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?

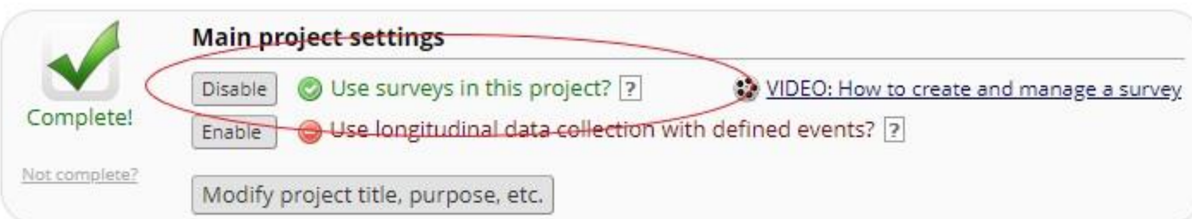
First and foremost, when designing a project, it is important to consider if collecting data through a survey is appropriate. In REDCap, data can be collected through a *form* or through a *survey*. A *form* is an instrument in which data can only be collected by an Illinois REDCap user who is logged 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. In the below example, demographics are collected through a survey, but other information is collected and entered by the research team on a form that is not enabled as a survey.

Enabling and Disabling Surveys

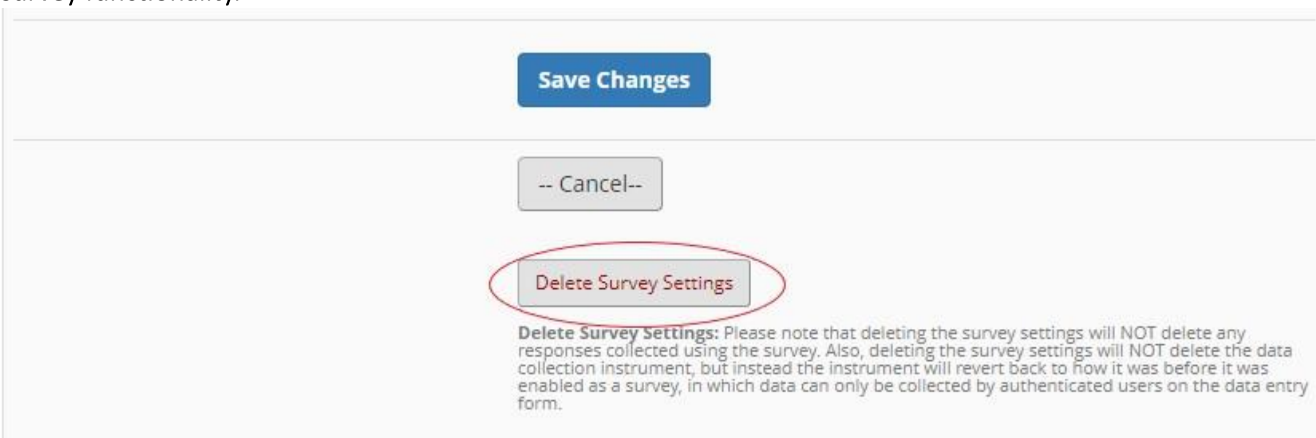
All surveys are first built as data collection instruments and then enabled as surveys. To enable a project to have surveys, navigate to the "Project Setup" page of the project and push the "Enable" button under "Main project settings." Doing this will let you enable individual data collection instruments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

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.



