

Surveys

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

3 Survey Design Spaces within REDCap

Online Designer

- Enter your questions in an instrument
- Enable instrument as a survey
- Edit Survey Settings
- Set survey notifications and survey login

Project Setup

- Enable surveys on project
- Enable 'designate an email field' (if applicable)

Survey Distribution Tools

- Access survey link
- Communicate with survey participants
- Track survey responses/invitations

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.

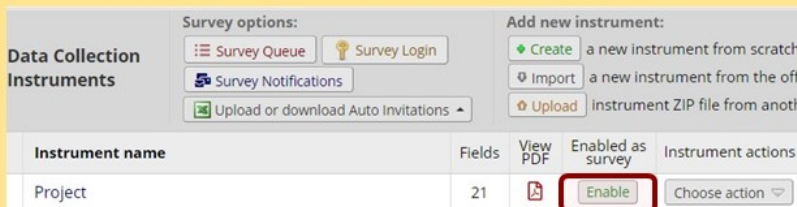
A video tutorial of creating a simple survey can be found at this link: <https://vimeo.com/435866091/bac2fc64bc>

Enable a Survey in 3 Easy Steps!

1 Enable “Use surveys in this project” on **Project Setup** tab



2 Enable instrument as a survey in **Online Designer**

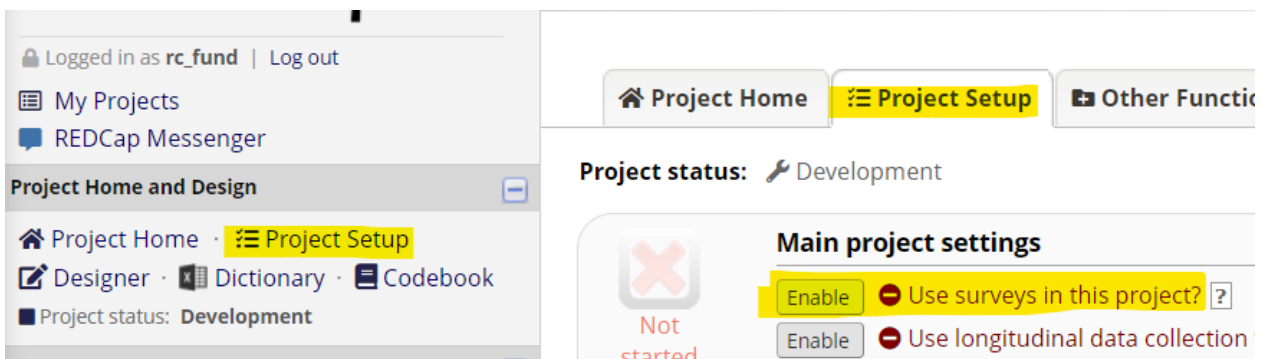


3 Save **Survey Settings**

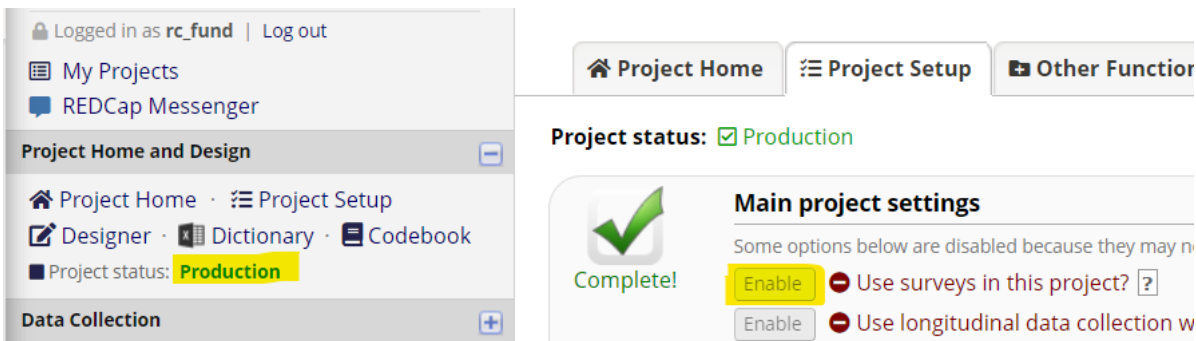
+ Set up my survey for data collection instrument "Project"

Enable Surveys within the project

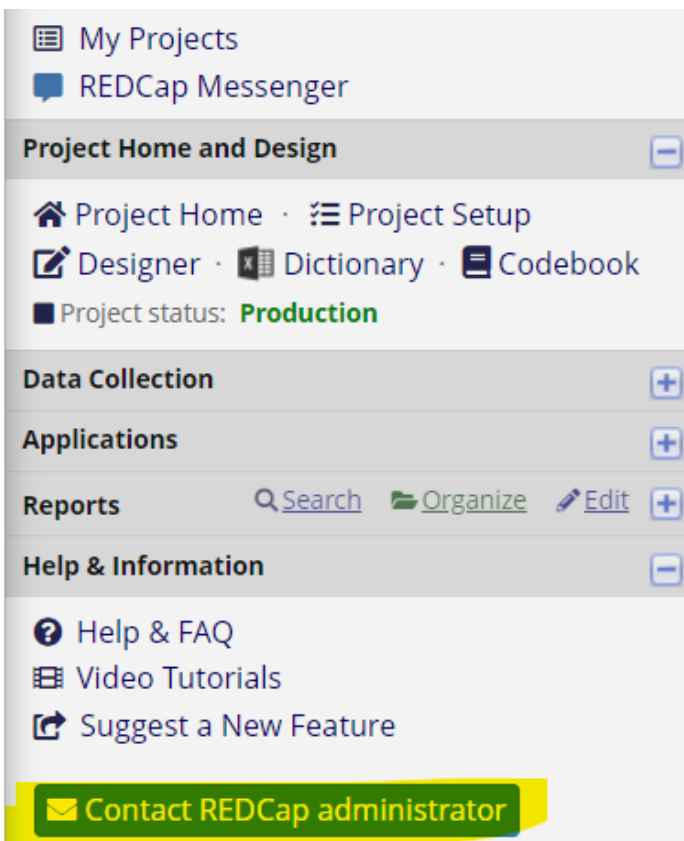
If you plan to use surveys in your project, you must go to the Project Setup page and click the first option under Main project settings:



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

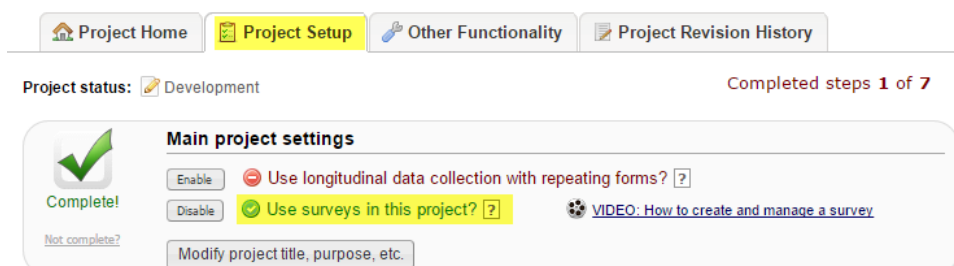


You will need to click on the 'Contact REDCap administrator button' from within your project and request that the project be enabled for surveys.



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.

The screenshot shows the 'Online Designer' tab selected in the top navigation bar. Below the navigation bar, there are buttons for 'Project Home', 'Project Setup', 'Online Designer', 'Data Dictionary', and 'Codebook'. A 'Create snapshot of instruments' button is visible with a subtext 'Last snapshot: never'. Below this, a note states: 'The Online Designer will allow you to make project modifications to fields and data collection instruments via your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.'

The main content area is titled 'Data Collection Instruments' and includes several options: 'Survey Queue', 'Survey Login', 'Survey Notifications', and 'Upload or download Auto Invitations'. To the right, under 'Add new instrument:', there are 'Create', 'Import', and 'Upload' buttons with their respective descriptions.

| Instrument name | Fields | View PDF | Enabled as survey | Instrument actions |
|-----------------|--------|----------|-------------------|--------------------|
| Demographics | 7 | | Enable | Choose action |

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...

