

REDCAP

Advanced Surveys (304)

ITHS

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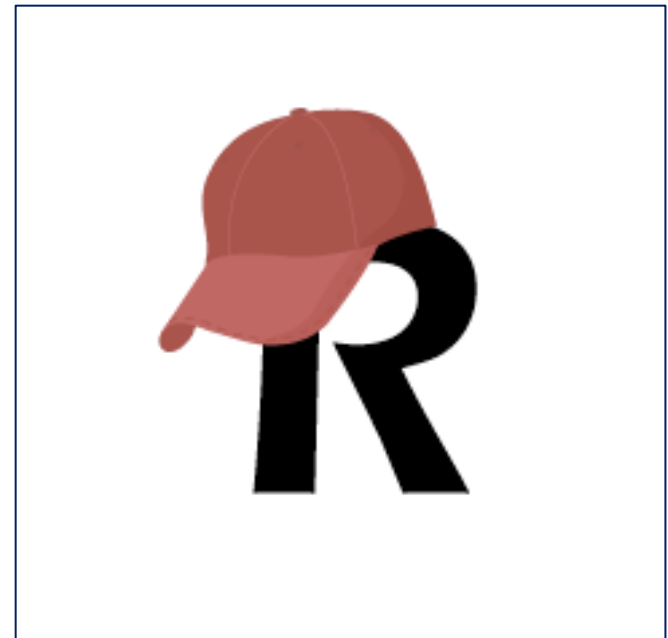
Laboratory

Clinic

Community

Learning objectives

- Advanced survey setup
- Distribution
- Automated Survey Invitations (ASI)
- Alerts and Notifications
- Survey Distribution
- Repeatable Surveys
- Gift Cards
- Twilio/Mosio (SMS)
- Action tags for Surveys



AUTHORIZATION TO RELEASE PATIENT HEALTH INFORMATION

Patient Name: _____ Date of Birth: _____

I authorize Seattle Children's Hospital to release information to: _____ Attn: _____

Organization/Individual: _____

Address: _____ State: _____ Zip: _____

City: _____ Fax #: _____

Phone #: _____

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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 _____

Purpose of Release:

Transfer to another provider _____

_____ (please specify) _____

What is a survey in REDCap terms?

A different way of doing data entry in your project

General survey models

Simple single survey

(Covered in the "Intro to REDCap survey" class)

- *Quick and easy to set up*
 - *Single record per response*
 - *Great for getting started with surveys*
-

Chained surveys

(Covered in the "Intro to REDCap survey" class)

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

Longitudinal surveys

- *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 set up*
- *Great for longer term studies*



Longitudinal survey uses

Example Uses for longitudinal surveys

- Multiple timepoints data collection
 - Clinical studies
 - Pre and post surveys
- Registration and review surveys
- Projects with:
 - Limited FTE
 - Large participant numbers
 - Low frequency

Longitudinal survey steps

Setup steps:

1. Plan distribution model

2. Craft email message

3. Setup invite triggers

4. Determine timing

Planning for longitudinal surveys

- Build on the simple survey and chained survey examples
- Define per event how you want your surveys to run
- First event will work similarly to a chained survey
- After the initial survey in each event, run through the surveys via auto-continue or survey queue
- The first survey in any follow up events can be distributed in different ways:
 - Manually (e.g., in-clinic on a tablet)
 - Automated Survey Invitations (ASI) (via email)
 - Alerts and Notifications (via email or SMS)

Automating survey invitations

Choose between two automation methods:

Automated survey invitations

- An Automated Survey Invitation (ASI) email will be repeatedly sent at a recurring interval.
- From Online Designer, click the 'Automated Invitations' button for the survey
- Fill out the invitation information and designate how often and how many times the invitations should be repeated.
- Use with surveys where the participant is emailed at a regular interval, such as with daily, weekly, or monthly surveys.
- For example: a COVID-19 daily symptom-tracking survey.

Alerts and notifications

- Send out a recurring email alert containing a specially-formatted survey link for a repeating survey.
- Create an alert using the Alerts & Notifications application.
- Choose how to trigger the alert and indicate how often and how many times the notifications should be repeated.
- Use for surveys where the participant is emailed at regular intervals depending on record status and/or logic.
- Can send notifications to project staff as well.

