

REDCap

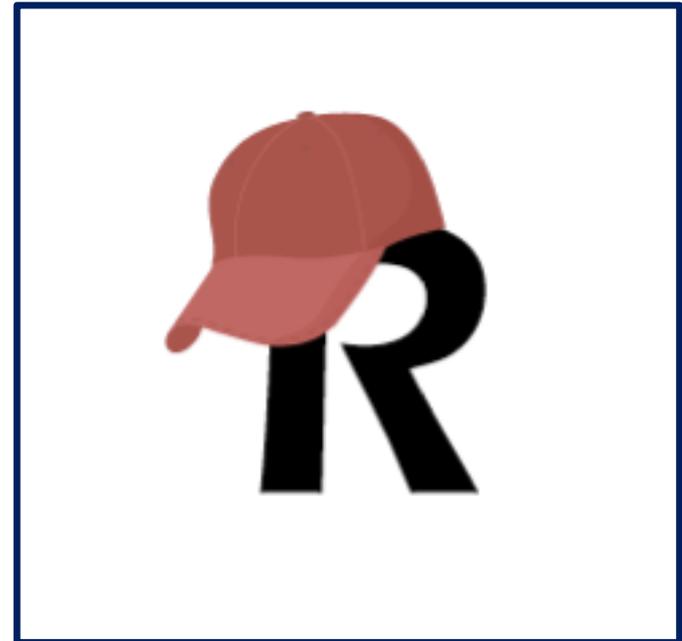
Intro to Surveys (RC-204)



 **REDCap**
Research Electronic Data Capture

Learning objectives

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



Medical Record Number _____

AUTHORIZATION TO RELEASE PATIENT HEALTH INFORMATION

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) _____

including, but not limited to _____

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

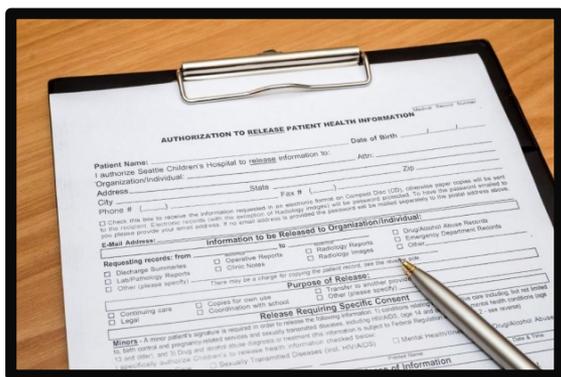
Uses

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

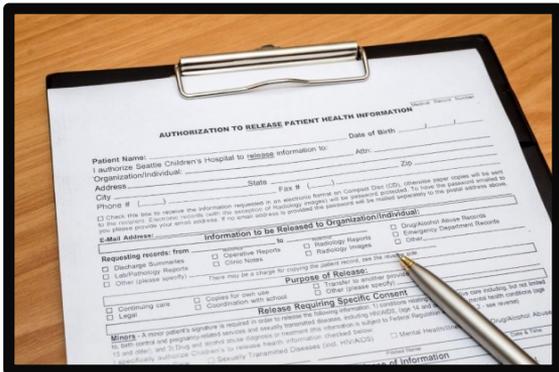
Enable surveys

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 have to do these in the right order!



Simple single survey

Uses

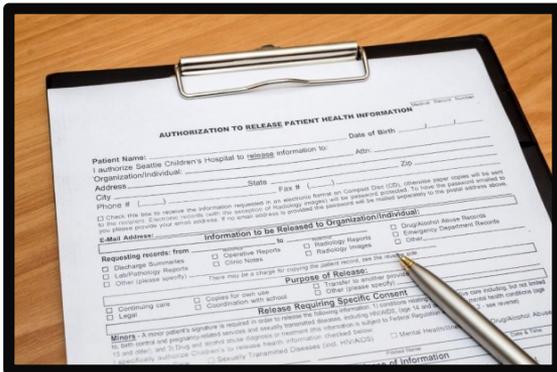
Setup

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

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? [?](#)

Main project settings

Complete Not complete

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Use longitudinal data collection with defined events? [?](#)

Simple single survey

Uses

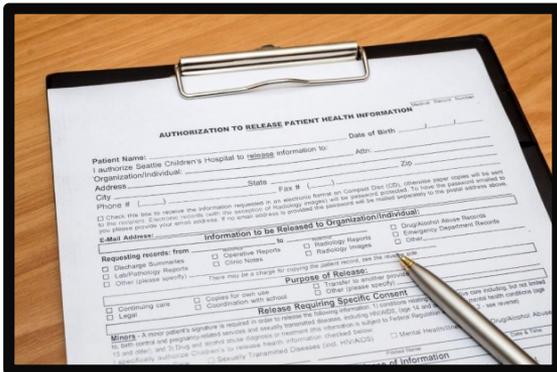
Setup

Turn on survey mode

Enable surveys

Survey settings

Distribution



Enable instruments as surveys

- ▶ Found in the online designer
- ▶ Hit the "Enable" button behind each instrument



