



REDCap: Survey Settings

Survey Status

At the top of the Survey Settings page, there is a box to make your survey Active or Offline. Surveys will default to Active status when you enable an instrument as a survey. If you wish to take your survey offline, you can change this drop-down to "Survey Offline."

Optionally, you can customize the text that is displayed to survey participants when they try to access an Offline survey by entering your text in the text window below the drop-down menu. If you choose to not add custom text, the default will display "Thank you for your interest, but this survey is not currently active."

Survey Status options in Survey Settings

Basic Survey Options

Under Basic Survey Options, you can change the Survey Title and customize the instructions that will display at the top of a survey page. By default, these will display the title of the instrument and a generic "Please complete the survey below. Thank you!" message to survey participants.

Basic Survey Options:

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

Survey Instructions
 (Displayed at top of survey after title)

Paragraph

[How to use Piping here](#)

Basic survey options in Survey Settings

Survey Design Options

Survey Design Options allows you to modify the look and feel of your survey as it is displayed to survey participants.

- **Width of survey on page** - Changes how much of the screen uses a survey. Can choose default, or set to 50% - 100% screen width.
- **Logo:** Uploads a file to be used as a logo that is displayed at the top of a survey page. Can also choose to hide survey title to replace the title with a logo.
- **Use enhanced radio buttons and checkboxes:** Changes the display of radio and checkbox buttons. Example:

What days of the week do you work? (check all that apply)

Monday Tuesday

Wednesday Thursday

Friday

Enhanced checkbox updated look when selected

- **Size of survey text:** Changes the size of survey text.
- **Font of survey text:** Changes the font of survey text.
- **Survey theme:** Selects color palette for survey display. Several options to choose from, or can customize. See below.

Survey Design Options: [Copy design to other surveys](#)

↔ Width of survey on page Fixed width (default) ▾
Set a custom width as a percentage of the webpage that the survey will take up.
Note: The percentage page width settings are fully dependent on the participant's screen size. This setting will not be applied when viewing the survey on mobile devices.

🖼 Logo Add new logo:
(Optional: display an image above the survey title) No file chosen
(Images wider than 600 pixels will be downsized to fit page.)
 Hide survey title on survey page when display logo

☑ Use enhanced radio buttons and checkboxes? Standard radios and checkboxes ▾ [Show example](#)
Includes Yes/No and True/False fields

🔤 Size of survey text Normal ▾

🔤 Font of survey text Open Sans ▾

🎨 Survey theme Default ▾

Survey design preview (sample survey): [Expand](#)

This is the survey title

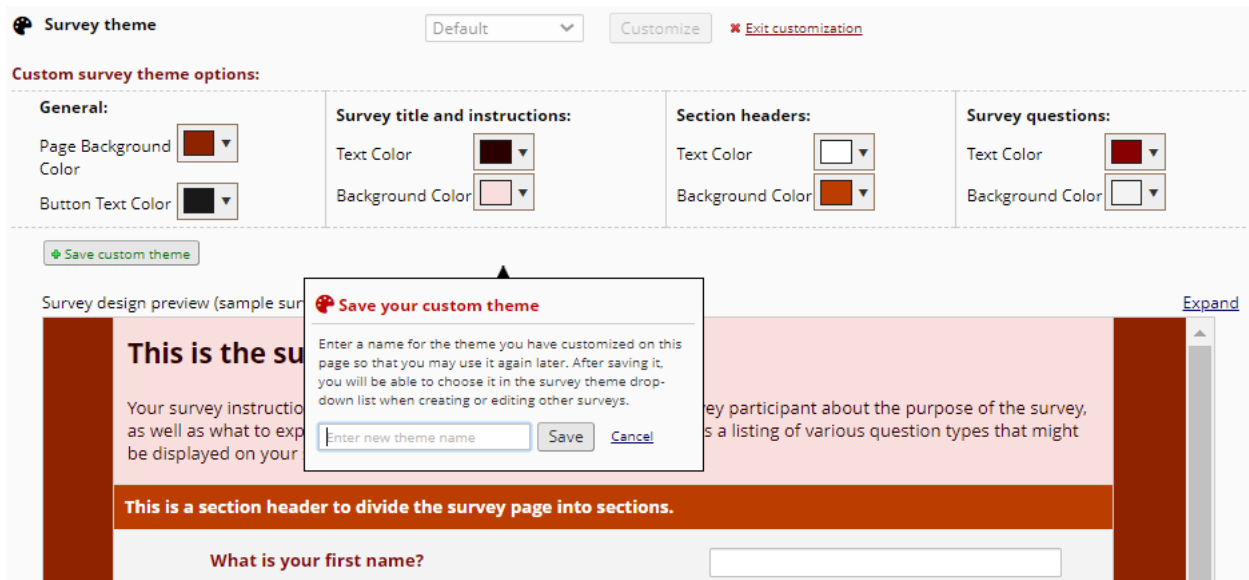
Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the survey, as well as what to expect once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

