Navigation Sheet – Surveys and invitations

Compliance & Data Office

Research Support & External Relations

Karolinska Institutet

Contents

This is a short guide to explain the use of surveys in a REDCap project.

Introduction

In your REDCap project, you may enable any instrument in *Online Designer* as a survey and then collect data for that instrument from survey respondents. When an instrument is enabled as a survey, study participants can enter data online via a survey link, although you will still have the possibility to enter data manually if needed.

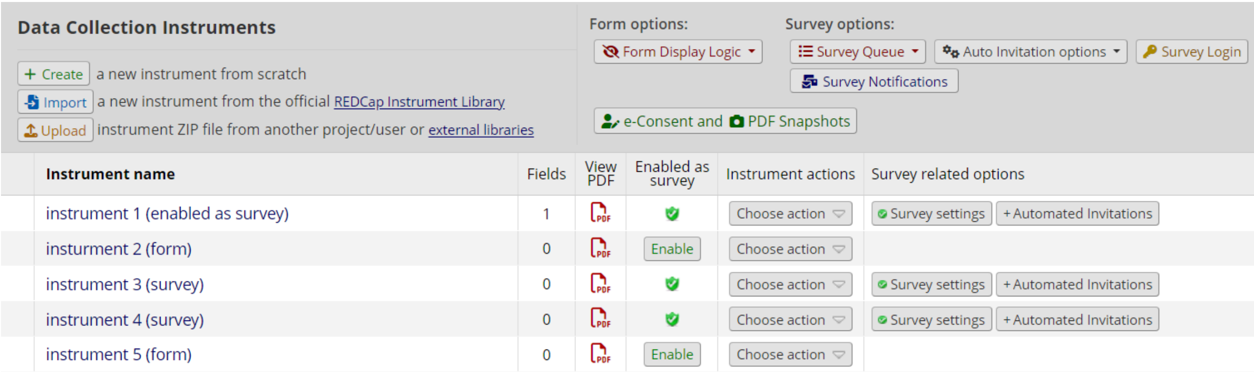
When using surveys, you may utilize the *Participant List* both for emailing your recipients and to track who has taken your survey(s).

If your first instrument is enabled as a survey, you can use a public survey link, which is a single link that can be emailed to all participants or even posted on a website.

There are several ways to send out surveys to study participants. In this guide we will go through some of the most common survey invitation tools.

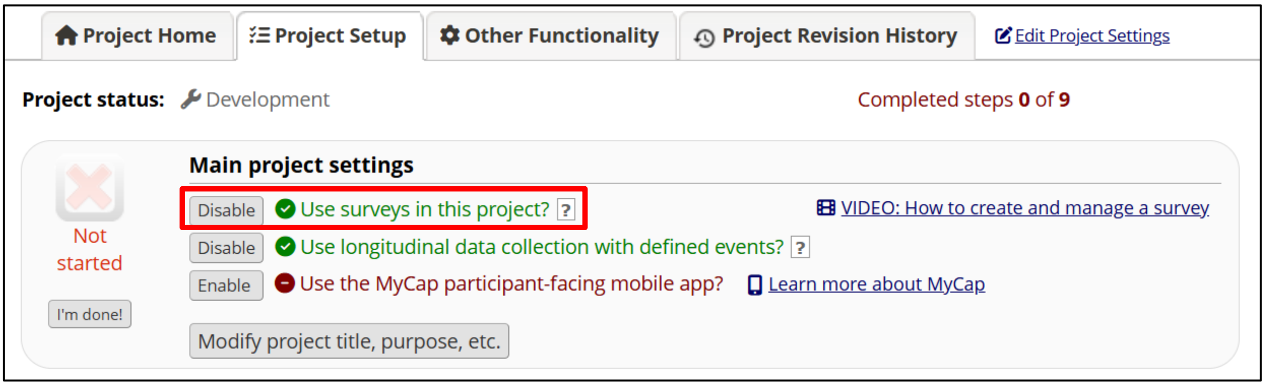
REDCap instruments: forms vs. surveys

In REDCap's *Online Designer*, you can create two different types of instruments: forms and surveys. Forms are data entry instruments that can be completed by REDCap users with a login (e.g. researchers, data collectors). Surveys are instruments that can be sent out to study participants and completed without having to log in to REDCap.

