

REDCAP

# INTRO TO REDCap SURVEYS CLASS (204)

ITHS

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: [www.iths.org](http://www.iths.org)

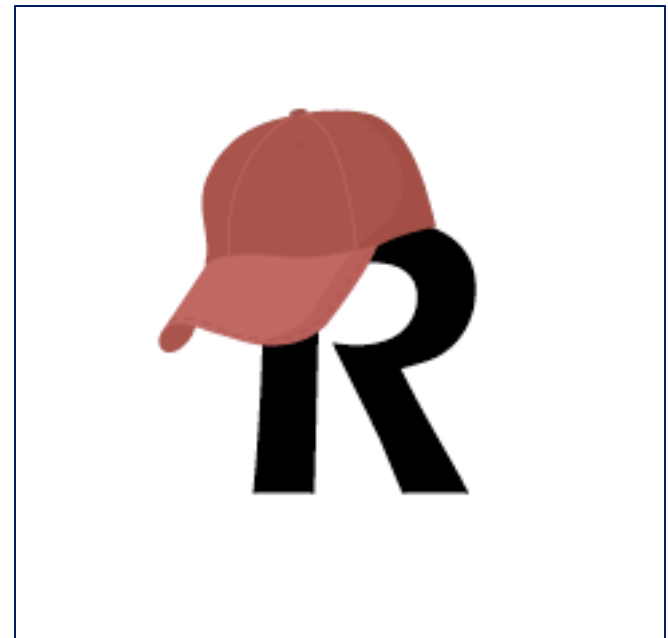
Laboratory

Clinic

Community

# Learning objectives

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



**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 #: \_\_\_\_\_

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) \_\_\_\_\_

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*
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## 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

## 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



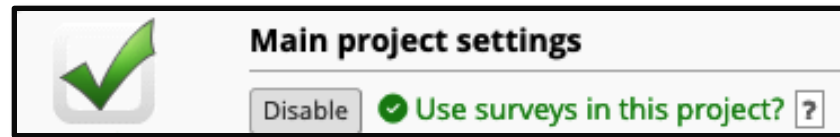
# Simple single survey

## Setup Steps:

1. Turn on survey mode
2. Enable surveys
3. Survey settings

## 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

Instrument name	Fields	PDF	Enabled as survey	Instrument actions	Survey related options
Intake Form	8			Choose action ▾	Survey settings  + Automated Invitations

**You MUST do these in the right order!**

# Simple single survey

## Setup Steps:

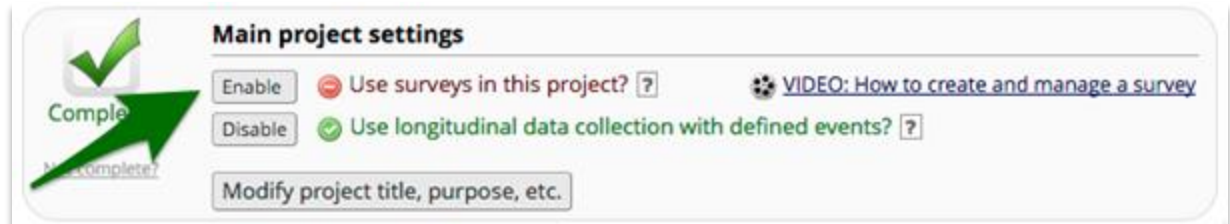
### 1. Turn on survey mode

[Enable surveys](#)

[Survey settings](#)

## 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**

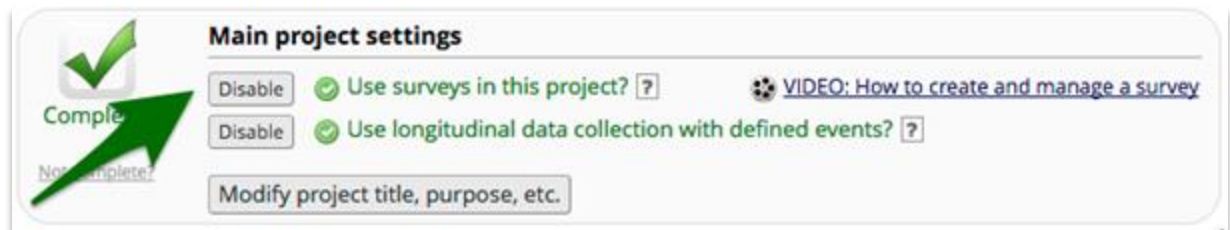
Enable  Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

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

Modify project title, purpose, etc.

