REDCap projects include **data collection instruments**. These instruments are where you record your data, either within a form or a survey. Instruments are either a *form* or *survey* created for capturing data.

- **Form:** a data entry instrument used solely by project staff to enter data. Staff log into REDCap, go into the project and start entering data into these forms.
- **Survey:** a data entry instrument that is sent to users *outside of REDCap*, typically by email invitation. The person entering data into a survey typically **does not** have a REDCap account, so they do not need to log into REDCap to enter data into the survey.
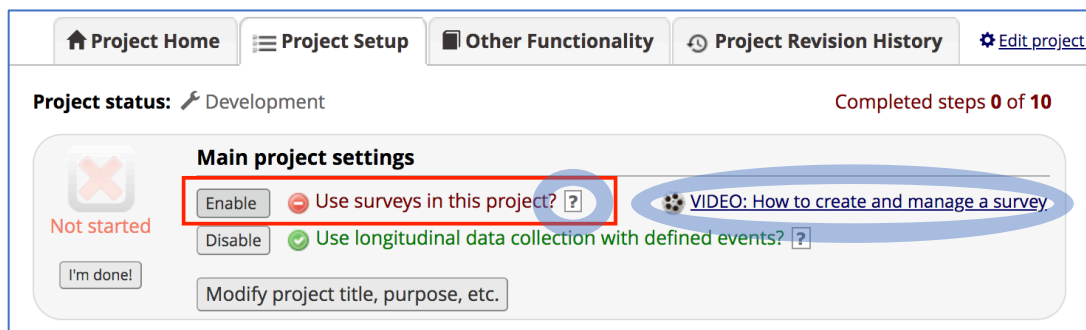
  Helpful hint: surveys can still be used by staff members as regular data entry forms. For instance, if a participant prefers to provide their responses over the phone and staff transcribe their info into the form, then it's helpful to be able to use surveys as forms.

A REDCap project doesn't include surveys by default, so if you want to use them you'll have to enable this option.

<div align="center">**Enable Surveys in your Project**</div>

There are three phases of using surveys in REDCap: 1) implementing the project-level setting, 2) enabling survey settings on an individual instrument, and then 3) sending out your survey to participants. This handout covers the first two steps.

1. The first step is to tell REDCap that you'll be using surveys in this project. Go to **Project Setup** > **Main Project Setting**s and click '**Enable**' next to "**Use surveys in this project?**" (To learn more, click the question mark or video link you see in REDCap, circled below.)

2. Next, you need to tell REDCap which of your instruments will be a survey. (This is important because not every instrument will necessarily be a survey—you might have a

mix of forms and surveys). Go to **Online Designer** and you'll be able to enable any of your instruments as surveys:

3. Within Online Designer, look to the column called "**Enabled as survey**". Find the instrument you're turning into a survey and click "**Enable**". The settings for that survey will automatically pop up. There are a *lot* of options so make sure to read through them carefully the first few times. (You'll find more detailed info on these settings within the Survey Settings handout.)

Once you click "**Save Changes**", congrats! You now have a survey.