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

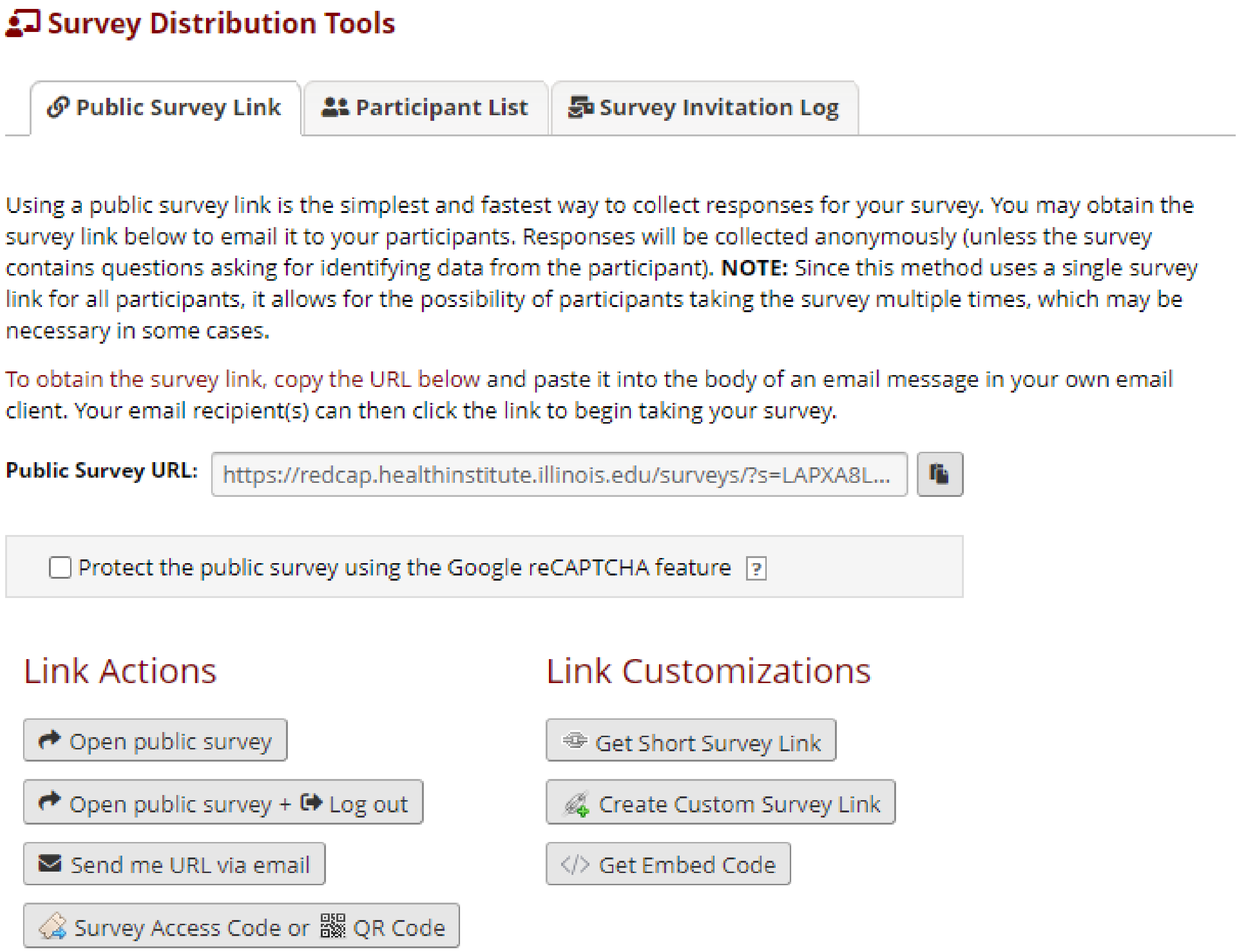
To customize the settings on a survey, navigate to the "Online Designer" page and select "Survey Settings" next to the survey you want to customize. The instrument must already be enabled as a survey before survey settings can be edited. REDCap provides a description of each setting on the "Survey Settings"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

