USING SURVEYS IN REDCAP

AN INTERMEDIATE COURSE

CHILDREN'S HOSPITAL OF PHILADELPHIA

LINDSAY BERRIGAN, REDCAP ADMINISTRATOR III

PREREQUISITES FOR THIS CLASS

- Beginner-intermediate REDCap skills

  EITHER

  - completion of "REDCap for Brand-New Beginners: Setting up a New Project" course at CHOP

  OR

  - equivalent experience creating your own REDCap projects
    - know how to create instruments & use different types of fields
    - familiarity with the Project Setup page and Online Designer

OBJECTIVES

- By the end of this class, you should be able to:
  - Determine the best method for distributing your surveys
    - Public survey link
    - Participant list w/o Participant Identifiers
    - Participant list w/Participant Identifiers
    - Designated email field
  - Set up basic Automated Survey Invitations
  - Understand the Survey Settings
  - Track your invitations that are scheduled/have gone out (Survey Invitation Log)
  - Understand when you may need to use the Survey Queue and set it up with basic logic
  - Know how to test your survey project

AGENDA

- Refresher of distribution methods
- Discussion of single-survey distribution
- Hands-on time: working together to develop a multi-survey project using many different features
- Questions

STEPS TO CREATING YOUR SURVEY PROJECT

- Always start by just creating your forms
  - Don't get bogged down in survey details right away
- Enable surveys in your project WHILE IN DEVELOPMENT MODE
  - You need to do this in order to thoroughly test your project!
  - If surveys aren't turned on until after you've moved to Production mode, **you haven't thoroughly tested.**
- Figure out what type of survey setup you need.
  - https://redcap.link/surveydesigntool takes you through some of this process
- Test, test, test! There's no such thing as too much testing. **Get really used to sending surveys to yourself!**
- The process may be iterative – you may need to revisit your survey setup many times.
  - This is good! It means you're testing thoroughly.

A QUICK REFRESHER

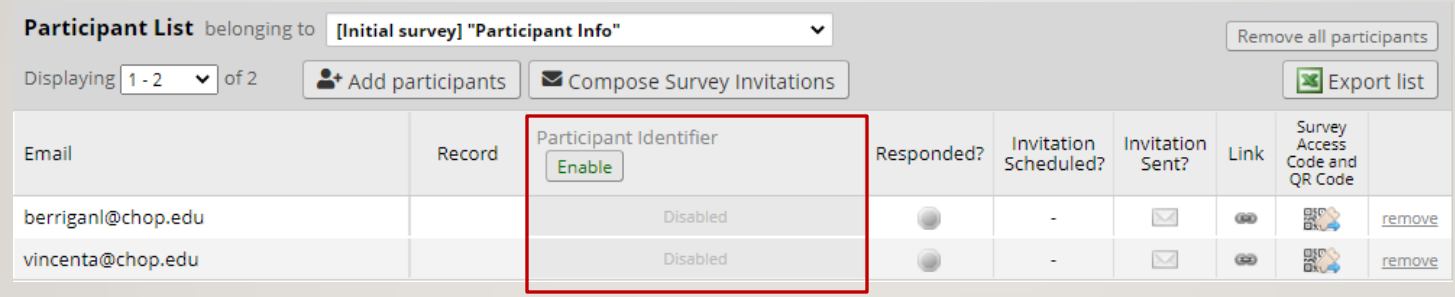
Survey distribution methods in REDCap

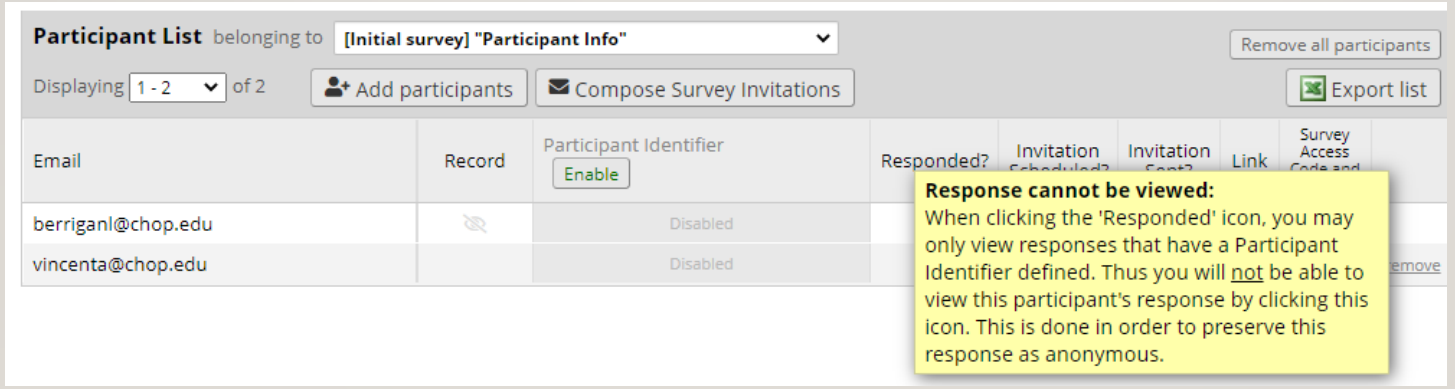
THE PUBLIC SURVEY LINK: ANONYMOUS SURVEY COLLECTION

- The public survey link is the easiest, most straightforward way to send out a single survey
- Inherently anonymous, but you can always ask name or other identifiers in the survey itself
- Always links only to the FIRST form in your project.
  - If you need two different public survey links to two different surveys – you likely need two different projects.
- Can also create QR codes, short links, and custom links from here.
- Anyone can fill it out more than once – no tracking of identities or IP addresses