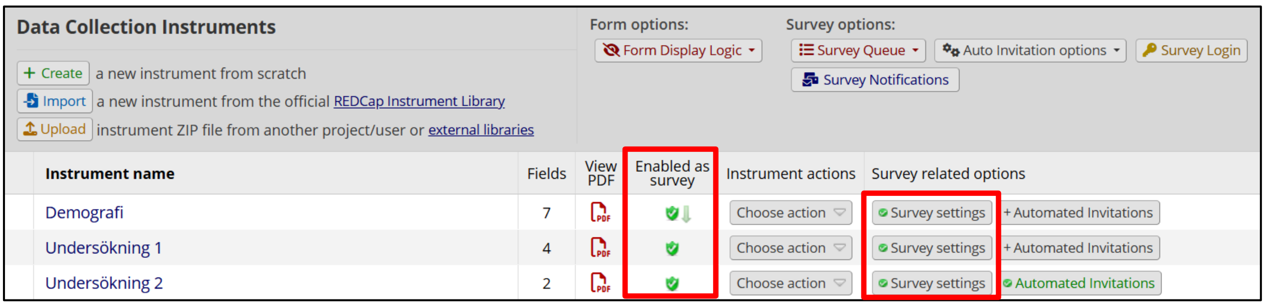


Enable surveys in your project

Navigate to the Project Setup tab and enable the survey function in your REDCap project.



Next, go to *Designer* and enable the instruments you wish to use as surveys. You will then have the possibility to set up specific survey settings for each instrument.



You will have the possibility to add survey instructions and a survey completion text field as well as choosing different limitation options such as a maximum number of responses or an end date for the survey. Another useful feature is the "auto-continue to the next survey" function. This means that the participant will be automatically redirected to the next survey after completing the first one. When this function is enabled, you will see a green arrow next to the enabled symbol for the specific instrument.

For more detailed information on the different functions that can be found under *Survey Settings*, see the Appendix.

Public vs. individual survey links

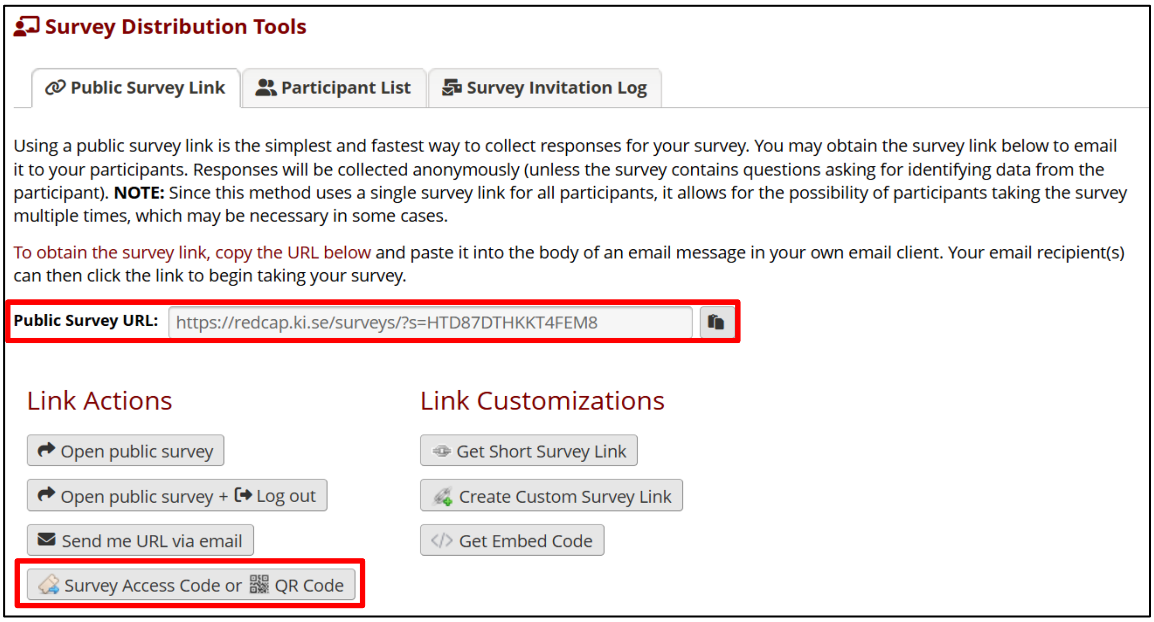
REDCap has the ability to send out public survey links or individual survey links. Public survey links are well suited to anonymous data collection or when you don't know exactly who your participants will be (anyone is able to follow the survey link and take part). Individual survey links can be sent if data collection is not anonymous; you know who your participants are and add their email addresses to the project to send out survey invitations.

