

How to Field Surveys using REDCap

The primary use of REDCap is to collect survey data from research participants. This guide will help you develop a REDCap project with surveys so you can start your survey data collection!

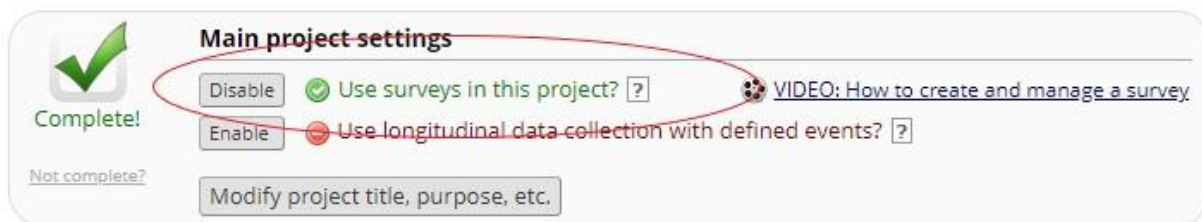
Are surveys appropriate for your project?

First and foremost, when designing a project, it is important to consider if collecting data through a survey is appropriate. In REDCap, data can be collected through a *form* or through a *survey*. A *form* is an instrument in which data can only be collected by an Illinois REDCap user who is logged into their REDCap account. A *survey* is an instrument in which a research participant can enter data or answer questions without an Illinois REDCap account by accessing the instrument through a URL.

When deciding if something should be a form or a survey, think about your research design and who will be entering the information. If a researcher will be entering the data, the instrument will be more useful if left as a form. Entering data via a form also adds data entry information, such as who entered the data and when it was entered, which is beneficial for auditing and logging. Forms can be completed and edited through the “Record Status Dashboard” or “Add/Edit Records” links in the left-hand menu. If a participant will be answering the questions after clicking on a URL, the instrument should be enabled as a survey. Other forms of data collection can still be done if a project is enabled to have surveys, including data entry by a researcher and data import.

Enabling and Disabling Surveys

All surveys are first built as data collection instruments and then enabled as surveys. To enable a project to have surveys, navigate to the “Project Setup” page of the project and push the “Enable” button under “Main project settings.” Doing this will let you enable individual data collection instruments as surveys after they’re created.



After creating your data collection instruments, you can enable them as surveys by going to the “Online Designer” page and pushing the “Enable” button next to the instrument. When an instrument is enabled as a survey, a green checkmark will appear, as well as additional links to customize survey settings, invitations, and notifications. Options to set up a Survey Queue, Survey Login, and Survey Notifications will also appear.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screener	27			Choose action ▾	Survey settings + Automated Invitations
Demographics	8			Choose action ▾	Survey settings + Automated Invitations
Anthropometrics	2		Enable	Choose action ▾	

Once an instrument is enabled as a survey, you can access the survey settings and customize the survey appearance and functionality.

To disable (or remove survey functionality) from an individual instrument, you “Delete Survey Settings” on the “Survey Settings” page. This **does not** delete the instrument or any collected data. It simply disables the form’s survey functionality.

Save Changes

-- Cancel--

Delete Survey Settings

Delete Survey Settings: Please note that deleting the survey settings will NOT delete any responses collected using the survey. Also, deleting the survey settings will NOT delete the data collection instrument, but instead the instrument will revert back to how it was before it was enabled as a survey, in which data can only be collected by authenticated users on the data entry form.

To disable surveys from the project entirely, push the “Disable” button under “Main project settings.” Again, this will not delete data or data collection instruments.

Survey Settings

To customize the settings on a survey, navigate to the “Online Designer” page and select “Survey Settings” next to the survey you want to customize. The instrument must already be enabled as a survey before survey settings can be edited. REDCap provides a description of each setting on the “Survey Settings” page.


Sending Survey Links

There are two types of survey links you can use in REDCap: public and private. A public survey is a publicly available link; these surveys can be anonymous if no personally identifying information is collected in the survey. A private survey sends survey links to specific participants. It is possible to use both public and private surveys in one project. For instance, users can start data collection with a public survey for recruitment; then, once relevant contact details are collected, private survey links can be used to send additional surveys.


Public Surveys

In the public survey option, REDCap generates a link that can be posted online or emailed to potential participants. Anyone can click this link any number of times, and REDCap auto-numbers the responses. There is no way to know who responded to a public survey unless you ask for identifiers in your survey, such as name or email address. It is recommended you enable the Google reCAPTCHA feature if you are using a public survey link to minimize the likelihood your project will be affected by spammers or bots. It is also inadvisable to post public links to high traffic websites.

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

Private Surveys


To send out a private survey, REDCap generates a unique survey link for each participant. This requires that you have each participant's email address, unless you will be opening the survey for the participant (if they are taking the survey in person). There are three ways to send private survey links.


Participant List:


To create a participant list, go to the "Participant List" tab under "Survey Distribution Tools." Click on the "Add Participants" button, circled in the below screenshot, and enter the email addresses of participants,

one per line, to add them to the email list. After participants are added, you can compose and send the survey invitation by pushing the “Compose Survey Invitations” button. Survey invitations can also be scheduled to send immediately or at a later date and time. If you need to keep track of which email address corresponds with which record ID, click “Enable” under Participant Identifier *prior* to data collection beginning.