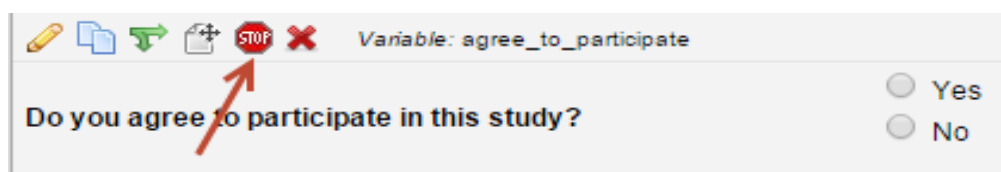
Field function in Surveys

| 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.

Set up Stop Actions for this Survey Question

STOP Stop Actions (for survey questions only):

The survey participant will be prompted to end the survey when ANY choices checked below are selected for this question on the survey. Stop Actions will not be enabled on the form when viewing in REDCap as an authenticated user, but only become enabled when a participant views this data collection instrument as a survey.

Do you agree to participate in this study?


[Select All](#) | [Deselect All](#)

- Yes
 No

Save

Close

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

 Variable: agree_to_participate

Do you agree to participate in this study?

Yes
 No [End 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”.

End the survey?

You have selected an option that triggers this survey to end right now. To save your responses and end the survey, click the button below to do so. If you have selected the wrong option by accident and do not wish to leave the survey, you may click the other button below to continue, which will also remove the value of the option you just selected to allow you to enter it again and continue the survey.

End the survey now

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.

STOP Options related to Survey Stop Actions:

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

If a Stop Action triggers the end of the survey, you may choose to keep the submitted responses or to prevent them from being saved as data in the project.

Do NOT save the survey response when a Stop Action is triggered

Do NOT save the survey response when a Stop Action is triggered

Save all survey responses regardless of Stop Action being triggered (default)

previous pages prior to triggering the Stop Action, all data collected thus far in that survey will be saved. Additionally, if the record does not contain data in any other instrument, the entire record itself will be deleted during this process.

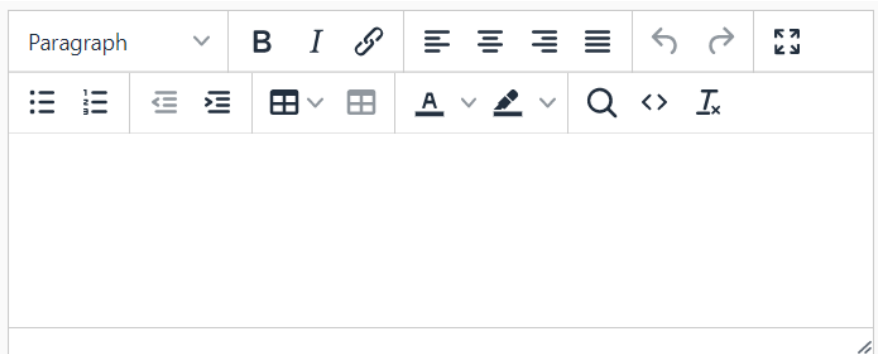
Alternate survey completion text if the survey ends via a Stop Action

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.

Options related to Survey Stop Actions:

Alternate Survey Completion Text (optional)

This completion text is ONLY displayed when a Stop Action triggers the end of the survey. If left blank, the standard Survey Completion Text will be used.

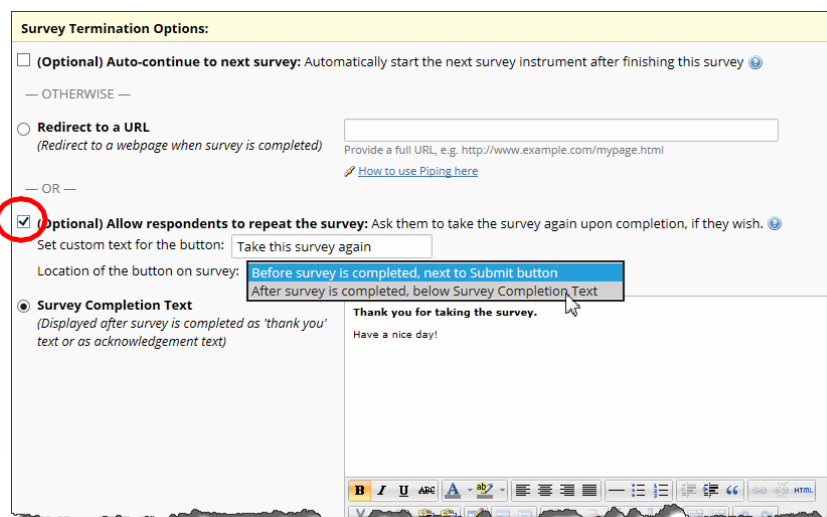


Enabling Repeating Instruments for a Survey Instrument

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.

Survey Access:

Response Limit (optional)
 (Maximum number of responses to collect. Prevents respondents from starting the survey after a set number of responses have been collected.) ?

(e.g., 150) If left blank, the response limit will not be enforced.

Will include

Custom text to display to respondent on survey when limit is reached:

Time Limit for Survey Completion (optional)
 (The amount of time that each respondent has to complete the survey based on when they were initially sent the survey invitation. Note: This feature excludes public survey links.)

days hours minutes

If the respondent loads the survey after this time has passed, it will not allow them to begin or continue the survey. (If all are left blank, the time limit will not be enforced.)

Survey Expiration (optional)
 (Time after which the survey will become inactive.) ?

The time must be for the time zone **America/Chicago**, in which the current time is **12/31/2018 13:31**.

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

Allow respondents to return without needing a return code ?

Allow respondents to return and modify completed responses ?

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

Survey Termination Options:

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

— OTHERWISE —

Redirect to a URL
(Redirect to a webpage when survey is completed)

Provide a full URL, e.g. <http://www.example.com/mypage.html>

[How to use Piping here](#)

— OR —

Survey Completion Text
(Displayed after survey is completed as 'thank you' text or as acknowledgement text)

Thank you for taking the survey.

Have a nice day!



[How to use Piping here](#)

PDF Auto-Archiver
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.

- Disabled
 Auto-Archiver enabled
 Auto-Archiver + e-Consent Framework [What is the e-Consent Framework?](#)
(includes end-of-survey certification & archival of PDF consent form)

Send confirmation email (optional)?
(Email the respondent when they complete the survey)

No ▼

[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.

(Optional) Allow respondents to repeat the survey: Ask them to take the survey again upon completion, if they wish. 

Set custom text for the button:

Location of the button on survey:

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.

 **PDF Auto-Archiver**
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.

Disabled
 Auto-Archiver enabled
 Auto-Archiver + e-Consent Framework [What is the e-Consent Framework?](#)
(includes end-of-survey certification & archival of PDF consent form)

e-Consent Framework Options: For e-Consent it is sometimes required to include the consenting participant's name (and date of birth in some cases) on the final consent form as extra documentation of their identity. Below you may select fields used to capture that info. You may also enter the current e-Consent version and e-Consent type for this form. The values for the fields below will be automatically inserted into the footer of the PDF consent form that the participant will review at the end the survey, after which that PDF 'hard-copy' will be archived in the File Repository. [Read more](#)

e-Consent version: e.g., 4

First name field:

Last name field:

Note: If you are using a single field to capture whole name, you may select it for either first/last name above while leaving the other name field unselected.

Optional fields (these are not always necessary for e-Consent):

e-Consent type: e.g., Pediatric

Date of birth field:

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.

 **Send confirmation email (optional)?**
(Email the respondent when they complete the survey)


Yes ▾

Provide email subject, email message, and (optionally) an attachment to be sent to respondent when they complete the survey. [How to use Piping here](#)


From:


Subject:

Expand

 Attachment: No file chosen

Include PDF of completed survey as attachment

 **WARNING:** 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).

 **Note:** Because the e-Consent Framework option is enabled on this page, the PDF included here will not be the full-length PDF but will be the 'compact' PDF, which omits unanswered questions and unselected choices.

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)



If collecting PHI, in Survey Settings...