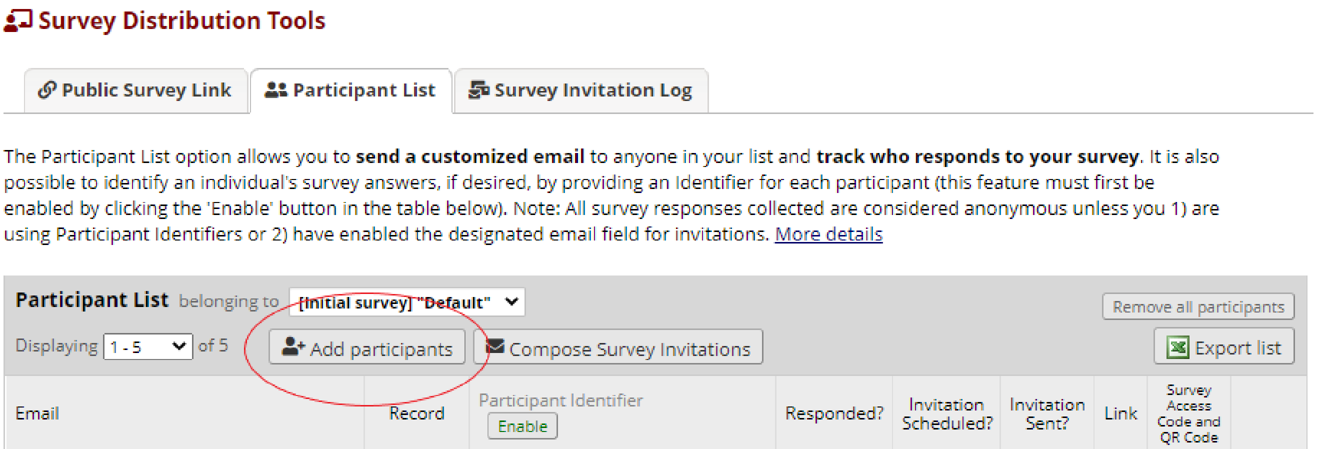
In the public survey option, REDCap generates a link that can be posted online or emailed to potential participants. Anyone can click this link any number of times, and REDCap auto-numbers the responses. There is no way to know who responded to a public survey unless you ask for identifiers in your survey, such name or email address.



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:

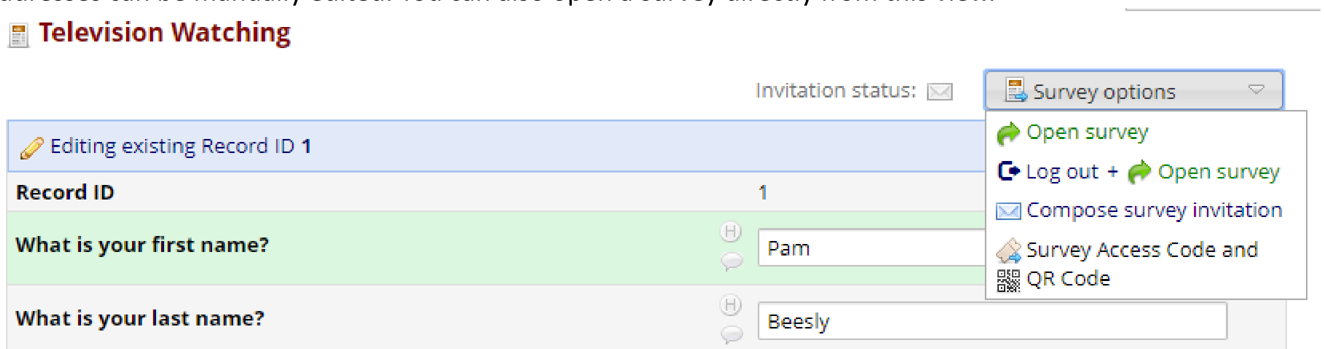
To create a participant list, go to the "Participant List" tab under "Survey Distribution Tools." Enter the email addresses of participants, one per line, to add them as participants to the project. After participants are added, you can compose and send the survey invitation by pushing the "Compose Survey 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.