Public survey link (one link to reach them all)

Using a public survey link is the simplest and fastest way to collect responses for your survey. This method uses a single survey link for all participants which can be distributed via email outside of REDCap or be posted on a website. It is also possible to obtain a QR code which you can then print and post in a patient waiting room or other places where you might find your target population. The public survey link can be found under *Survey Distribution Tools*, in the left-hand side menu.

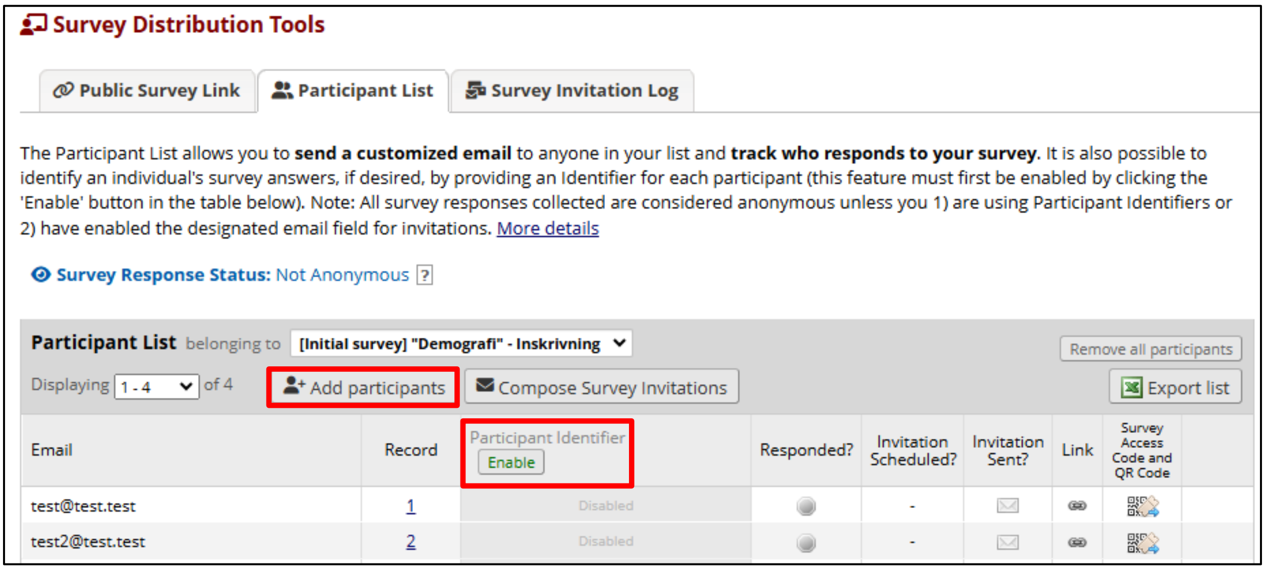
Please note that the public survey link will only be available for the first instrument on your list (as seen in *Designer*). This also means that a public survey link is only available for your project if your first instrument in *Designer* is enabled as a survey. If the first instrument in *Designer* is a form, you will not be able to use a public survey link in your project.