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

What is your first name?

Survey Design options in Survey Settings

If you select "Customize" for Survey theme, REDCap will display a color selection menu which will allow you to select any color for text and backgrounds for your survey by using a color picker or by entering the HEX color value. Once you have selected your colors, you can save the theme by selecting "Save custom theme" which will create a pop up where you can name your new theme to use on other instruments in your project. This theme will now appear in the drop-down for you to select elsewhere in your project.



Survey custom theme options in Survey Settings

Note: When selecting custom colors, test their readability. Use dark colored text on light backgrounds, and white text on dark backgrounds for readability.

Survey Customization

Survey Customization allows you to select a variety of options to change the look for function of your survey.

- **Question Numbering:**
 - Allows auto-numbering or customization of numbering of survey questions. If custom, will need to add numbering in Online Designer or Data Dictionary
- **Pagination:**
 - Select if Section Headers will be used as page breaks to create multiple-page surveys.
- **Allow Participants to download a PDF of their responses:**
 - Allows survey respondents to download a copy of their responses (not available for auto-continue or survey queue surveys)
- **Save a PDF of completed survey response to File Upload field:**
 - Saves a PDF of the survey responses to a designated upload field
- **Survey-specific email invitation field:**

- Specifies which email field to use for survey invitations. If the project email is set in Project Setup, this does not need to be set.
- **Required field asterisk and text:**
 - Changes Required Field denotation between "**must provide value" text and a simple red asterisk (*) notation.
- **Display font resize options:**
 - Displays font resize options at top of survey. Enabled by default.
- **Allow survey respondents to view aggregate results:**
 - Allows survey respondents to view group data from ALL respondents in graphical and/or descriptive statistic format.
- **Text-to-speech functionality:**
 - Enables a speaker icon to reach each question out-loud on survey device.
- **Show or hide Submit buttons:**
 - Choose to show or hide the Submit, Next page, and Previous page buttons on a survey. Always display selected by default.
- **Customize text of Submit buttons:**
 - Choose custom text for Submit, Next page, and Previous page buttons.

Survey Customizations:

☰ Question Numbering

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

Auto numbered ▾

📄 Pagination

One page or multiple pages? Section headers, which begin new sections on the instrument, will serve as the page break in a multi-page survey, in which each page will begin with a section header.

Single 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)

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

Display a button for the participant to download a PDF file of their responses for the survey they just completed.

No ▾

This option will not be available if the Survey Auto-continue or Survey Queue auto-start option is enabled. Also, if a field utilizes the @HIDDEN action tag, it will not be displayed in the PDF.

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

A PDF copy of the survey response will be immediately stored in the field selected on the right whenever a participant completes this survey.

Current event ▾ Disabled ▾

- Store the translated version of the PDF (if using Multi-language Management)

Choose a File Upload field from the drop-down above to enable this feature. Tip: If desired, the field may exist on the survey instrument that is triggering it, in which the field can be hidden on the survey page using the action tag @HIDDEN-SURVEY. [Learn more](#)

✉ Survey-specific email invitation field

Designate an email field for sending survey invitations for [this survey only](#) [?]

-- select a field -- ▾

ⓘ It appears that the project-level email invitation field has been enabled already. Please note that it is **not required to select a survey-specific email field** here if a project-level email field has already been defined. This is an optional setting only.

Note: This option will override the project-level email invitation field (if enabled on the Project Setup page) and will also override any email address originally entered into the Participant List. Also, if this field has no value and the project-level email field is enabled, then the project-level email field's value will be used instead.