- Set customization to allow download but **DON'T** attach completed responses to confirmation email
- If enable save & return, don't tick box to allow participant to return without a return code

Survey Design tip re: User Access

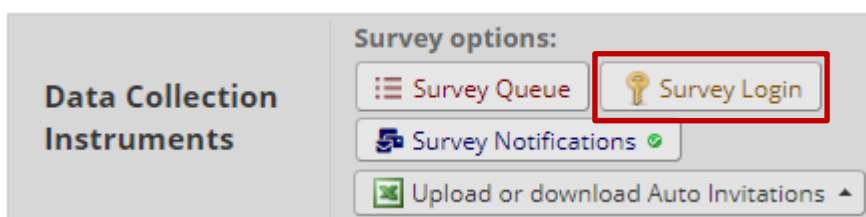
In the User Rights application, you will notice that you can limit a user's access by instrument. So, when designing your project, you might think about breaking up the information that will be entered into separate instruments, in order to restrict access. For example, say you have an application where 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:

🔑 Survey Login
✕

You may enable a Survey Login page on one or more surveys that will force your survey respondents to authenticate (log in) on your surveys before they are allowed to view and complete the survey. [Tell me more](#)

Below, select the fields that you wish to serve as the login fields for the respondent to enter, as well as several other settings that control how the survey login is applied to the surveys in your project. NOTE: Once a respondent has logged in to a survey, they will not be prompted to enter their login credentials again if they return to that survey or begin another survey using the survey login within the following 30 minutes.

| | |
|--|--|
| 🔑 Enable Survey Login? | Enabled ▾ |
| Fields to display on the survey login form | |
| Login field #1 <small>🔗 Add another login field</small> | login_code "Survey Login Code:" ▾ |
| Customizations for survey login | |
| Minimum number of fields above that are required for login | 1 ▾ |
| Apply the survey login to all surveys in project? | All surveys ▾ |
| Custom error message: Provide a custom error message that will be displayed on the survey login form for when the user experiences issues, such as not being able to log in successfully, so that they may contact you for help. <small>EXAMPLE: "If you have any trouble logging in to the survey, please contact survey_admin@myinstitution.edu for help."</small> | <div style="border: 1px solid #ccc; padding: 5px; font-size: 10px;"> You have entered the incorrect login code. If you need help, please contact the project owner by calling 816-555-5555. Thank You! </div> <small>HTML may be used in order to add links or to add style to text.</small> |
| Security settings for survey login (optional) | |
| Number of failed login attempts before respondent is locked out for a specified amount of time, which is set below. | <input style="width: 50px;" type="text" value="3"/> 0 = Disabled |
| Amount of time respondent will be locked out after having failed login attempts exceeding the limit set above. | <input style="width: 50px;" type="text" value="1"/> Minutes, 0 = Disabled |

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.

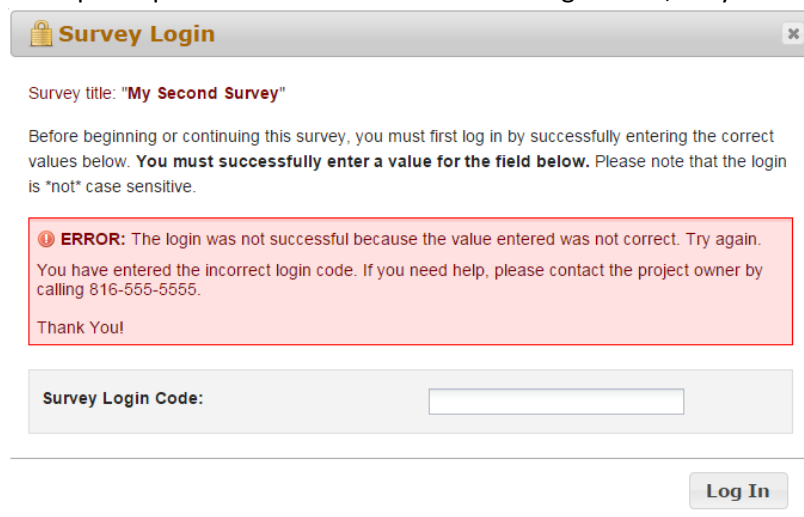
Amount of time participant will be locked out: Enter the amount of time (in minutes) you would like to have the participant locked out for. If you do not wish to lock them out, enter 0.

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



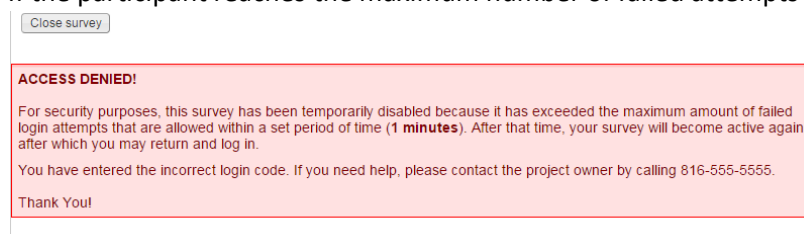
The screenshot shows a dialog box titled "Survey Login" with a close button (X) in the top right corner. The text inside reads: "Survey title: 'My Second Survey'". Below this, it says: "Before beginning or continuing this survey, you must first log in by successfully entering the correct values below. **You must successfully enter a value for the field below.** Please note that the login is *not* case sensitive." There is a text input field labeled "Survey Login Code:" and a "Log In" button at the bottom right.

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



The screenshot shows the same "Survey Login" dialog box as above, but with an error message displayed in a red-bordered box. The error message reads: "❗ **ERROR:** The login was not successful because the value entered was not correct. Try again. You have entered the incorrect login code. If you need help, please contact the project owner by calling 816-555-5555. Thank You!". Below the error message is the "Survey Login Code:" input field and the "Log In" button.

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



The screenshot shows the "Survey Login" dialog box with a "Close survey" button in the top left corner. A red-bordered box contains the following text: "**ACCESS DENIED!** For security purposes, this survey has been temporarily disabled because it has exceeded the maximum amount of failed login attempts that are allowed within a set period of time (**1 minutes**). After that time, your survey will become active again, after which you may return and log in. You have entered the incorrect login code. If you need help, please contact the project owner by calling 816-555-5555. Thank You!".

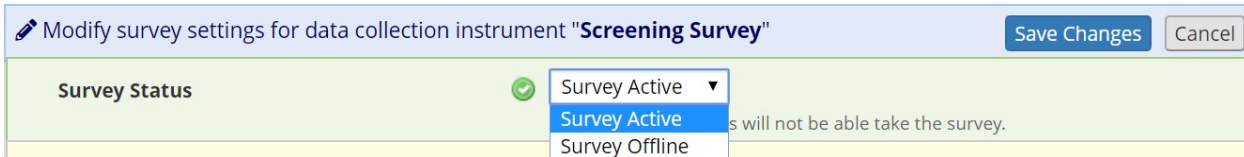
Survey Settings

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

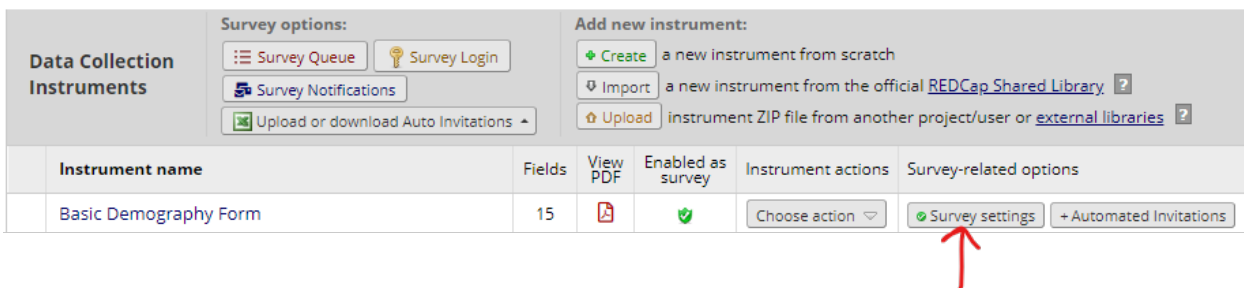


Modify survey settings for data collection instrument "Screening Survey" Save Changes Cancel

Survey Status ✓ Survey Active Survey Active Survey Offline Participants will not be able take the survey.

