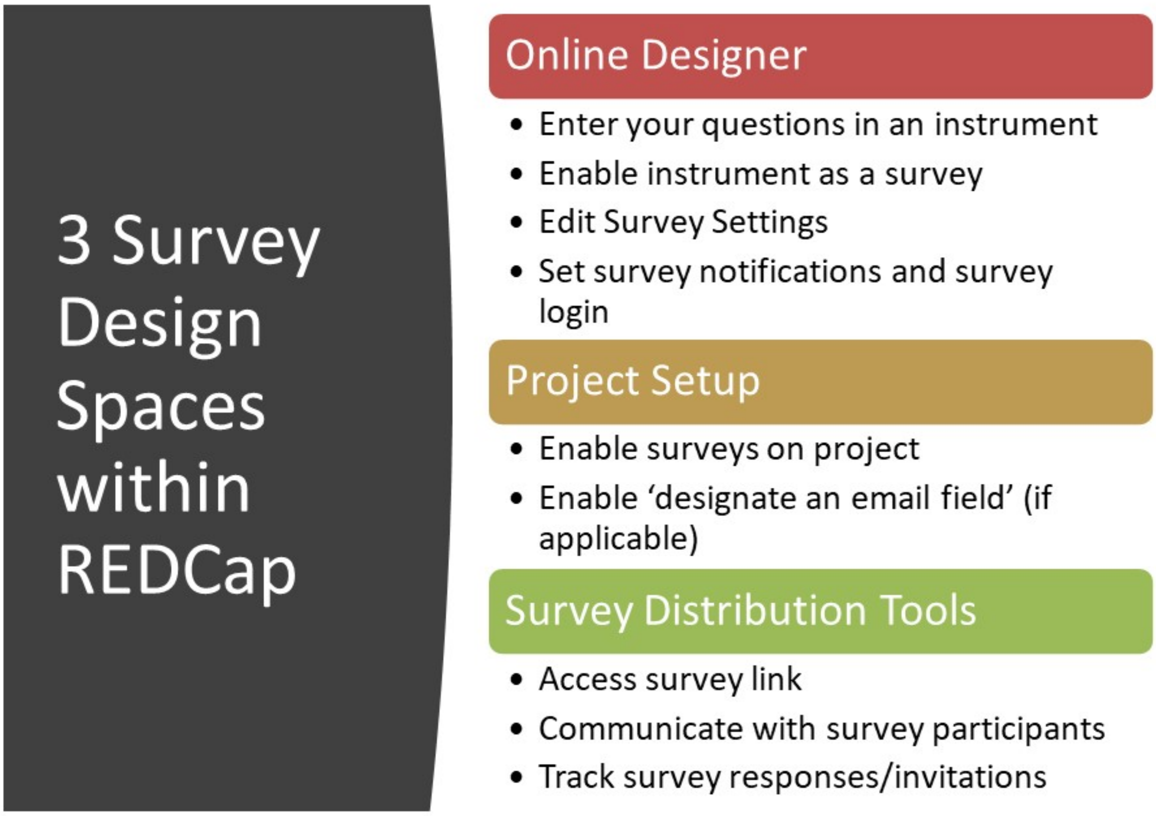
Surveys

There are 3 main spaces within REDCap that you will work to design/manage your survey:



Survey Wizard

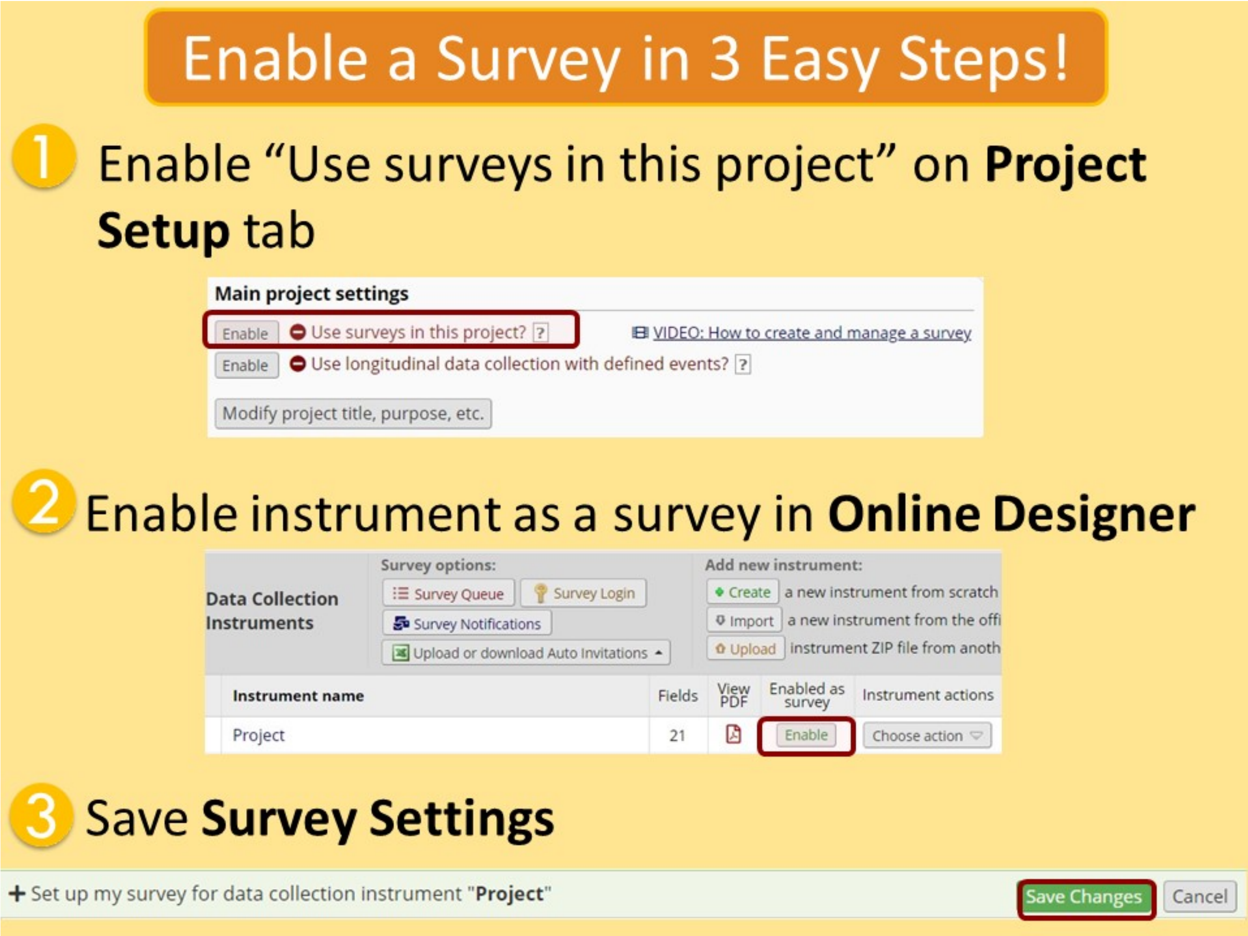
For step-by-step guidance about setting up surveys, we highly recommend you use the Survey Wizard. It is an interactive online tool that addresses when to enable survey functionality, what to consider when choosing a survey model, and reviews survey setting options.

Quick Guide to Creating a Simple Survey

1. From the home screen or My Projects tab within REDCap, click on the New Project button.
2. Name your project, select a purpose, leave the default choice of creating an empty project (blank slate) and click Create project.
3. On the Project Setup page where you land, click the Enable button for "Use Surveys in this project?" (the first button on that page, under Main project settings).
4. In the next section of the Project Setup page, click on the Online Designer button.
5. Click the Choose action button and select 'rename'. Change the instrument name from 'Form 1' to whatever you want to name your survey.
6. Click on the instrument name to enter into the instrument. Click the 'add field' button to add questions to your survey.
7. After adding all your questions, scroll to the top of the page and click on the blue button 'return to list of instruments'
8. Click the enable button under 'Enabled as survey'. You will be brought to the Survey Settings page.
9. Make any selections you'd like on the Survey Settings page. At minimum (even if you don't make any selections), click on the 'save changes' button. This finalizes the conversion of your instrument from a data entry form to a survey.
10. On the left-hand navigation bar, click on Survey Distribution Tools (under Data Collection). Click on the "Open public survey" button to see how your survey looks.
11. Enter test data into the survey.
12. On the survey distribution tools page, click on the clipboard icon to copy your public survey link. Paste the link into an email and send it to your colleagues to enter test data.
13. Go to Data, Exports, Reports & Stats (under Applications on your left-hand navigation bar). Click on Report A to view all your data.
14. If needed, click on the Designer button (under Project Home and Design on your left-hand navigation bar) and then click on your instrument name to make any adjustments to your survey.
15. After your survey is looking the way you want it to, click on Project Setup (on your left-hand navigation bar under Project Home and Design) and click on the last button on that page – Move project to Production. You can select the option to delete all the records (if all your records are test records).
16. Share you survey link. Click on Survey Distribution Tools (in the Data Collection section on the left-hand navigation bar) and click on the clipboard icon. You can then paste the url into an email, post on a website, etc. If you wish for participants to complete the survey only once, see Survey Delivery Options to learn about using the Participant List to create one-time use only links.

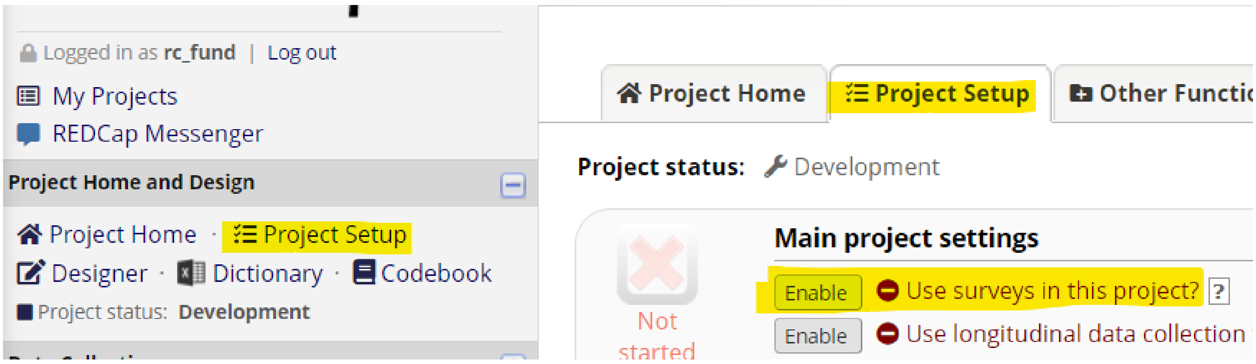
A video tutorial of creating a simple survey can be found at this link: https://vimeo.com/435866091/bac2fc64bc

Quick Guide to Survey Setup

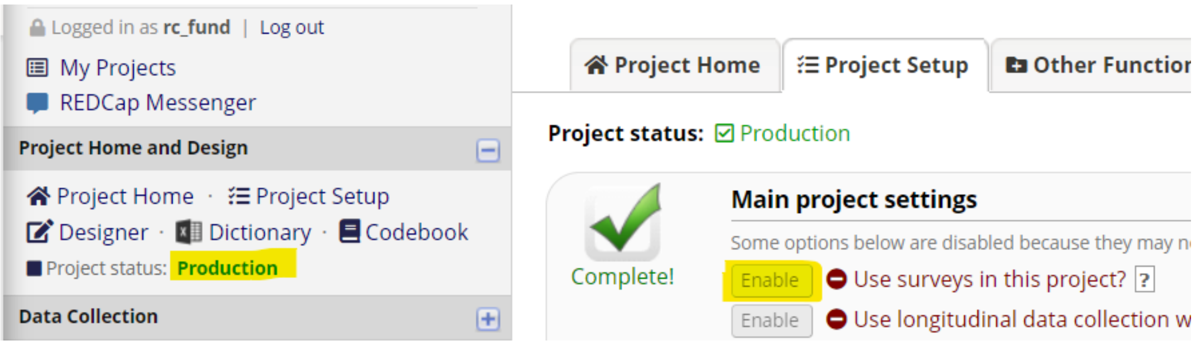


Enable Surveys within the project

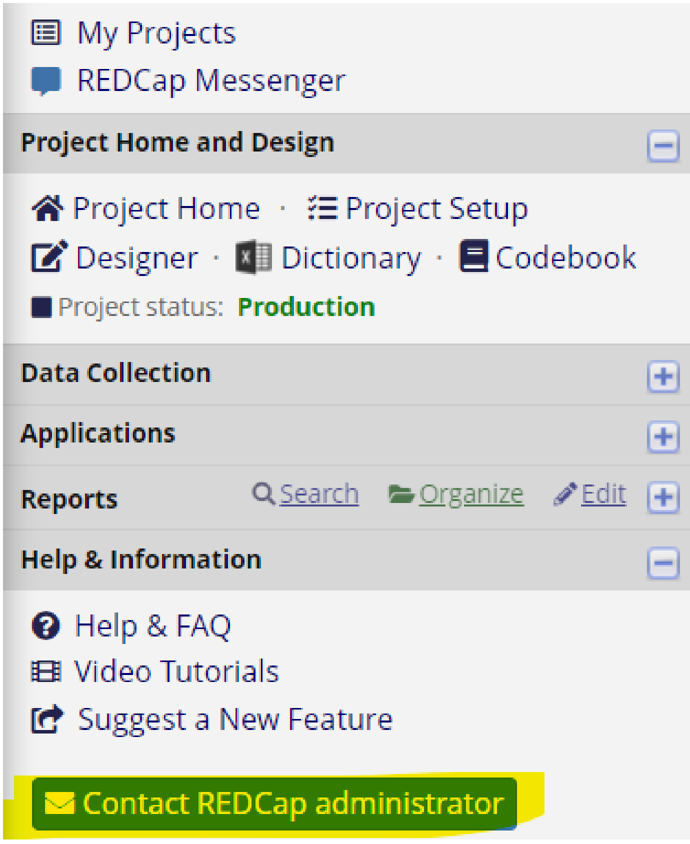
If you plan to use surveys in your project, you must go to the Project Setup page and click the first option under Main project settings:



If your project is in Production mode, the Enable button will be greyed out:

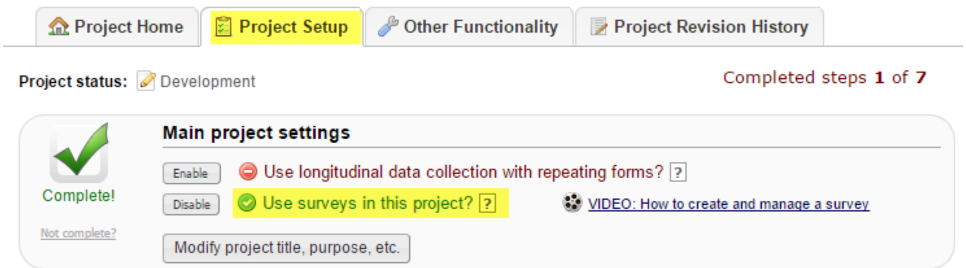


You will need to click on the ‘Contact REDCap administrator button’ from within your project and request that the project be enabled for surveys.



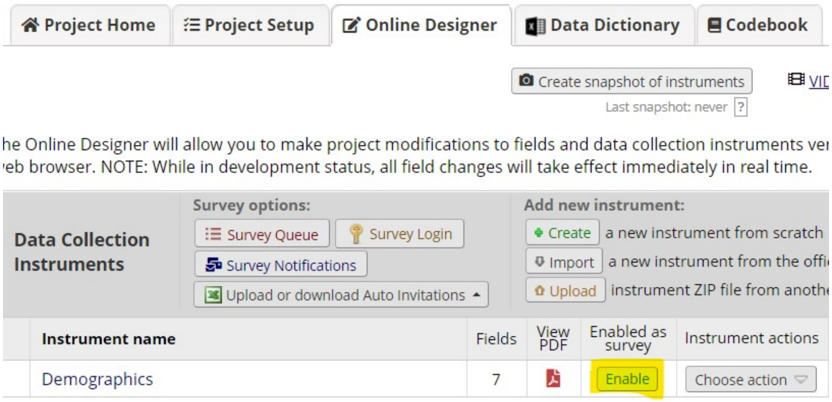
Enable Your Instrument as a Survey (Enabling your instrument as a survey, converting your instrument to a survey, converting a data entry form to a survey)

Once you have enabled the “Use surveys in this project” setting under Project Setup…



… you will want to indicate which data collection instrument(s) will be used as survey(s).

Under Online Designer, click 'Enable' next to the data collection instrument you want to use as a survey.



You will then automatically be brought to the page where you can setup Survey Settings. You can leave the default settings or make adjustments. But you must click the 'save changes' button in order for the instrument to convert to a survey. If you navigate away from the page and do not save changes, your instrument will remain a data entry form.

Continue on following page...

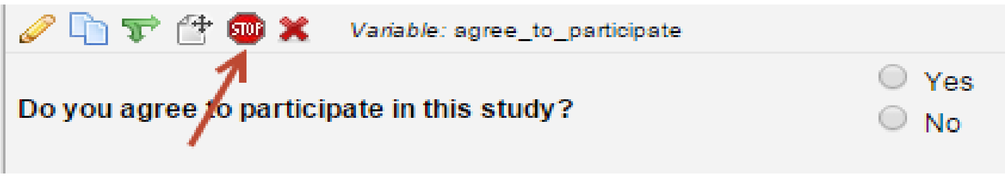
Field function in Surveys

Field in Online Designer	Survey Settings	Result
Begin New Section	One section per page	Survey split up into multiple pages
Choice question set with Stop Action		Survey will end for participant if they select the specified choice
Validated for email	Confirmation email set to 'yes'	Confirmation email will automatically get sent to participant
Radio buttons and checkboxes (drop-down lists aren't eligible)	Enhanced buttons	Mobile-friendly!
Branching logic	Questions will be custom-numbered	No question numbers next to survey questions
Numbering in field label	Question numbering set to custom	Will see question numbers next to survey questions

Stop Action

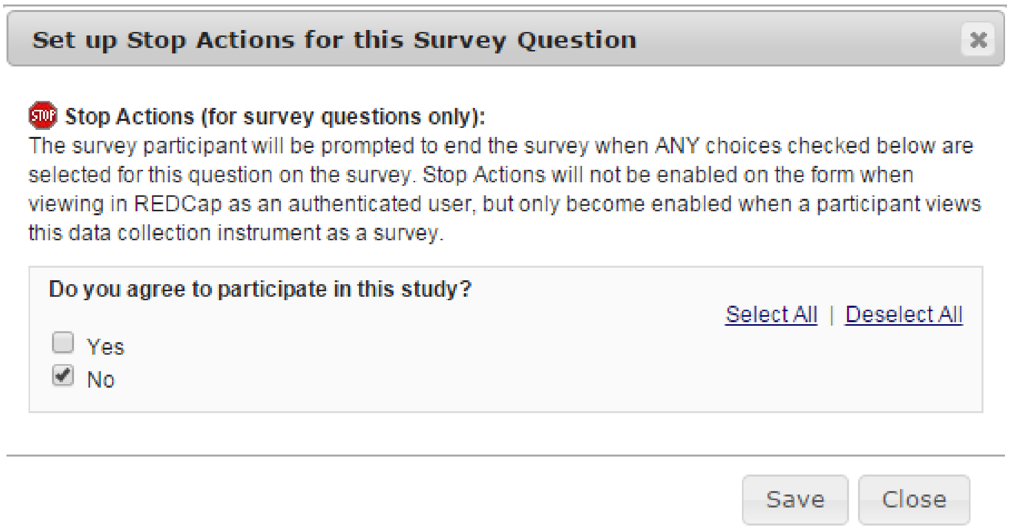
The Stop Survey action will prompt the survey participant to end the survey when a specific answer is given. The stop survey action is available on Drop-down List, Radio Buttons, Multiple Answers, Yes/No and True/False field types.

Once you have created one of the field types listed above and you have your data collection instrument set up as a survey, you will see a stop sign icon.

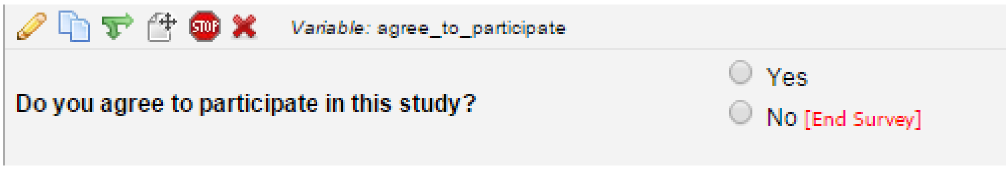


To add the Stop Survey logic, click on the stop sign icon. The Stop Survey logic box will appear. Select the answer choice that should prompt the survey participant to end the survey and click Save.

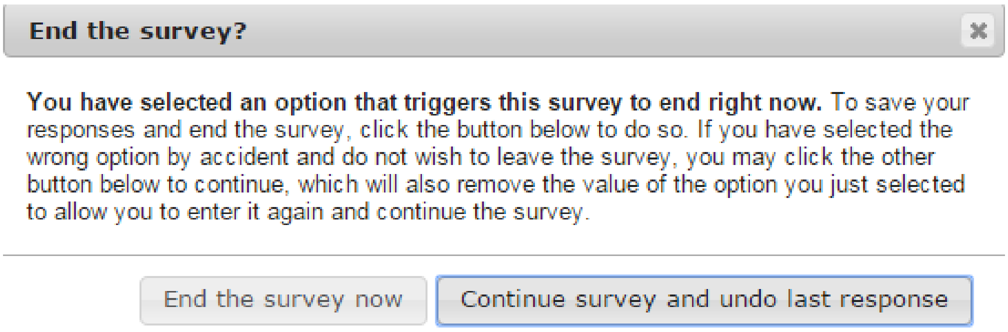
In this example, I want the survey participant to be prompted when they click No.