Completion status:  Complete,  Not complete

A green arrow points to the 'Enable' button.



**Main project settings**

Disable  Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

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

Modify project title, purpose, etc.

Completion status:  Complete,  Not complete

A green arrow points to the 'Disable' button.



# Simple single survey

## Setup Steps:

Turn on survey mode

## 2. Enable surveys

Survey settings

## Enable instruments as surveys

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



- 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

# REDCap Shared Library

- Repository for REDCap forms that can be used by researchers at REDCap partner institutions
- Newer features - PROMIS, Adaptive Tests, Auto Scoring Instruments

**Survey Queue Demo** PID 74783

[Project Home](#) [Project Setup](#) [Online Designer](#) [Data Dictionary](#) [Codebook](#)

[VIDEO: How to use this page](#) [Create snapshot of instruments](#) Last snapshot: never [?](#)

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser.  
NOTE: While in development status, all field changes will take effect immediately in real time.

**Data Collection Instruments**

- [+ Create](#) a new instrument from scratch
- [Import](#) a new instrument from the official [REDCap Instrument Library](#)
- [Upload](#) instrument ZIP file from another project/user or [external libraries](#)

**Form options:**

- [Form Display Logic](#)

**Survey options:**

- [Survey Queue](#) ✓
- [Auto Invitation options](#) ▾
- [Survey Login](#)
- [Survey Notifications](#)

Medical Record Number \_\_\_\_\_

## AUTHORIZATION TO RELEASE PATIENT HEALTH INFORMATION

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### Purpose of Release:

Transfer to another provider \_\_\_\_\_

\_\_\_\_\_ (please specify) \_\_\_\_\_

\_\_\_\_\_  
Patient, but not limited to

# Survey Settings

# Survey Settings

## Setup – Survey settings

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### Basic options

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### Design options

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### Survey access

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### Termination options



## 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

# Survey Settings

## Setup – Survey settings

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Basic options

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**Design options**

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Survey access

---

Termination options

**Survey Design Options:**

## 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

# Survey Settings

## Setup – Survey settings

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Basic options

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Design options

---

**Survey access**

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Termination options

**Survey Access:**

## 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

# Survey Settings

## Setup – Survey settings

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Basic options

---

Design options

---

Survey access

---

Termination options

### Survey Termination Options:

## 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

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\_\_\_\_\_ (please specify) \_\_\_\_\_

\_\_\_\_\_  
Patient, but not limited to

## Survey Distribution



# Survey Distribution

## Distribution

### Public Link

### Participant List

### Survey Invitation Log

## 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
  - Short code
    - Very temporary (1 hour)
    - Example usage: In-clinic



# Survey Distribution

## Distribution

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[Public Link](#)

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## Participant List

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[Survey Invitation Log](#)

 **Participant List**

## Distribution – Participant List

- 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!

# Survey Distribution

## Distribution

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[Public Link](#)

---

[Participant List](#)

---

[Survey Invitation Log](#)

 **Survey Invitation Log**

## Distribution – Survey Invitation Log

- View all past and future survey invites
  - Filter on various aspects
  - Past versus future
  - Reminders
- Allows 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 invite
- Edits/deletes will need to be done for each invite and reminder separately
- Take this into account when setting up

# Anonymous Surveys

- Public Link – Anonymous responses
- Participant List – Can be anonymous
- Participant Identifier – Usage makes survey NOT anonymous

The screenshot shows a web interface for managing surveys. At the top, there are three tabs: 'Public Survey Link', 'Participant List' (which is selected), and 'Survey Invitation Log'. Below the tabs is a paragraph of text explaining the Participant List feature, including a link to 'More details'. A red box highlights a toggle switch labeled 'Survey Response Status: Not Anonymous' with a question mark icon. Below this, there is a section for the 'Participant List' belonging to '[Initial survey] "Intake Form" - Event 1 (Arm 1: Arm 1)'. It includes a dropdown for 'Displaying 1 - 16 of 16', buttons for 'Add participants' and 'Compose Survey Invitations', and an 'Export list' button. At the bottom, a table header is visible with columns for 'Email', 'Record', 'Participant Identifier (optional)', 'Responded?', 'Invitation Scheduled?', 'Invitation Sent?', 'Link', 'Survey Access Code and QR Code', and 'Survey Queue'. A 'Disable' button is located under the 'Participant Identifier (optional)' column.