When using the public survey link, responses will be anonymous, unless you ask for any identifying data in the survey. If you want the participants to take several surveys, you will then need to enable the "auto-continue to the next survey" function (see Appendix), or in the first survey ask the participants to register their email address so that you can schedule further survey invitations for each participant. In this case the survey will no longer be anonymous. Since all participants use the same survey link, it will be possible for the same participant to take the survey multiple times. If you don’t want this to be possible you will need to use another survey invitation method.



Individual survey links & the *Participant list*

The *Participant List* can be found under *Survey Distribution Tools* and allows you to send a customized email to anyone in your list and track who responds to your survey. Once a participant has responded, they will not be able to take the survey again, since each link is individual. It is also possible to identify an individual's survey answers, if desired, by providing a Participant Identifier after



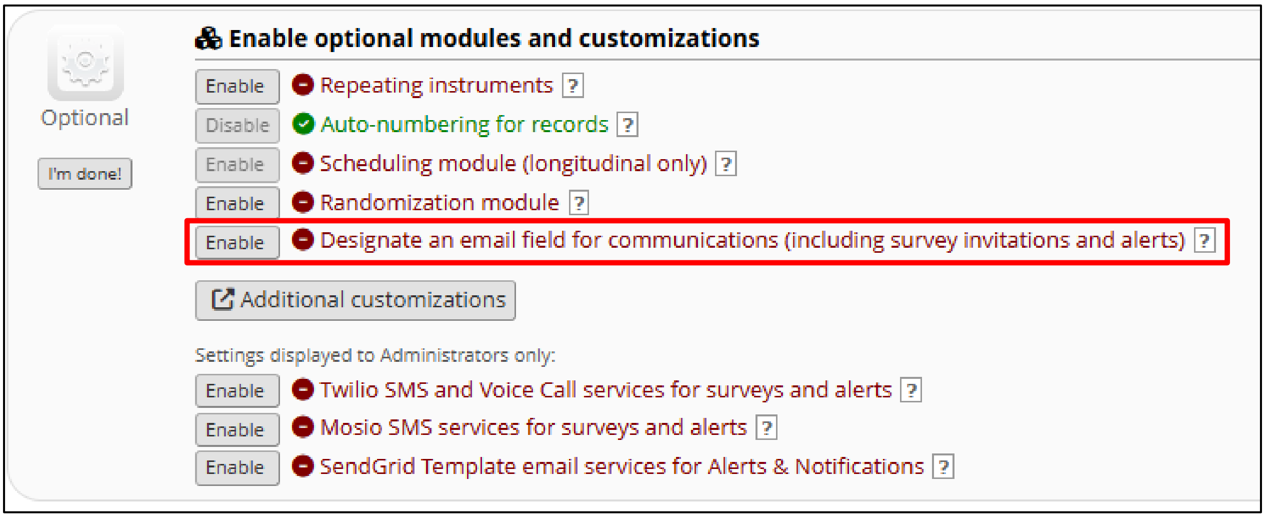
adding them to the participant list below. The identifier could be an ID number, e.g. the same code number you may use for the clinical part of the study if this exists.

Note: Survey responses will not be considered anonymous when you are using Participant Identifiers or have enabled the designated email field for invitations.

Adding participants

There are two ways of adding email addresses to your Participant list.