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



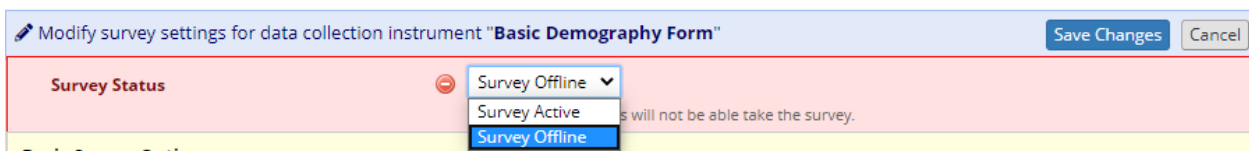
Data Collection Instruments

Survey options: Survey Queue Survey Login Survey Notifications Upload or download Auto Invitations

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

| Instrument name | Fields | View PDF | Enabled as survey | Instrument actions | Survey-related options |
|-----------------------|--------|----------|-------------------|----------------------------|---|
| Basic Demography Form | 15 | | ✓ | Choose action | Survey settings + Automated Invitations |

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



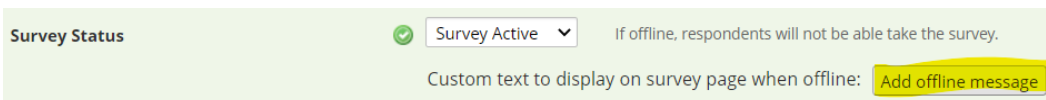
Modify survey settings for data collection instrument "Basic Demography Form" Save Changes Cancel

Survey Status ✗ Survey Offline Survey Active Survey Offline Participants will not be able take the survey.

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

Custom offline message for surveys in offline status

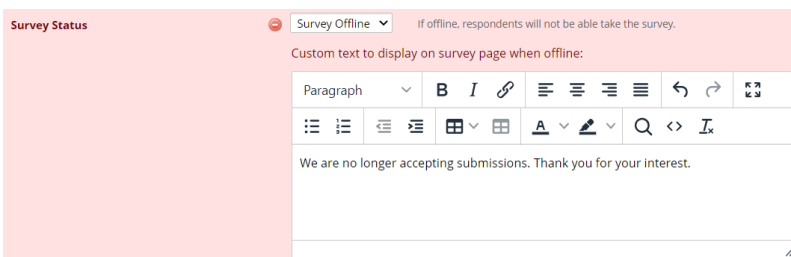
You can provide custom text that is displayed to participants only when the survey is offline. This text can be set at the top of the Survey Settings page. Click the ‘add offline message’ button:



Survey Status ✓ Survey Active Survey Active Survey Offline If offline, respondents will not be able take the survey.

Custom text to display on survey page when offline: Add offline message

And then enter your custom message:



Survey Status ✗ Survey Offline Survey Active Survey Offline If offline, respondents will not be able take the survey.

Custom text to display on survey page when offline:

Paragraph B I 🔗 ☰ ☰ ☰ ☰ ↶ ↷ ↻

☰ ☰ ☰ ☰ ☰ ☰ A 🖌 🔍 <> I_x

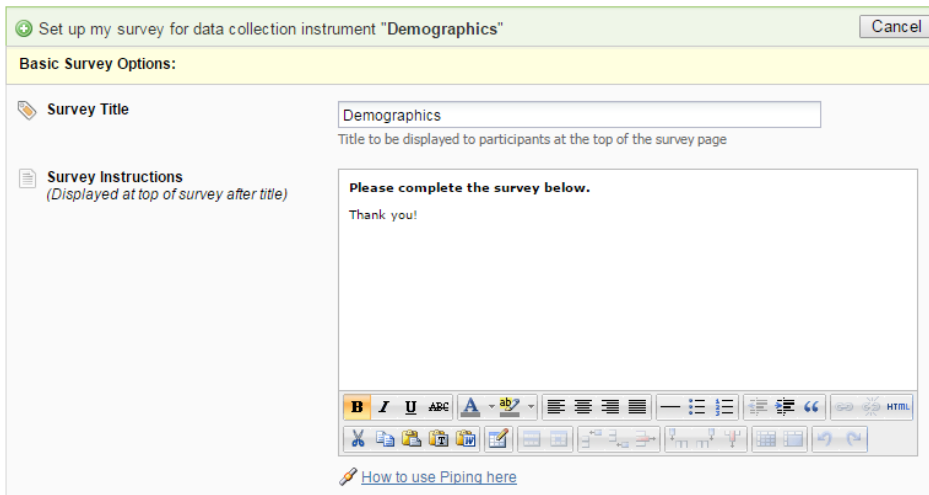
We are no longer accepting submissions. Thank you for your interest.

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.



Set up my survey for data collection instrument "Demographics" Cancel

Basic Survey Options:

Survey Title
Demographics
Title to be displayed to participants at the top of the survey page

Survey Instructions
(Displayed at top of survey after title)
Please complete the survey below.
Thank you!

How to use Piping here

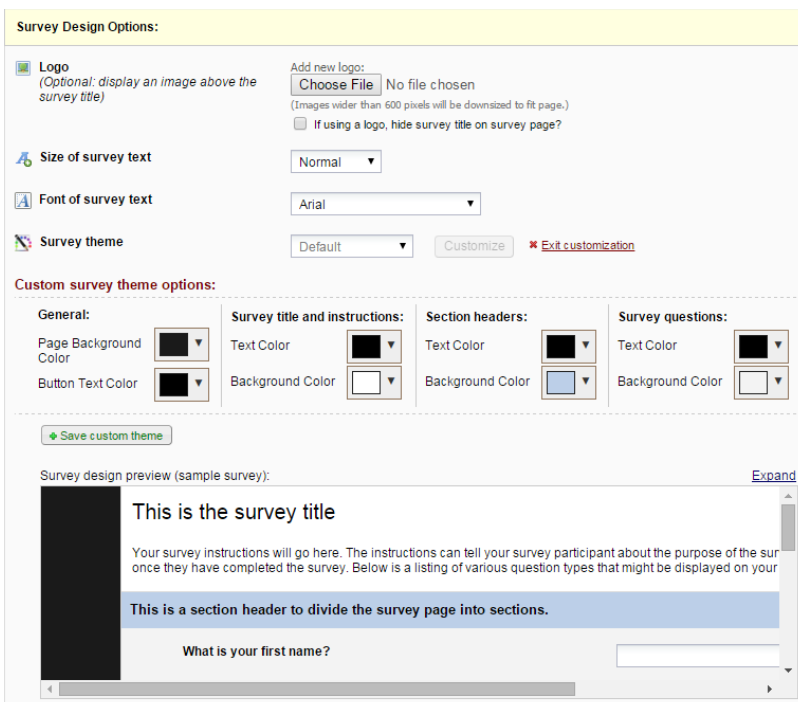
Survey Design Options

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 Design Options:

Logo
(Optional: display an image above the survey title)
Add new logo:
Choose File | No file chosen
(Images wider than 600 pixels will be downsized to fit page.)
 If using a logo, hide survey title on survey page?

Size of survey text
Normal

Font of survey text
Arial

Survey theme
Default Customize Exit customization

Custom survey theme options:

| General: | Survey title and instructions: | Section headers: | Survey questions: |
|-----------------------|--------------------------------|------------------|-------------------|
| Page Background Color | Text Color | Text Color | Text Color |
| Button Text Color | Background Color | Background Color | Background Color |

Save custom theme

Survey design preview (sample survey): Expand

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the survey once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

This is a section header to divide the survey page into sections.

What is your first name?

Survey Customizations in Survey Settings

Survey Customizations:

- Question Numbering:** Auto numbered
- Question Display Format (One page or multiple pages?):** All on one page
 - Display page numbers at top of survey page
 - Hide the 'Previous Page' button (i.e., Back button) on the survey page (prevents respondents from going back to previous pages)
- For 'Required' fields, display the red 'must provide value' text on the survey page?** Yes
 - If 'No', then it will NOT display the following text beneath all 'Required' fields: * must provide value
- Allow survey respondents to view aggregate survey results after completing the survey?** Disabled
 - Additional settings:
 - Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10)
 - Do not show plots for questions lacking diversity in response values? (What does this mean?)
- Text-To-Speech functionality (Allows text on survey page to be read audibly to participants.)** Disabled
 - When enabled, icons will be displayed next to all text on the survey page, and when clicked, the text will be read out loud to the participant (must have computer speakers turned on).
 - NOTICE: All text that is spoken is sent to a service hosted at Vanderbilt University that utilizes the AT&T Text-to-Speech API service. Be advised that if the survey utilizes piping, for privacy concerns, data piped from Identifier fields will "not" be sent to the service with the rest of the text but will instead be redacted.

