Working with REDCap Surveys

Paul Litwin - plitwin@fredhutch.org
Collaborative Data Services (CDS)
What Questions We Will Attempt to Answer Today?

• What makes surveys different from other REDCap data forms?
• How do I make a data form into a survey?
• When would I use a survey?
• How do I get participants to take a survey?
• How do I manage survey invitations and responses?
• How do I customize surveys to handle special situations?
Agenda

• What is a Survey in REDCap?
• Creating Surveys
• Survey Use Cases
• Survey Invites
• Survey Configuration
• Authenticating Participants
• Survey Responses
• Survey Queue
What is a REDCap Survey?

Definition: A survey is an investigation about the characteristics of a given population by means of collecting data from a sample of that population and estimating their characteristics through the systematic use of statistical methodology. Context:

OECD Glossary of Statistical Terms - Survey Definition
https://stats.oecd.org... Organisation for Economic Co-operation and Development... 

• In REDCap a survey is a version of a data form that is completed by a study participant without logging into the REDCap system
Agenda

• What is a Survey in REDCap?
• **Creating Surveys**
• Survey Use Cases
• Survey Invites
• Survey Configuration
• Authenticating Participants
• Survey Responses
• Survey Queue
Creating a Survey

1. Make sure project is enabled for surveys (from Project Setup)
   • Requires the Project Design & Setup permission

2. Create the data form

3. Enable the data form as a survey (from Edit instruments)
Agenda

- What is a Survey in REDCap?
- Creating Surveys
- **Survey Use Cases**
- Survey Invites
- Survey Configuration
- Authenticating Participants
- Survey Responses
- Survey Queue
Survey Use Cases
(or what are you trying to accomplish?)

Ways to use surveys...

1. Survey unknown people
2. Recruit unknown people to be participants in a study
3. Survey/recruit from a pool of known participants
4. Survey existing study participants (e.g., for follow-up)
Survey Use Cases
(or what are you trying to accomplish?)

Ways to use surveys...

1. **Survey unknown people**
   - Create survey as the only instrument in project and advertise the anonymous survey URL
2. Recruit unknown people to be participants in a study
3. Survey/recruit from a pool of known participants
4. Survey existing study participants (e.g., for follow-up)
Survey Use Cases
(or what are you trying to accomplish?)

Ways to use surveys...

1. Survey unknown people
2. **Recruit unknown people to be participants in study**
   • Create survey as *first* instrument in project and advertise the anonymous survey URL
3. Survey/recruit from a pool of know participants
4. Survey existing study participants (e.g., for follow-up)
Survey Use Cases
(or what are you trying to accomplish?)

Ways to use surveys...

1. Survey unknown people
2. Recruit unknown people to be participants in a study
3. Survey/recruit from a pool of know participants
   • Invite pts to survey via one of the following...
     a) Potential Participant list (ppl) with survey as first instrument
     b) Enter ppl contact info into first instrument. Survey is 2\textsuperscript{nd} instrument
     c) Import ppl contact info into first instrument. Survey is 2\textsuperscript{nd} instrument
4. Survey existing study participants (e.g., for follow-up)
Survey Use Cases
(or what are you trying to accomplish?)

Ways to use surveys...

1. Survey unknown people
2. Recruit unknown people to be participants in a study
3. Survey/recruit from a pool of known participants
4. Survey existing study participants (e.g., for follow-up)
   • Collect email address/text phone number via an instrument
   • Invite pts to follow-up survey via email invite
Agenda

• What is a Survey in REDCap?
• Creating Surveys
• Survey Use Cases
• **Survey Invites**
• Survey Configuration
• Authenticating Participants
• Survey Responses
• Survey Queue
Survey Invites

- Public Survey Link
- Participant Lists
- Compose Survey Invitations
- Automated Survey Invites
Public Survey Link

Different ways to copy public URL

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. Get shorter survey link or Get embed code to place link on a webpage.

Public Survey URL: https://cdsweb07.fhcrc.org/redcap/surveys/?s=DJAF...

Start survey immediately (testing)

Get generic survey URL + code –or- QR code
What is a Participant List?

- A useful oddity of REDCap
- A way to define a list of potential participants to invite to a survey
- But, the participant list data is kept separate from the actual data in the project
- The participant list data is only used for inviting people to take a survey
Adding Participants to Participant List

1. **Add** email addresses directly into the participant list
   - Or cut and paste into the box

2. **Designate an email field** (text box field with validate = email) on another instrument to funnel participants into participant list as data is collected and either...
   a) Enter data into this instrument
   b) Import data into this instrument
Creating Survey Invitations

1. At Participant List tab, first **select the survey**
2. Click **Compose Survey Invitations**
   a) When should the emails be sent
      • Now or at specific date/time
   b) Enable reminders
      • Only used if pt doesn’t respond
   c) Compose message
      • Remember to **select correct From Email** address
      • Can use piping to customize message
      • Survey link will be automatically added to end of message
   d) Select participants
3. Click **Send Invitations**
Creating Survey Invitations
Creating Survey Invitations

