

Survey Settings

The **survey settings** for an individual form in REDCap allow you to customize your respondents' survey-taking experience.

You can find the survey settings for any survey-enabled instrument in the Online Designer:

The screenshot shows the 'Survey options' and 'Add new instrument' sections. Below these is a table of instruments:

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Demographics	1			Choose action	Survey settings + Automated Invitations
Consent	0			Choose action	Survey settings + Automated Invitations

You can change the survey settings at any time, even while the project is in production.

Basic Survey Options

The **Survey Title** is what the respondent will see. This does NOT change the name of your instrument itself. This will also correspond to the text in the [survey-link] smart variable and the title in the Survey Queue. You may want to display something participant-friendly here:

The 'Survey Title' field is set to 'About You and Your Child'. Below the field, it says 'Title to be displayed to participants at the top of the survey page'.

Survey Instructions is a space for you to provide any information you may need at the top of the survey page. You can include information from the record in here using piping:

The 'Survey Instructions' field contains the following text:

Hi [first_name]!

Thank you for taking part in the Healthy Eating study!

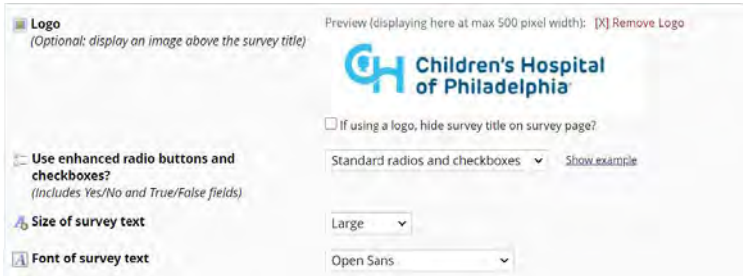
The following questionnaire should take no longer than 15 minutes. You can save your progress and return at any time by clicking "Save and Return Later".

If you have any questions, please

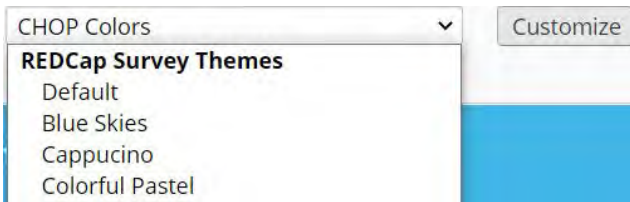
Survey Settings

Survey Design Options

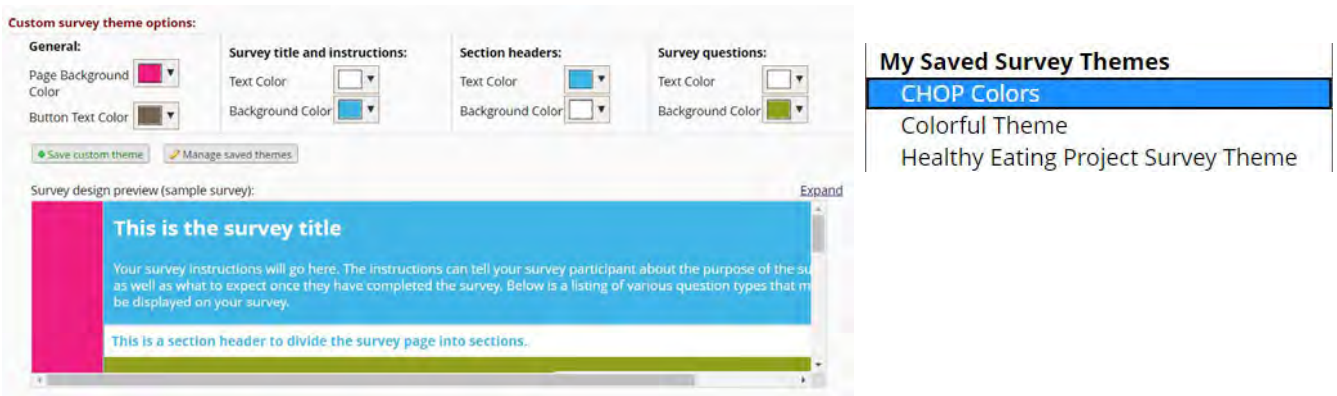
This section controls the appearance of your survey. You can add a logo, change fonts and sizes, and select enhanced radio buttons (easier to click on mobile devices).