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.

Question Numbering
For custom numbering, each question's number will be blank by default until manually added via the Online Designer or Data Dictionary.

Custom numbered

Question numbers will not display correctly if using auto numbering if some questions have branching logic employed. Question auto numbering has been automatically disabled because some of your survey questions use branching logic.

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:

Edit Field

You may add a new project field to this data collection at the bottom. When you add a new field, it will be added to the bottom of the list. You may view the [Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date, etc.)

Question Number (optional) A

Displayed only on the survey page

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

Question Display Format in Survey Settings

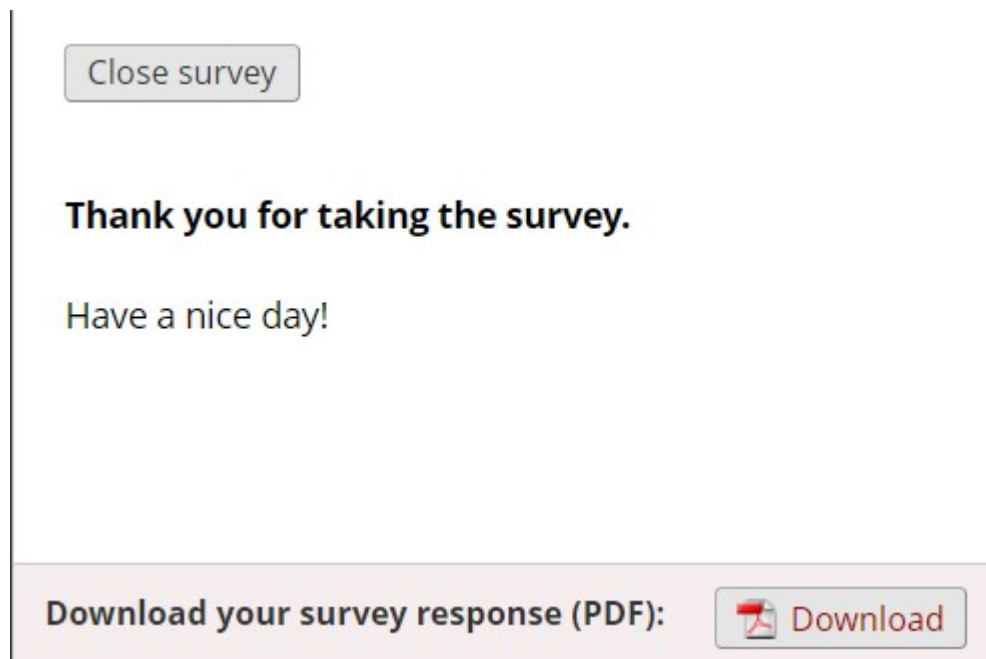
All on one page: Select this if you would like all of your questions placed on one page.

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](#)

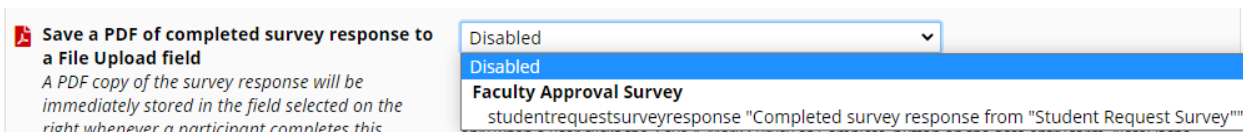
Let’s say you have a project with two instruments: the first is a survey that a student will complete and the second is a survey a Faculty member will complete in response to the student’s request:

| 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](#)

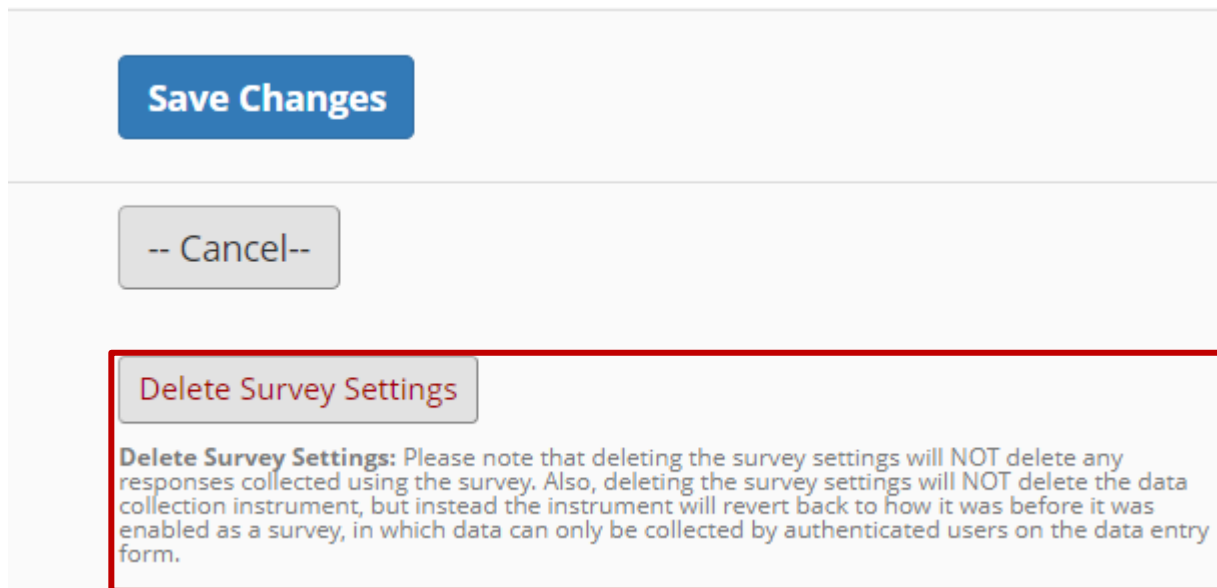
The default setting is disabled. Otherwise you may choose to display Graphical Plots, Descriptive Statistics or both plots and statistics. If you enable this setting, you can choose the minimum number of responses before participants are allowed to view the aggregate data.

[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.

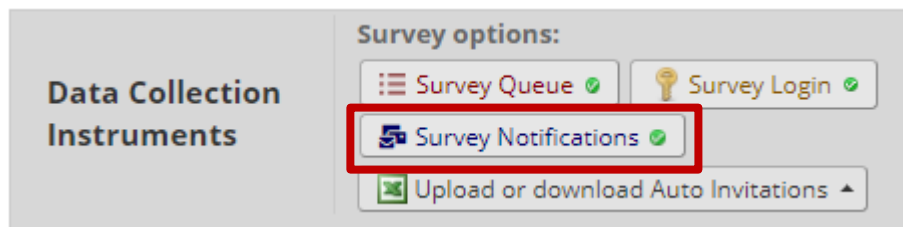
To change an instrument from a survey back into a data entry form (reverting a survey to a data entry form)

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:

Logged in as rc_fund | Log out

My Projects

REDCap Messenger

Project Home and Design

Project Home · Project Setup

Designer · Dictionary · Codebook

Project status: Development

Data Collection

Survey Distribution Tools

- Get a public survey link or build a participant list for inviting respondents

Record Status Dashboard

- View data collection status of all records

Add / Edit Records

- Create new records or edit/view existing ones

Show data collection instruments

Applications

Help & Information

Help & FAQ

Video Tutorials

Suggest a New Feature

Contact REDCap administrator

Survey Distribution Tools

Public Survey Link | Participant List | Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

Public Survey URL:

Protect the public survey using the Google reCAPTCHA feature ?

Link Actions

Open public survey

Open public survey + Log out

Send me URL via email

Survey Access Code or QR Code

Link Customizations

Get Short Survey Link

Create Custom Survey Link

Get Embed Code

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:

Survey Distribution Tools

 **Public Survey Link**


 **Participant List**

 **Survey Invitation Log**

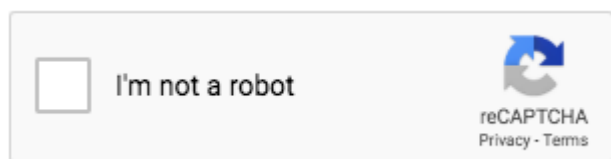
Using a public survey link is the simplest and fastest way to collect responses for your survey. Copy the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single link for all participants, it allows for the possibility of participants taking the survey multiple times if necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your email client. Your email recipient(s) can then click the link to begin taking your survey.