- Example Projects
  - Paul Survey Tracked – Public Survey
    - Participants added to Pt List via designated email on survey
  - Paul Survey Tracked - Pt List
    - Participants manually added or pasted into Pt List
  - Paul Survey Tracked - Designated Email
    - Participants added to Pt List via designated email on data form –or– when data imported into form
Automated Survey Invites (ASIs)

- Instead of the emails being sent at a specific date/time in batches (based on current participants in pt list), they occur automatically when either...
  - A earlier survey is completed, and/or
  - An expression (calculation based on collected fields) is satisfied
- Perfect for rolling enrollment scenarios or follow-up surveys
- Click **Automated Invitations** at Edit **Instruments** screen (to right of survey for which to send invite under Survey-related options)
Automated Survey Invites (ASIs)

**Define Conditions for Automated Survey Invitations**

**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]

**STEP 1: Compose message**

- **From:** plitwin@fhcrc.org (select any project user to be the 'Sender')
- **To:** [All participants who meet the conditions defined]
- **Subject:** Foo Survey Invite

Dear [first_name],

Please take the foo survey.

Etc.

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

You may use HTML formatting in the email message:<b> bold</b>, <u> underline</u>, <i> italics</i>, <a href="..."> link</a>, 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:
    - [email_address] := ""
    - (e.g., [age] > 30 and [gender] = "1")

[How do I use special functions?]

Test logic with a record: [select record]

Ensure logic is still true before sending invitation?

**STEP 3: When to send invitations AFTER conditions are met**

- Send immediately
- Send on next -- select day -- at time -- select time --
- Send after lapse of time: [days] hours [minutes]
- 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
Agenda

- What is a Survey in REDCap?
- Creating Surveys
- Survey Use Cases
- Survey Invites
- Survey Configuration
- Authenticating Participants
- Survey Responses
- Survey Queue
Survey Settings (1 of 2)

• Numerous settings, including...
  • Survey Status (Survey Active/Survey Offline)
  • Survey Title/Instructions – displayed at top of survey
  • Other design options (logo, theme, font, enhanced buttons and checkboxes, etc.)
• Survey Customizations
  • Question numbering
  • Question display format (All on one page; One section per page)
  • Allow participants to download PDF of their responses
  • Display "must provide value" for required fields
  • Allow survey respondents to view aggregate survey results
Survey Settings (2 of 2)

• Numerous settings, including...
  • Survey Access
    • Response limit – limit total # of responses
    • Time limit – total time respondent has to complete survey in days/hours/minutes
    • Survey expiration – absolute date/time expiration
    • Allow "save & return later"
  • Survey Termination Options
    • One of the following:
      • Auto-continue to next survey – simple alternative to survey queue
      • Redirect to a URL
      • Survey completion text
    • Send confirmation email
Agenda

• What is a Survey in REDCap?
• Creating Surveys
• Survey Use Cases
• Survey Invites
• Survey Configuration
• **Authenticating Participants**
• Survey Responses
• Survey Queue
Authenticating Participants

- From Edit Participants screen, click **Survey Login**
Starting Survey with Login

Survey title: "Followup Survey"

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.

**ERROR:** The login was not successful because the value entered was not correct. Try again.

Please enter your correct date of birth to continue.

What is your date of birth?

You will need to re-enter this value on the follow-up survey.
Agenda

• What is a Survey in REDCap?
• Creating Surveys
• Survey Use Cases
• Survey Invites
• Survey Configuration
• Authenticating Participants
• **Survey Responses**
• Survey Queue
Multi-Page Surveys

- On **Survey Settings**, under **Question Display Format**, select **One section per page (multiple pages)**
- **Partial responses** are saved when user navigates past page one without completing the survey
Editing Responses

• User must have **Edit Survey Responses** permission for each survey they wish to edit.

• Then to edit a response, open data form from Record Status Dashboard and click **Edit Response** at top of survey.
Survey Notifications

Notifying study staff when survey is completed

- On Edit Instruments, click Survey Notifications
- Select email for each user to be notified for each survey
Agenda

- What is a Survey in REDCap?
- Creating Surveys
- Survey Use Cases
- Survey Invites
- Survey Configuration
- Authenticating Participants
- Survey Responses
- Survey Queue
Survey Queue

- Survey packaging option. Allows for chaining together multiple surveys using optional logic
- On Edit Instruments, click **Survey Queue**
What Have We Learned Today?

- What makes surveys different from other REDCap data forms?
- How do I make a data form into a survey?
- Different use cases for survey usage
- How do I get participants to take a survey?
- How do I manage survey invitations and responses?
- How do I customize surveys to handle special situations?
Training & Docs

- Right within REDCap...
  - Note: you must close any project and go to the Home or My Projects tab
More Information

- Visit [http://redcap.fredhutch.org](http://redcap.fredhutch.org)
- Or email [redcap@fredhutch.org](mailto:redcap@fredhutch.org)

- Also...
  - [http://project-redcap.org](http://project-redcap.org) (Vanderbilt REDCap site)
Thank you