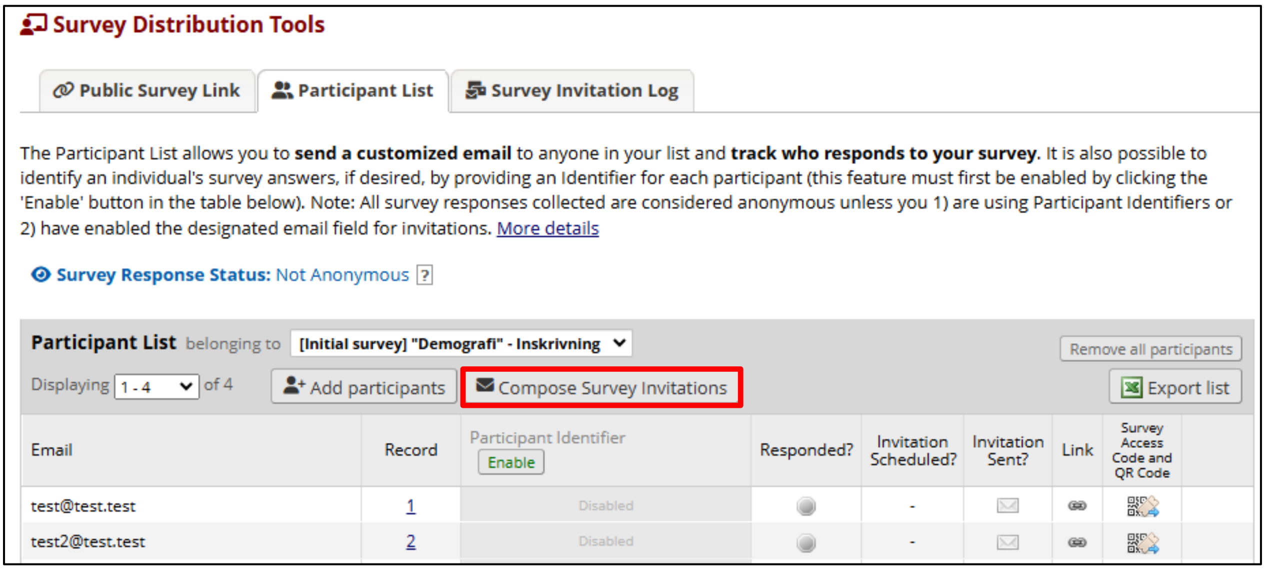
1. **Use the "Add participants" button in the *Participant List* tab.**
   This is useful if you have a list of email addresses before you start the study.
   - When clicking the button, a pop-up window will appear where you can add all email addresses at once, each address needs to be on a separate row.
   - Click on "Add Participants" and the addresses will now appear in your Participant List.
2. **Use the "Designate an email field for communications" function.**
   This is useful if your first instrument is either a public survey (where you don't know the participant's email address) or a form (where study staff enters data) and you wish to use survey invitations for other instruments in your project.
   - First you need to create an email field in your first instrument where the participant (or study staff) can enter the email address. Use the email-validation so that REDCap recognizes the field as an email field.
   - Next, go to Project Setup and enable the function Designate an email field for communications.



- A pop-up window will appear where you will choose the email field you created on your instrument.
- When this function is enabled, the *Participant List* will automatically be populated once an email is added to the first instrument of a new Record.