Notice that once the Stop Survey logic is setup, text appears next to the answer choice that will end the survey.



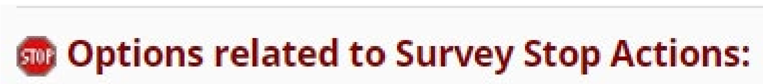
When the participant takes the survey and they answer No, they will receive the following message. The message is hard coded and cannot be changed. The participant can either choose to "End the survey now" which would take them to the Survey Acknowledgment text or they can choose "Continue survey and undo last response".

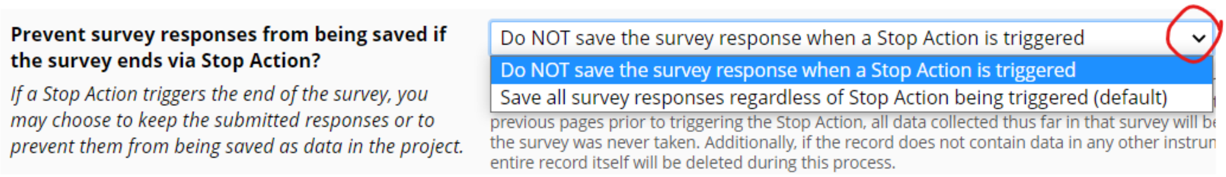


Please note: REDCap records the partial response as a completed response and saves the data. This is even if there are required questions on the survey that are not completed.

Prevent survey responses from being saved if the survey ends via a Stop Action

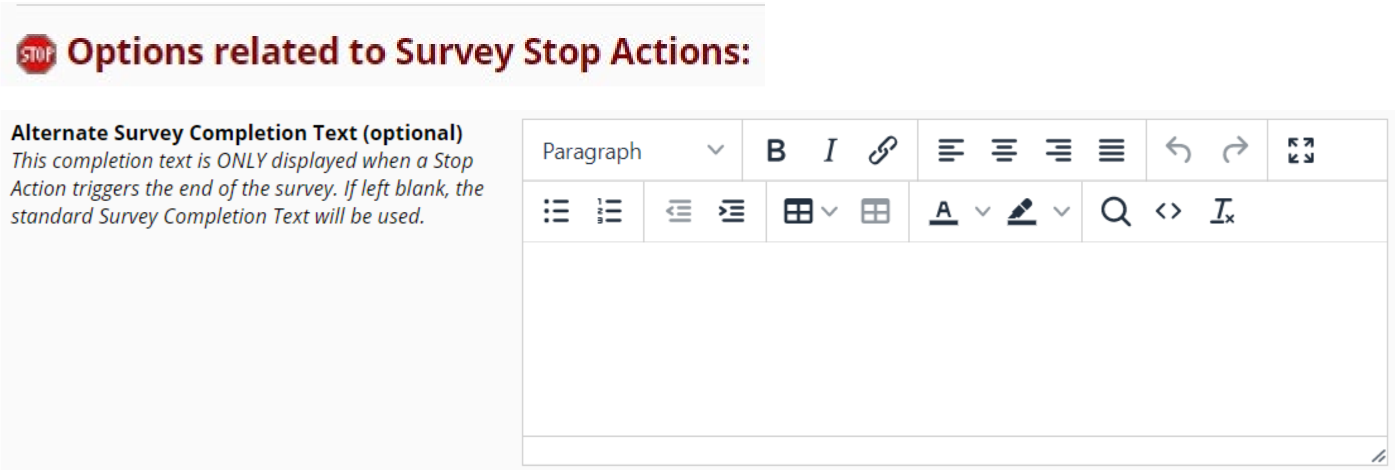
If desired, you can choose to prevent submitted responses from being saved in the project if the survey ends via a Stop Action on any field. This is useful if you do not wish to keep the data for ineligible participants, for example. This means that if a one-page public survey is started but ends via Stop Action, no data from that response will be saved into the project (i.e., no new record will be created). You can make this choice via Survey Settings in the Survey Termination Options section.





Alternate survey completion text if the survey ends via a Stop Action

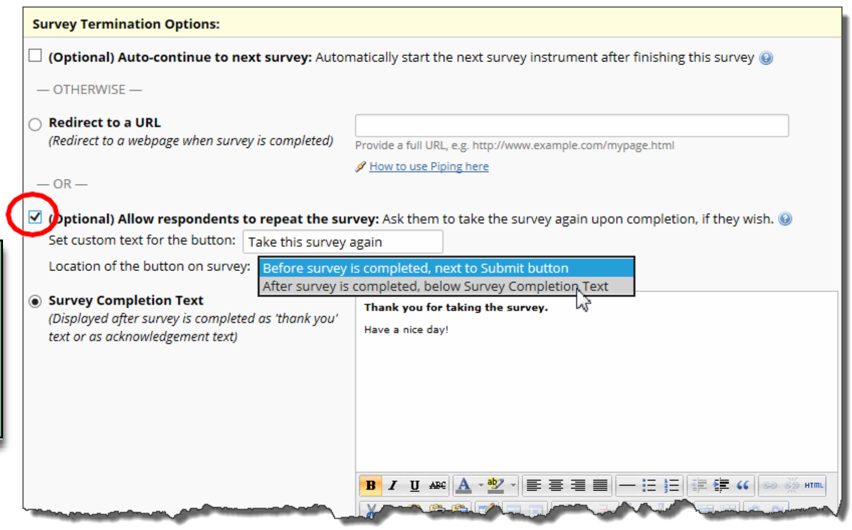
You can set alternative survey completion text that is displayed in place of your standard survey completion text whenever a survey ends via a Stop Action on any field. For example, this could be useful if it doesn't make sense for ineligible participants to see the same survey completion text as those who completed the survey fully. You set this up via Survey Settings in the Survey Termination Options section.



Enabling Repeating Instruments for a Survey Instrument

A Survey can be set up as a repeating instrument. You need to complete the steps largely in order, however.

- **Enable** Surveys for the Project
- **Build** the Instrument (at the very least, name it)
- From Project Setup, **Enable** Repeatable Instruments. Click **Modify** to select the Survey(s) to be Repeated
- From Online Designer, **Enable** the Instrument as a Survey, opening the Survey Settings page
- From Survey Settings, Survey Termination Options:
  - **Check the Checkbox** to Enable the Survey to be Repeated
  - Add optional custom text to the button
  - Select the location for the Repeat button to appear
- Click **Save**



You MUST check the box to enable the Repeating feature on the instrument.

For more information about Repeating Instruments, see this section of this User Guide.

Survey Design tip: Validation check error messages

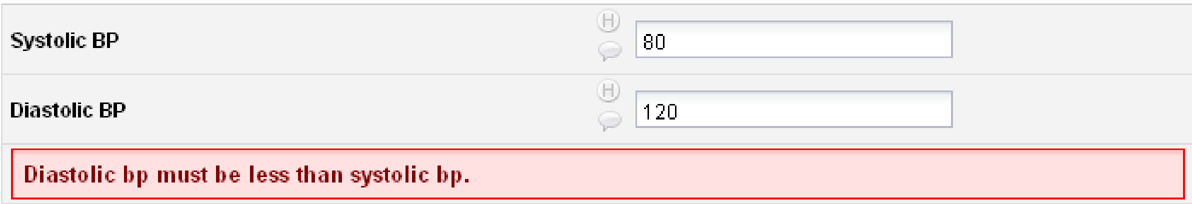
Descriptive Text fields can be useful for displaying an error message of a cross-field validation check. For example:

```
<div class="red" style="font-weight:bold;">Diastolic bp should be less than systolic bp</div>
```

Used with a branching logic expression along these lines:

```
[systolic_bp]<>'' and [diastolic_bp]<>'' and [diastolic_bp]>=[systolic_bp]
```

Produces an outcome like this:

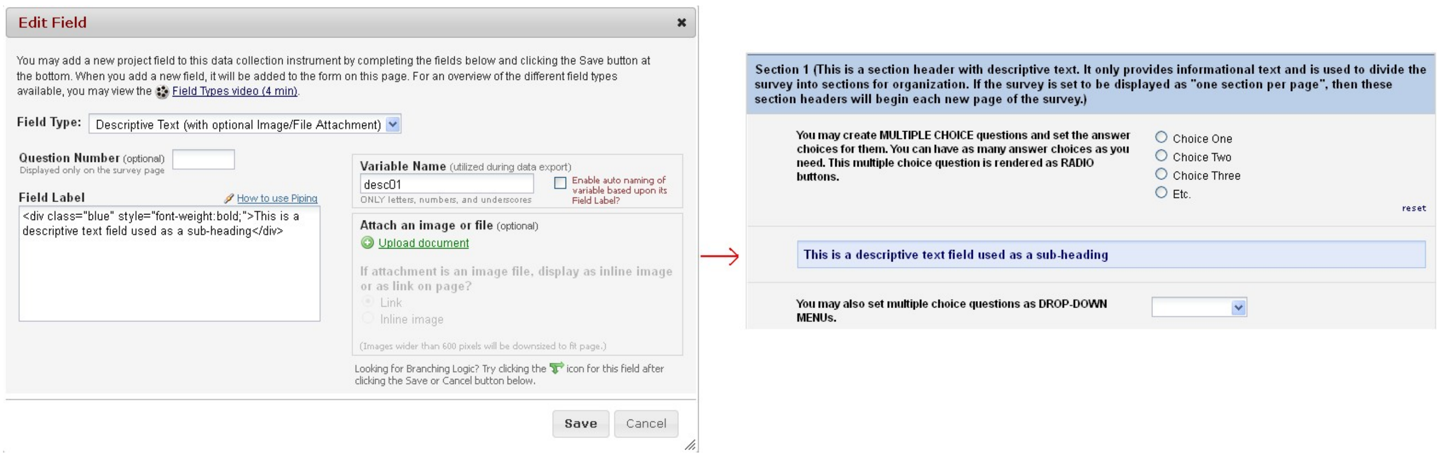


Survey Design Tip: Using Descriptive Text field as a section sub-heading

If you want to break up the content of the survey page but don't want the participant to have to go to a new page (which is what a 'Begin New Section' field type will cause), use the descriptive text field instead.

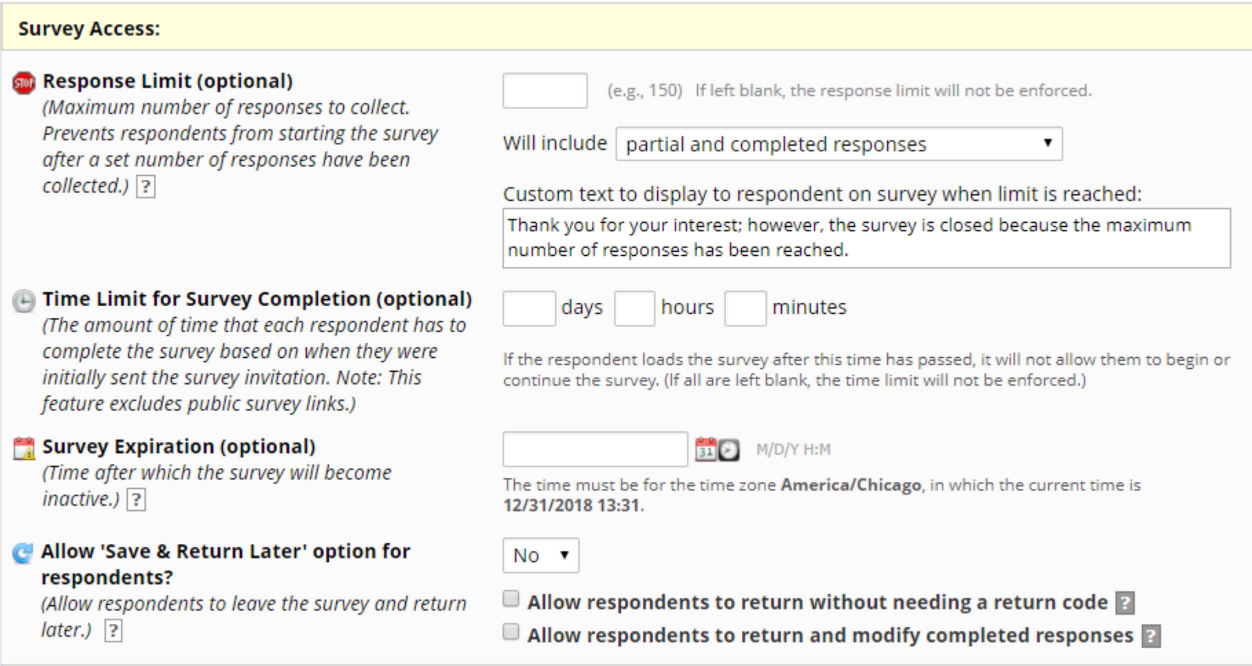
For example, using html coding you could type this as your field label:

```
<div class="blue" style="font-weight:bold;">A descriptive text field used as a sub-heading</div>
```



Survey Access in Survey Settings

How a survey participant accesses the survey can be set in the Survey Access section of Survey Settings.



Response Limit for a survey (optional): Default is blank

This setting prevents respondents from starting the survey after a set number of responses have been collected. You can specify if a response is only completed responses or partial/completed responses. You can also modify the stock language that is shown when the limit is reached.

For a comparison of how this differs from other survey expiration options, see this section of the User Guide.

Time Limit for Survey Completion

You can use this setting if you wish to limit the amount of time a respondent has to complete a survey after it was sent to them.

This only works when you have a participant list – it will not work on public survey links. It's ideal if you want to keep a survey open but will have rotating groups of people taking it.

Note: the language displayed to the participant is not customizable.

For a comparison of how this differs from other survey expiration options, see this section of the User Guide.

Survey Expiration (optional):

You may enter a date/time you would like for your survey to expire. This saves you the trouble of going to survey settings and changing the survey status to inactive (especially helpful if you want the survey to go offline when you are not at work!)

For a comparison of how this differs from other survey expiration options, see this section of the User Guide.

Allow 'Save & Return Later' (Save and Return Later) option for survey respondents:

You may enable this option if you would like your participants to be able to come back and finish taking their survey.

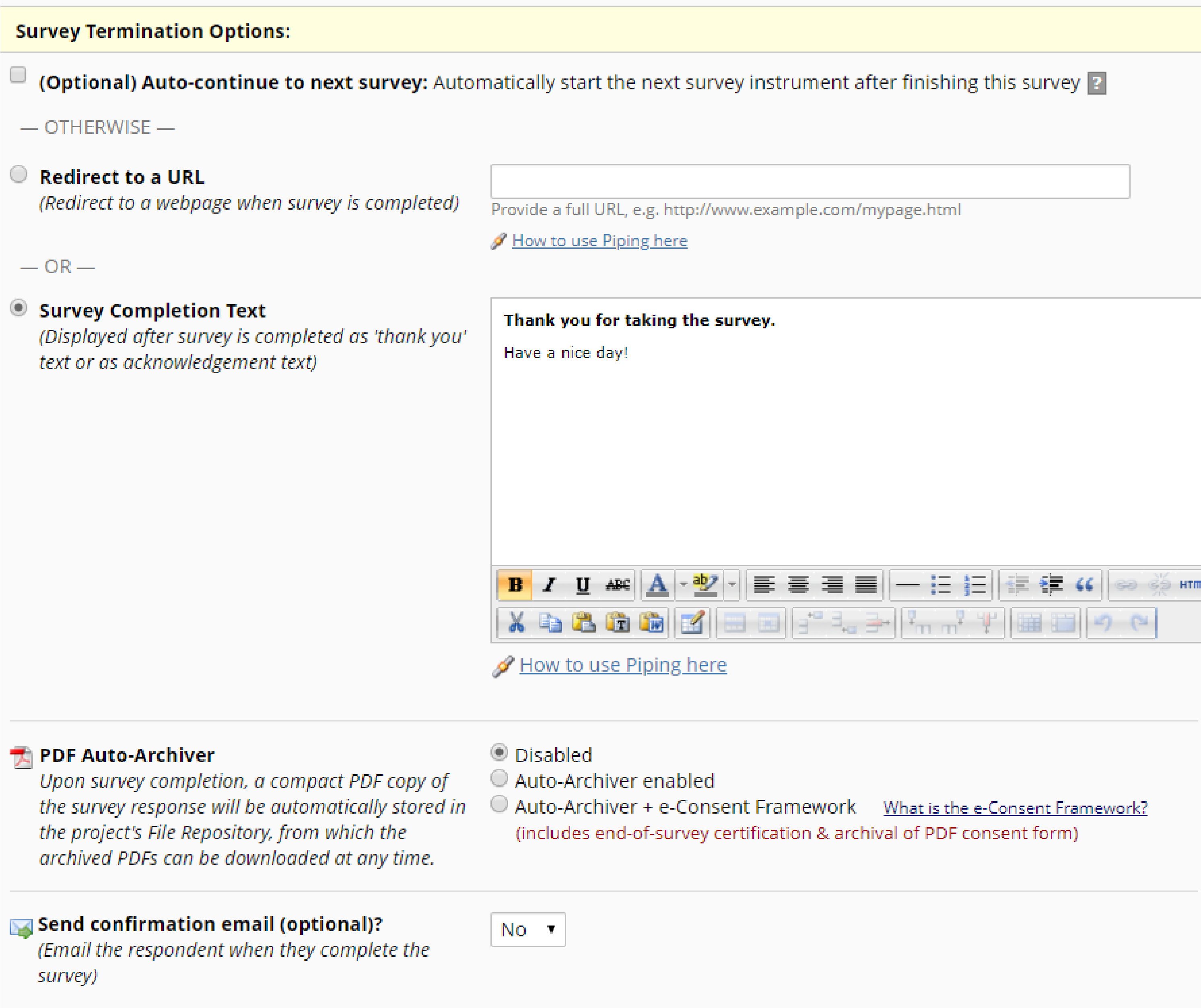
If enabled, the participant will receive a generated code they must enter in order to continue. If you want them to be able to return to the survey without needing a code, you can check that box. **NOTE: If you are collecting identifying information (e.g., PII, PHI), for privacy reasons it is HIGHLY recommended that you leave the option unchecked so as to enforce a return code.**

You may also indicate if you would like your participants to be able to return and modify their completed responses.

To set up Save and Return for a survey:

1. Go to Online Designer
2. Click on Survey Settings of the survey to which you want to apply this feature
    a. If you have multiple surveys in a project, you will need to perform these steps for each survey for which you wish to have this feature.
3. Scroll down to the Survey Access section
4. Change the ‘Allow save and return later option for respondents?’ answer to ‘yes’.
5. If you want survey respondents to be able to return to the survey without a code, tick the corresponding box.
    a. If you don’t tick the box, the survey respondent will be given a code on the screen that pops up once they hit the ‘save’ button. They will need to write down the code or provide their email address to have it emailed to them. Then when they return to the survey, they will need to enter that code to access the survey.
    b. If you do tick the box, the survey respondent will simply have to click on the survey link and will immediately have access to the survey
6. If you want survey respondents to be able to modify any answers they’ve already entered, tick the corresponding box.
7. Scroll down and click on the ‘save changes’ button.

Survey Termination Options in Survey Settings



Auto-continue to next survey

Click this if you have more than one survey and you would like the next survey to automatically start as soon as this survey is completed. If you want the respondent to complete a subsequent survey at a later time or only if they answered questions with a specific answer, then you would not want to enable this feature. See Survey Invitations for further information.

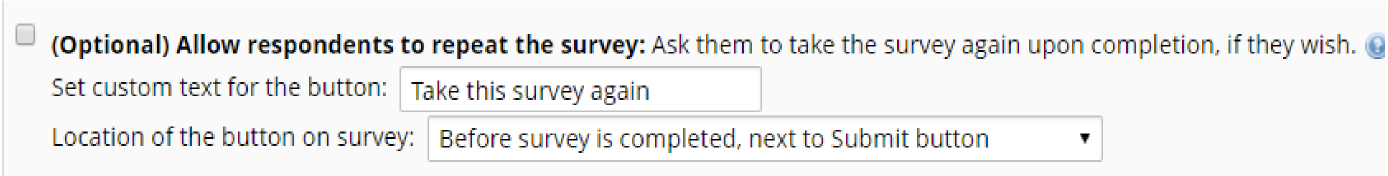
Note: if you have auto-continue enabled and then set up a Survey Queue, auto-continue is not automatically disabled. In fact, it will trump your Survey Queue settings.

Redirect to a URL

If you would like the participant to be redirected to another URL after they have completed their survey, enter the full URL. For instance, if a person is registering for an event and you have a website for your event, you could enter that website here.

Allow respondents to repeat the survey

If the instrument is enabled as a repeating instrument, you will see these options in the Survey Settings.