Public Survey URL: 

Protect the public survey using the Google reCAPTCHA feature 

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

Survey Distribution Tools



- 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:

Survey Distribution Tools



 Public Survey Link

 Participant List

 Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier (must first be enabled by clicking the 'Enable' button in the table below). Note: All surveys are anonymous unless you 1) are using Participant Identifiers or 2) have enabled the design.

Participant List belonging to [Initial survey] "Employee Information" ▾

Displaying 1 - 1 ▾ of 1  Add participants  Compose Survey Invitations

| Email | Record | Participant Identifier |
|-------|--------|------------------------|
| | | Enable |

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

Participant List belonging to [Initial survey] "Employee Information" ▾

Displaying 1 - 3 ▾ of 3  Add participants  Compose Survey Invitations

| Email | Record | Participant Identifier (optional) |
|-----------------------|--------|-----------------------------------|
| | | Disable |
| mycap@vumc.org | | MyCap admin |
| redcap@vanderbilt.edu | | REDCap admin |
| redcapapp@vumc.org | | REDCap Mobile app admin |

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.

| 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:

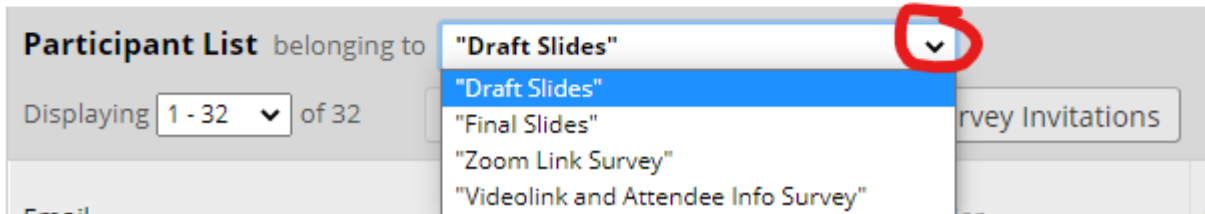
- Participant Identifier values must be unique
- Email addresses need not be unique. You may add your own (or a project) email address for all records, for example, if you wish to tailor each request to each specific participant and send the request email yourself

[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:

The Participant List option allows you to **send a customized email** to anyone in your list as possible to identify an individual's survey answers, if desired, by providing an Identifier for e (enabled by clicking the 'Enable' button in the table below). [More details](#)



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.

✉ Email a Survey Invitation to Participants ✕

Info

Survey title: e-Diary

Event: Randomisation

When should the emails be sent?

Immediately

At specified time: M-D-Y H:M

The time must be for the time zone System/Localtime, in which the current time is 04-09-2013 11:14.

Compose email message

From: ▼

To:

Subject:

NOTE: The survey link will be automatically included in the email message.

You may use HTML formatting in the email message: bold, <u> underline, <i> italics, link, etc.

Participant List Actions: -- check/uncheck participants -- ▼

(those who have not responded)

| Email | Participant Identifier | Scheduled? | Sent? |
|---|------------------------|------------|-------|
| <input checked="" type="checkbox"/> a@email.com | | - | ✉ |
| <input checked="" type="checkbox"/> b@email.com | | - | ✉ |

- 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.

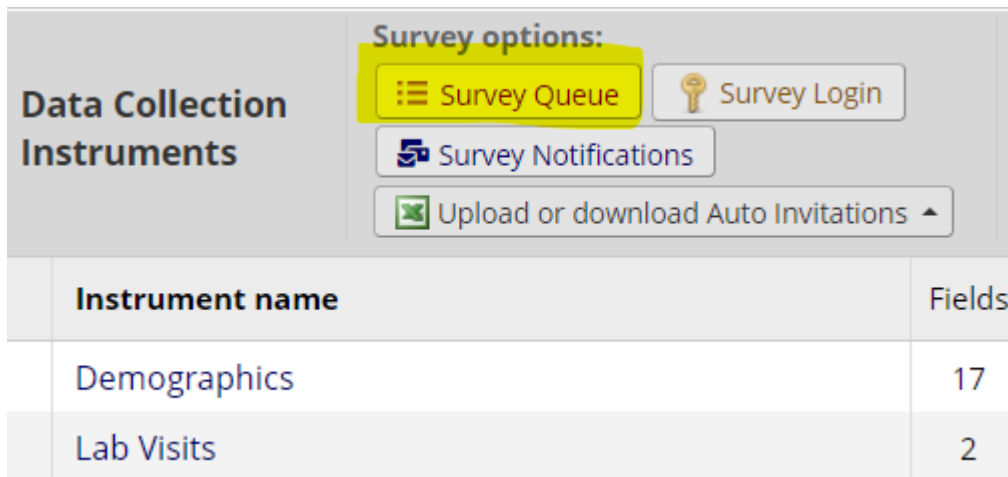
- Select the desired recipients by ticking the relevant checkbox. The Actions drop-down list gives you shortcuts to ticking:
 - Check All
 - Uncheck All
 - Check Sent
 - Check Not Sent
 - Check Scheduled
 - Check Not Scheduled
 - Check Not Scheduled and Not Sent
- There is no limit to the number of times 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.



| Instrument name | Fields |
|-----------------|--------|
| Demographics | 17 |
| Lab Visits | 2 |

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.

Set up Survey Queue

The Survey Queue displays a list of your surveys to a participant all on a single page, in which the queue comprises all surveys that are to be completed (like a 'to-do' list) as well as the surveys that the participant has already completed. [Tell me more](#)

[+ Add custom text to display at top of survey queue](#)

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

Keep the Survey Queue hidden from participants?

This setting will keep the Survey Queue table hidden from participants, and will force Auto Start to be enabled for all queue-activated surveys (even if unchecked below). This is useful if you wish to use the Survey Queue to automatically guide survey participants to the next survey without displaying the queue of surveys.

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.

Set up Survey Queue

The Survey Queue displays a list of your surveys to a participant all on a single page, in which the queue comprises all surveys that are to be completed (like a 'to-do' list) as well as the surveys that the participant has already completed. [Tell me more](#)

NOTE: The first instrument survey is not displayed below because it does not have a survey that comes before it for which to set conditions.

[Add custom text to display at top of survey queue](#)

| Activated? | Survey Title | Display survey in the Survey Queue when... | Auto start? |
|---|--------------|--|--------------------------|
|  Not activated <input type="button" value="Activate"/> | "Lab Visits" | <input type="checkbox"/> When the following survey is completed: --- select a survey --- AND <input type="checkbox"/> When the following logic becomes true: How to use this <input type="text"/> (e.g., [age] > 30 and [gender] = "1") | <input type="checkbox"/> |

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

Set up Survey Queue

The Survey Queue displays a list of your surveys to a participant all on a single page, in which the queue comprises all surveys that are to be completed (like a 'to-do' list) as well as the surveys that the participant has already completed. [Tell me more](#)

NOTE: The first instrument survey is not displayed below because it does not have a survey that comes before it for which to set conditions.

[Add custom text to display at top of survey queue](#)

| Activated? | Survey Title | Display survey in the Survey Queue when... | Auto start? |
|---|--------------|---|--------------------------|
|  Activated <input type="button" value="Deactivate"/> | "Lab Visits" | <input checked="" type="checkbox"/> When the following survey is completed: "Demographics" AND <input checked="" type="checkbox"/> When the following logic becomes true: How to use this [age] > 12 <input type="text"/> (e.g., [age] > 30 and [gender] = "1") | <input type="checkbox"/> |

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

Survey Queue Get link to my survey queue

Listed below is your survey queue, which lists any other surveys that you have not yet completed. To begin the next survey, click the 'Begin survey' button next to the title.

| Status | Survey Title |
|--------------|--------------|
| Completed | Demographics |
| Begin survey | Lab Visits |

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.

Set up Survey Queue

The Survey Queue displays a list of your surveys to a participant all on a single page, in which the queue comprises all surveys that are to be completed (like a 'to-do' list) as well as the surveys that the participant has already completed. [Tell me more](#)

NOTE: The first instrument survey is not displayed below because it does not have a survey that comes before it for which to set conditions.