THE PARTICIPANT LIST – **WITHOUT** IDENTIFIERS

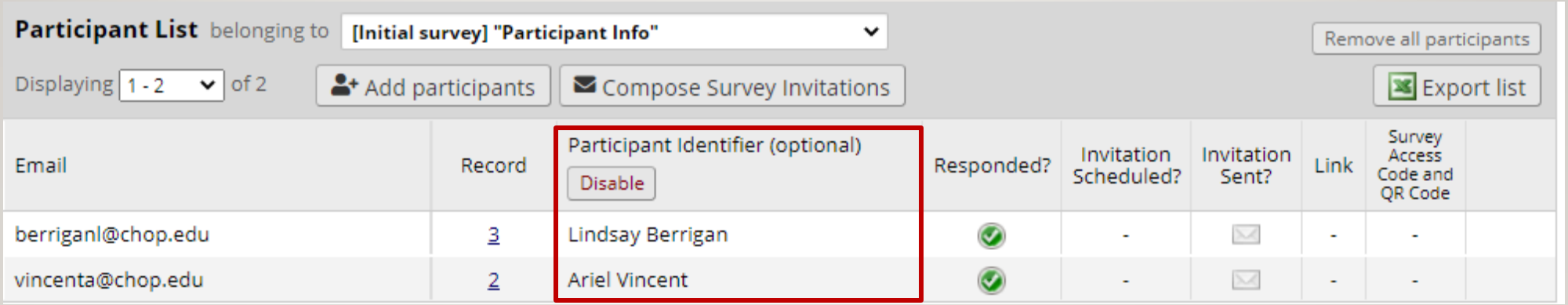
- For **anonymous** data collection when you have your participants' email addresses





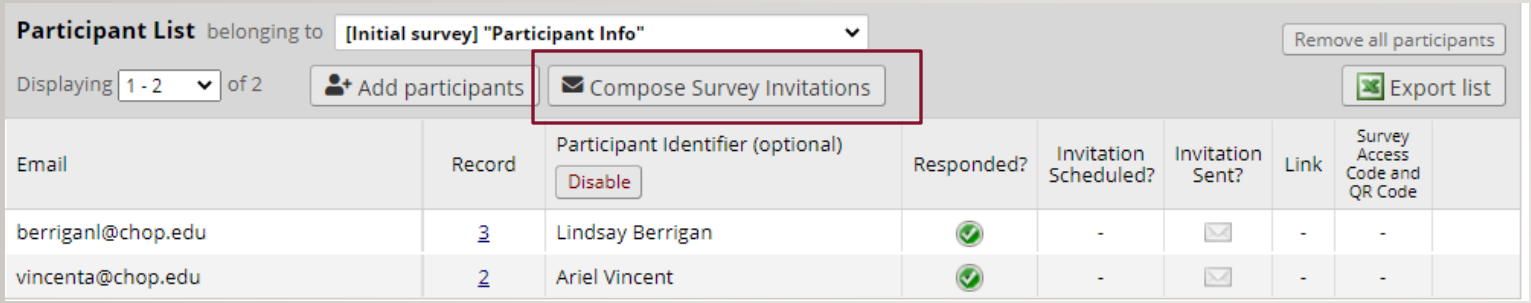
THE PARTICIPANT LIST – **WITH** IDENTIFIERS

- For **identifiable** data collection when you have your participants' email addresses