Survey Completion Text

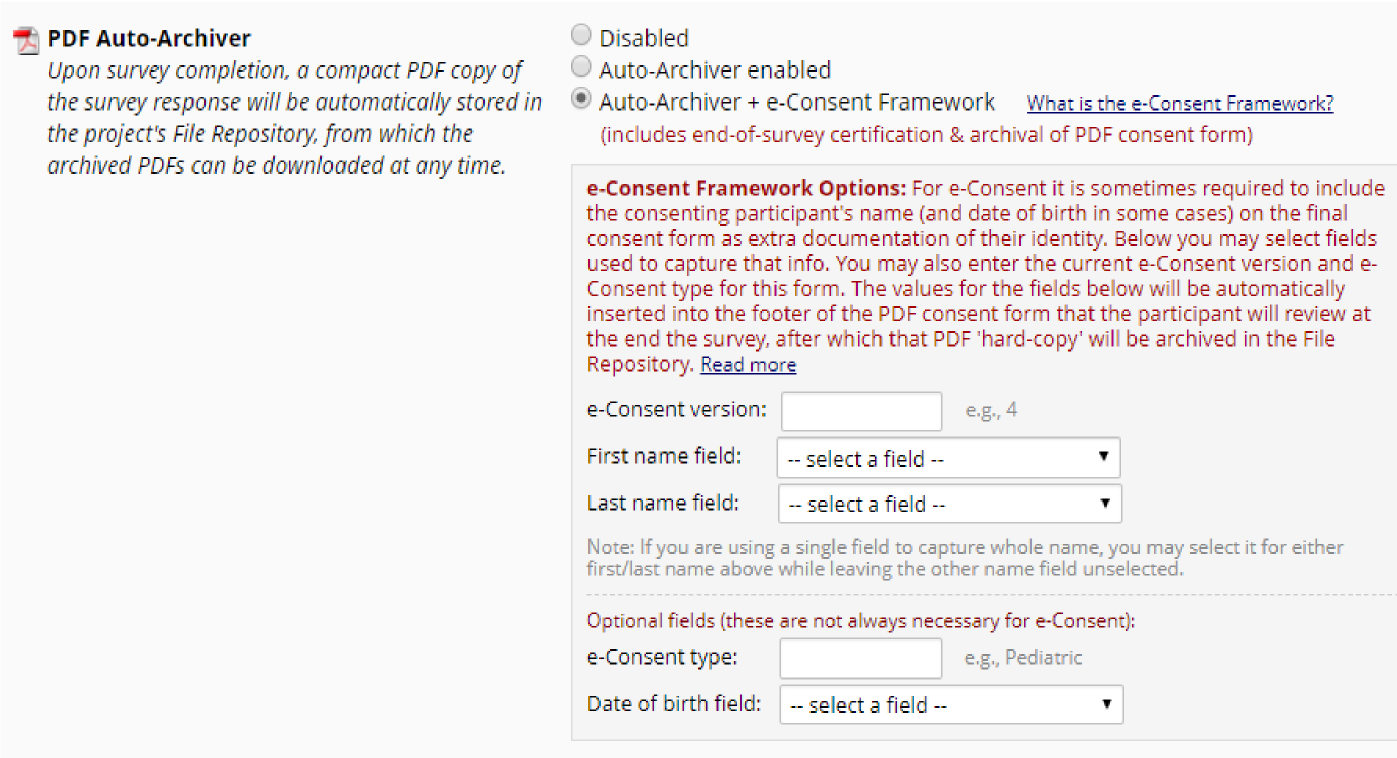
Enter any text you wish to display after the participant has finished taking your survey. The default text is “Thank you for taking the survey. Have a nice day!”

PDF Auto-archiver

With this setting enabled, upon survey completion, a compact PDF copy of the survey response will be automatically stored in the project's File Repository, from which the archived PDFs can be downloaded at any time. The default setting for this option is ‘no’.

Auto-Archiver + eConsent Framework

This setting not only will save the version of the completed survey to the file repository, but it will provide a summary screen to the respondent. The respondent has to review that summary screen before clicking submit.



It is highly recommended that you have a discussion with your local Institutional Review Board (IRB) if you wish to do e-Consent in REDCap.

Send survey confirmation email in Survey Settings

If you would like the participant to receive a confirmation email once they have completed the survey, use the drop down and select Yes.

Setting who the email comes from

There is a drop-down arrow next to the ‘From’ box when setting your survey confirmation email. If you click on it, you will see the email addresses associated with any user on the project. If you want the email to come from an email address that is not listed in that drop-down list, see the instructions regarding [Associating another email address](#).

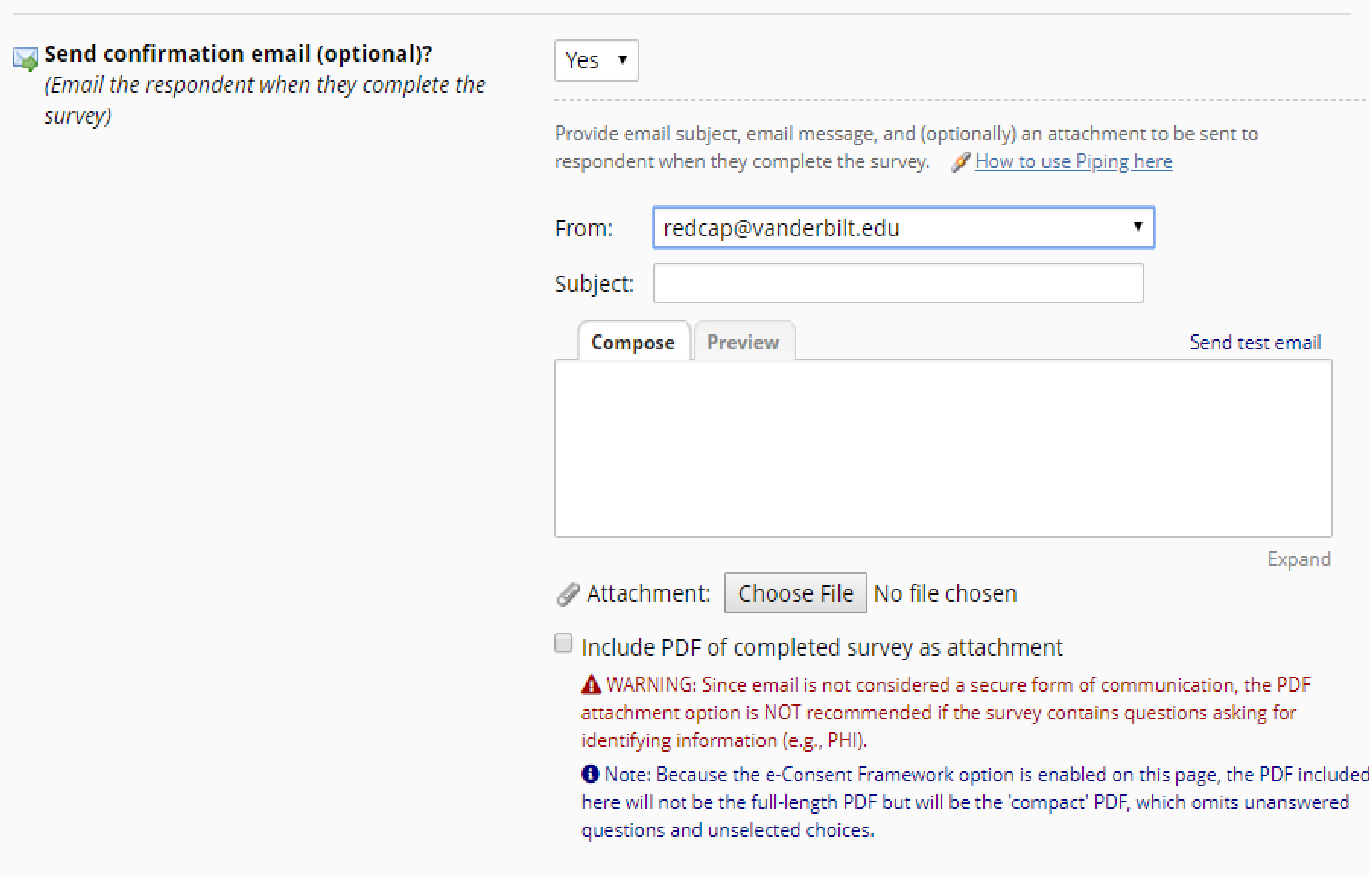
Enter the subject and the body of the message.

You may also add an attachment to the email by clicking Choose File or automatically attach a PDF of the completed survey as an attachment. The PDF of the completed survey will show all the questions and choices in the survey – not just the questions and choices selected.

Since email is not considered a secure form of communication, the PDF attachment option is NOT recommended if the survey contains questions asking for identifying information (e.g., PHI).

If you send a confirmation email to the participant and you have the eConsent framework enabled, the participant will receive a compact version of the PDF of their survey responses. That means that they will only see the questions they answered (it will omit unanswered questions and unselected choices.)

You can use html coding in the confirmation email.

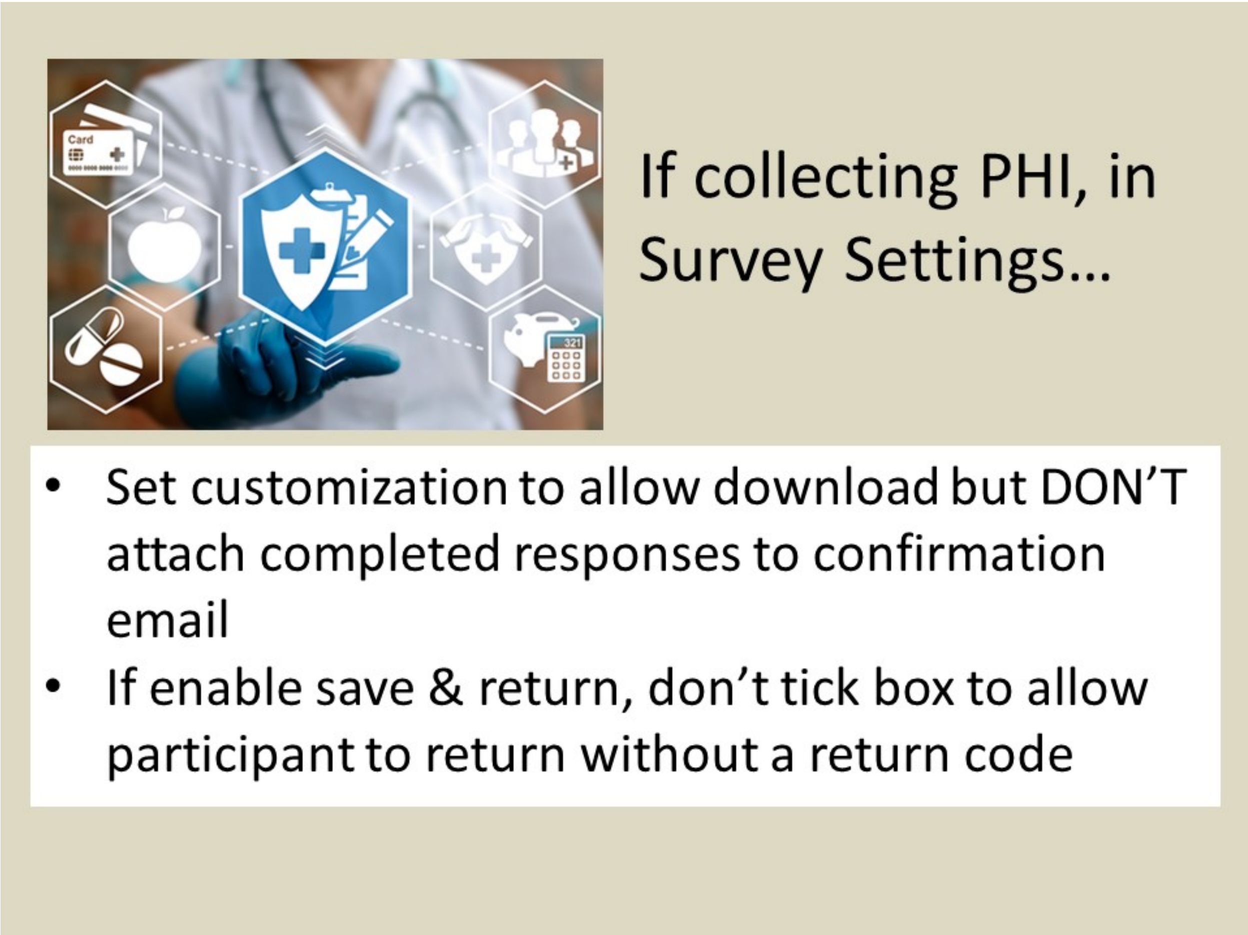


Inactive Survey Comparison

There are several ways a survey can be taken offline. Here is a side-by-side comparison to help you choose the one that best suits your needs:

	Survey Status	**Survey Expiration**	**Response limit**	**Time limit for survey completion**
Where to find	At the top of Survey Settings page	In the Survey Access section of Survey Settings	In the Survey Access section of Survey Settings	In the Survey Access section of Survey Settings
Manual/Automatic	Manual	Automatic	Automatic	Automatic
Who it affects	All survey participants	All survey participants	All survey participants	Individual participants, based on the survey send time
Timing	Not time-specific	Time-specific	Not time-specific	Time-specific
Participant list	Not required	Not required	Not required	Required

Best practices for Survey Settings if collecting PHI (Protected Health Information)



Survey Design tip re: User Access

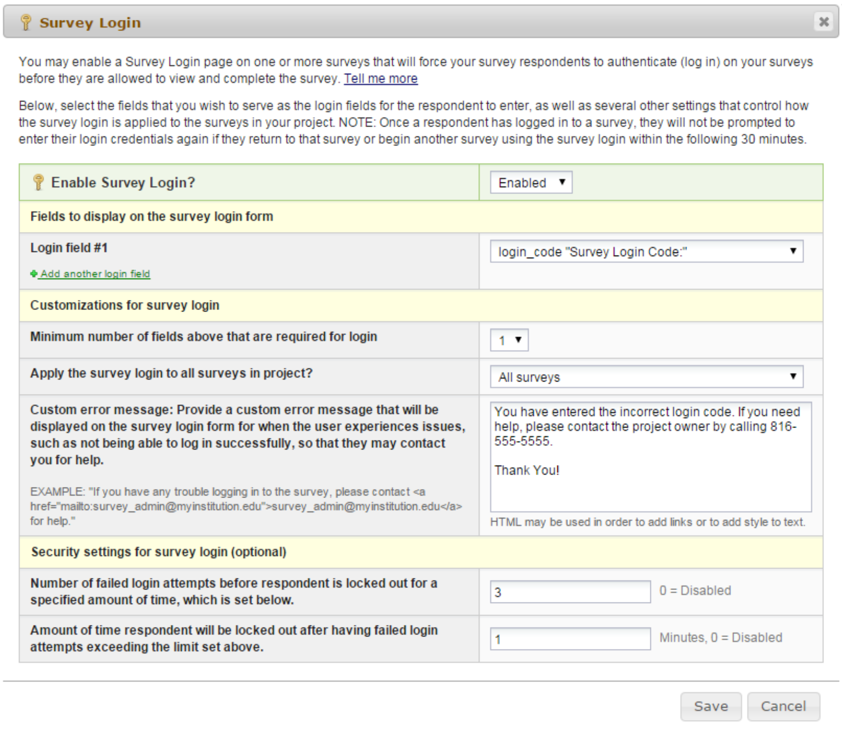
In the User Rights application, you will notice that you can limit a user's access by instrument. So, when designing your project, you might think about breaking up the information that will be entered into separate instruments, in order to restrict access. For example, say you have an application where you collect an applicant's merits, demographics, and scholarship information via survey. If you have a committee reviewing the applications, you may not want them to consider the applicant's demographics or the fact of whether or not the applicant is requesting a scholarship. In this instance, you could have separate those questions into 3 different surveys. You could enable survey auto-continue, so that the applicant can complete all 3 surveys in one sitting. Then, behind the scenes the committee member would be added as a user to the project but only be given access to view the merits survey.

Survey Login

You can provide improved security for your surveys with a survey login form, in which respondents will be required to enter some login credentials – their date of birth, for example – in order to begin a survey or (if the "Save & Return Later" feature is enabled) to return to a previously entered survey response.

To enable the Survey Login feature,go to Online Designer and click the **Survey Login** button at the top of the instrument list**.**

That will open up the Survey Login settings popup:



Login Field # 1: Use the drop down and select a field from your project. If you would like to add another login field, click the Add another login field link.

Minimum number of fields above that are required for login: If you have more than one field that you are using as the login, indicate how many of the fields are required. For an example, you might have three fields but only two of them are required to be answered in order to log in.

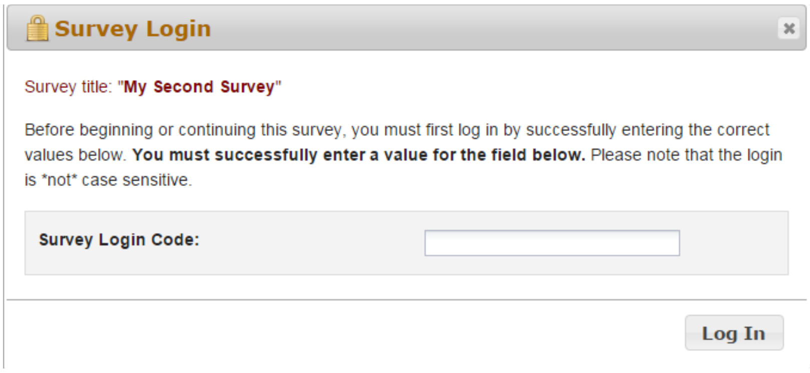
Apply the survey login to all surveys in this project: Use the drop down and indicate if the survey login should be used for all surveys or if you would like to specify the surveys this will be used for. If you would like to specify which surveys this will be used for, you will need to navigate to survey settings.

Custom error message: Enter a custom error message that will be displayed if the participant experiences difficulty logging in.

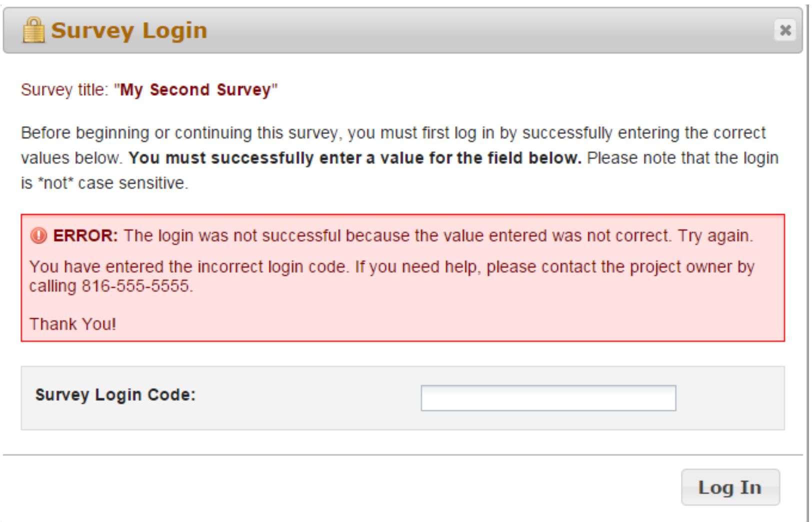
Number of failed login attempts: Enter the amount of login attempts you would like to grant to the participant. If you would like them to have unlimited attempts, enter 0.

Amount of time participant will be locked out: Enter the amount of time (in minutes) you would like to have the participant locked out for. If you do not wish to lock them out, enter 0.

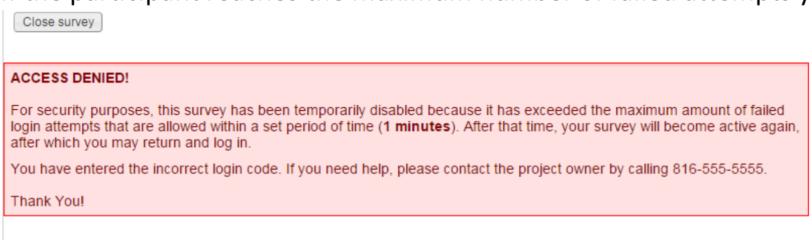
When the participant attempts to take the survey, this will receive this log in box:



If the participant does not enter the correct Login Code, they will receive this message:



If the participant reaches the maximum number of failed attempts you specified, they will receive this message:



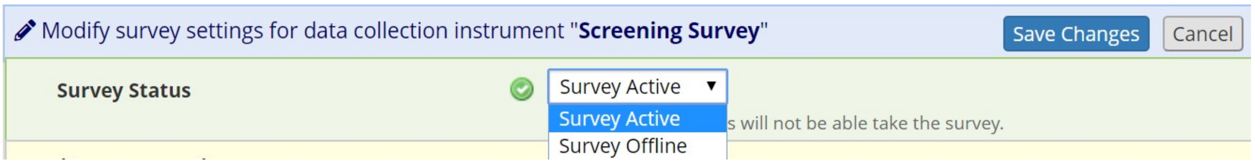
Survey Settings

Once you enable your data collection instrument as a survey, the “Survey Settings” page will appear.

You can make changes to Survey Settings at any time. To get to the Survey Settings click on the Designer link on the left-hand navigation bar under Project Home and Design.