[Add custom text to display at top of survey queue](#)

| Activated? | Survey Title | Display survey in the Survey Queue when... | Auto start? |
|--|--------------|---|-------------------------------------|
| <input checked="" type="checkbox"/> Activated <input type="button" value="Deactivate"/> | "Lab Visits" | <input checked="" type="checkbox"/> When the following survey is completed: "Demographics" AND <input checked="" type="checkbox"/> When the following logic becomes true: [age] > 12 <small>(e.g., [age] > 30 and [gender] = "1")</small> | <input checked="" type="checkbox"/> |

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.

Project Home | Project Setup | **Online Designer** | Data Dictionary | Codebook

Create snapshot of instruments | VIDEO: How to use this

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

Survey options: **Survey Queue** | Survey Login

Add new instrument: Create | Import | Upload

| Instrument name | Fields | View PDF | Enabled as survey | Instrument actions | Survey-related options |
|-----------------|--------|----------|-------------------------------------|--------------------|------------------------|
| Demographics | 17 | | <input checked="" type="checkbox"/> | Choose action | Survey settings |
| Lab Visits | 2 | | <input checked="" type="checkbox"/> | Choose action | Survey settings |

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.

STEP 3 [How to use filters and AND/OR logic](#)

Filters (optional)

| | | Operator / Value | | |
|----------|---------------------------------------|-----------------------|------------------|---------------------|
| Filter 1 | age "Age (years)" | > = | 12 | |
| AND | | | | |
| Filter 2 | diagnoses "Diagnoses" | is checked | diabetes | |
| OR | Filter 3 | diagnoses "Diagnoses" | is checked | high blood pressure |
| OR | Filter 4 | diagnoses "Diagnoses" | is checked | high cholesterol |
| AND | | | | |
| Filter 5 | demodate "Date this form is complete" | < | 03-09-2021 13:03 | |
| AND | | | | |
| Filter 6 | Type variable name or field label | = | | |

Switch format: Use advanced logic

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.

STEP 3

Filters (optional)

Advanced filter logic: (e.g., [age] > 30 and [sex] = "1") [How do I use special functions?](#)

```
(([age] >= 12) AND (([diagnoses(1)] = "1" OR [diagnoses(2)] = "1" OR [diagnoses(3)] = "1") AND (([demodate] < "2021-03-09 13:03"))
```

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

"Lab Visits" Activated Deactivate

When the following survey is completed:
"Demographics"

AND

When the following logic becomes true: [How to use this](#)

```
(([age] >= 12) AND (([diagnoses(1)] = "1" OR [diagnoses(2)] = "1" OR [diagnoses(3)] = "1") AND (([demodate] < "2021-03-09 13:03"))
```

(e.g., [age] > 30 and [sex] = "1")

Valid (The determination of validity may not be 100% accurate in all contexts.)

Test logic with a record: -- select record --

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

Define Conditions for Automated Survey Invitations (ASI)

Instructions: In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. [Tell me more](#)

Info
Survey title: Intake Survey

STEP 1: Compose message

From: [Display name (optional) | laura.j | j@vumc.org] (select any project user to be the 'Sender')

To: [All participants who meet the conditions defined]

Subject: []

Send test email

Paragraph [B I [Link] [List] [Align] [Indent] [Outdent] [Undo] [Redo] [Fullscreen]]

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:
[survey-url]

NOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.

You may use HTML formatting in the email message: bold, <i> italics, link, etc.

[How to use Piping in the survey invitation](#)

STEP 2: Conditions

Specify conditions for sending invitations:

When the following survey is completed:
--- select a survey ---

AND

When the following logic becomes true:
[]
(e.g., [age] > 30 and [sex] = "1")

[How do I use special functions?](#)

Test logic with a record: -- select record --

Ensure logic is still true before sending invitation? [?]

[How to use 'stop logic' to disable an automated invite](#)

STEP 3: When to send invitations AFTER conditions are met

Send immediately

Send on next -- select day -- at time [] H:M

Send the invitation [] days [] hours [] minutes
after the automated survey invitation has been triggered [?]

Send at exact date/time: [] M/D/Y H:M

OPTIONAL: Enable reminders

Re-send invitation as a reminder if participant has not responded by a specified time?

STEP 4: Activated?

Activate these automated invitations? In order for automated survey invitations to be sent using these specified conditions, it must be set to Active. You may make them Not Active (and vice versa) at any point in the future.

Active Not Active

Save Save & Copy to... Cancel

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:

The screenshot shows the 'STEP 3: When to send invitations AFTER conditions are met' section. The 'Send the invitation' option is selected, and a dropdown menu is open showing options for when to send the invitation. The selected option is 'the automated survey invitation has been triggered'. Other options include 'Send it based on when...', 'Or based on the time value of a field from "Intake Form"', and several date-related fields like 'start time', 'Date of birth', and 'end time'.

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.

STEP 3 [How to use filters and AND/OR logic](#)

Filters (optional) **Operator / Value**

| | | | | | |
|----------|--|--|----------------------|-----------------------|---|
| Filter 1 | boards "Does this study require the fo" <input type="checkbox"/> | is checked | Institutional Review | ✕ | |
| OR | Filter 2 | boards "Does this study require the fo" <input type="checkbox"/> | is checked | Scientific Review Coi | ✕ |
| OR | Filter 3 | boards "Does this study require the fo" <input type="checkbox"/> | is checked | FDA Approval (Other) | ✕ |
| AND | | | | | |
| Filter 4 | rosterdate "Roster Date:" | > | 01-01-2018 | ✕ | |
| AND | | | | | |
| Filter 5 | rosterdate "Roster Date:" | < | 01-01-2019 | ✕ | |
| AND | | | | | |
| Filter 6 | Type variable name or field label | = | | | |

Switch format: [Use advanced logic](#)

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.

STEP 3

Filters (optional)

Advanced filter logic: (e.g., [age] > 30 and [gender] = "1") [How do I use special functions?](#)

`((boards(1)) = "1" OR [boards(2)] = "1" OR [boards(6)] = "1") AND ([rosterdate] > "2018-01-01") AND ([rosterdate] < "2019-01-01")`

Expand

Switch format: [Use simple logic \(choose fields from list\)](#)

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

STEP 2: Conditions

Specify conditions for sending invitations:

When the following survey is completed:

--- select a survey ---

AND ▾

When the following logic becomes true:

`[[boards(1)] = "1" OR [boards(2)] = "1" OR [boards(6)] = "1"] AND
[[rosterdate] > "2018-01-01" AND ([[rosterdate] < "2019-01-01"]]`

(e.g., [age] > 30 and [gender] = "1")

✓ Valid [How do I use special functions?](#)

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.

Project Home Project Setup **Online Designer** Data Dictionary Codebook

Create snapshot of instruments VIDEO: How to use this page
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

Add new instrument:

Create a new instrument from scratch
Import a new instrument from the official REDCap Shared Library ?

Survey options:

Survey Queue Survey Login
Survey Notifications

Automated Survey Invitation options:

Upload or download Auto Invitations
Re-evaluate Auto Invitations

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:

Re-evaluate conditions for Auto Invitations ✕

It may sometimes be necessary to re-evaluate some or all Automated Survey Invitations (ASIs) for all records in the project. **This is especially useful if an ASI's conditions (in Step 2 of the ASI setup process) has been modified after data has already been entered for some records.** Thus, re-evaluating an ASI for all records can bring them all up to speed to where they should be based on the current conditions of the ASI. Thus, re-evaluating them might cause some invitations to be sent and/or scheduled.

NOTE: Re-evaluating ASIs will **NOT modify anything for already-scheduled invitations, such as invitation text, recipient or sender addresses, and the date/time that the invitation is scheduled to be sent. Re-evaluating an ASI only schedules invitations that haven't been scheduled that should be scheduled, and conversely, it will remove any invitations that are currently scheduled that should not be scheduled (because the ASI condition no longer evaluates as TRUE).** Please keep in mind that ASI invitations will be sent shortly after clicking the button below if set to send 'Immediately', and if any are set to send after a certain delay, the delay will be based on when you re-evaluated the ASI.

