning objectives

- Basic survey setup
- Distribution
- Management
- Example of 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

Setup

Distribution



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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

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 have to do these in the right order!

Uses

Setup

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

Setup

Turn on survey mode

Enable surveys

Survey settings

Distribution

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Enable instruments as surveys

Found in the online designer

survey

Hit the "Enable" button behind each instrument

You have to this for each instrument you want to
distribute as a survey

Enable

- 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
 - It is ok to leave this empty

Uses

Setup – Survey settings

Basic options

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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
 - 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



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

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
 - Default option
 - Allows for custom text
 - HTML allowed
 - Confirmation email
 - Send upon completion
 - Requires an email
 - 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 "Manage survey participants"
- Auto-generated by REDCap
- Alternatives:
 - Shortened link great for tweets/text
 - Custom link Human readible
 - 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



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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

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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

Uses Setup 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
 - Instruments
 - Branching logic

Uses

Setup

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 have to do these in the right order!

Uses

Setup

Auto-continue

Survey queue

Best practices

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

Uses

Setup

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
 - Branching logic
 - Both
 - Auto-start
 - Immediately start next survey
 - Go to survey queue overview first
 - Order of instruments determines who wins the "tie"

Uses

Setup

Auto-continue

Survey queue

Best practices

Distribution



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Notifications (found in the online designer)

Customization copy (found in survey settings)

Do not trigger for each survey

Setup – Best practices

- 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

Distribution

Return codes vs login

Paricipant list





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

Uses Setup **Distribution** Return codes vs login **Paricipant list**

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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 Functionaly

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