Medical Record Number _____

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Automated Survey Invitations (ASI)

ASI – Setup email invitation

Step 1: Compose message

- Select a "From" email
 - You can add up to 2 emails to REDCap in your Profile
- Define a subject line
 - Short and to the point
- Define the invitation email body
 - REDCap will add the links automatically via the smart variables [survey-link] and [survey-url]
 - HTML is allowed – add formatting, logos or hyperlinks
 - Piping is allowed – add participant's name or other information from an existing field

ASI – Triggering the invitation

Step 2: Conditions

- REDCap schedules an ASI invite when the condition(s) become true
- Three main ways of triggering, similar to survey queue
 - Survey completion
 - e.g., After consent survey is completed
 - Logic
 - e.g., After consent equals yes ([consent]='1')
 - Combination of the two
 - e.g., After the consent survey is completed AND consent equals yes
- Check the “Ensure logic is still true before sending invitation” box
 - Use to stop sending an invite if conditional logic may change for future invitations

ASI – Message timing

Step 3: When to send after conditions are met

Two points of message timing:

1. When to send

- Immediately (depending on server load)
- Next day of week
- After or before a specific interval of time (from the moment of trigger or based on a field value)
- Exact date and time

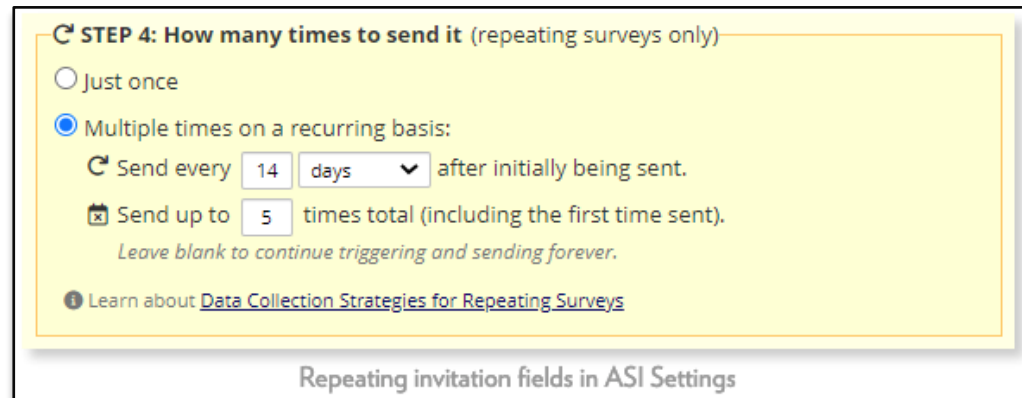
2. Optional reminders

- Up to 5 reminders
- Set schedule (e.g. every 3 days, Mondays)
- Remaining reminders get deleted when their survey is completed

ASI - Repeating instruments

Step 4: Repeating instruments

- Step 4 only appears for repeating surveys
- Choose to send just once or multiple times
- Choose max number of times to send



STEP 4: How many times to send it (repeating surveys only)

Just once

Multiple times on a recurring basis:

Send every days after initially being sent.

Send up to times total (including the first time sent).
Leave blank to continue triggering and sending forever.

Learn about [Data Collection Strategies for Repeating Surveys](#)

Repeating invitation fields in ASI Settings

ASI - Activation

Remember to Activate your invitation!

Activate automated invitations for this survey?

Survey title: Demo Survey

Event: Event 1 (Arm 1: Arm 1)

"Active" must be selected in order for automated survey invitations to be triggered and sent using the conditions specified in this popup. You may make it Not Active (and vice versa) at any point in the future. [?](#)

Active Not Active

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...but not limited to

Alerts and Notifications

Alerts & Notifications – Triggers

Step 1: Triggering the Alert

A. How will this alert be triggered?

Form/Survey saved

Conditional logic

Both

B. Triggering the alert...

Defining when instrument is saved or when logic is true

C. Trigger Limit

Flexibility with regards to repeatable instruments/events

Alerts & Notifications – Scheduling

Step 2: Set the Alert Schedule

- When to send the alert
 - Immediately or exact date/time
 - Next day or specific day of week
 - Send x days after or before an event or date
- Send it how many times
 - Just once
 - Every time a form is saved
 - Multiple times on a recurring basis (sending forever or enter number of times to be sent)
- Alert expiration
 - Use with send every x days to stop repeating alert after a set date (e.g., enter study end date)