Medical Record Number \_\_\_\_\_

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Transfer to another provider \_\_\_\_\_

\_\_\_\_\_ (please specify) \_\_\_\_\_

\_\_\_\_\_  
Signature, but not sealed

# Chained Surveys

# Chained surveys

## 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 options:

[Auto-continue](#)

[Survey queue](#)

[Best practices](#)

## Setup steps for chained surveys

- Enable Surveys in project setup (same as a simple single survey)
- Enable multiple desired instruments as surveys
- Setup the chain



**You MUST do these in the right order!**

# Chained surveys

## Setup options:

Auto-continue

Survey queue

Best practices

## 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
- *Do not use along with the survey queue!*

### Survey Termination Options:

**Auto-continue to the next survey?** Automatically start the next survey instrument after finishing this survey [?](#)

**(Optional) Conditional logic for Survey Auto-Continue:**

Auto-continue to the next survey ONLY if the conditional logic below is *TRUE* or if the textbox has been left blank.

e.g., [enrollment\_arm\_1][age] > 30 [How to use this](#)

**● NOTICE:** The Survey Queue has been enabled in this project. Please note that the Survey Queue can sometimes conflict with the Survey Auto-continue feature.



# Chained surveys

## Setup options:

[Auto-continue](#)

**[Survey queue](#)**

[Best practices](#)



## 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 options:

---

Auto-continue

---

Survey queue

---

## Best practices

## Setup – Best practices

- Use 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

# Chained surveys - Distribution



## Distribution

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### Return codes vs login

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### Participant list

 **Allow 'Save & Return Later' option for respondents?**  
(Allow respondents to leave the survey and return later.) 

## Return codes versus survey login

- First survey will be distributed like a simple survey
- Return codes for individual surveys
  - "Save and return" turned on
  - 6-digit alpha-numeric code (*Optional*)
  - Lookup codes 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

# Chained surveys - Distribution

## Distribution

[Return codes vs login](#)

## Participant list

## Participant list

- Multiple surveys drop-down selector
- 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

The screenshot shows a web interface for managing a 'Participant List'. The title is 'Participant List' with a subtitle '(those who have not responded completely)'. There are two columns: 'Email' and 'Participant Identifier'. The 'Email' column has one row with the value 'annwg24@yahoo.com (ID 1)'. A blue checkmark is visible in the first column of this row. To the right of the table is an 'Actions' dropdown menu. The menu is open, showing a list of options: '-- check/uncheck participants --', 'Check All', 'Uncheck All', 'Check Sent', 'Check Not Sent', 'Check Scheduled', 'Check Not Scheduled', 'Check Not Sent and Not Scheduled', 'Check Responded (Partial and Complete)', '- Check Partial Response', '- Check Completed Response', 'Check Not Responded', and 'Check Not Responded and Partial Response'. The first option is highlighted in blue.

	Email	Participant Identifier
<input checked="" type="checkbox"/>	annwg24@yahoo.com (ID 1)	

xyz123

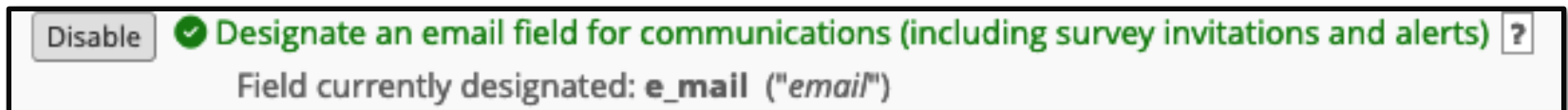
Actions: **-- check/uncheck participants --**

- Check All
- Uncheck All
- Check Sent
- Check Not Sent
- Check Scheduled
- Check Not Scheduled
- Check Not Sent and Not Scheduled
- Check Responded (Partial and Complete)
- Check Partial Response
- Check Completed Response
- Check Not Responded
- Check Not Responded and Partial Response

# Chained surveys - Distribution

## Designate an email field

- Setup in project settings
- Select an existing email field in the project
- Import or manually enter email addresses
- Use with Participant List, and other methods of sending out surveys



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



Thank You!

Questions?



# CONNECT WITH ITHS

[www.iths.org](http://www.iths.org)



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/ithsuw



/InstituteofTranslationalHealthSciences

# Visit [ITHS.org](https://www.iths.org) to Become an ITHS Member

Join a unique catalyst that accelerates discoveries to practice.

## Access

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

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## Education and Training

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

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## Funding

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

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## Collaboration

*Members can connect with collaborators across the CTSA consortium.*