Record ID is clickable – response is not anonymous

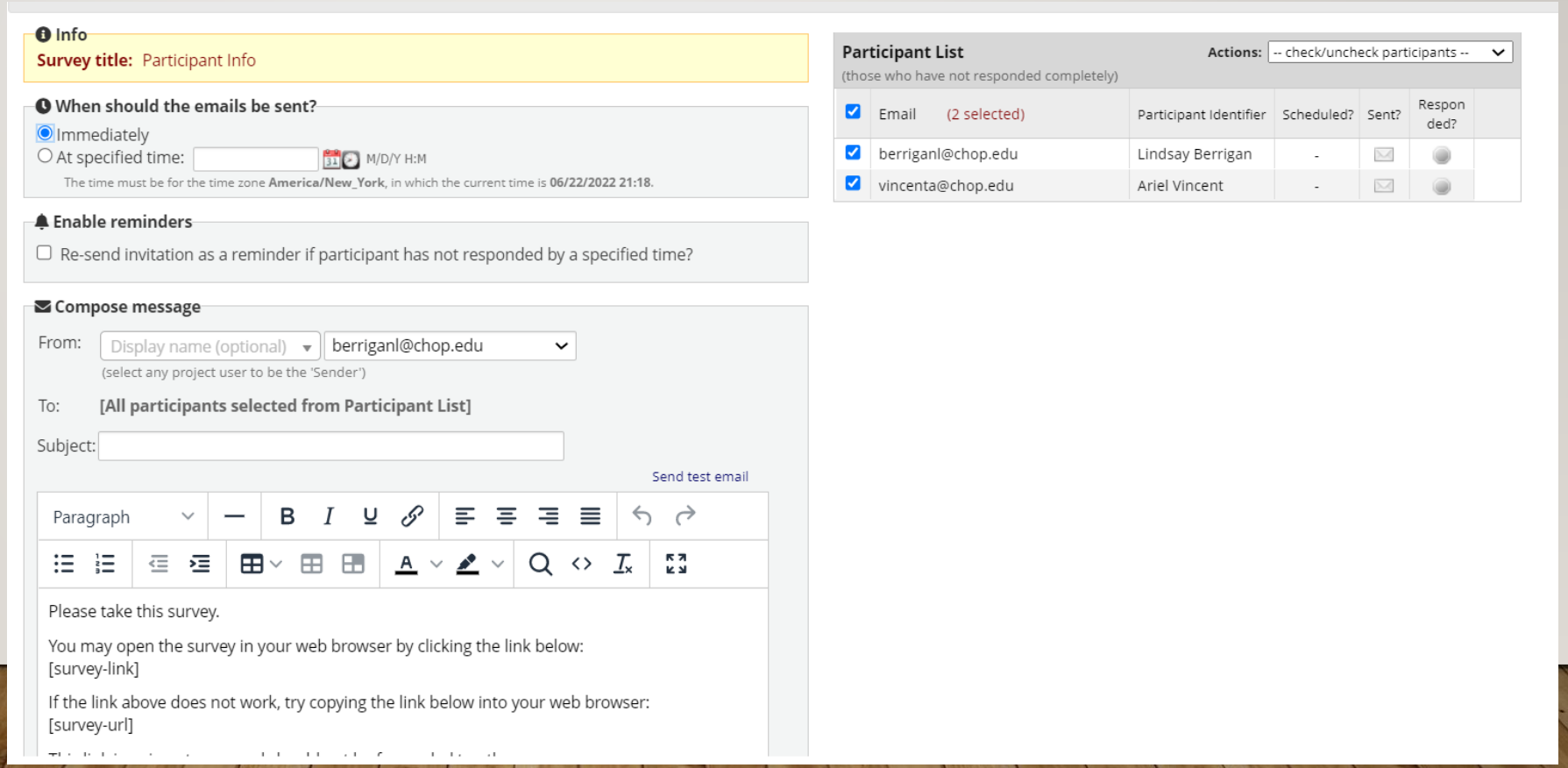
SENDING FROM THE PARTICIPANT LIST



Choose which recipients to send to

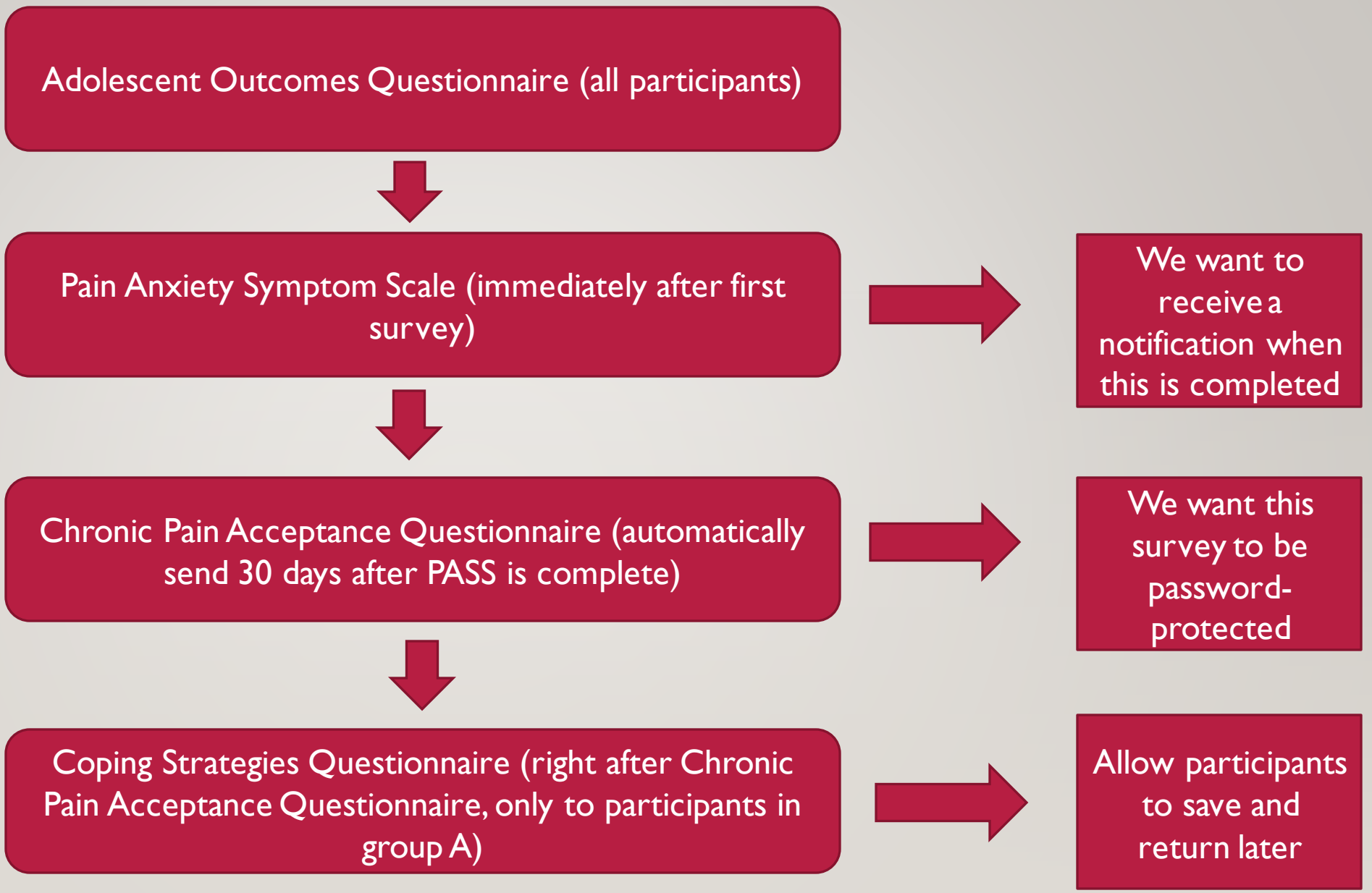
Choose when to send/remind

Write your email – always include [survey-link] and [survey-url]



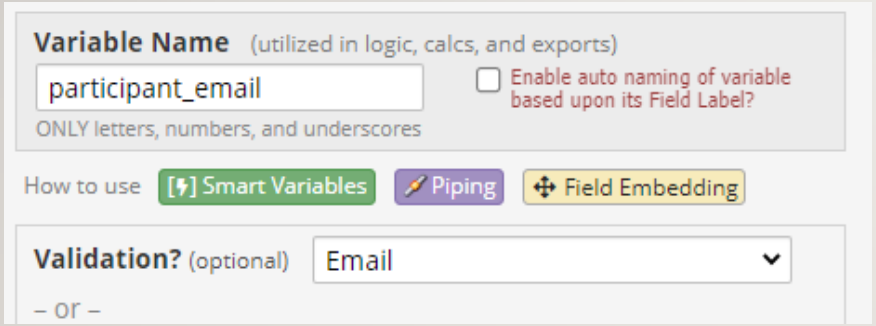
HANDS-ON TIME

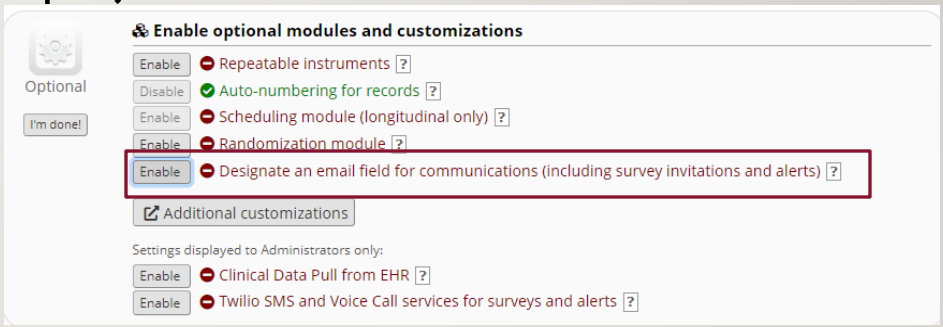
BUILDING A MULTIPLE SURVEY PROJECT TOGETHER


Adolescent Outcomes Questionnaire (all participants)
Pain Anxiety Symptom Scale (immediately after first survey)
We want to receive a notification when this is completed
Chronic Pain Acceptance Questionnaire (automatically send 30 days after PASS is complete)
We want this survey to be password-protected
Coping Strategies Questionnaire (right after Chronic Pain Acceptance Questionnaire, only to participants in group A)
Allow participants to save and return later

DESIGNATING AN EMAIL FIELD

- Create a text field with email validation in your project:

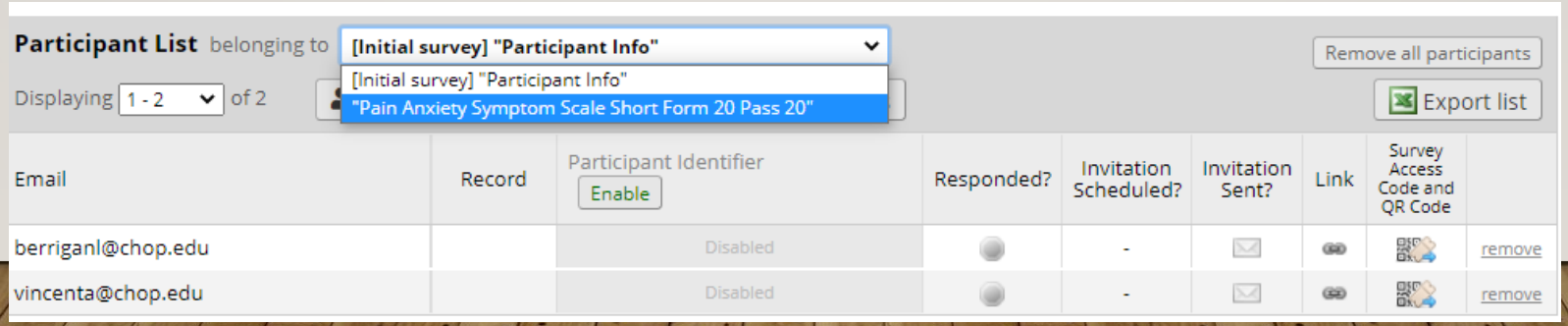




- An easy, clean way to build your participant list
- Needed for certain survey functionalities
- If I have my participants' email addresses, I often use this method
  - Allows for the most control over the project

CAN I BUILD A MULTI-SURVEY PROJECT WITHOUT USING A DESIGNATED EMAIL FIELD?

- Short answer: yes! But your options are limited:
  - First instrument must be a survey
  - Participants must fill out first survey in order fill out subsequent surveys
  - Can't automate the first survey invitation
- If those criteria are ok with you, you can send multiple surveys from the Participant List, either with or without identifiers:



SURVEY SETTINGS

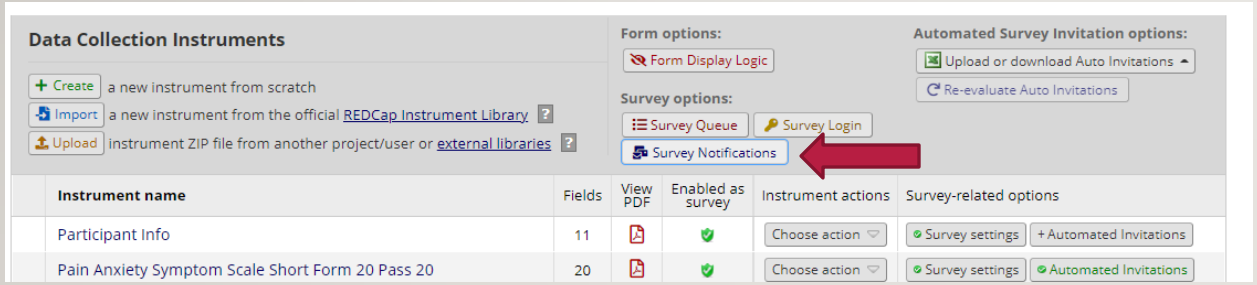
- A lot of these are "you don't know you need them until you need them" type of things
- Features are frequently added here with upgrades

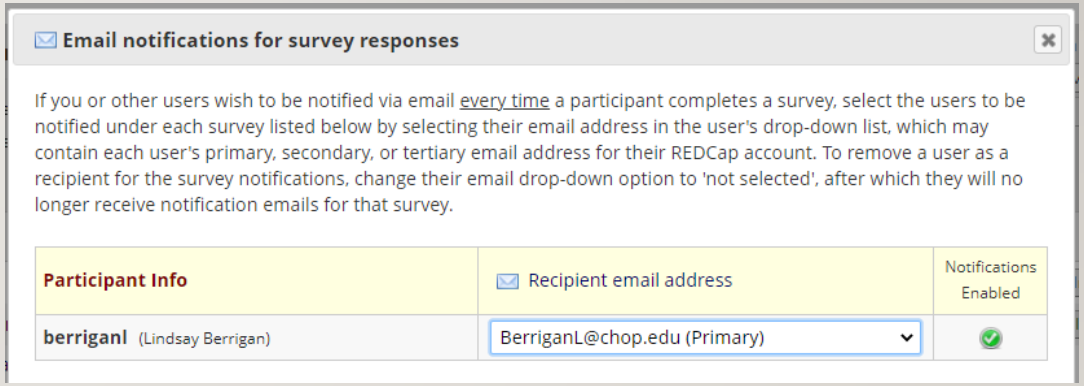
Check out:

https://storage.googleapis.com/arcus-edu-libsci/PDFs/SurveySettings.doc.pdf

SURVEY NOTIFICATIONS

- Use survey notifications to receive a simple notification when a participant completes a particular survey in your project