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 and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

 Survey Response Status: Not Anonymous 

Participant List belonging to: [Initial survey] "Demographics And Screening" ▾ Remove all participants

Displaying -- ALL -- ▾ of 0  Add participants  Compose Survey Invitations  Export list

Email	Record	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
No participants have been added							

REDCap also includes a feature above the participant list that will let you know if the survey settings will allow for a survey to be fielded anonymously or not. This is based on whether the Participant Identifier has been enabled or if a project-level email field has been established. This **does not** consider what questions are included in your survey, so it may not be accurate at all times.

You can toggle between the participant lists for different surveys by using the dropdown menu in the middle of the page.

Through an individual record:

You can also send private surveys through individual records once a record has been created and saved. To do this, go to “Add/Edit Records” and add and save a new record. The record must first be saved so it exists in the system. Go to the survey you would like to send privately and click on “Survey Options.” Here you can compose the invitation. If no email is entered for this record, it can be entered manually. If an email has been entered for this record, REDCap will load that email address into the invitation email field automatically. Any existing email addresses can be manually edited. You can also open a survey directly from this view.

Television Watching

Automated Survey Invitations:

From the “Online Designer” page, select “Automated Invitations” next to the survey you would like to send invitations for. This will give you the opportunity to compose an automated invitation and enable reminders to be sent after a certain amount of time. The Automated Survey Invitation (ASI) allows you to establish conditional logic for when a survey is sent. For instance, if you only want people who pass a screening survey to receive the next survey, you can establish that in the ASI. For information on sending ASIs for repeating instruments, see our [“Repeating Data Collection”](#) support document.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screening	27			Choose action	Survey settings + Automated Invitations
Demographics	8			Choose action	Survey settings + Automated Invitations
Anthropometrics	2		Enable	Choose action	

Importantly, don’t forget to set the invitations to active!

Reminders

Reminders can also be set up to prompt participants to complete a survey if they have not yet done so. Reminders can be set up anywhere an invitation can be scheduled, such as through the participant list, through an individual record, or through the Automated Invitations button on the “Online Designer.” page

Important: The REDCap system is set to Coordinate Universal Time (UTC), which is either 5 or 6 hours ahead of the Central Time Zone, depending on Daylight Savings. When composing survey invitations, there will be text at the bottom of the “When should the email be sent?” box telling you what the current UTC time is.

Additional Survey Options

On the “Online Designer” page, there are also several additional survey options that can be utilized to make data collection as efficient and secure as possible.

The screenshot shows the 'Data Collection Instruments' section of the REDCap Online Designer. It includes buttons for 'Create', 'Import', and 'Upload'. Below these are three sections: 'Form options' (with 'Form Display Logic'), 'Survey options' (with 'Survey Queue', 'Survey Login', and 'Survey Notifications'), and 'Automated Survey Invitation options' (with 'Upload or download Auto Invitations' and 'Re-evaluate Auto Invitations'). A table below lists instruments: 'Screener' (27 fields, enabled), 'Demographics' (8 fields, enabled), and 'Anthropometrics' (2 fields, with an 'Enable' button). A red circle highlights the 'Survey Queue', 'Survey Login', and 'Survey Notifications' buttons in the 'Survey options' section.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screener	27		<input checked="" type="checkbox"/>	Choose action	<input checked="" type="checkbox"/> Survey settings + Automated Invitations
Demographics	8		<input checked="" type="checkbox"/>	Choose action	<input checked="" type="checkbox"/> Survey settings + Automated Invitations
Anthropometrics	2		<input type="checkbox"/>	Enable Choose action	

Survey Queue



The Survey Queue displays a list of all the surveys a participant needs to complete, as well as the ones they have already completed, on a single page. Surveys can be set to appear in the queue when previous surveys have been completed or when certain conditions are met, such as in the below screenshot where the background survey is only accessible after someone has taken the screening survey and consents to participate ([consent]=“1”). Auto start can also be enabled for surveys in the queue by checking the box in the “Auto start?” column. You can hide the survey queue from participants but still take advantage of the conditional logic feature of the queue by selecting “Keep the Survey Queue hidden from participants?”

☰ **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](#)

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.

Activated?	Survey Title	Display survey in the Survey Queue when...	Auto start?
Screening			
 Not activated <input type="button" value="Activate"/>	"Screening Survey" - Screening	<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 [e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1"] Test logic with a record: -- select record --	<input type="checkbox"/>
 Activated <input type="button" value="Deactivate"/>	"Background Survey" - Screening	<input checked="" type="checkbox"/> When the following survey is completed: "Screening Survey" - Screening AND <input checked="" type="checkbox"/> When the following logic becomes true: How to use this [consent] = '1' [e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1"] Test logic with a record: -- select record --	<input type="checkbox"/>

Note that the "Auto-continue to the next survey?" survey termination feature in the "Survey Settings" overrides Survey Queue logic and it is not recommended to use the auto-continue feature on instruments enabled in the Survey Queue.

To see what the Survey Queue looks like from the participant's point of view, try out our [Survey Queue Demo](#).

Survey Login

When this feature is enabled, participants must log in to the survey before they can complete surveys. They must log in with values that have already been entered and saved in the participant's record, such as data that was collected during Wave 1 of a longitudinal study or information that was entered by a research team member into a form. Up to three fields can be used for survey login.

Survey Notifications

Utilizing this feature will notify via email one or more REDCap users that a survey has been completed, allowing for easier tracking and organized record-keeping. There is no conditional logic functionality with survey notifications; they are only sent to the designated REDCap users upon survey completion.