Alerts & Notifications - Messaging

Step 3: Message Settings

- Alert Type - Email vs. SMS (Twilio or Mosio service)
- Email From, To, BCC, Failure errors
 - Send message to project staff on certain conditions
- Message
 - Use smart variables
 - Piping data (prevent piping identifier data check box)
 - Use event names with fields in longitudinal projects
- Attachments
 - File upload field vs. Browse for a file

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Distribution Options

Longitudinal survey distribution

Distribution – Fire & Forget

- Setup your entire project to send surveys with minimal oversight
- For projects with limited manpower or that will run for a long time
- You can build all your ASI's with survey completion and logic triggers if you know the schedule ahead of time
 - Single trigger point model
 - i.e., everything gets scheduled based on 1 trigger but with different delays between surveys
 - Cascading model
 - Each survey completion triggers another to be sent

Longitudinal survey distribution

Distribution – Fuzzy triggers

- Use when you want to automate things, but you don't know when certain events will take place.
 - e.g., Trigger a set of surveys after an ED visit
 - e.g., Trigger follow-up surveys after an illness is reported
- Instead of using survey completion trigger, you can trigger things off a field.
 - Build a special form that contains triggers
 - Use checkboxes for immediate triggers
 - Use date variables for fuzzy time triggers (e.g., send survey 2 weeks before a scheduled visit)
 - Filled out by study personnel
 - Allows more control over survey distribution but takes more staff time

Longitudinal survey distribution

Distribution – Kill Switches

- Flip side of a fuzzy trigger
- Disables scheduled surveys and reminders
- Build in a special manual control field in a form
- Add branching logic to the ASI
 - e.g., [kill(1)]=‘1’ (option 1 don’t send” is checked)
 - **Check "Ensure logic is still true“ box**
- Managed by study personnel
- Secondary uses
 - Reset and resend your survey invitations
 - Remember to update invitation text

Longitudinal survey distribution

Distribution – Repeatable forms

- Repeatable form distribution can get complicated
- You can setup ASI's for repeatable events as well as Alerts & Notifications
- Have respondents repeat the same survey over and over, even within events
- Make a form/survey repeatable in Project Settings
- Optional, use “Repeat the survey” button in the survey settings
- Use repeatable forms/surveys only if specifically needed
 - Recommendation: Test, test and test again
- For more information, see *Data Collection Strategies for Repeating Surveys* link is ASI or Alerts and Notifications

Gift Card Models

Gift cards are tricky

- Potential for scamming is high
 - Build in at least one manual step
 - Contact REDCap administrator for assistance
-

Setup

- Create a "gift card" instrument
 - Include read only gift card information field plus instructions
 - Setup ASI to send out when gift card field is not empty
-

Running a gift card model

- Tell your respondents that you will distribute the gift cards after the survey
- Build a report that displays all records eligible for a gift card but that haven't received one
- Download the report in csv raw format, plug in codes and reupload with the data import tool

Texting (SMS)

Twilio or Mosio

- Send invites as text via a third-party service (<https://www.mosio.com/redcap.>)
 - Need to create an account with Twilio or Mosio
 - There is a cost per message fee paid directly to the company
-

Texting options

- Send alerts & notifications via text
 - Send survey link via text
 - Send survey as text conversation (not secure/not recommended)
-

Setup

- See REDCap project setup page for more information
- Sign up with Mosio or Twilio for an account
- Contact REDCap administrator to enable your account

Action Tags

Useful Action tags for surveys

- @HIDDEN-SURVEY
 - Handy for markup by study team
- @READ-ONLY
 - For displaying preloaded data
- @LATITUDE & @LONGITUDE
 - For capturing someone's location
- @NOW & @TODAY
 - For creating a "start" time stamp
 - Often combined with @HIDDEN
- @NONEOFTHEABOVE
 - To create an option in a checkbox that unchecks all other options
- @RANDOMORDER
 - To circumvent "multiple choice" bias (not for Matrix)
- @HIDECHOICE
 - To update options in an active survey



Thank You!

Questions?

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