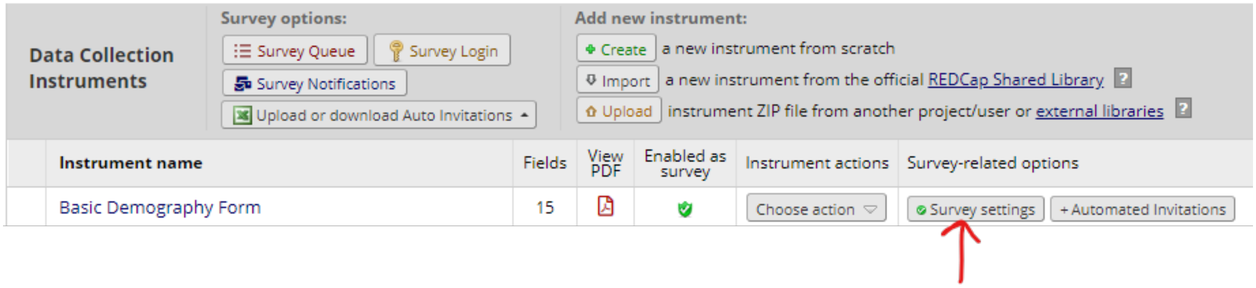
Survey Status

A survey can be Active (online) or Inactive (offline). The default setting is online

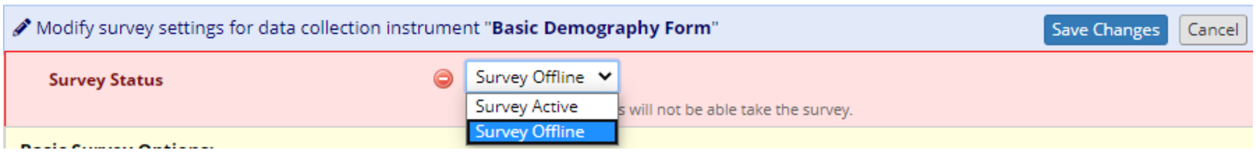


To take your survey offline (or to make your survey inactive):

- Click on Designer (on the left-hand navigation bar in the Project Home and Design section)
- Click on the Survey Settings button



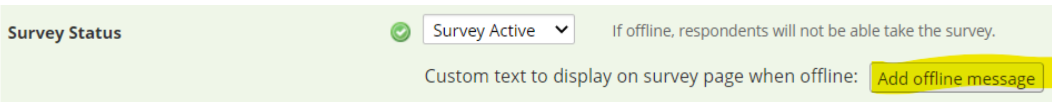
- Click on the drop-down arrow for Survey Status and change it to Survey Offline:



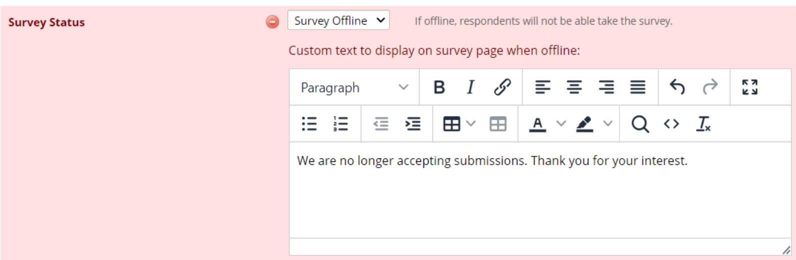
4. Be sure to click the ‘save changes’ button

Custom offline message for surveys in offline status

You can provide custom text that is displayed to participants only when the survey is offline. This text can be set at the top of the Survey Settings page. Click the ‘add offline message’ button:



And then enter your custom message:

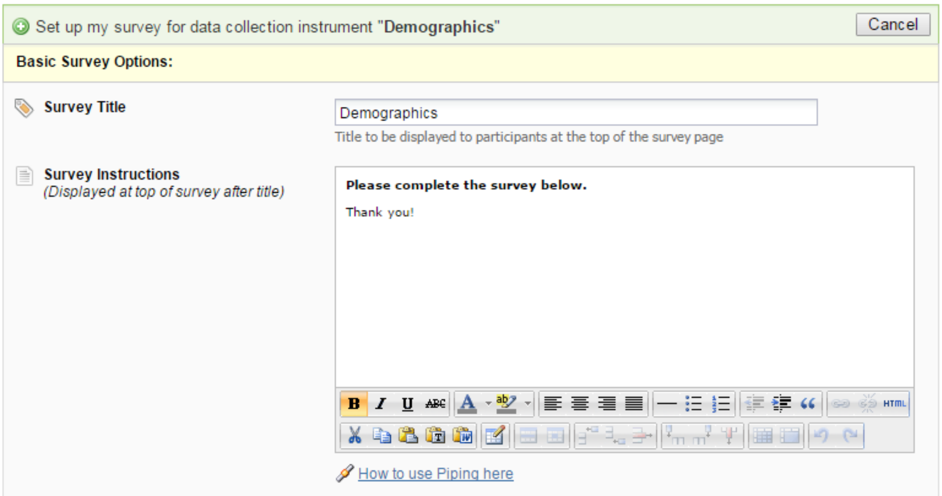


For a comparison of how this differs from other survey expiration options, [see this section of the User Guide](#).

Basic Survey Options in Survey Settings

Survey Title: The default survey title is the name of the instrument. However, your survey title does not have to be the same name as your instrument. You can change the title here in Survey Settings.

Survey Instructions: Enter any instructions you wish to give to the participant. The default instructions are "Please complete the survey below. Thank You!" Oftentimes it is helpful to include a contact email address if the person has questions or the deadline by when you need them to complete the survey.



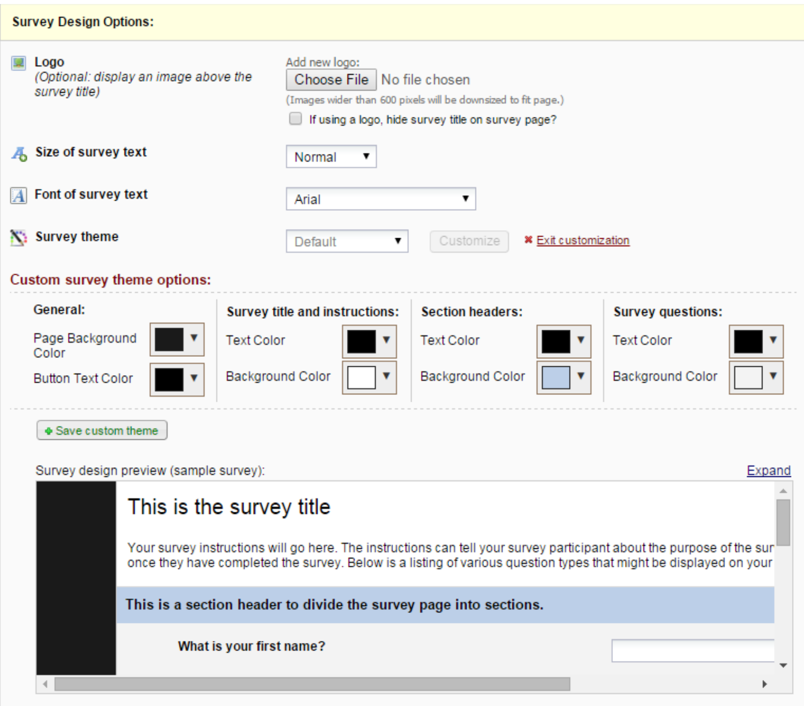
Survey Design Options

Logo: Click the Choose File icon and add a logo.

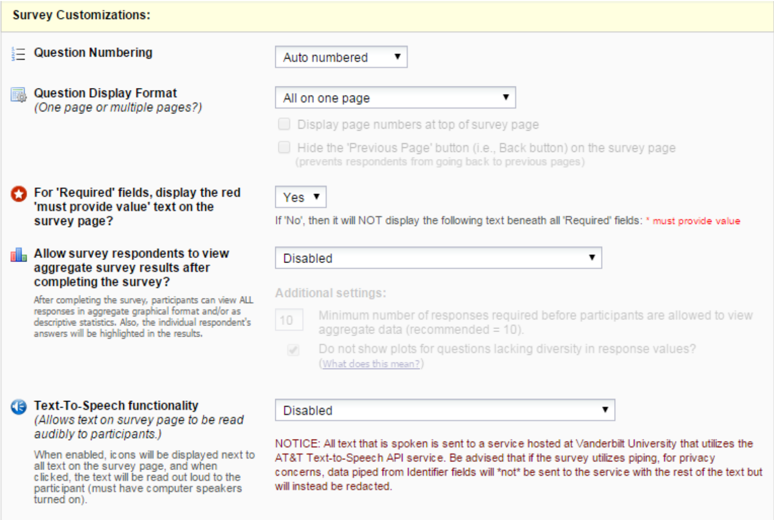
Size of survey text: Use the drop down and select Normal, Large or Very Large.

Font of survey text: Use the drop down and select the font family you would like to use.

Survey Theme: Use the drop down to select a saved survey theme, including a CMH survey theme. Otherwise you may click Customize and change the color of your backgrounds, fonts and buttons. If you would like to use the same color choices at a later date, click the Save custom theme icon.

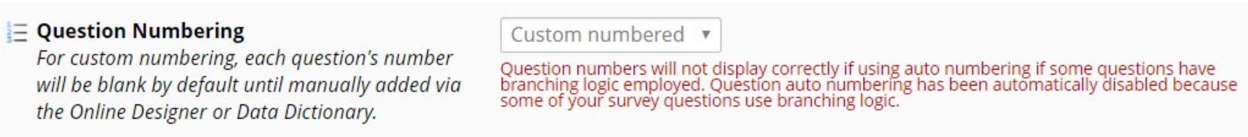


Survey Customizations in Survey Settings



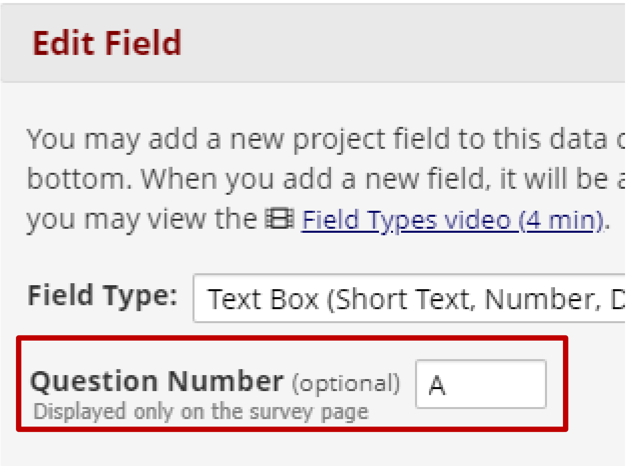
Question Numbering

REDCap will by default auto number survey questions. The exception is if you have branching logic in your survey. In that case, auto-numbering is disabled and instead your questions are custom-numbered.



Custom numbering of questions in Survey

If you change the setting to custom numbering, question numbers will be removed. If you set your Survey Settings so that your questions are custom numbered, you will see a 'Question Number' box for each field of that survey in Online Designer:



You can enter your custom question number there (or leave it blank.)

Question Display Format in Survey Settings

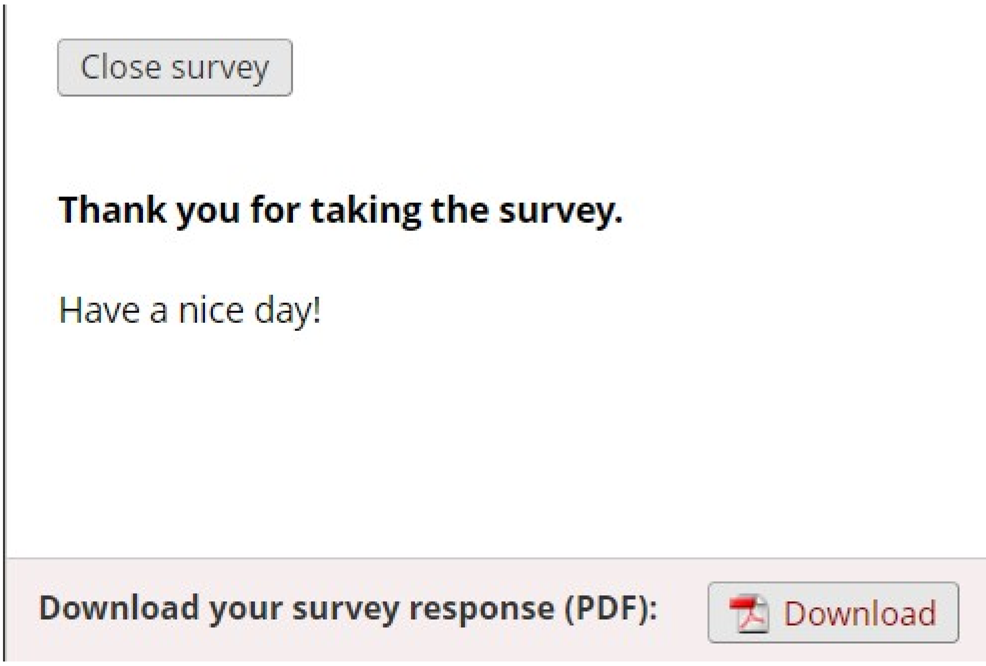
All on one page: Select this if you would like all of your questions placed on one page.

One section per page (multiple pages): Select this option if you would like to like to break your survey up into sections by your section headers (the yellow banner bars). If you select this option, you can display the page numbers at the top of the survey page and also hide the “Previous Page button”.

Allow participants to download a PDF of their responses at end of survey?

The default setting is no.

The respondent will see a PDF button on the confirmation screen (screen they see after they hit the survey submit button).



All fields viewable to the survey respondent on the screen, regardless of whether or not they answered the question, are included in the PDF. This means that if a HIDDEN action tag is used on a field in the survey, that field will not be visible in the PDF.

Exceptions: This option is not available if the Survey Auto-continue feature is enabled or if the Survey queue auto-start option is enabled.

Save a PDF of completed survey response to a File Upload field

The "Save Survey PDF to Field" feature allows you to automatically save a PDF copy of a participant's survey response to a File Upload field upon completion of the survey. This may be useful if you want to store the snapshot of the response immediately after being submitted, or it can be used to send the PDF of the response as an email attachment via Alerts & Notifications, among other things. This feature can be enabled on the Survey Settings page for any data collection instrument in the Online Designer.

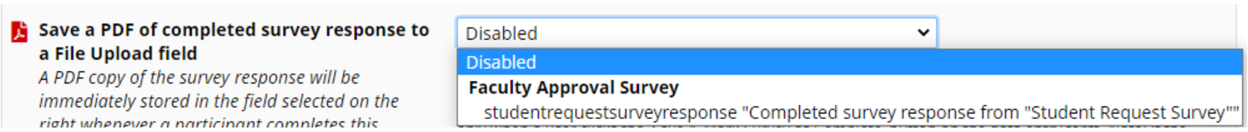
Example of Save a PDF of completed survey response

Let’s say you have a project with two instruments: the first is a survey that a student will complete and the second is a survey a Faculty member will complete in response to the student’s request:

Instrument name	Fields	View PDF	Enabled as survey
Student Request Survey	22		
Faculty Approval Survey	4		

In the Faculty Approval Survey is a file upload field:

You can go to the Survey Settings for **Student Request Survey** and enable the option for 'Save a PDF of completed survey response…". What you're seeing on the drop-down list is all the fields in your project that are the field type 'file upload' (in this example, there's only the one file upload field):



Be sure to scroll up or down and click the 'Save changes' button.

With that in place, any time a student completes the request survey, a PDF of their response will get saved to that second instrument, the Faculty Approval Survey. This can be really helpful if you want a second party (in this case, faculty) to see the responses given by someone else (the student). Otherwise, you would have to add the Faculty member to the project for them to be able to see the student's response. This way, you can trigger a survey invitation or alert to go to the Faculty member. When they click on their Faculty survey, they can see the student's response and enter their information in response to that request.

Bonus tip: to display the completed survey response inline (so that the file doesn't have to be downloaded, but instead displays on the page), add the action tag INLINE to the destination field (in the above example, the one named studentrequestsurveyresponse.)

Survey-specific email invitation field in Survey Settings

You may have a project with multiple surveys where different people are completing the survey for the same record. If you wish to designate which person should be sent the invitation for that specific survey, you would select that designated email field from the drop-down list.

Note: only text box fields that have been validated as an email address show up on the drop-down list.

For "Required" fields, display the red 'must provide value' text on the survey page

The default setting is Yes. If you do not wish to have the 'must provide value' field display on your survey, use the drop down and select No.

Allow survey respondents to view aggregate survey results after completing the survey

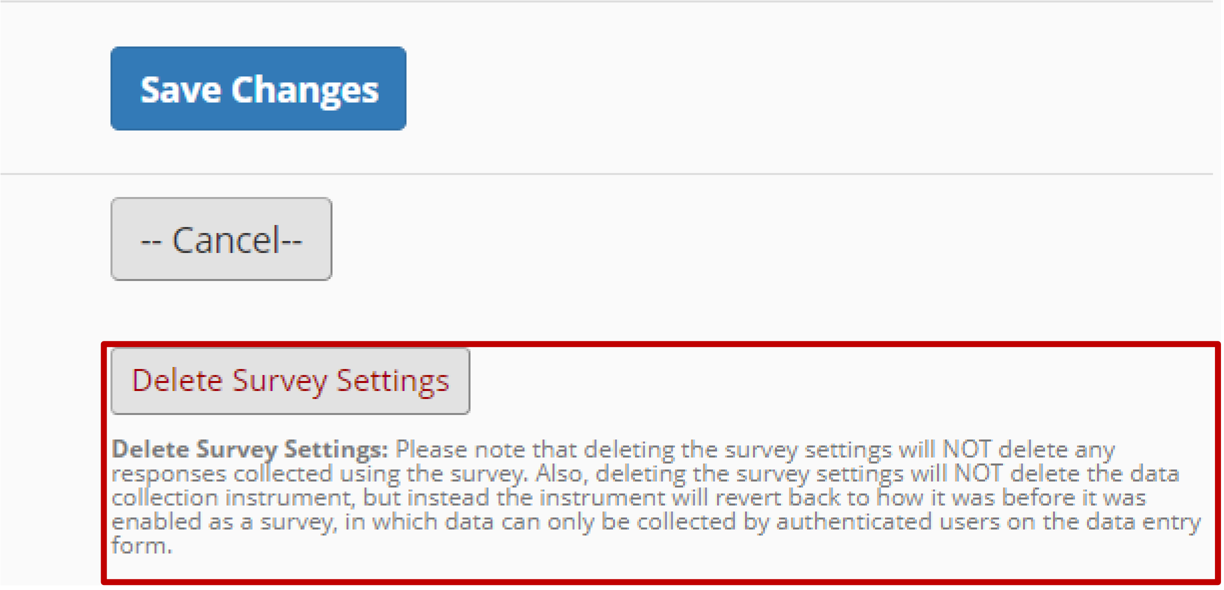
The default setting is disabled. Otherwise you may choose to display Graphical Plots, Descriptive Statistics or both plots and statistics. If you enable this setting, you can choose the minimum number of responses before participants are allowed to view the aggregate data.

Text-To-Speech functionality

The default settings is Disabled. When enabled, icons will be displayed next to each text that is listed on the survey. When clicked, the text will be read out loud to the participant.

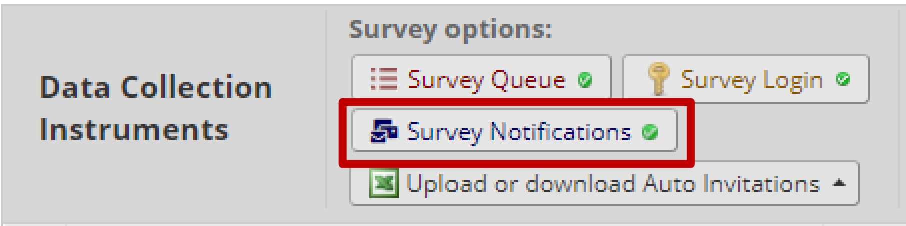
To change an instrument from a survey back into a data entry form (reverting a survey to a data entry form)

If you have designed an instrument as a survey but want to change it back to a data entry form, go to Survey Settings (Project Setup/Online Designer) and click on the Delete Survey Settings button at the bottom of the page.



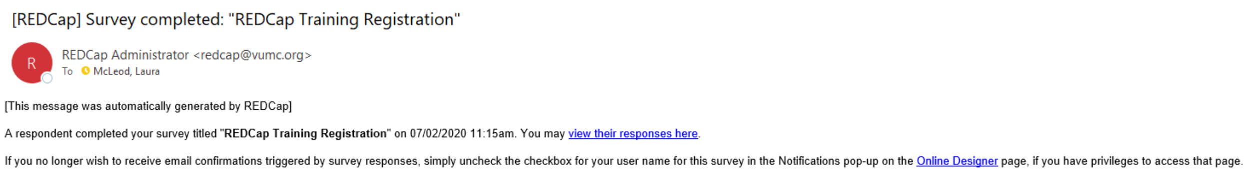
Survey Notifications (Survey notification emails)

If you would like REDCap to email you or a team member **every time** a survey is completed, you can turn on Survey Notifications. Go to Online Designer and you will see this:



Click on Survey Notifications. Listed are all the surveys in the project and under each survey is a list of email addresses associated with each user that has been granted access to the project. You can select which user should receive the survey notification email.

The email that is sent simply explains that the survey has been completed and provides a hyperlink to that particular survey response:


[REDCap] Survey completed: "REDCap Training Registration"

REDCap Administrator <redcap@vumc.org>
To McLeod, Laura

[This message was automatically generated by REDCap]

A respondent completed your survey titled "**REDCap Training Registration**" on 07/02/2020 11:15am. You may view their responses here.

If you no longer wish to receive email confirmations triggered by survey responses, simply uncheck the checkbox for your user name for this survey in the Notifications pop-up on the Online Designer page, if you have privileges to access that page.

The user can click on the hyperlink, sign into REDCap and immediately see the survey result. No data from the survey is included in the email. This is intentional, since some survey responses may contain sensitive information.

If you have a lot of survey responses coming in at once, it can be overwhelming to receive a flurry of notification emails. If that is the case, you might want to turn off survey notifications and instead create a reverse chronological order report in your project and check that on a regular basis. For information on creating custom reports, see this section of this User Guide: Create Custom Report.

There are many examples of when you might prefer to receive an alert about a survey response (rather than a Survey Notification for all survey responses):

- If you only want to be notified if a particular response is marked in the survey
- if you want someone who is not a user on the project to be alerted
- if you want an attachment to be included with the email
- if you want to pipe in data from the survey response to the email
    - note: this is not recommended if the data is sensitive/confidential/contains Personal Health Information (PHI)

See the Alerts & Notifications section of this User Guide for instructions on how to set that up such an alert.

Embedding your survey on a webpage

If you have a website into which you want to embed your public survey so that it appears inline (and not just as a link):

Take the public survey link and set it as the src attribute inside an IFRAME html tag, such as below.