- ▶ You have to 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

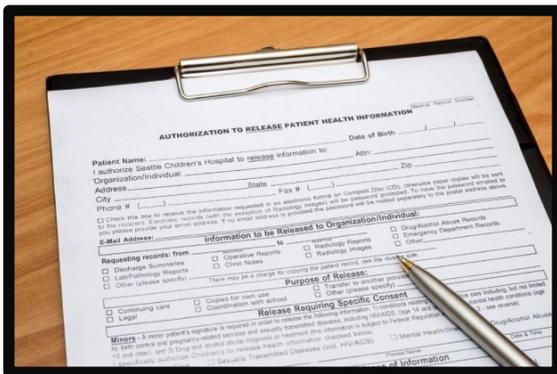
Basic options

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

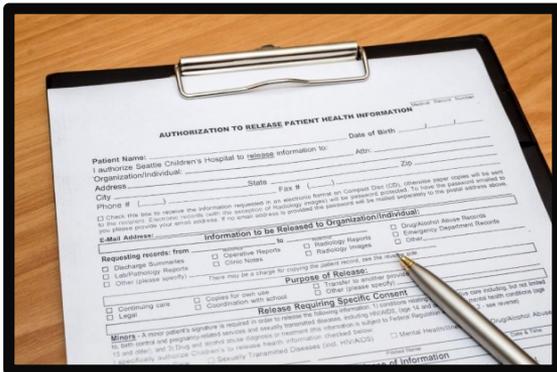
Basic options

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

Simple single survey

Uses

Setup – Survey settings

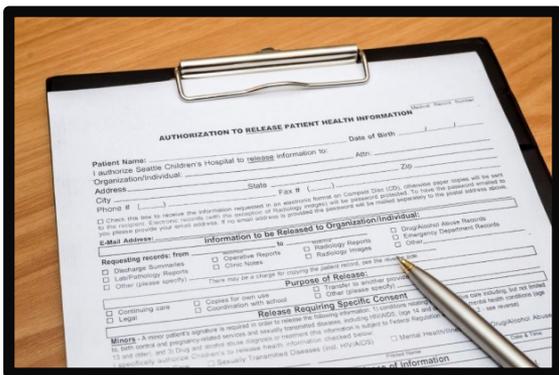
Basic options

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

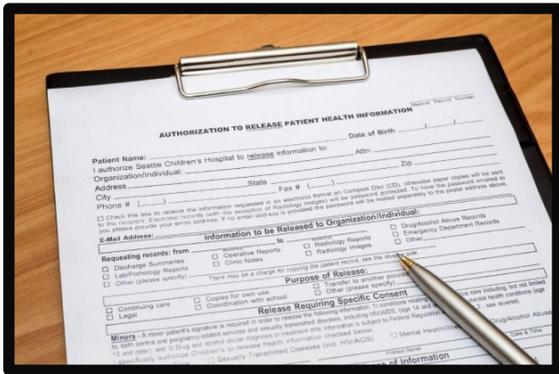
Basic options

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

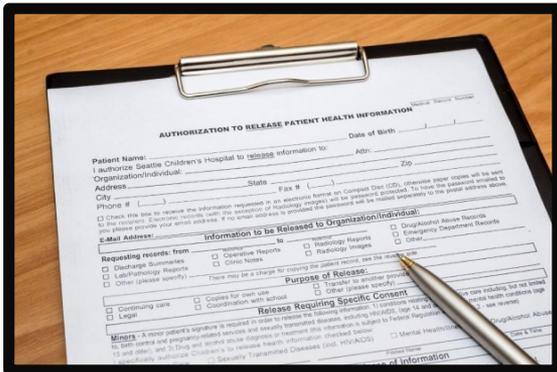
Public Link

Participant list

Survey invitation log

Distribution – Public link

- ▶ Found under "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



Simple single survey

Uses

Setup – Survey settings

Distribution

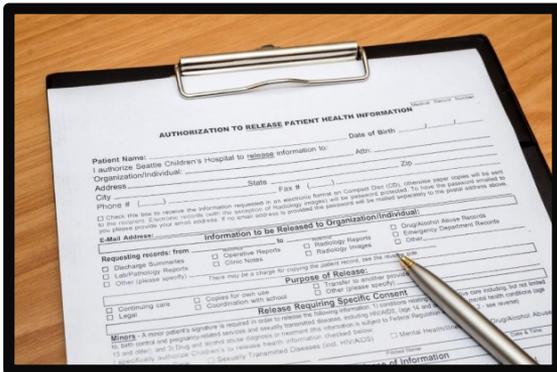
Public Link

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

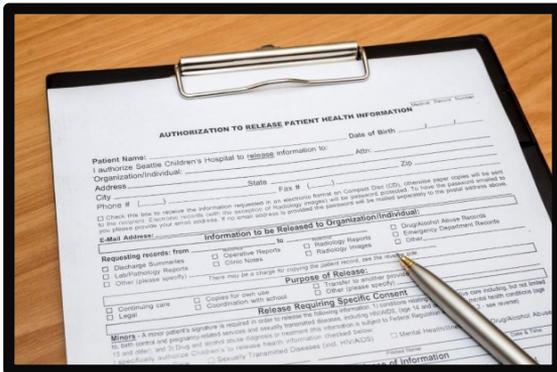
Public Link

Participant list

Survey invitation log

Distribution – Survey Invitation log

- ▶ View all past and future survey invites
 - ▶ Filter on various aspects
 - ▶ Past versus future
 - ▶ Reminders
- ▶ 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

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

Chained surveys

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!**



Chained surveys

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



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

Setup

Auto-continue

Survey queue

Best practices

Distribution

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

Uses

Setup

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
 - ▶ 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 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