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

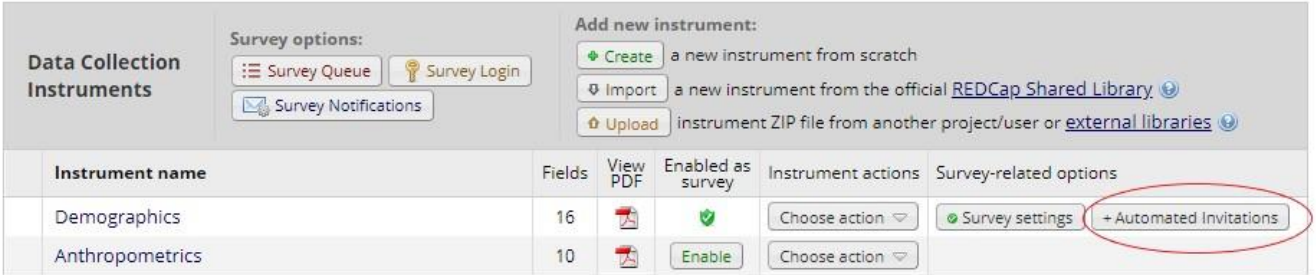
Through an individual record:

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.



Automated Survey Invitations:

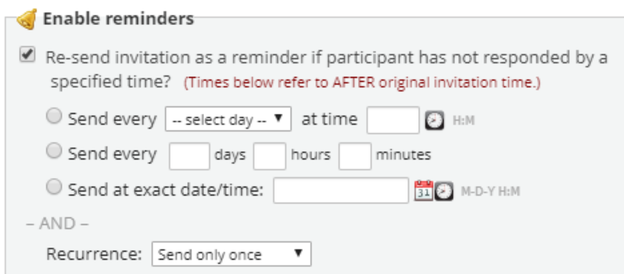
From the “Online Designer” page, select “Automated Invitations” next to the survey you would like to send invitations for. This will give you the opportunity to compose an automated invitation and enable reminders to be sent after a certain amount of time. The Automated Survey Invitation (ASI) allows 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.



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

Reminders

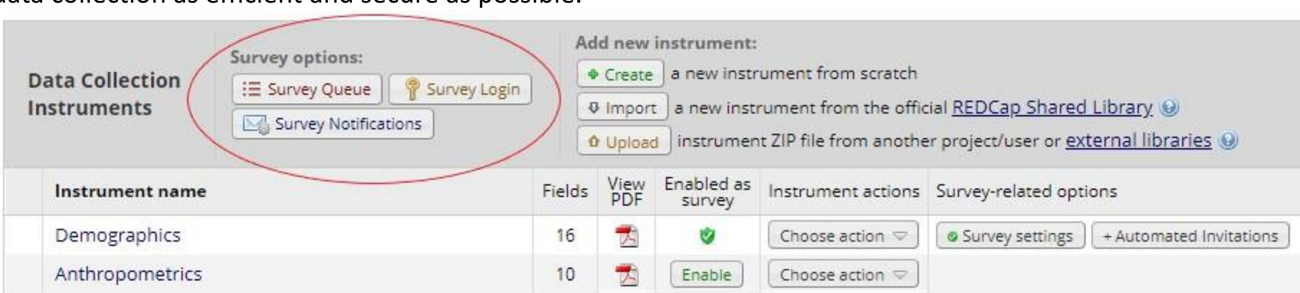
Reminders can also be set up to prompt participants to complete a survey if they have not yet done so. Reminders can be set up anywhere an invitation can be scheduled, such as through the participant list, through an individual record, or through the Automated Invitations button on the "Online Designer."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