* 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**

☑ Display the font resize options at the top of the survey page

Yes ▾

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

After completing the survey, participants can view ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent's answers will be highlighted in the results.

Disabled ▾

Additional settings:

- 10 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.)

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).

Disabled ▾ [Learn more](#)

Language of text to be spoken: English - United States (Female) ▾

* Does not perform translation but only reads text in the language specified here.

🔍 Show or hide the Submit buttons

Show or hide the Submit buttons displayed at the bottom of every survey page (including the 'Next Page' and 'Previous Page' buttons).

Always display the Submit buttons ▾

Hiding the Submit buttons can be useful if you are not using the survey for data collection but for instructional purposes or other similar use cases.

✎ Customize the text of the Submit buttons

Provide alternative text for the 'Submit', 'Next Page', and 'Previous Page' buttons displayed at the bottom of every survey page.

Any alternative text provided for the submit buttons will override their default text below:

<< Previous Page : << Previous Page

Next Page >> : Next Page >>

Submit : Submit

Full list of survey customization options in Survey Settings

Survey Access

Survey Access allows you to set limits and access to the REDCap survey.

- **Response Limit:**
 - Set maximum number of responses to collect. Respondents will not be able to start the survey after the limit has been hit.
- **Time Limit for Survey Completion:**
 - Set time limit for survey completion based on when they were sent the automatic survey invitation. Does not apply to public survey links or Alert & Notification messages.
- **Survey Expiration:**
 - Allows you to set the time after which the survey will become inactive (i.e. go offline) so that respondents may no longer take the survey. After expiration, the survey can be brought back online again (if needed) on the Project Setup page.
- **Allow Save and Return Option:**
 - Provides respondents with a 'Save & Return Later' button on the survey page, which allows them to save their progress and return where they left off to complete the survey any time in the future. Can be combined with "Survey Login" option in the Online Designer.

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:

Paragraph

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 and is not applicable for survey links sent via Alerts & Notifications.)

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.) [?](#)

M-D-Y H:M

The time must be for the time zone **America/New York**, in which the current time is 01-09-2024 13:07.

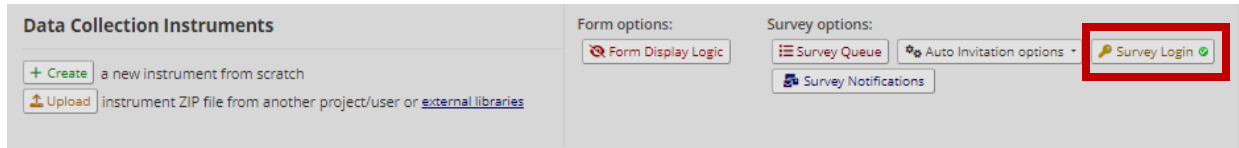
Enforce 'Survey Login'?
(All respondents will be required to enter login credentials before beginning the survey and also any time they return to the survey again.)

If set to 'Yes', this survey will employ the Survey Login feature according to its settings defined in the Online Designer.

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

Allow respondents to return and modify completed responses [?](#)

Survey access options in Survey Settings



"Survey Login" option in the **Online Designer**.

Survey Termination Options

Optional Conditional logic for Survey Auto-continue:

Allows users to only auto-continue surveys when specific criteria have been met as defined by logic entered in the text box.

Survey Termination Options:

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

(Optional) Conditional logic for Survey Auto-Continue:
Auto-continue to the next survey ONLY if the conditional logic below is *TRUE* or if the textbox has been left blank.

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

e.g., [enrollment_arm_1][age] > 30 [How to use this](#)

— OTHERWISE —

Survey Termination Options allows you to set rules for ending a survey.

Options:

- **Auto-continue to the next survey:** Automatically starts the next survey instrument after finishing the current survey.

OR

- **Redirect to a URL:** Provide a URL to send the respondent to after completing the survey.

OR

- **Survey Completion Text:** Set text to display after completing the survey. Defaults to "Thank you for taking the survey. Have a nice day!"

Optionally, you can offer to repeat the survey which will show a button to display a prompt to take the survey again. This can be placed before the survey is completed or after the survey is completed.