- For more complex notifications, use the Alerts & Notifications section

AUTOMATED SURVEY INVITATIONS

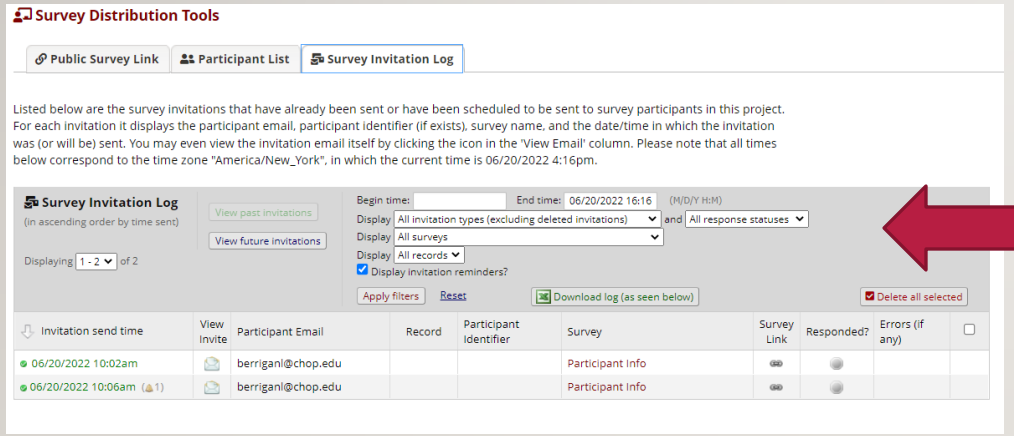
- Automated Survey Invitations (ASIs) are a way to trigger survey invitations and reminders
- You control what makes them send in the ASI setup

More on ASIs here:

https://storage.googleapis.com/arcus-edu-libsci/PDFs/Automated%20Survey%20Invitation.pdf

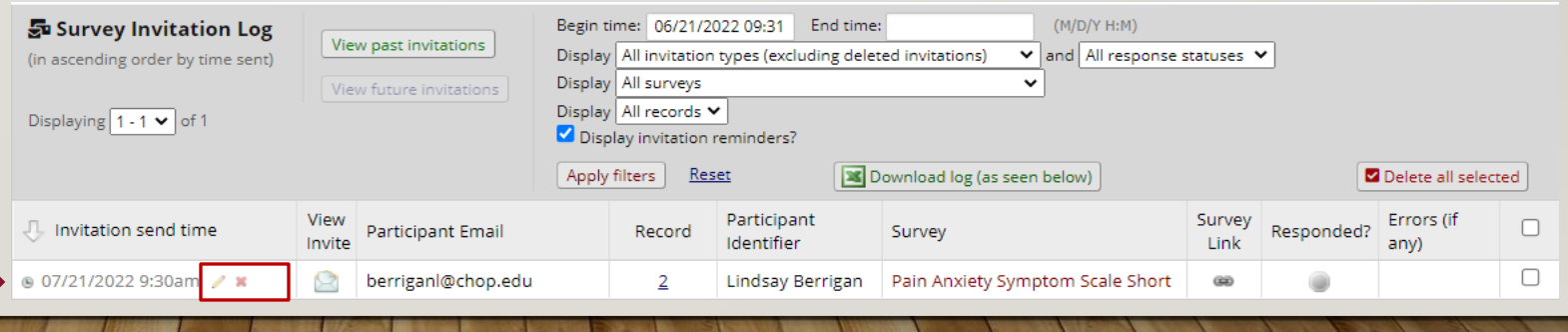
SURVEY INVITATION LOG

- Your hub to see what has gone out and what's scheduled to go out in the future



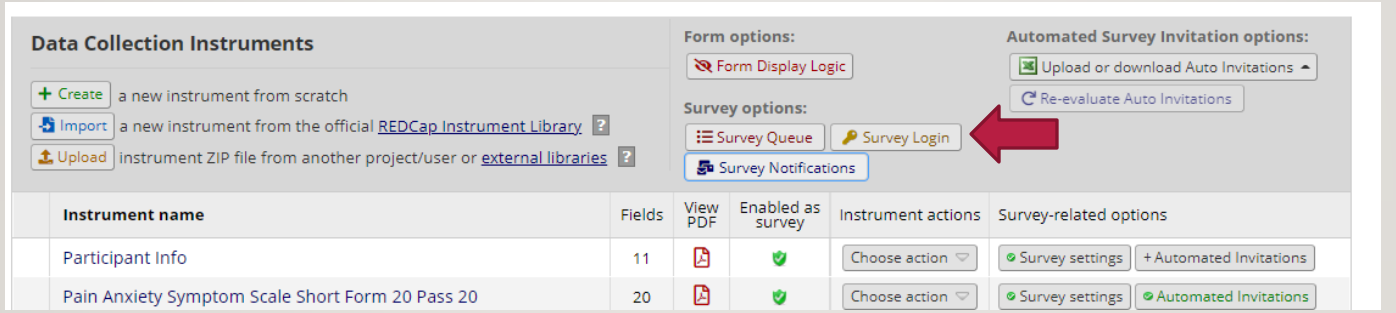
Filter by instrument, record, date/time, past vs future invitations