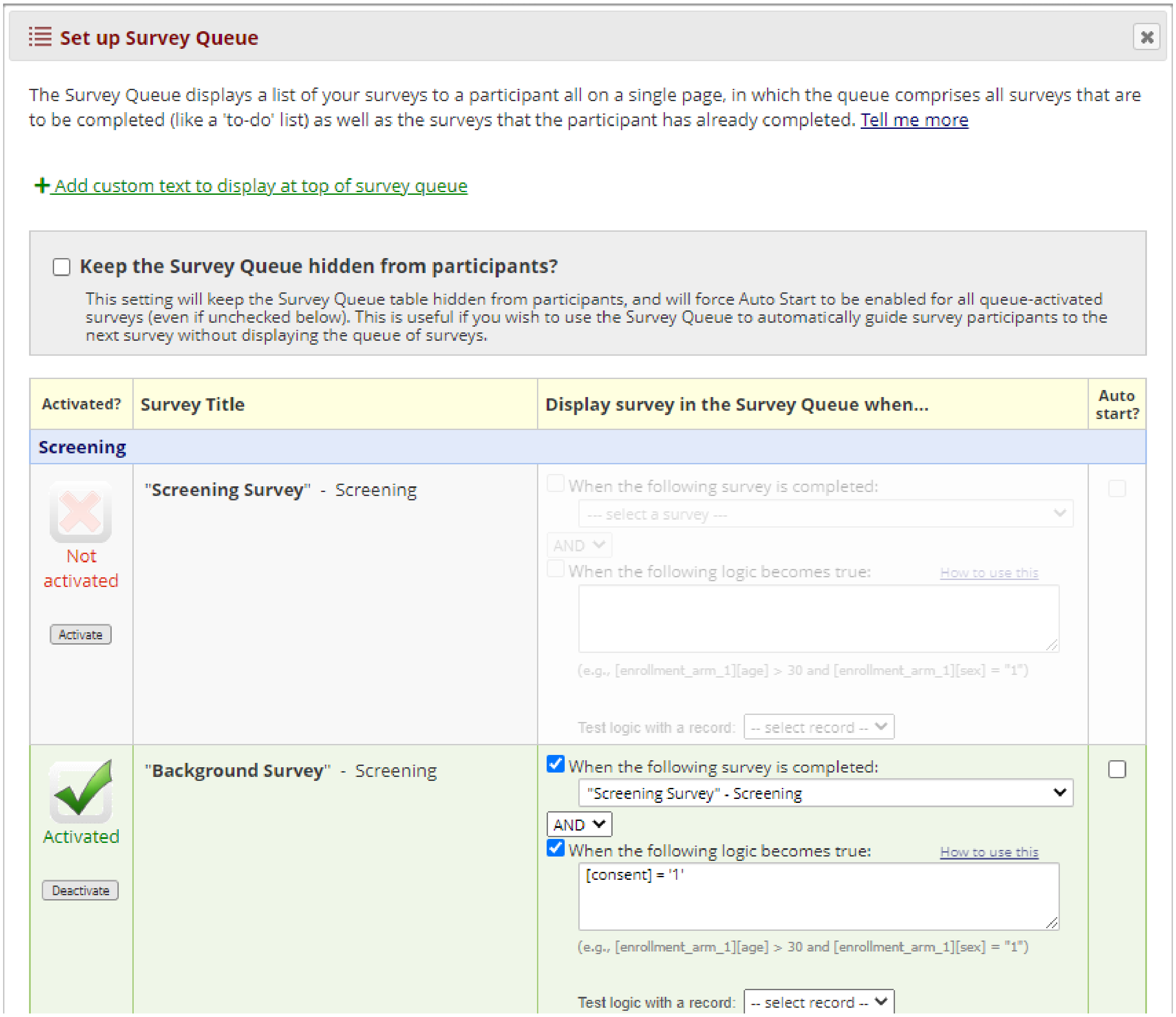
Important: the REDCap system is set to Coordinate Universal Time (UTC), which is either 5 or 6 hours ahead of the Central Time Zone, depending on Daylight Savings. When composing survey invitations, there will be text at the bottom of the "When should the email be sent?" box telling you what the current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



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 example where the background survey is only accessible after someone 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?"



Survey Login – When this feature is enabled, participants must “log in” 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.