Survey Termination Options:

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

(Optional) Conditional logic for Survey Auto-Continue:
Auto-continue to the next survey ONLY if the conditional logic below is *TRUE* or if the textbox has been left blank.

e.g., [enrollment_arm_1][age] > 30 [How to use this](#)

— 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, [survey-url:other_survey]

[How to use Piping here](#)

— OR —

(Optional) Repeat the survey: Ask participants to take the survey again upon completion [?](#)


Set custom text for the button:

Location of the button on survey:

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

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

Paragraph ↶ ↷

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Thank you for taking the survey.

Have a nice day!

[How to use Piping here](#)

Survey termination options in Survey Settings

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 can save or discard the responses. Default saves all responses.
- **Alternate Survey Completion Text**
 - Text to display when a Stop Action triggers the end of the survey. If left blank, then standard Survey Completion Text will be used.

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.

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

WARNING: If any data has been saved on the survey instrument prior to the Stop Action being triggered, that data will be deleted. For example, if the survey is a multi-page survey in which data has been entered on previous pages prior to triggering the Stop Action, all data collected thus far in that survey will be deleted as if the survey was never taken. Additionally, if the record does not contain data in any other instruments, the entire record itself will be deleted during this process.

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.

Paragraph ▼ — B I U

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Stop action survey options in Survey Settings

e-Consent Framework:

Electronic-Consent (e-Consent) is a platform for consenting patients or research subjects either on site or at home using a computer-based consent form rather than traditional paper documentation. Consent forms can be implemented in a REDCap survey via computer, mobile phone, or tablet.

Most importantly, it is highly recommended that you have a discussion with the Institutional Review Board (IRB) if you wish to do e-Consent in REDCap.

How the e-Consent Framework works

The 'Auto-Archiver + e-Consent Framework' survey option adds two things to the typical survey-taking process. 1) Before a participant completes the survey, an extra certification page is added to end of the survey that displays an in-line PDF copy of their survey responses in which they will be asked to confirm that all information in the document is correct. Once they confirm all is correct, the survey will then be marked as complete. The survey will not be considered complete until they fulfill the certification step. 2) Upon completion of the survey, a static copy of their responses in the form of a consent-specific PDF will be stored in the project's File Repository. The consent-specific PDF will have the values of the e-Consent Framework Options inserted at the bottom of each page in the PDF. These values (i.e., name, date of birth, etc.) are added to the PDF as extra documentation of the identity of the person who is consenting.

Patients/subjects can 'sign' their consents by typing in their name or by utilizing REDCap's 'Signature' field type (i.e., 'wet signature') on the survey. One might also assign PIN numbers to prospective participants to aid in the signature process.

e-Consent **version** and **type** are both text fields whose value will be inserted at the footer of each page in the PDF. The e-Consent 'type' is optional and is just a text label that you might want to display in the PDF footer to signify the type of e-Consent that this survey represents (e.g., pediatric). The type is often used to distinguish between multiple e-Consent forms within a project.

The screenshot shows the 'e-Consent Framework' settings in a survey configuration tool. On the left, there is a sidebar with a red person icon, the text 'e-Consent Framework', and a sub-section for 'PDF Auto-Archiver' with a brief description. The main area contains three radio button options: 'Disabled', 'Auto-Archiver enabled', and 'Auto-Archiver + e-Consent Framework' (which is selected). Below these are 'e-Consent Framework Options' including a checked checkbox for allowing user edits, text input fields for 'e-Consent version' and 'e-Consent type', and dropdown menus for 'First name field' and 'Last name field'. There are also dropdowns for 'Date of birth field' and 'Signature field #1'. A note explains that selecting a single field for names will capture the whole name. A section titled 'Force signature field(s) to be erased...' provides instructions on how to handle signature fields during survey completion.

eConsent Framework setup and options in Survey Settings

Confirmation Email:

Choose to send a confirmation email to the survey respondent upon survey completion. User can customize the sender, subject line, and message like other email settings. Optionally, can choose to include a PDF of the complete survey responses as an attachment to the email to be sent to the survey respondent.

Send confirmation email?
(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:

[Send test email](#)

Paragraph ▾

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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.

Confirmation email setup in Survey Settings