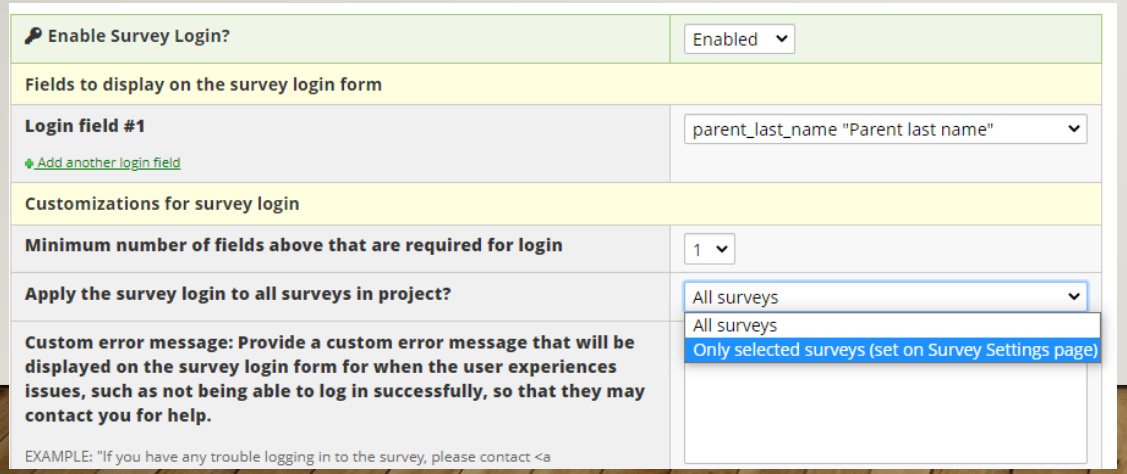
Can edit/delete individual future invitations from here



SURVEY LOGIN

- Use the survey login to password-protect your surveys

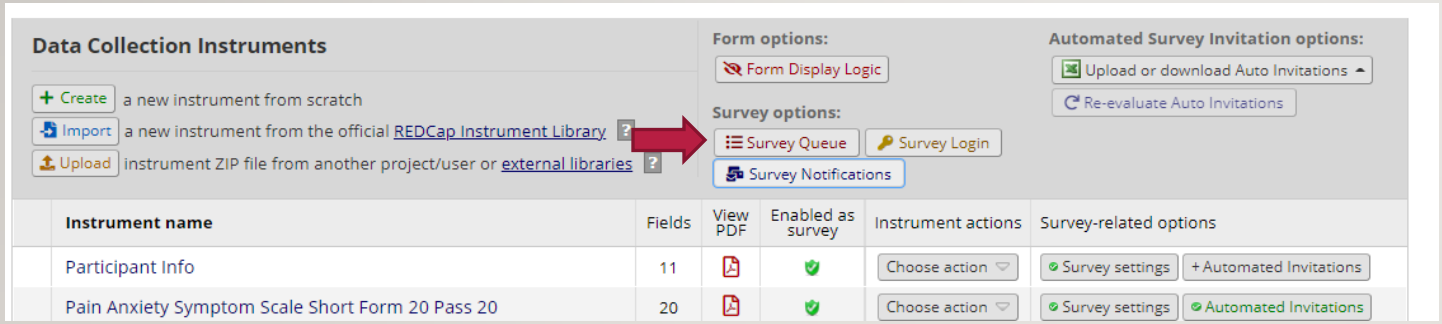




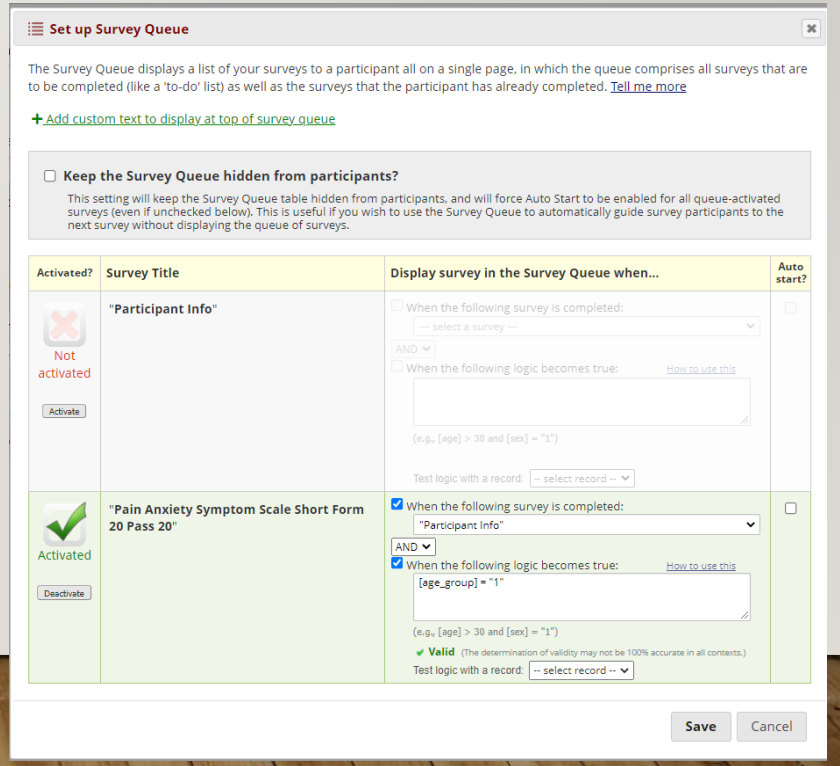
Choose whether to apply to all surveys or only some (specify in Survey Settings)