<iframe frameborder="0" src="https://redcap.vanderbilt.edu/surveys/?s=xxxxxx" style="height:800px; width:900px;"></iframe>

So you would replace the hyperlink in the above textstring with your public survey url. You could also adjust the height and width as you wish.

Survey Delivery options

There are many ways to deliver survey invitations. Outlined below are the delivery options and when you might want to use them.

Delivery Option	**Allows for future scheduling**	**Allows for conditional logic**
Manual (via public survey link or participant list found under Survey Distribution Tools)	Yes	No
Auto-continue (found in survey settings)	No	No
Survey queue (found on Online Designer page)	No	Yes
Automated Survey Invitations (found on Online Designer page)	Yes	Yes

Public survey link vs Private Survey Link

Public Survey Link	**Private Survey Link**
Only available if the first instrument in your project is a survey	Is only available if you know the email address of the participant
Only available for the first survey in your project (if you have follow-up surveys, there is no public survey link you can send for those)	Is created via the Participant List, Automated Invitation or Alerts & Notifications (using a smart variable)
Can be completed by the same person more than once	Can only be completed once
	Allows for automated reminders

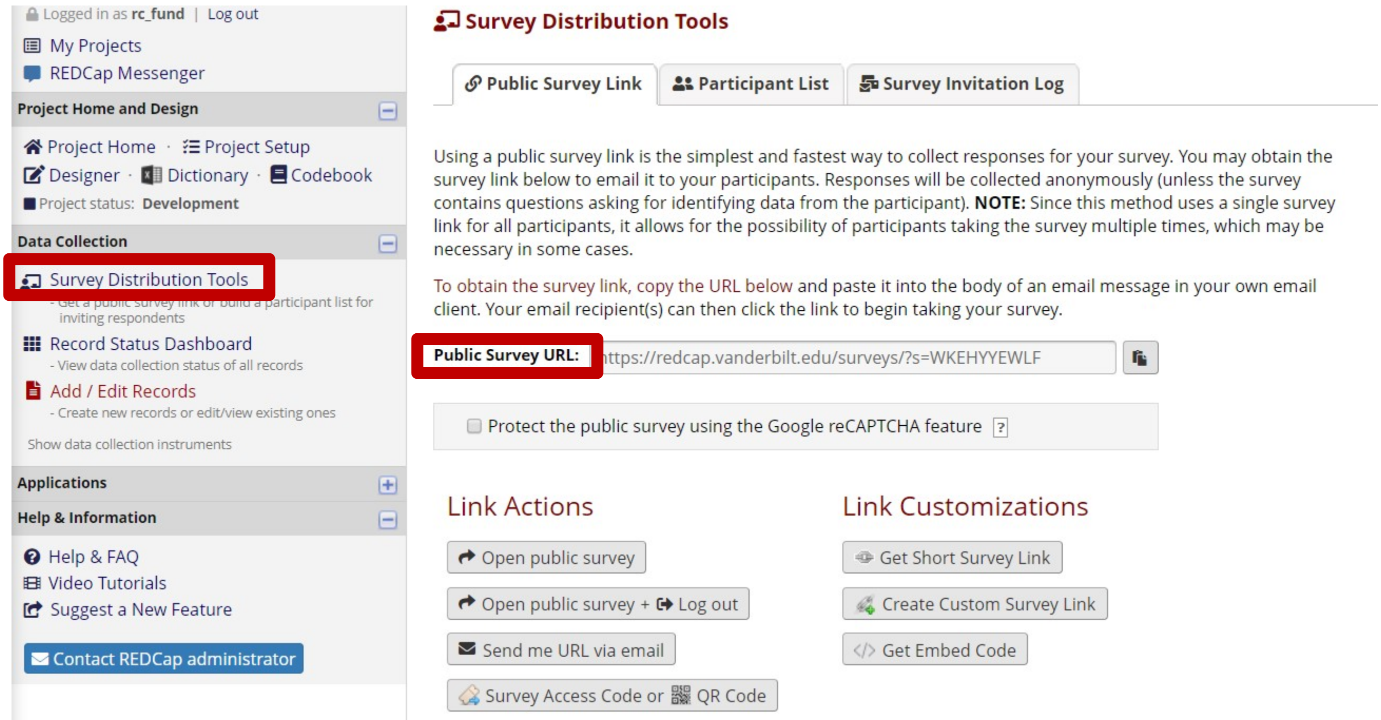
You can find additional information about those delivery options at the locations listed above. Below are some brief explanations.

Public Survey Link

Using a public survey link is the simplest and fastest way to collect responses for your survey. Responses are collected anonymously. Three things need to be in place for you to have a public survey link:

1. Your project must be enabled for surveys (1st step on the Project Setup page) while in Development mode.
   a. If a project is in Production, the use surveys in project' button is disabled on the Project Setup page. The project must be moved back into Development mode in order for that setting to work. You will need to contact your REDCap administrator to move your project back into Development mode.
2. You must have an instrument enabled as a survey within your project (set this in Online Designer)
3. The first instrument within your project must be a survey.

To access the public survey link, click on Survey Distribution Tools in the left-hand navigation menu:



There is the option to obtain a shorter, more easily typed link by clicking the **Get shorter survey link**. The link generated, when accessed, will redirect the user's browser to the regular public survey URL.

Project status re: survey link

Your public survey link remains the same when you move the project from Development mode to Production. If you created a short public survey link in development, it will carry through into Production – you won't see it at first on the Survey Distribution Tools page but when you click on the 'get short public survey url' button, it will generate the same short url that you had in Development.

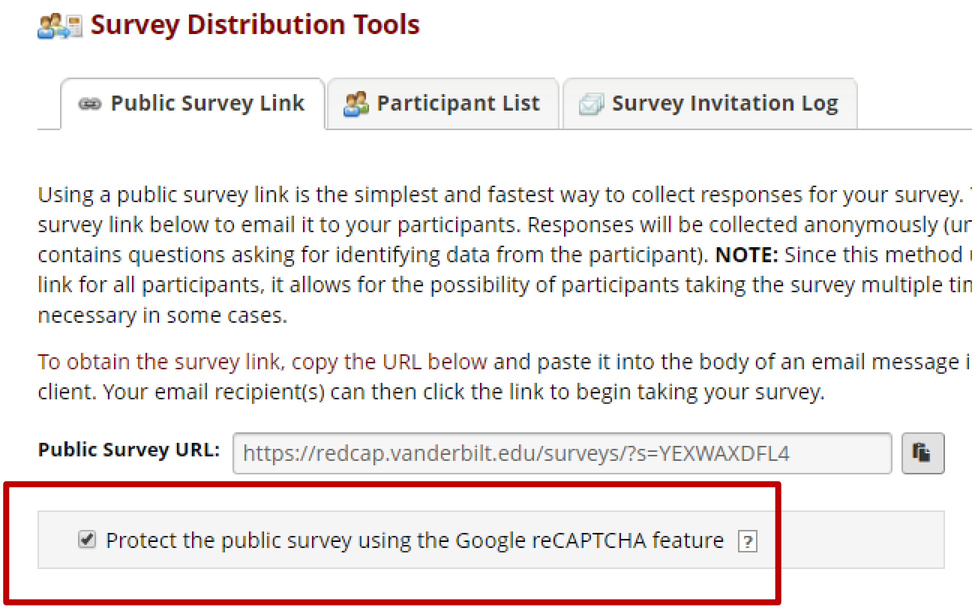
Only one public survey link per REDCap project

Please note: only the first survey in a project has a public survey link. Any subsequent surveys within the project have their own unique link. There are several ways you can disseminate the private link. This is important in tying the responses from different surveys together. If you wish to disseminate multiple surveys with public survey links for each one, just know that each survey will have to be in a separate REDCap project and the responses cannot be tied together.

This concept is still true even if you have a Longitudinal Project with multiple arms. Only one instrument (regardless of which arm it is in) can have a public survey link. So, even if you have multiple arms, you don't get one public survey link per arm.

reCAPTCHA – Protect the public survey using the Google reCAPTCHA feature

This feature allows you to utilize the Google reCAPTCHA functionality to help protect public surveys from abuse from "bots", which are automated software programs that might enter trash data into surveys. You can enable the Google reCAPTCHA functionality on the Public Survey Link tab of Survey Distribution Tools:



The public survey will display the reCAPTCHA checkbox and "I'm not a robot" text on a survey page prior to allowing the participant to view the public survey:

This feature is not employed on any private survey links because those are unique to a record and thus would never be made publicly available like a public survey link would.

Note: A survey participant will never have to pass the reCAPTCHA test more than once per day on a given device/computer.

Emailing unique survey links to participants

If you know ahead of time the email addresses of your survey respondents, you can email the survey link to those people from REDCap using Compose Survey Invitations. To use that feature, you first need to build your Participant List.

Participant List

You can use something called the Participant List to send private, one-time use survey links to potential survey participants. This is helpful if you want participants to only complete the survey once. It is required that you know the person's email address in advance.

REDCap generates a survey URL that is unique to each member of the list, which enables you to track who is responding to your survey invitation – and who is not – without requiring that the survey form contain any identifying information.

Quick Guide to Building a Participant List

- Click on Survey Distribution Tools on the left-hand navigation bar
    - If you are not seeing the Survey Distribution Tools link, you have not enabled surveys on your project. See these instructions for doing that.

- Click on the Participant List tab

- Click 'add participants'
    - Add email addresses, one per line
- Click on compose survey invitations
    - Select the timing
    - Enable reminders (optional)
    - Compose the message
        - Select who the invitation comes from
        - Add a subject line
        - Edit the message – you can edit the pre-populated text. Just don't remove [survey-link]. That text converts to a private survey link once you hit send.
    - Confirm recipients by ticking/unticking email addresses in the participant list
- Click the send button!

Participant Identifier (Optional)

The ability to specify an identifier for each member of the participant list is optional. This means that you can choose a tracking model that best suits your project:

1. **No identifier:** the Participant List shows who has responded but there is no link from the participant to a specific response. **The responses remain anonymous**.

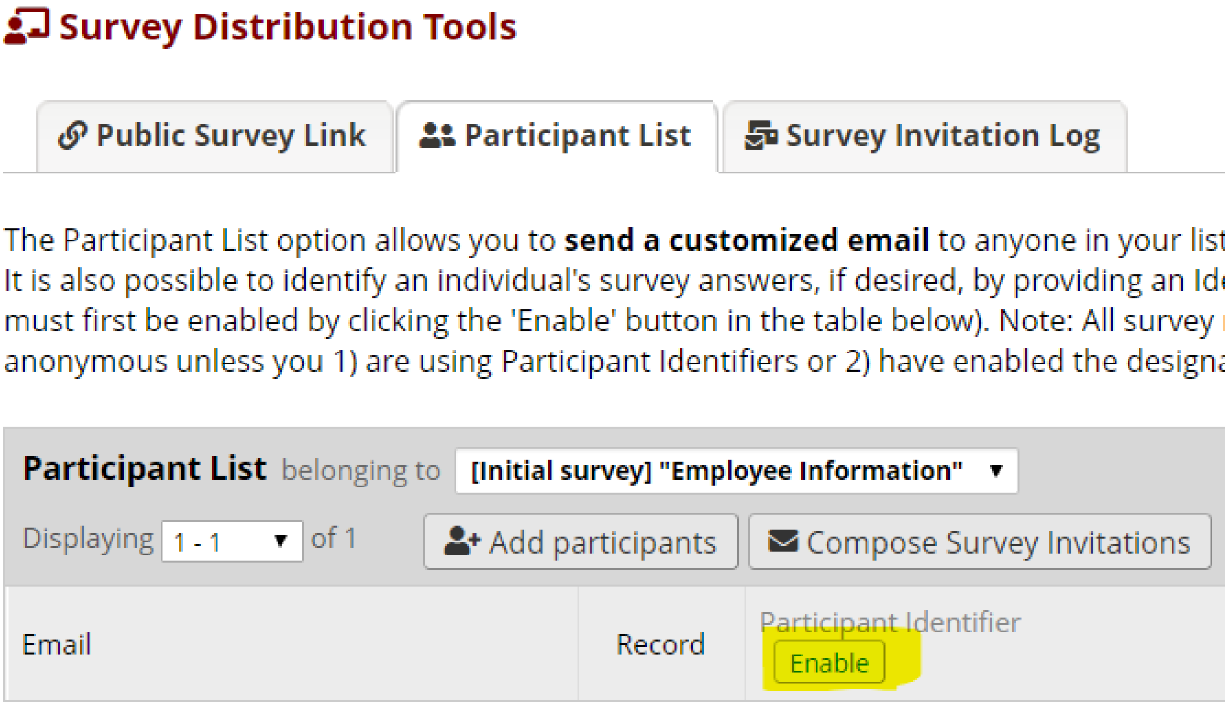
2. **With identifier:** the Participant List shows who has responded and you can navigate directly to the participant's response.

This setting is available only when your project is in Development and your first instrument is a survey. If your project is in Production mode and you wish to enable identifiers, you will need to email redcap@vumc.org and request that the administrator enable Participant Identifiers on your project.

You should not use participant identifiers if you want your responses to remain anonymous.

Enable Participant Identifiers

To enable participant identifiers, click the Enable button on the Participant List page:



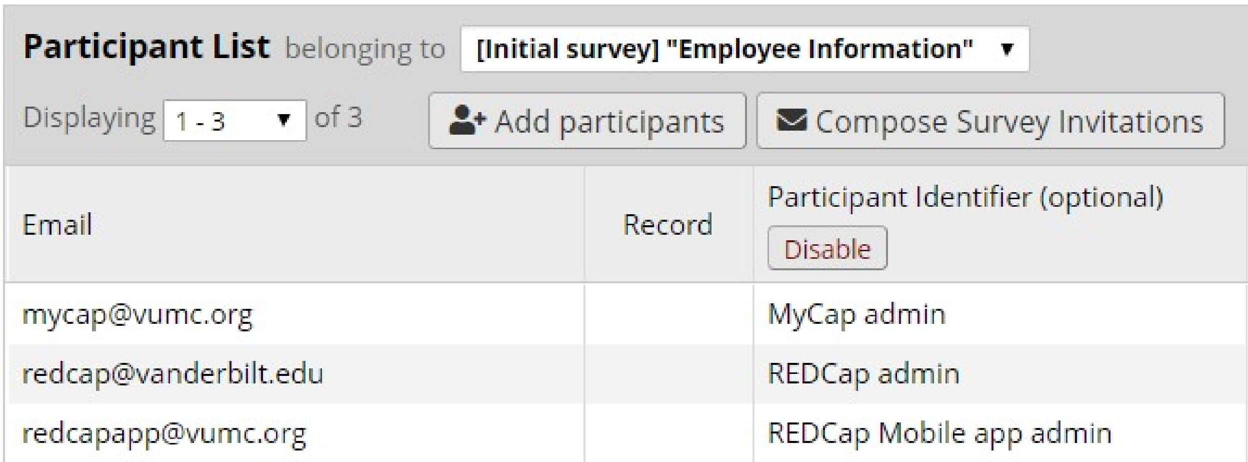
Add Participants

There are two options for populate your participant list:

1. Click **Add Participants** and enter (e.g. copy-and-paste) your list of email addresses (and identifiers, if enabled), one per line:

`<email address>` email only, with no identifier

`<email address>,<id>` comma-separated email,id when identifiers have been enabled



If you add participants with identifiers but you have not enabled identifiers, you will see this error message:

Alert ✖

It appears you are attempting to provide participant identifiers for one or more participants. However, this is not possible because identifiers are not enabled. Please remove the identifiers for the emails listed below, and submit your list of participants again.

REMOVE IDENTIFIER - email@email.com, Email

If you wish to build a participant list from a distribution list within your email client (e.g. Outlook), please see the instructions for [Converting an Outlook Distribution List into a Participant List.]

2. [Designate an email field] from one of your data collection forms. Email data entered into this field will be used to populate the Participant List automatically.

Participant List belonging to "Consent Form"

Displaying 1 - 3 of 3 | Add participants | Compose Survey Invitations | Export list

Email	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
1) luke.stevens@mcri.edu.au (ID 112)	Disabled		-		-	-
2) luke.stevens@mcri.edu.au (ID 212)	Disabled		-			
3) luke.stevens@mcri.edu.au (ID 211)	Disabled					

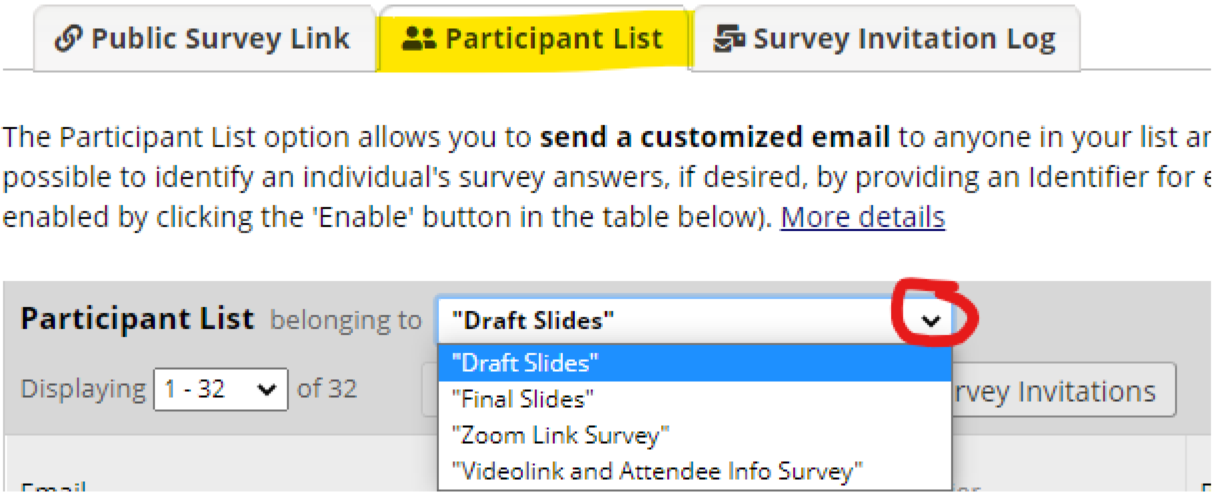
Note:

- Participant Identifier values must be unique
- Email addresses need not be unique. You may add your own (or a project) email address for all records, for example, if you wish to tailor each request to each specific participant and send the request email yourself

Send Survey Invitations via Participant List

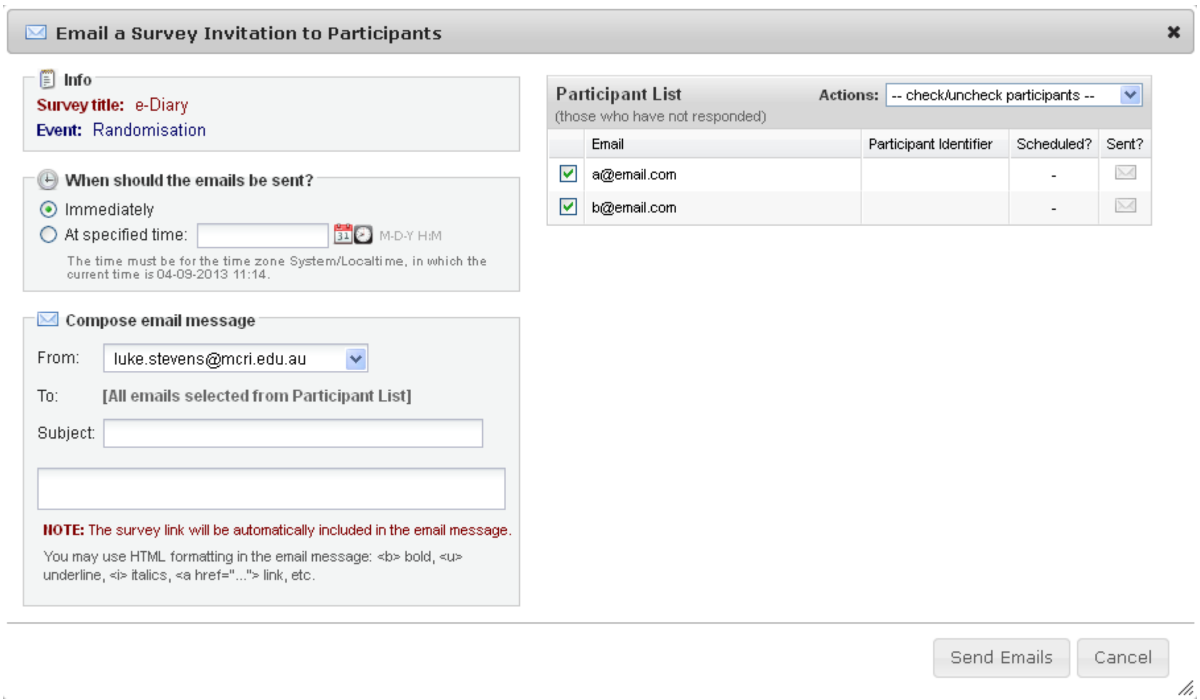
If you know in advance the email addresses of your survey participants, you can use something called the Participant List to send a unique survey link to each individual. This prevents people from taking the same survey more than once, which they can do if you use the public survey link.

If you have more than one survey in your project, by default you will come to the Participant List of the first survey when you land on the Participant List page (which you can get to by clicking Survey Distribution Tools on the left-hand navigation bar and then clicking on the middle tab, Participant List). If you wish to send any of the subsequent surveys to your participants, you can click on the drop-down list to select one of the other surveys:



Please note, though, that only the participants who have completed the initial survey will get pulled through to the participant list of subsequent surveys. The exception is if you have created a data entry form within the project that you use to control survey dissemination.

Clicking **Compose Survey Invitations** enables you to send email invitations to members of your participant list.