If you select the surveys below and click the 'Re-evaluate' button, it will begin the process of re-evaluating each ASI for **every** record in the project. NOTE: If your project contains thousands of records or more, the process may take a few minutes, so please let it finish, and do not leave the page until it completes. Additionally, if an ASI has conditional logic and has the option 'Ensure logic is still true before sending invitation?' checked, please be aware that any scheduled (i.e. unsent) invitations **may** get unscheduled/removed during the process of re-evaluation if the conditional logic no longer evaluates as TRUE for a given record.

Select surveys below to re-evaluate their ASI conditions:

[Check All](#) [Uncheck All](#)

- (2) Participant Info Survey
- (3) Participant Morale Questionnaire
- (4) Participant Research Project II Introduction

Re-evaluate selected surveys

Cancel

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:

📄 Survey Distribution Tools


🔗 Public Survey Link


👤 Participant List

📄 Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

Public Survey URL: 

Custom Public Survey URL:  

Protect the public survey using the Google reCAPTCHA feature [?](#)

Link Actions

↪ Open public survey

↪ Open public survey + ↪ Log out

Link Customizations

🔗 Get Short Survey Link




🔗 Create Custom Survey Link

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:

🏠 Record Home Page






The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

Legend

-  Incomplete
-  Unavailable
-  Complete

 Choose action for record ▾

Record ID **204** Teresa Parker

|  Data Collection Instrument | Status |
|--|---|
| REDCap Training Registration (survey) |  |
| Reminder/Cancellation Survey (survey) |  |
| Registrant Info |  |
| Training Feedback Survey (survey) |  |

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:

Training Feedback Survey

Invitation status:

Editing existing Record ID 204

Record ID: 204

Presentation/Training Materials

The slides from today's presentation:

Attachment: REDCap the Basics April 2019.pptx (44.32 MB)

Survey options dropdown menu:

- Open survey
- Log out + Open survey
- Compose survey invitation
- Survey Access Code and QR Code

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.

Survey Distribution Tools

Public Survey Link | Participant List | **Survey Invitation Log**

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. For each invitation it displays the participant email, participant identifier (if exists), survey name, and the date/time in which the invitation was (or will be) sent. You may even view the invitation email itself by clicking the icon in the 'View Email' column. Please note that all times below correspond to the time zone "America/Chicago", in which the current time is 12/27/2018 10:02am.

| Invitation send time | View Invite | Participant Email | Record | Participant Identifier | Survey | Survey Link | Responded? | Errors (if any) |
|------------------------|-------------|-------------------|--------|------------------------|-----------------------------|-------------|------------|-----------------|
| 11/29/2018 11:22am | | bdev... | 1 | | Speaker Profile Information | - | | |
| 11/29/2018 11:23am | | ... | 2 | | Speaker Profile Information | - | | |
| 12/03/2018 11:24am (1) | | ... | 2 | | Speaker Profile Information | - | | |
| 12/18/2018 10:43am | | ... | 3 | | Speaker Profile Information | | | |
| 12/18/2018 10:43am | | ... | 3 | | Webinar Information | - | | |
| 12/18/2018 10:45am | | ... | 4 | | Webinar Information | - | | |
| 12/18/2018 10:45am | | jace...@edu | 4 | | Speaker Profile Information | | | |

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



For collecting truly anonymous data...

- Don't ask for any identifying data in the survey (including name, email address)
- Only use public survey link (don't use participant list)
- In Survey Settings, can set customization to download of completed responses and/or confirmation email

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:

Edit Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date/Time, ...)

Field Label: What is your email address? Use the Rich Text Editor ?

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports): email Enable auto naming of variable based upon its Field Label?

How to use [Smart Variables](#) Piping

Validation? (optional): Email

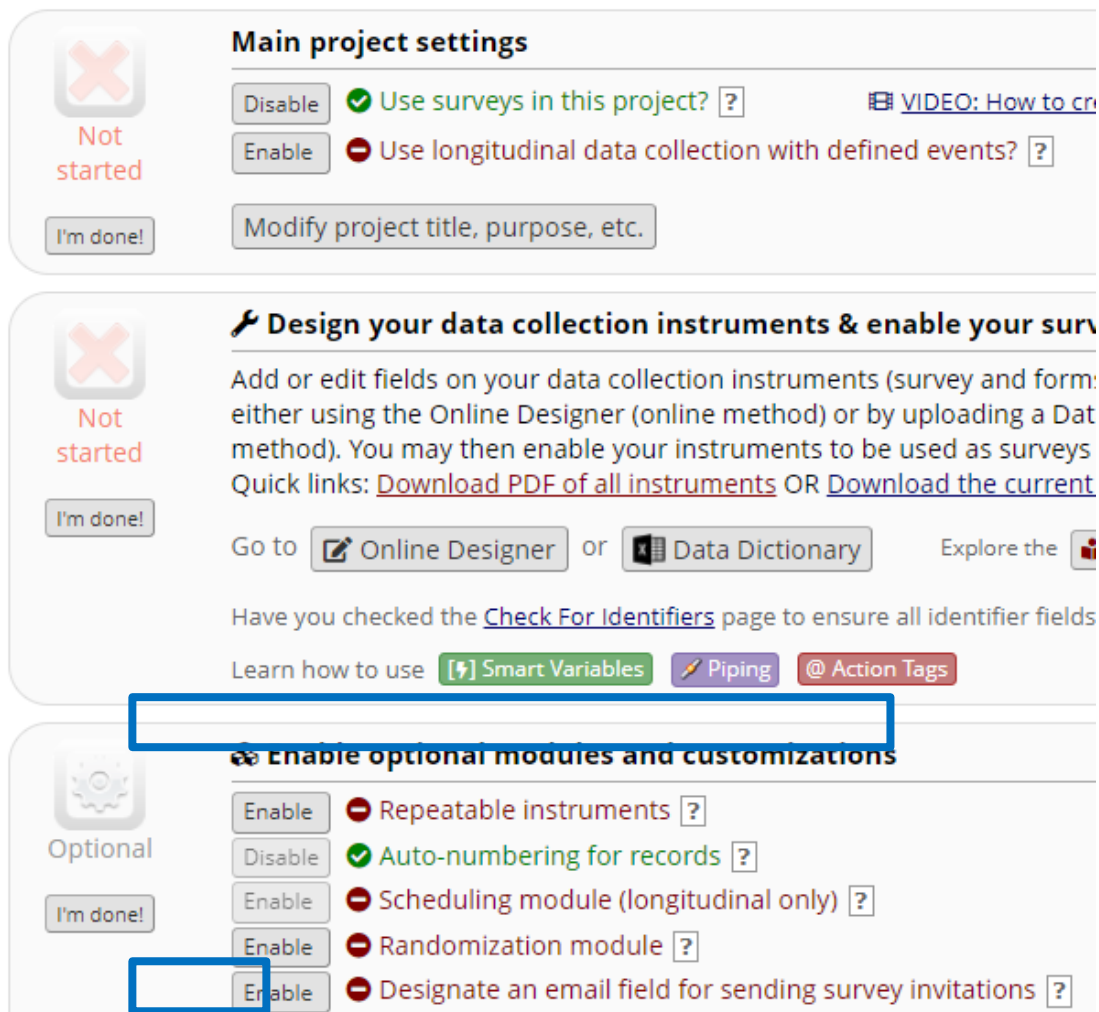
Required?* Yes No
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information?

Custom Alignment: Email

Field Note (optional):
Small reminder text displayed

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



- 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:



- 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.
- 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:

Record Home Page

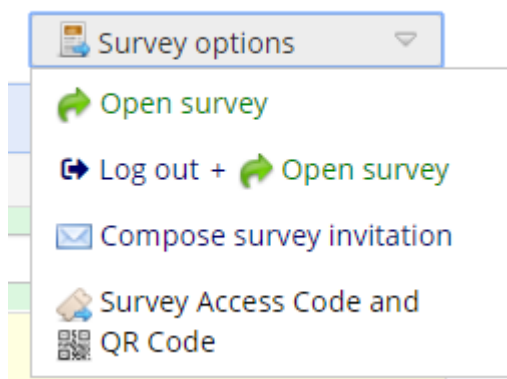
The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

Choose action for record

Record ID 1

| Data Collection Instrument | Status |
|----------------------------|---|
| First Survey (survey) |  |
| Follow-Up Survey (survey) |  |

- 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.
- In the upper right-hand corner you will see a survey options button:



- 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.