Choose from built-in REDCap survey color themes, or create your own by clicking “Customize”:



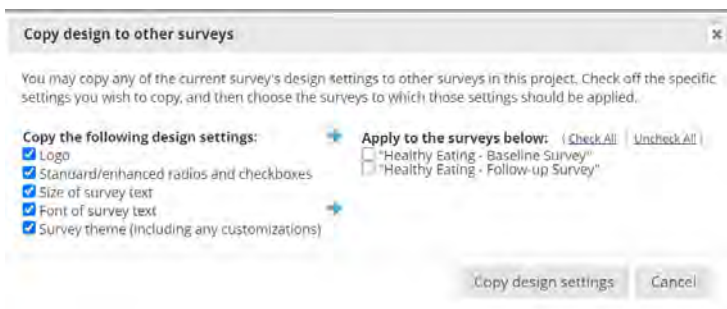
Once you create a custom theme, click “**Save custom theme**” to re-use on any future project. Themes you create will appear in the Survey Theme dropdown:



When you’ve set your design settings for one survey in your project, you can **copy those settings** to any other survey in the same project. This helps keep your project uniform:

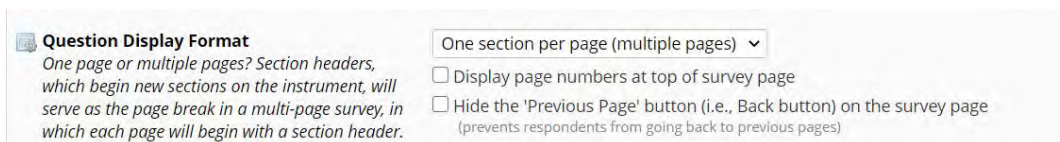


Survey Settings

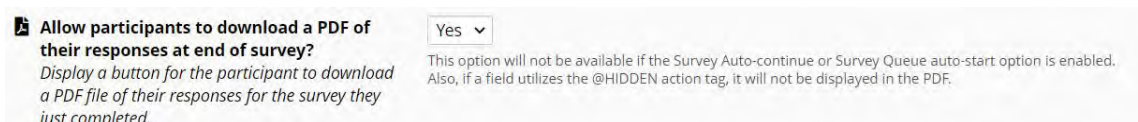


Survey Customizations

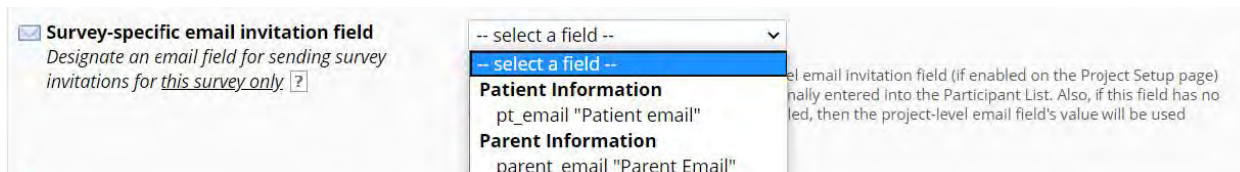
Choose whether to display survey all on one page, or break it up using section header fields:



Allow participants to download a PDF of their completed survey:



Designate an email field to receive invitations for each particular survey that will override the project-level designated email field (located on the Project Setup page). This is useful for projects with multiple subjects on one record (e.g. a parent/child dyad, a child/teacher dyad):



Survey Access

This section contains several options for **limiting responses** by number or time:

Survey Settings

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:

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.)

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 **06/23/2020 09:20**.

You can also choose whether to let respondents **save their survey progress** and come back to finish. With short surveys, it's best to keep this off – but for longer survey queues, you may want

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

Allow respondents to return without needing a return code ?

Allow respondents to return and modify completed responses ?

to give participants this option. The return code allows for extra security.

Survey Termination Options

Choose what your respondents will do when they finish the survey. The **auto-continue function** will take them directly to the next survey. This option will **override the Survey Queue**, so be sure you're not using both at once.

Survey Termination Options:

(Optional) Auto-continue to next survey: Automatically start the next survey instrument after finishing this survey ?

You can also **redirect participants** to a particular URL:

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](#)

Survey Settings

This section is also where you'll turn on the **e-consent Framework and Confirmation email**. For more information on these features please see the **e-consent information sheet**.

<input checked="" type="checkbox"/> e-Consent Framework	<input type="radio"/> Disabled
- and -	<input type="radio"/> Auto-Archiver enabled
<input checked="" type="checkbox"/> PDF Auto-Archiver	<input checked="" type="radio"/> Auto-Archiver + e-Consent Framework What is the e-Consent Framework? (includes end-of-survey certification & archival of PDF consent form)