- Indicate whether the message(s) is(are) to be sent immediately or at a specified time
- Select the email address that you want the message(s) to be sent from. You will have the option to select the email address of any user on the project. If you want the email to come from an email address that you do not see on that drop-down list, see this section of this User Guide in regards to Associating another email address.
- Set the message subject and body: the participant's unique URL will automatically be appended to the message body. You can edit any of the pre-populated text, but you must keep the unique survey link string,

which will be listed within brackets.

- Select the desired recipients by ticking the relevant checkbox. The Actions drop-down list gives you shortcuts to ticking:
    - Check All
    - Uncheck All
    - Check Sent
    - Check Not Sent
    - Check Scheduled
    - Check Not Scheduled
    - Check Not Scheduled and Not Sent

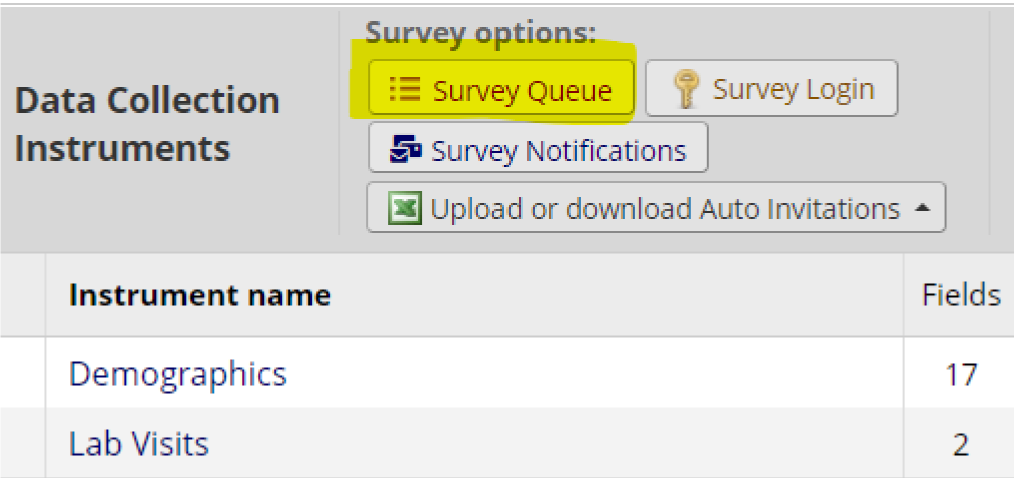
- There is no limit to the number of times an invitations may be manually sent and re-sent to a participant

Survey Queue

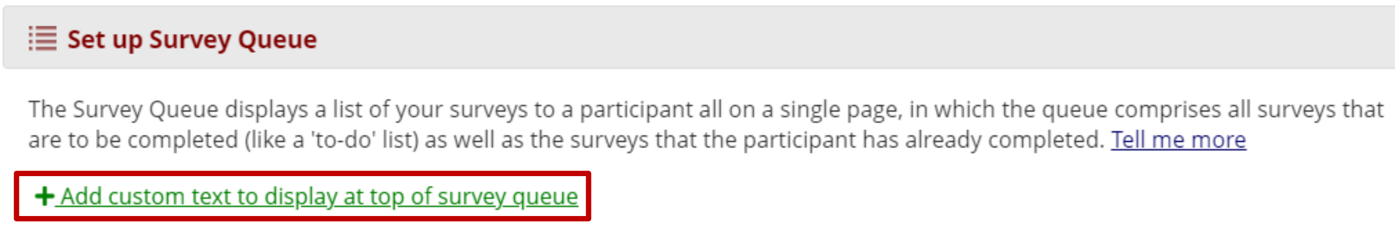
The survey queue enables your survey respondents to see a list of the surveys that you are asking them to complete. This can be a powerful feature because it enables you to, for example:

1. Force respondents to complete surveys in a particular order
2. Give different surveys to different respondents based on certain criteria. Age-specific questionnaires, for example.
3. Control when surveys become available.

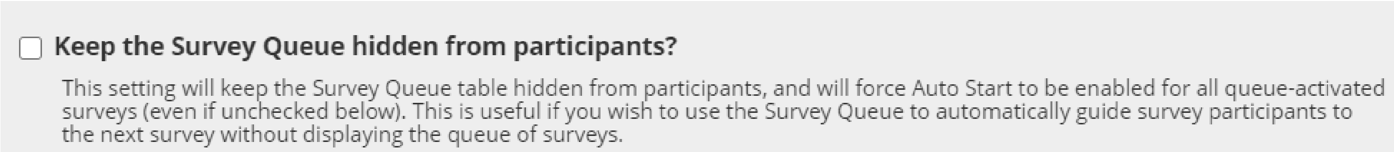
To activate your survey queue, navigate to Online Designer and click the Survey Queue icon located above your data collection instruments.



A “Set up Survey Queue” box will appear. If you would like, you may add your own custom text to display at the top of the survey queue.

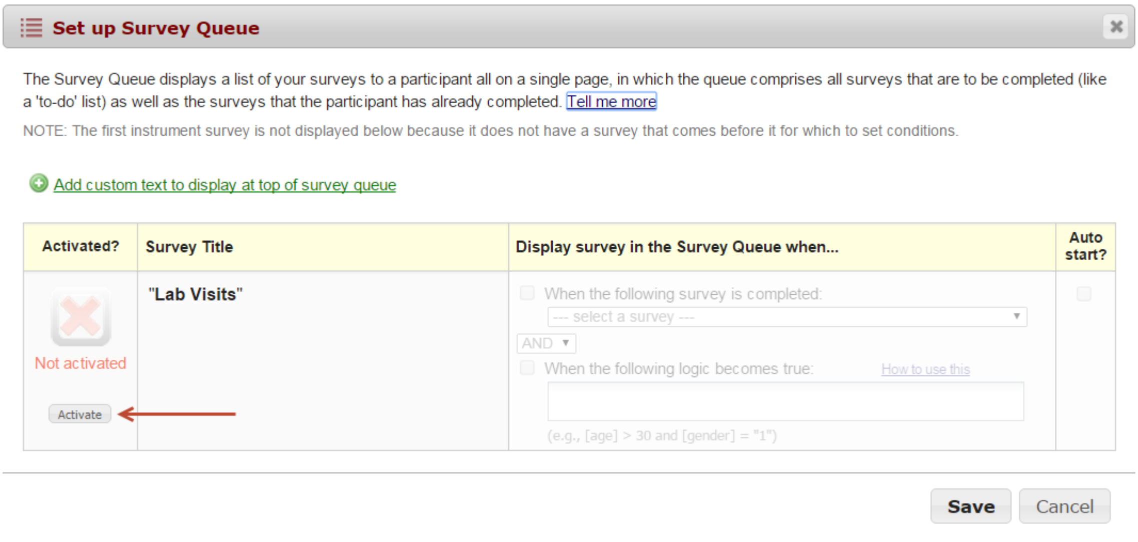


You'll also notice an option to hide the Survey Queue from participants:



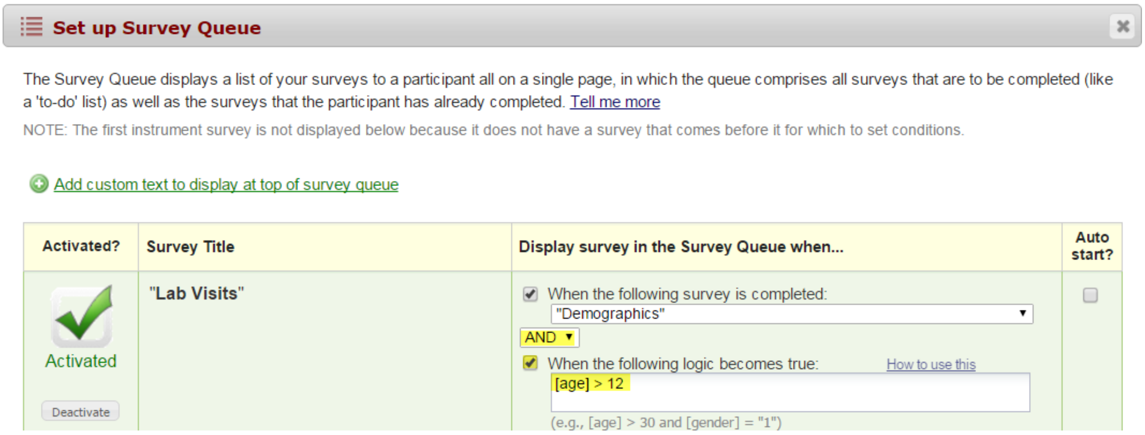
Selecting your surveys for the Survey Queue

Click the Activate icon for each survey you would like to set up. Under the "Display survey in the Survey Queue when…" column, use the drop down to indicate when the survey should be displayed. For an example, you might want your second survey to display after the first survey is completed.

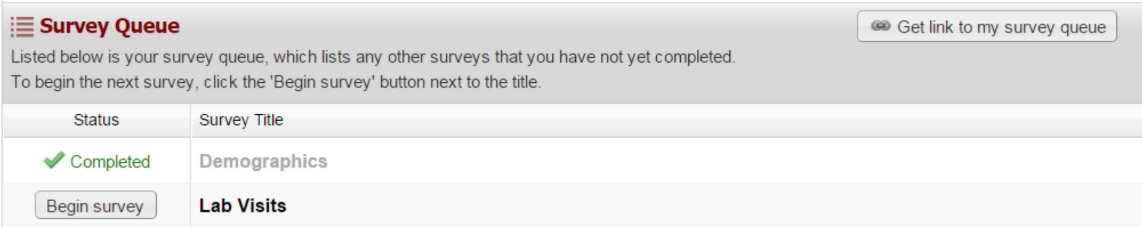


If you would like to add additional logic as to when the next survey should be displayed, use the operator drop down and select AND/OR and then check the box next to "When the following logic becomes true" and finally add your logic in the formula box. See further down for tips on how to configure complex Boolean logic.

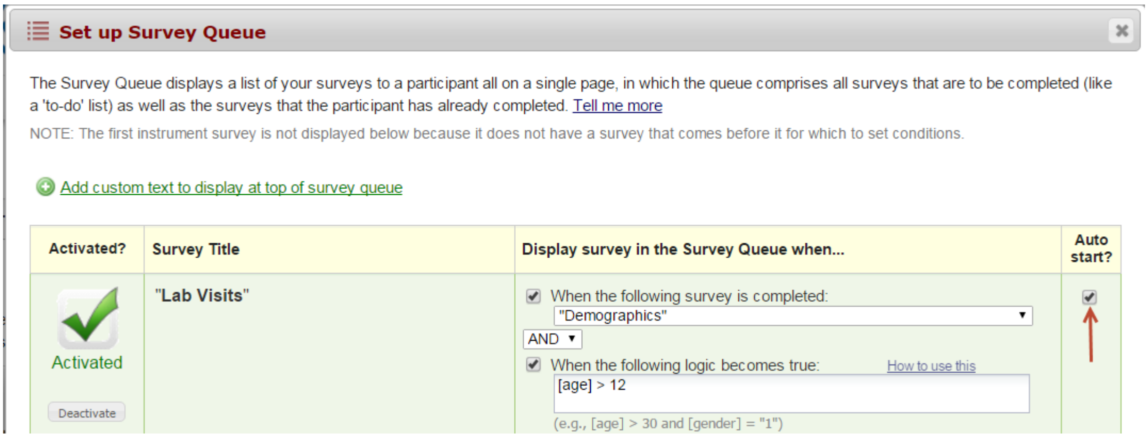
For an example, I want my second survey to start after my first survey is completed AND the participant's age is greater than 12. To do this, I added the variable for the participant's age field in square brackets, the greater than sign and the number. [age] > 12



When a participant takes my survey and enters an age greater than 12, they will see the following Survey Queue:



They can click the Begin Survey to start the second survey. If you would like the second survey to automatically launch and do not want to force the participant to click the Begin Survey icon, you can accomplish this by going back to the Survey Queue settings and click the box underneath the Auto Start column. When the participant finishes the first survey and they are at least 13 years old, the second survey will display.



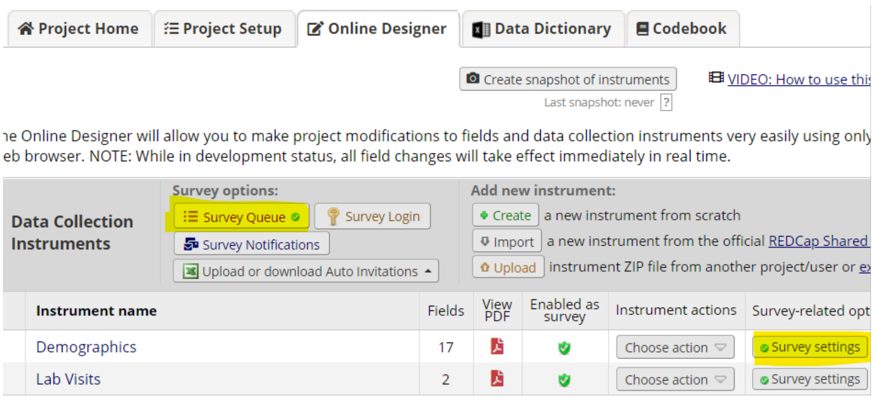
You may continue to add logic for the rest of your surveys.

As with all features in REDCap, it is a good idea to test this feature before using it with real participants.

Caution when using Survey Queue

The auto-continue option overrides the Survey Queue. So, if you want to use Survey Queue, make sure that auto-continue is turned off for any surveys that precede a survey that is activated in the Survey Queue. Otherwise, the participant will automatically be taken to the next survey even if they do not meet the conditions specified in the Survey Queue.

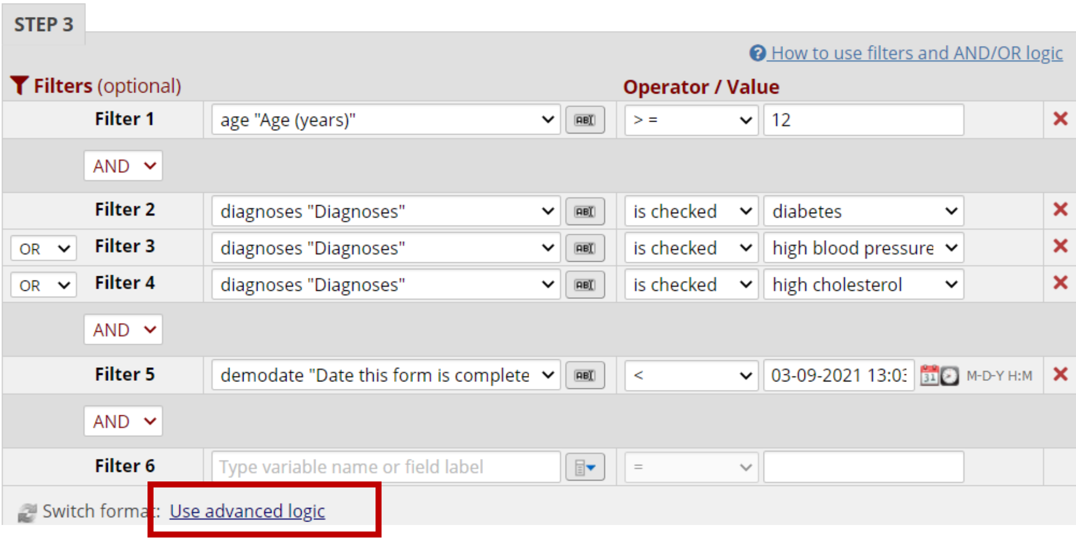
The auto-continue option is in Survey Settings for the individual survey. Survey Queue is found on the Online Designer page.



Design tip: writing conditional logic for a Survey Queue

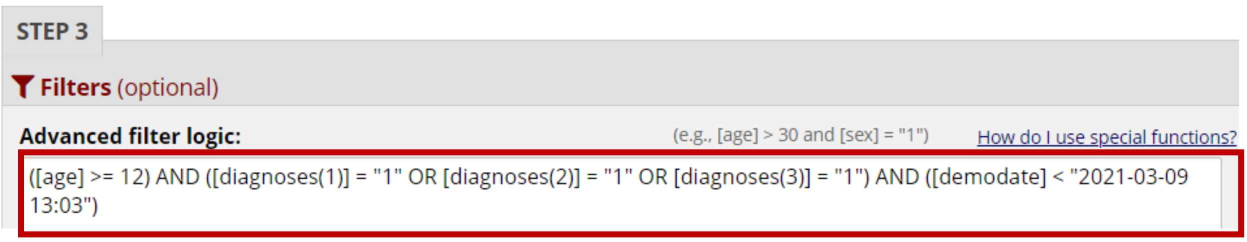
Sometimes it can be tricky writing conditional logic, especially when working with checkbox fields or date ranges. What you can do is create a test report using the filter section of the custom report to figure out your logic.

In the example below, we are essentially saying that we want to see the results where the box is checked for any of the three boards and the roster date is between 1/1/2018 and 12/31/2018.

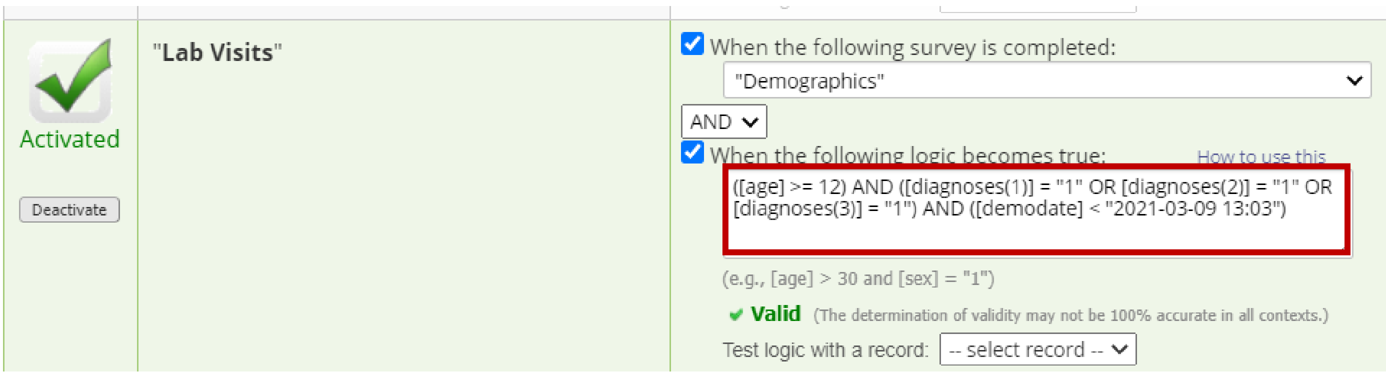


You can check the results of the report to make sure you have your logic configured correctly.

Once you get it right, you can click on Advanced Logic (noted in the red box above) and click the ‘convert’ button. You will see your logic written for you in Boolean form.



You can copy and paste that logic into the box “When the following logic becomes true” in your **Survey Queue**:



Automated Survey Invitations (ASIs)

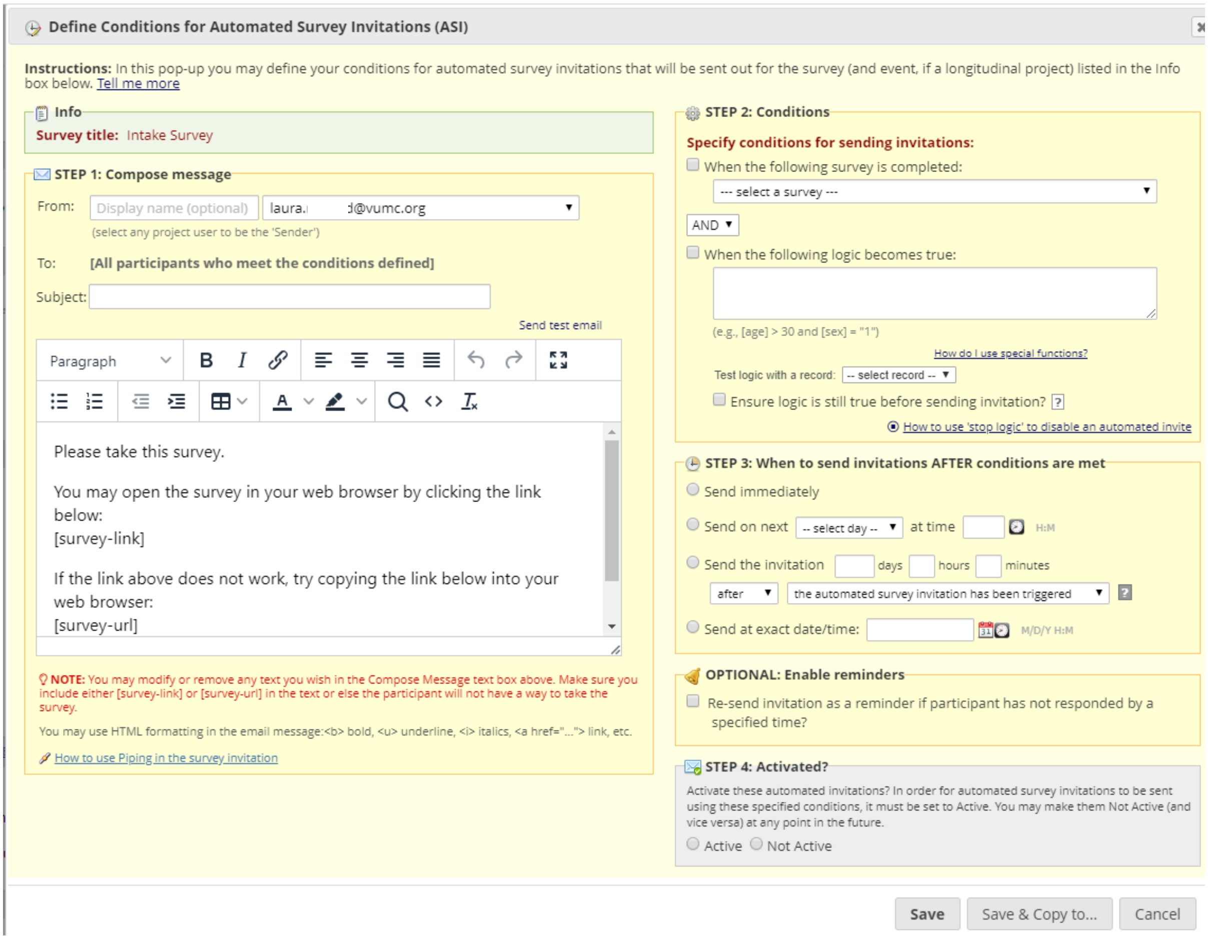
You can configure invitations to be sent automatically by REDCap upon certain criteria being met using the **Automated Invitations** option.