Compose manual survey invitation

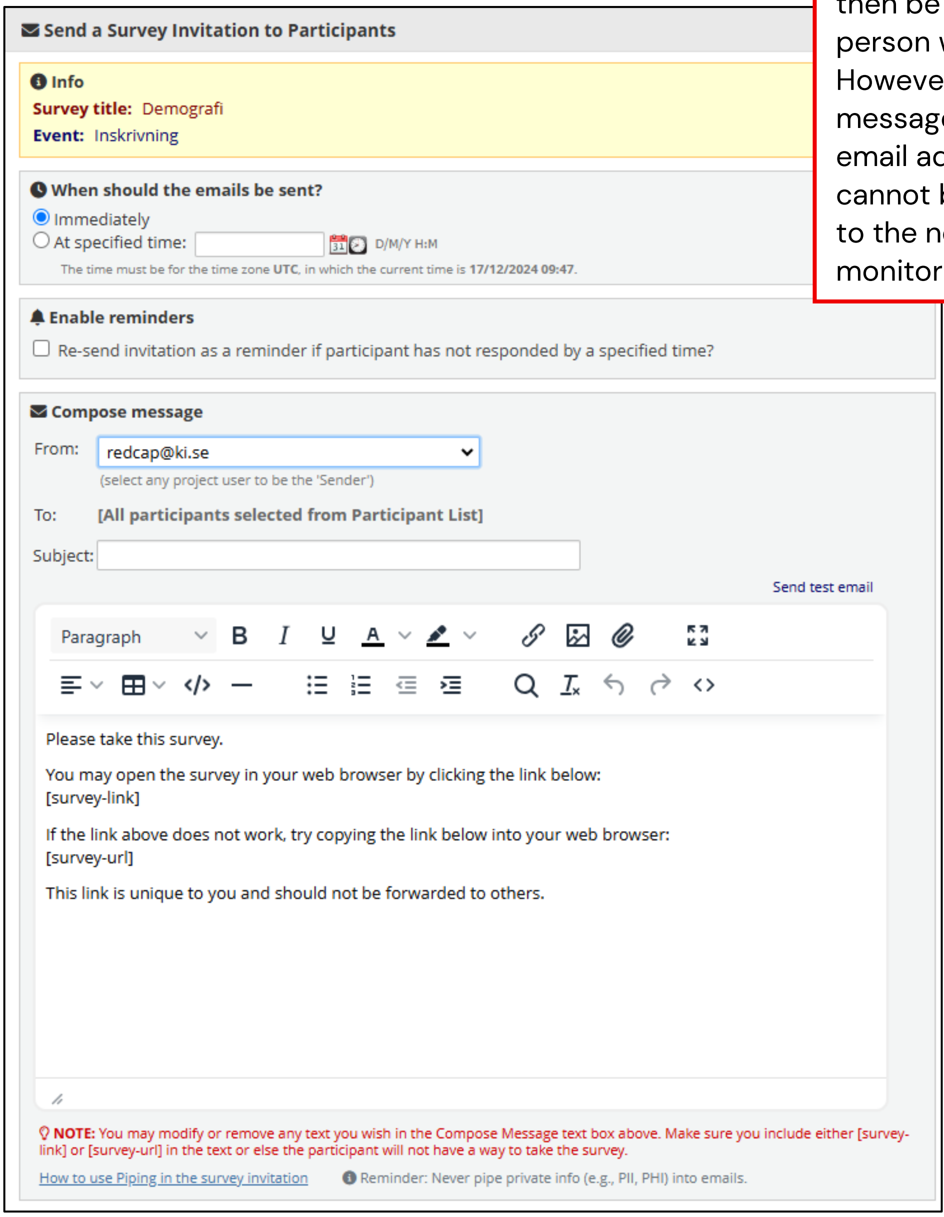
When composing a manual survey invitation, you must go through a few steps before sending out the survey.



- Choose the date and time for when the survey will be sent out.
- Add one or several reminders to people who haven't responded to the survey. (Optional)

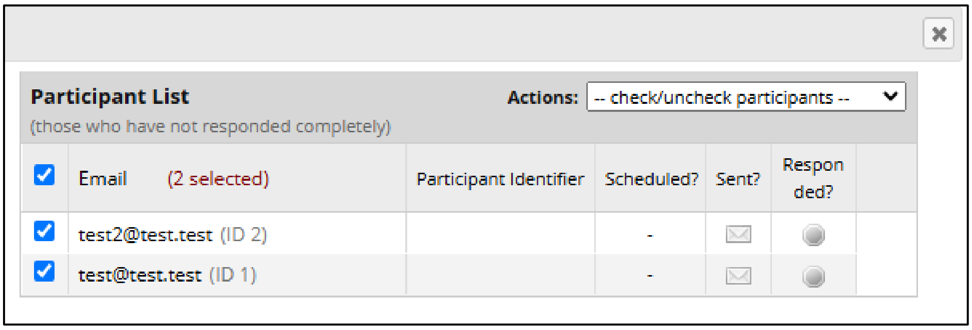
- Compose message – If you are several users in your project, you can choose which email address to be used as the sender. When using a KI email address, this will be the address shown in the sender field, but when using an external email address, the sender will automatically be set to noreply-redcap@ki.se.