THE SURVEY QUEUE

- The **survey queue** is used when different participants will fill out different sets of surveys

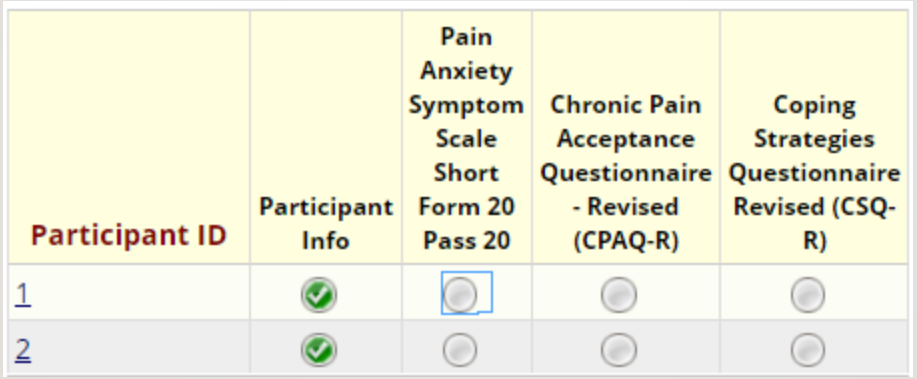


Usually requires creating your own REDCap logic



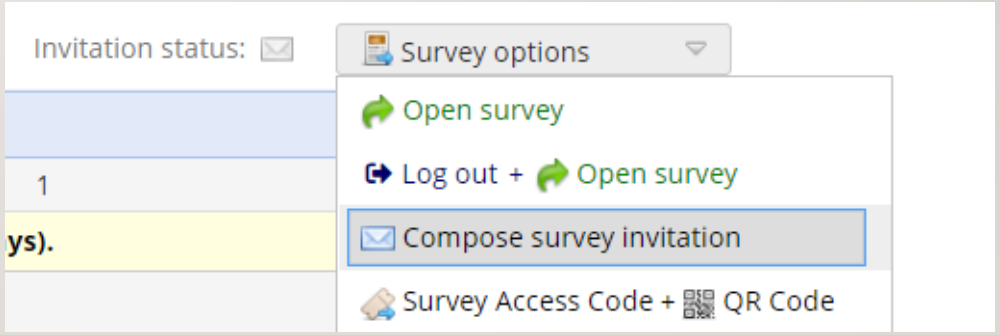
SENDING SURVEYS FROM WITHIN A RECORD

Click in the bubble of the survey you want to send for that record



Participant ID	Participant Info	Pain Anxiety Symptom Scale Short Form 20 Pass 20	Chronic Pain Acceptance Questionnaire - Revised (CPAQ-R)	Coping Strategies Questionnaire Revised (CSQ-R)
1	✓	○	○	○
2	✓	○	○	○

Then you can compose a survey invitation from there, or open the survey for a participant to fill out in person



SENDING SURVEYS VIA TEXT MESSAGE

- You can send SMS survey invites using Twilio – a third-party service that works with REDCap
- Everything we've learned is still relevant to sending via SMS instead of email
- More information on Twilio:

What Is Twilio?

Twilio setup instructions

BEST PRACTICES FOR TESTING YOUR SURVEY PROJECT

- DON'T just enter in the data entry form and assume that's good enough!
- Test the WHOLE process, end-to-end – as though you/your testing partner are an actual participant.
- Recruit others on your team to help.
- Test across a variety of browsers (i.e. Chrome, Firefox, Safari), and devices (laptops, tablets, phones).
- If you're using multiple surveys and ASIs with date-based logic, temporarily set your dates closer together to test the whole project (i.e. instead of 30 days, set it to send in 1 day).

MORE RESOURCES

- Survey-specific resources
- General REDCap Resources

Contact us at redcap@chop.edu

Office hours 2x per month – hours listed on REDCap home page

FEEDBACK

Scan the below QR code to give feedback on this class. Be honest – we're always trying to improve!