Exception: Automated Survey Invitations **do not work** on a project enabled with repeating instruments/events.

Requirement: You need to have the 'designate an email field' function enabled on your project setup page in order for Automated Survey Invitations (ASI) to work. For instructions on how to set that up, see this section of this User Guide. (If you have designated a survey-specific email field in Survey Settings for the instrument, that will work, too).

Note: you may want to have your Codebook open on a separate tab if you are going to use piping in the survey invitation email and to write the conditional logic.

- Click **Automated Invitations** in the **Online Designer** tab for the appropriate survey
- If your project is longitudinal, select the event
- The **Define Conditions for Automated Survey Invitations** dialog is displayed



Info: Displays the event and survey that you have selected
Step 1: Compose message:

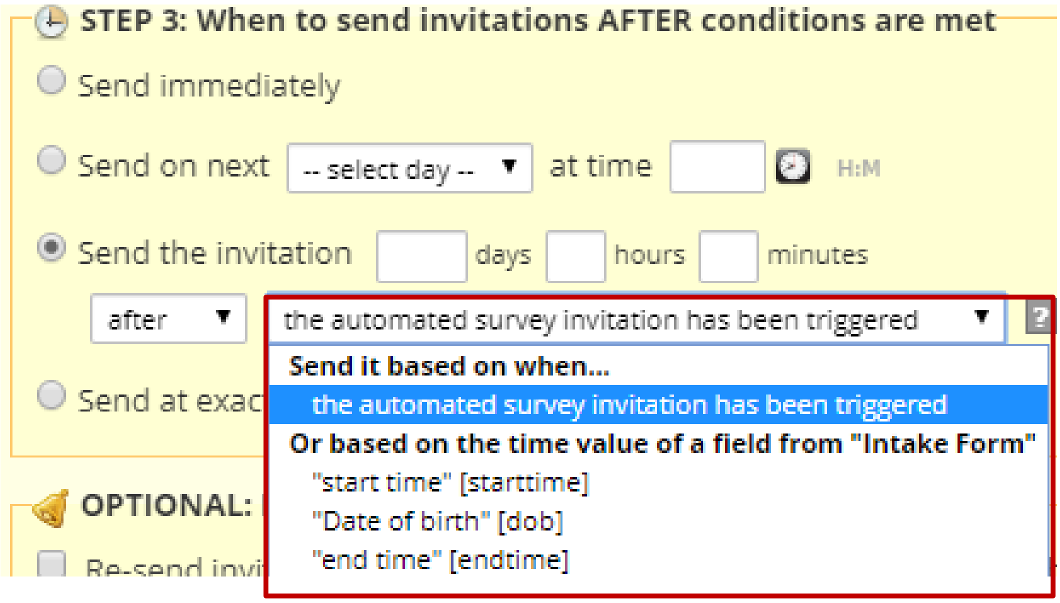
- There is a drop-down arrow next to the 'From' box. If you click on it, you will see the email addresses associated with any user on the project. If you want the email to come from an email address that is not listed in that drop-down list, see the instructions regarding Associating another email address.
- Specify the subject line and content for the email that REDCap will send.
- The participant's unique URL link and some stock text will pre-load in the dialog box. You can edit the

content, but you need to keep the survey link in the format it appears (with brackets around it). That text is a smart variable. Once the invitation is sent, that text converts to the private survey link for that individual.

- **Step 2: Conditions:**
  - Indicate the conditions that – when met – will indicate to REDCap that an invitation is to be sent. ***Ensure that you include the event reference alongside any field reference*** *if your project is longitudinal (as in the example shown in the image above).*
  - If you want to employ stop logic so that you can easily cancel an invitation after it has been scheduled, be sure to include that logic in the conditional logic box and also tick the 'Ensure logic is still true…' box.
- **Step 3: When to send:**
  - Specify when REDCap should send the invitation **after the trigger condition has been met.**

Date-based timing for Automated Invitation

If you select the third option in the 'When to send invitations' section, you will see this:



Note that you have the option to send the invitation based on a date-validated field in your project. This is helpful if the date you want to send the invitation is based on a date that is relative to an individual record and is not the same for all records.

- **Optional: Enable reminders**:
  - Choose the settings you want for automating the resending of the survey invitation. The invitation will be sent at most five times (i.e. the initial invitation and four resends).
- **Step 4: Activated?**:
  - To save your ASI settings, click on save. By default, the settings will remain Inactive. This is helpful during the design phase of the ASI.
- Save & Copy to…
  - If you have several automated invitations to set up and most/all of the content is the same, you can use the Save & Copy to option. This will replicate your automated invitation settings across whichever automated invitations you select.

Note that you can still send invitations manually via the participant list irrespective of the **Automated Invitations** settings.

Scheduled invitations (and reminders) may be deleted via the Survey Invitation Log.

Once an automated survey invitation has been triggered…

Note: once an ASI fires for a record, you can't make it trigger again, even if you change the conditions and the record meets the new conditions. You can however, re-send the invitation via the Participant List. If you do that, you would go to the Participant List (via Survey Distribution Tools) of the particular survey and click on Compose Survey Invitations. You could select the option 'check sent' to filter your participant list as it appears in the Compose Survey Invitation box.

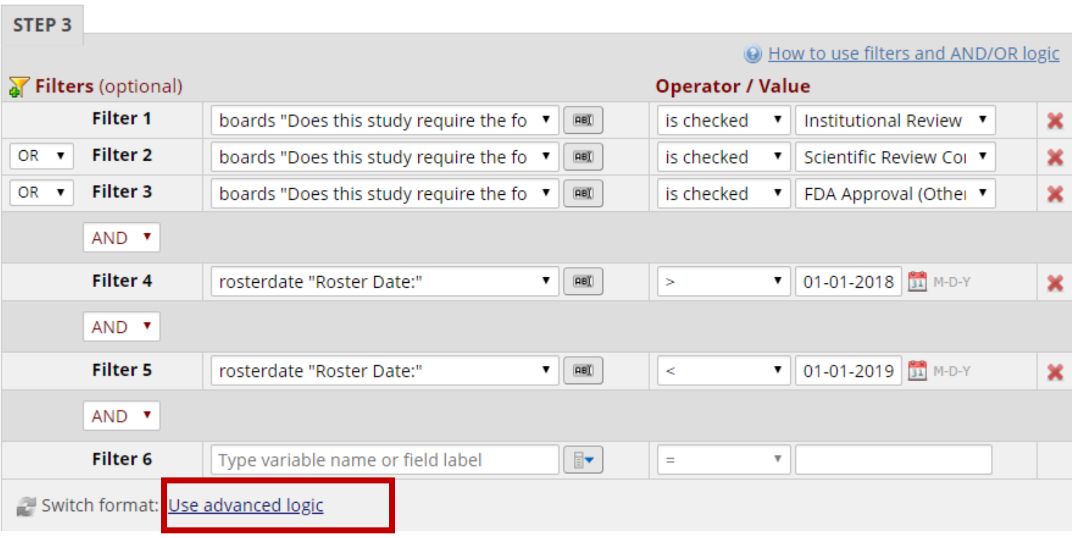
Automated Survey Invitation online tutorial

Please click on this link for an interactive tutorial in Automated Survey Invitations (ASIs):
https://redcap.vanderbilt.edu/surveys/?s=LKM4DPEHL4

Design tip: writing conditional logic for an Automated Survey Invitation

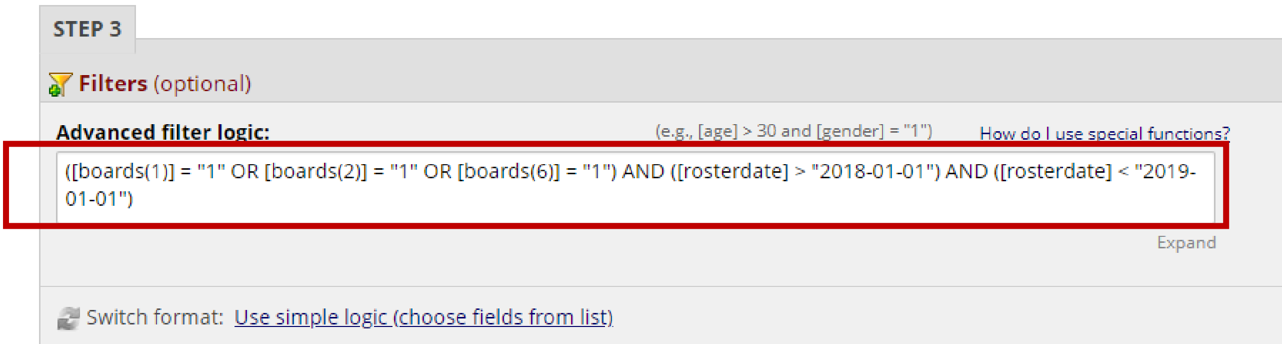
Sometimes it can be tricky writing conditional logic, especially when working with checkbox fields or date ranges. What you can do is create a test report using the filter section of the custom report to figure out your logic.

In the example below, we are essentially saying that we want to see the results where the box is checked for any of the three boards and the roster date is between 1/1/2018 and 12/31/2018.

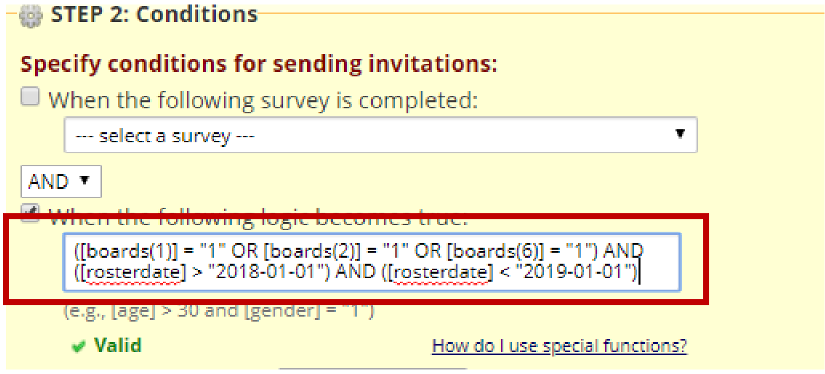


You can check the results of the report to make sure you have your logic configured correctly.

Once you get it right, you can click on Advanced Logic (not it in the red box above) and click the 'convert' button. You will see your logic written for you in Boolean form.



You can copy and paste that logic into the box “When the following logic becomes true” in your **ASI**:



If you want to use a datediff function to return results that satisfy the conditions for the last year, you can add the datediff function to your advanced logic. The advanced logic builder does not have the capability of constructing it.

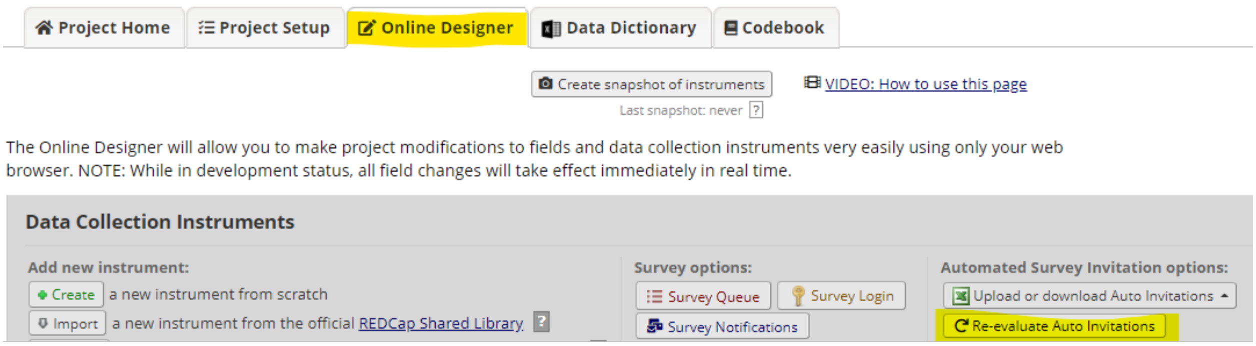
For the above example, our date validation is in the format of ymd. To capture results from the last year, you could add datediff([rosterdate],"today","d","ymd")<=365 to your advanced logic.

Conditional logic in ASI of Longitudinal Project

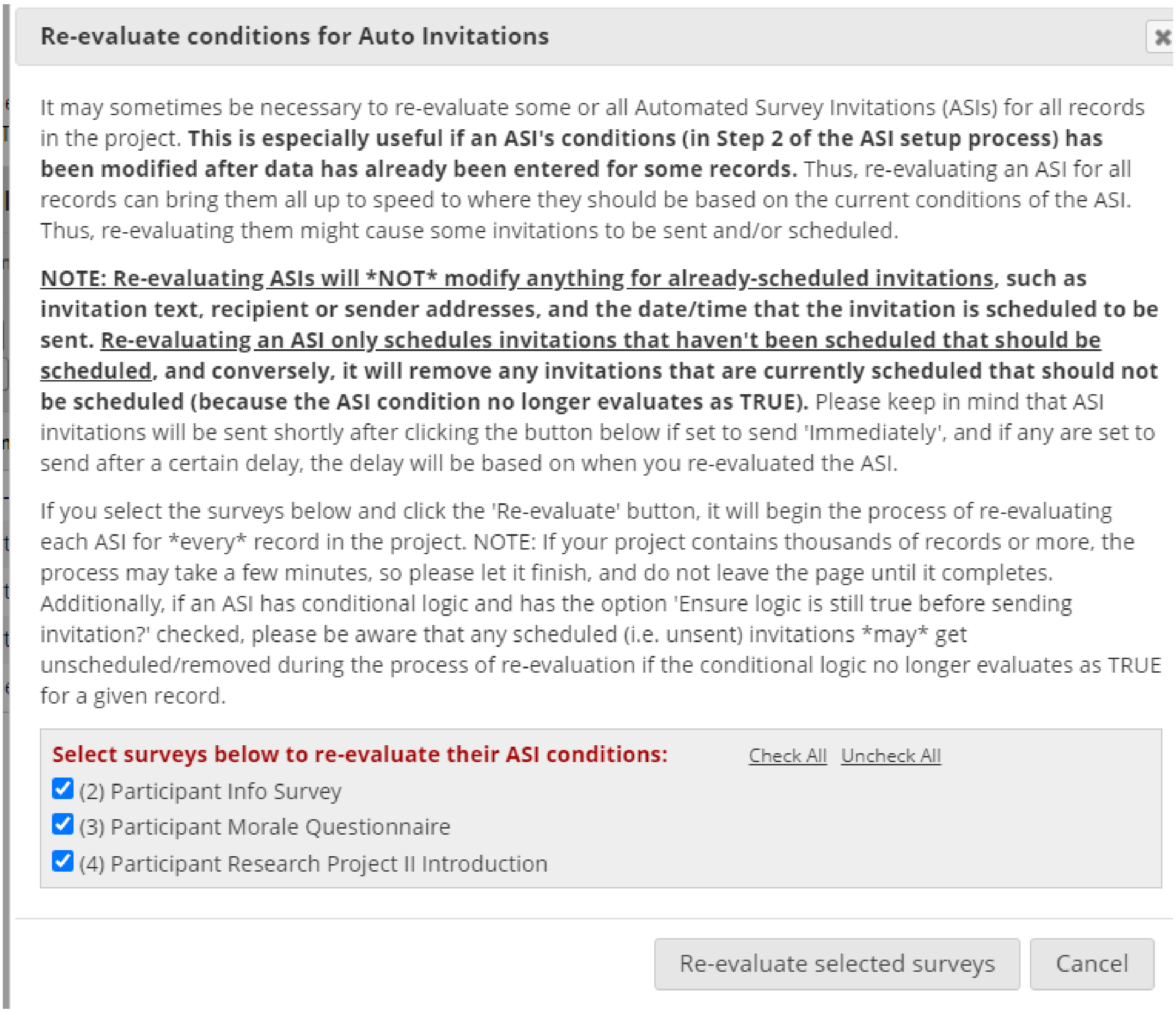
If your project is longitudinal and you want to use a variable in your conditional logic that is from an event *that is not the current event*, you need to pre-pend to the variable the appropriate unique event name also enclosed within square brackets, e.g. [unique_event_name][variable_name]. Unique event names can be found by going to Project Setup/Define My Events. You will see an events table, and the last column shows you the Unique event name, which is automatically generated by REDCap.

Re-evaluating Automated Survey Invitations

There is a button on the Designer page that you can click to re-evaluate automated survey invitation logic.



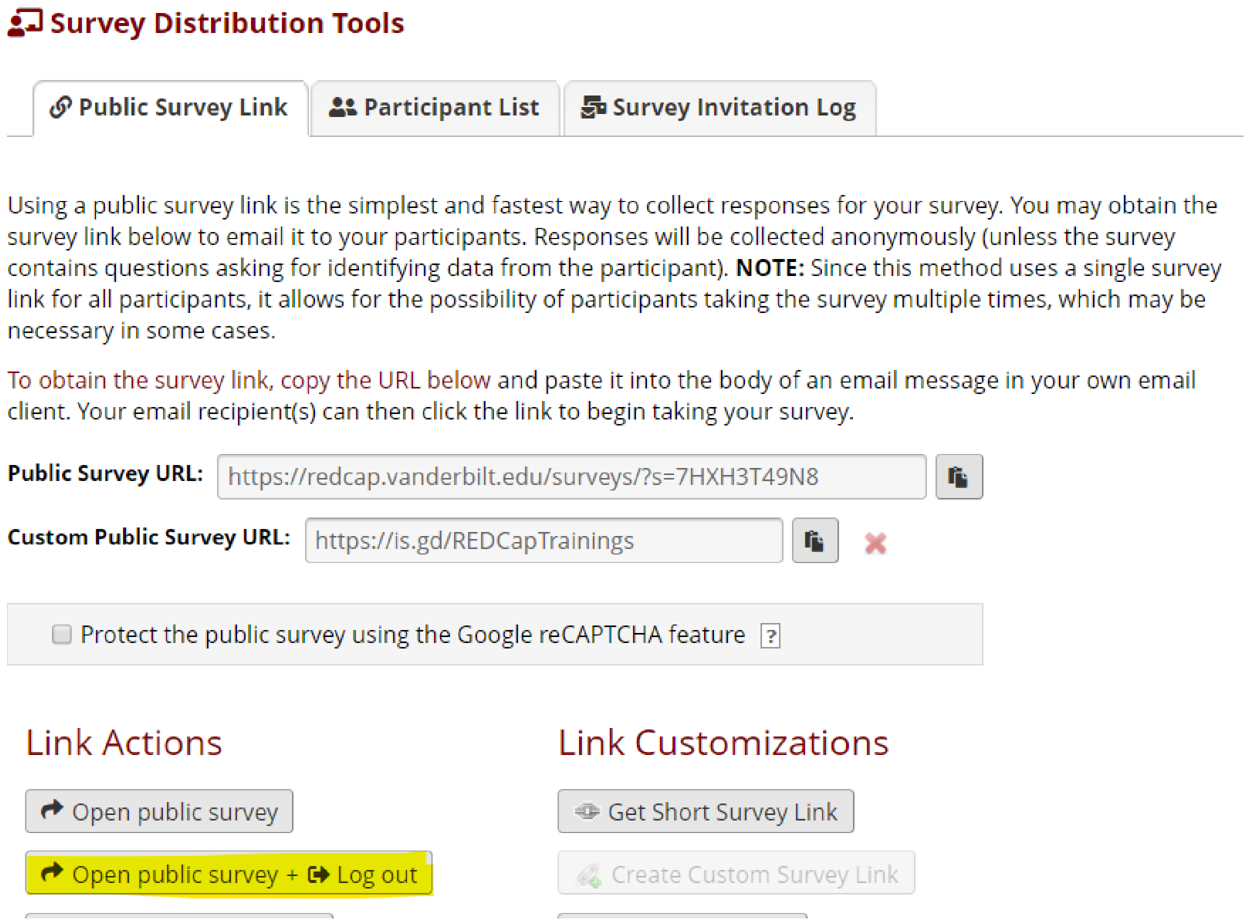
This button manually triggers automated invitations. This is useful for sending automated invitations to records that existed before the automated invitation was created or if the data changed in existing records so that they now meet the conditional logic of the automated invitation. Reminder: new automated invitations don’t automatically trigger retroactively. You can see in the below screenshot that you have the ability to select which automated invitation you want to re-evaluate:



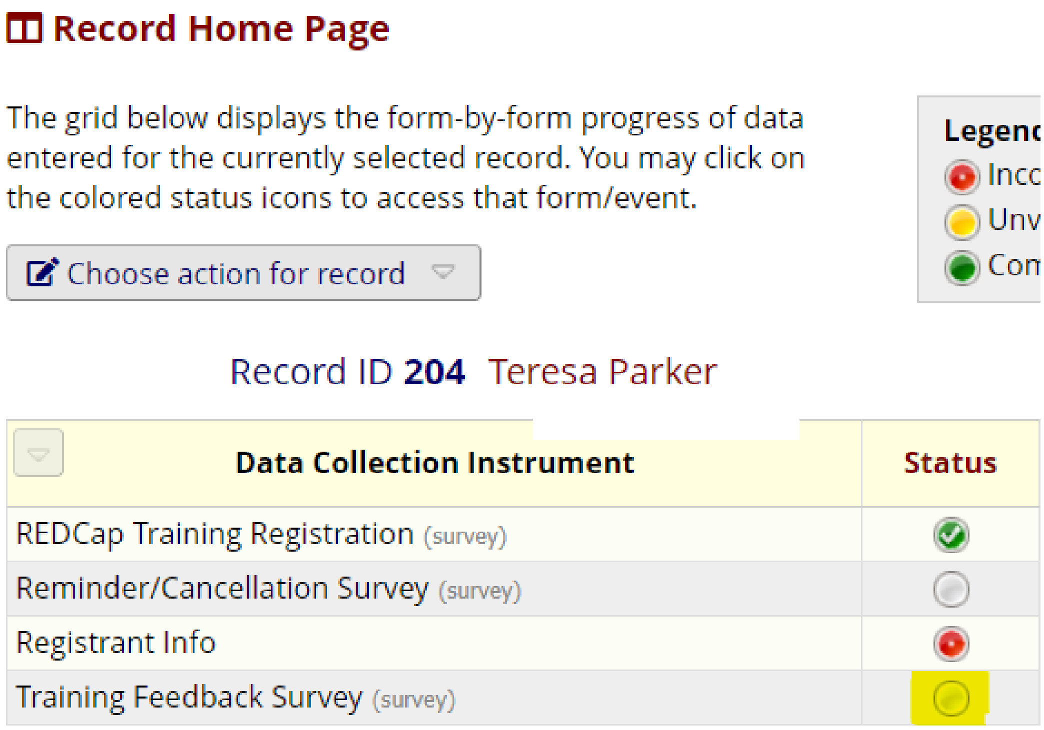
Giving device to survey participant in person

If you want a person to complete a survey as a participant and they are in the same physical space as you, it is best to use the logout feature when handing the device over to the participant. That will prevent the participant from having access to your project. This protects the security of the data that is stored in your project.

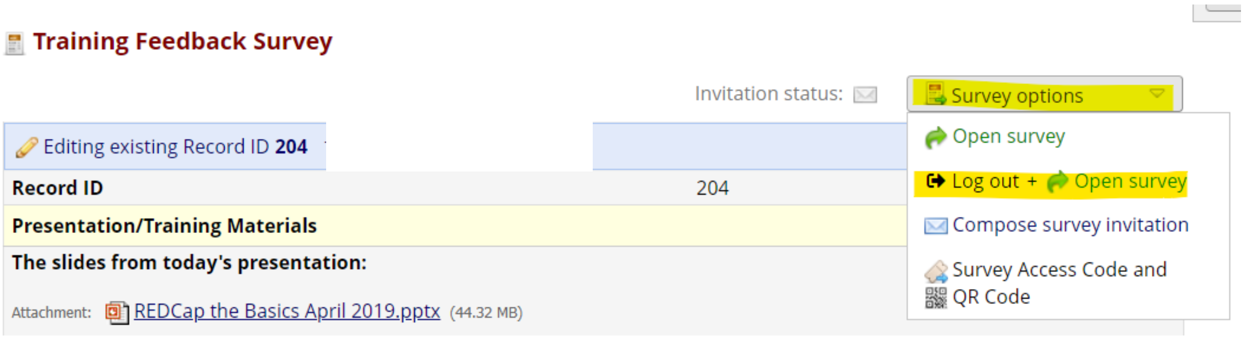
If the survey you wish the person to complete is the first survey in the project and there is a public survey link, you can go to Survey Distribution Tools and select the logout option from there:



If the survey you wish them to complete is not the first survey, navigate to the record home page for that person via the Record Status Dashboard or Add/Edit records:



On that record home page, click on the empty circle of the survey you want the person to complete. In this example, you're clicking on the highlighted circle in the image above. You will see a screen like this:



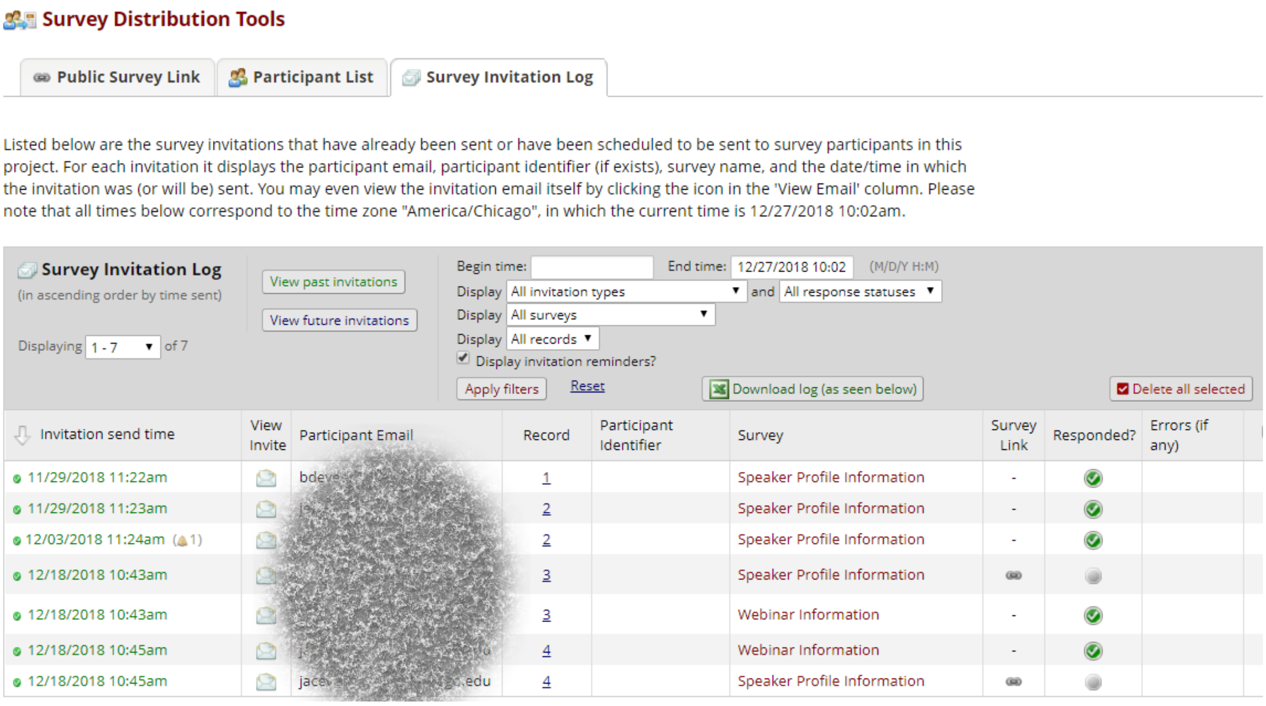
If you click on the Survey options button on the top right, you see an option to Log out and open the survey. This means the person will now be entering their information into the instrument as a survey. They will not see the left-hand navigation bar. This protects the security of the data that is stored in your project.

Viewing Survey Invitations

The **Survey Invitation Log** tab of the **Survey Distribution Tools** page can display all of the survey invitation messages sent for your project and the date and time that any future invitations are scheduled to be sent.

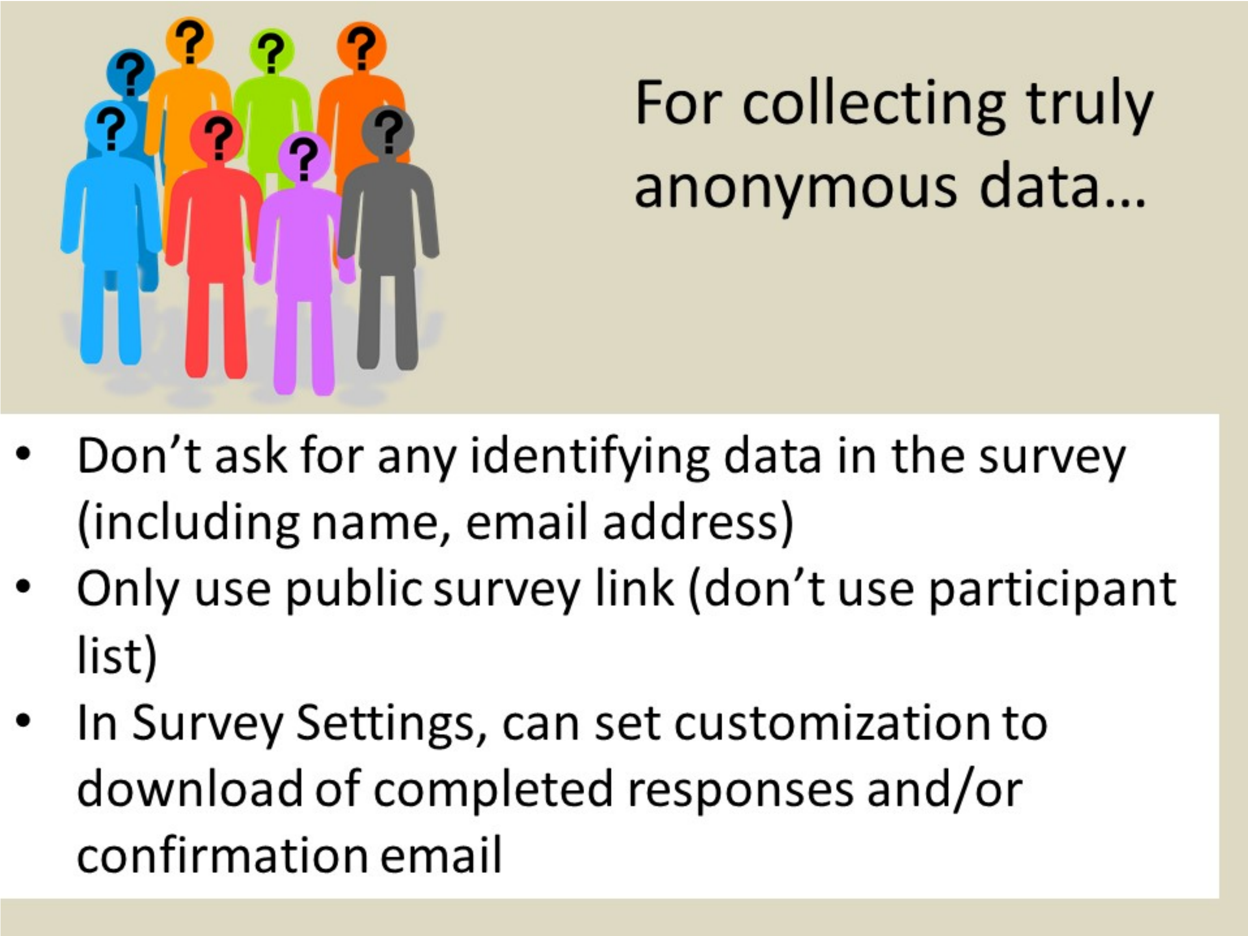
Use the filter criteria to specify the criteria for the invitations you are interested in seeing. Click Apply filters to refresh the list.

Unsent invitations (including reminders) may be deleted by clicking the red **X**. There is no undo, but you may always send or invitation manually.



To view the content of the email invitation, click on the envelope icon.

Best practices for collecting anonymous data via Surveys



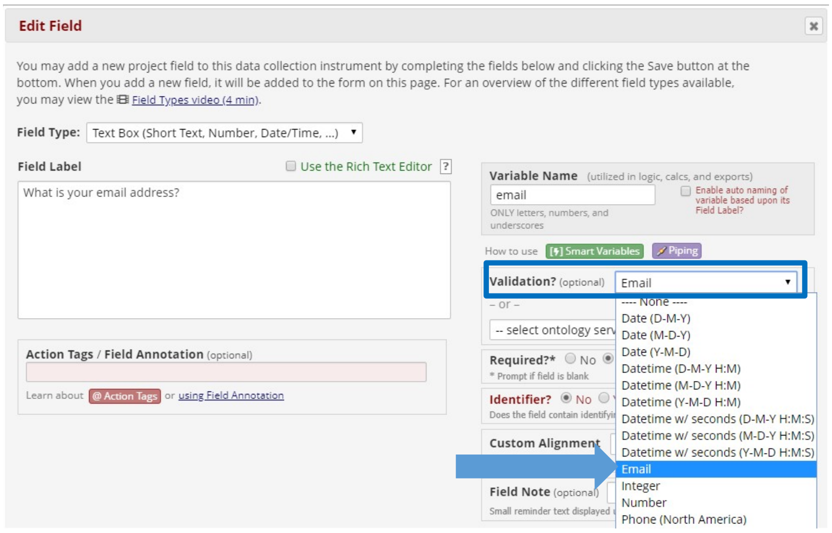
Testing the survey

It is critical to test your survey to make sure it looks and behaves the way you want it to for your survey participants. See Adding test data for surveys for suggestions on how to do that.

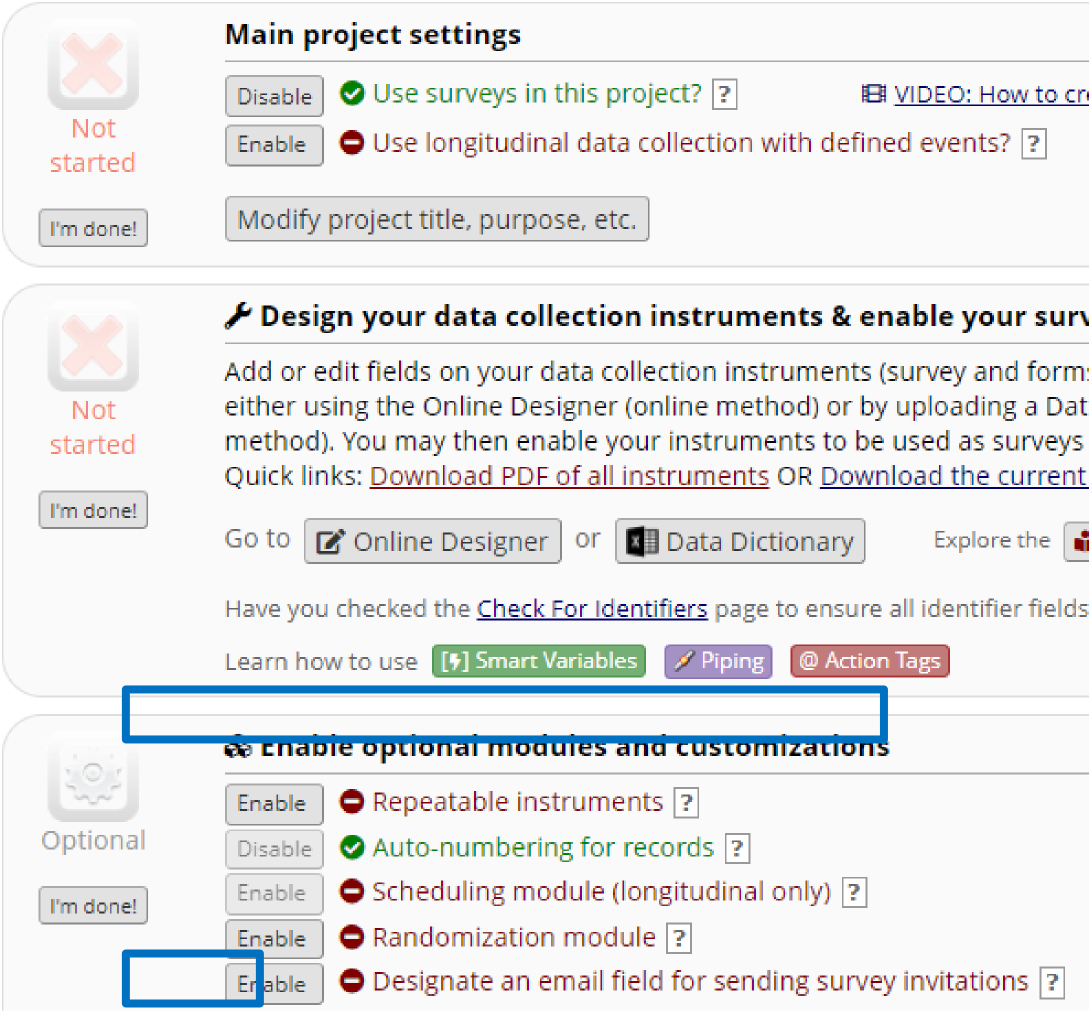
If you have a follow-up survey

These are instructions for a Classic (not Longitudinal) project where the first instrument is a survey (and therefore the public survey link is available) and you plan on having a follow-up survey(s) in the same project.

1. Make sure there is an email-validated text box field in the first survey that asks for the survey participant's email address. It should be a required question. To do this, add a field, select the field type 'text box', fill out the field label and variable name and select 'email' from the validation drop-down list:



2. On the project set up page, scroll down to Enable Optional Modules and customizations. Click the 'Enable' button for 'designate an email field…'



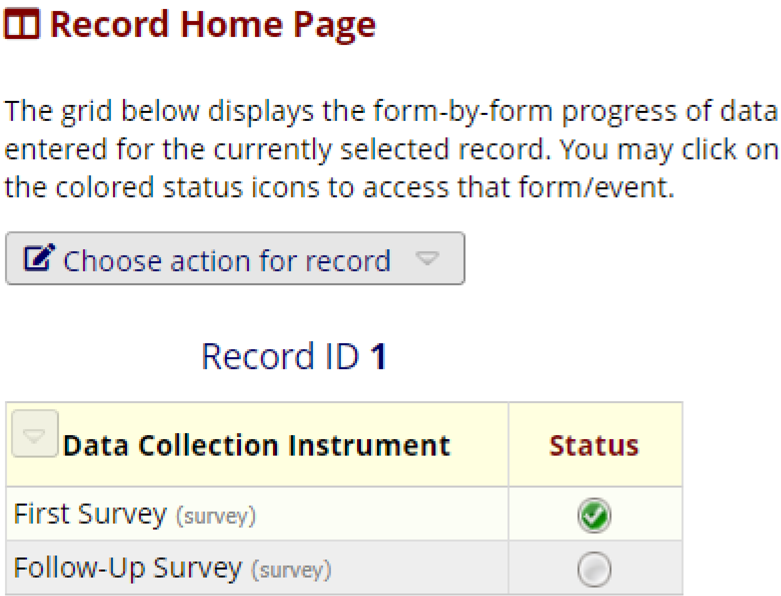
a. A dialog box will pop up. Click on the drop-down arrow and select the email address in the first survey. If you are not seeing the email address field that is in your first survey, it is likely because you have not added email validation to the field.

With those two pieces in place, REDCap will have the email address of the survey participant and therefore know where to send any follow-up surveys.

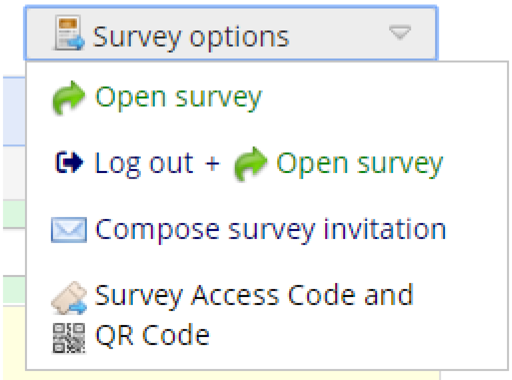
Testing a follow-up survey

To see how a follow-up survey will look, follow these steps. These instructions are for a Classic (not longitudinal) project whose first instrument is a survey, and therefore a public survey link is available:

1. Create a test record for the first survey. The easiest way to do this is to go to Survey Distribution Tools, Open Public Survey and enter test data.
2. Go to Add/Edit Records or the Record Status Dashboard. Find the record that you just created and select it. You should land on the Record Home page:



3. Click on the circle that aligns with the follow-up survey. You will now be on the form-version of that instrument for that specific record.
4. In the upper right-hand corner you will see a survey options button:



5. Select the Open survey option. It will open up a new tab so that you are now viewing the instrument as a survey for that specific record.

ERASE CURRENT VALUE Message during survey entry

If a survey participant lets you know that they are seeing a message that reads "ERASE CURRENT VALUE OF FIELD", it is not an error! This is REDCap letting the participant know that there is a value hidden on that page. REDCap is asking if the survey participant wants that hidden value to be over-written, or if they want to retain the value.

This situation can occur because of a couple scenarios:

- there is a field with the action tags @DEFAULT + @HIDDEN, whose value is being pre-filled due to the default action tag AND is not displaying due to branching logic
- the survey participant has changed an answer(s). By changing the answer to a question, questions that previously displayed due to branching logic are now suppressed (because the condition which triggered the follow-up questions to appear no longer applies).

The message gives the survey participant the option to retain the existing data (by clicking 'cancel') or erase the data (by clicking 'ok').

As an example,

- let's say survey respondent Keeda selected the answer "other" to a question "What is your favorite flavor ice cream? (variable name **flavor**).
- When she selects that choice, that causes the question asking her to describe her other favorite flavor (variable name **flavor_other**) to appear.
- Keeda enters 'pistachio' for the answer to flavor_other. Then Keeda saves the survey.
- If Keeda returns a few days later and changes her choice for that first question from 'other' to 'strawberry', she is going to be prompted with a message that says that REDCap is going to erase the data value she has saved for the subsequent question (the **flavor_other** question). That's because that follow-up question no longer applies to her.

Keeda will then have the option to click 'ok' to erase her response 'pistachio' or to click 'cancel' to keep the original answers to those two questions.