Note: When the noreply address is being used, study participants can still reach the study team by replying to the email, this will then be re-directed to the person who created the mail-out. However, potential bounce back messages (sent when a recipient email address is not correct or cannot be reached) will be sent to the noreply inbox, which is not monitored.



Please note: If emails have previously been sent out this way, a drop-down menu with previous email templates shows up below the email textbox. KI does *not* recommend using these templates as we have found that this can cause problems for the survey links in the emails (links are not properly updated and might have to be replaced manually by the user). Consider keeping study-specific email templates outside of REDCap instead, do not use REDCap's built-in template function.

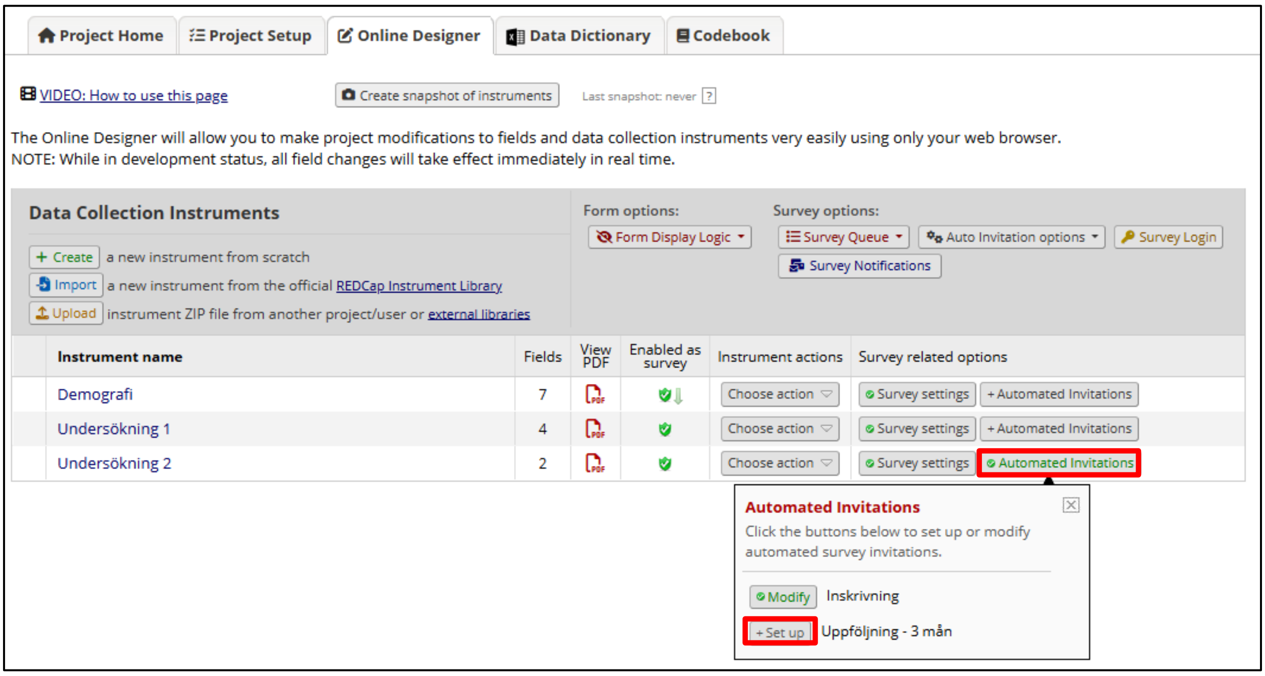
- Choose all, or selected recipients from your participant list.



Automated Survey invitations (ASI)

Survey invitations can also be scheduled to be sent automatically using the function *Automated Survey Invitations* (ASI). The invitations will then be scheduled when specific conditions in the project are met, such as if the participant completes another survey in your project or if certain data values for a record are fulfilled.

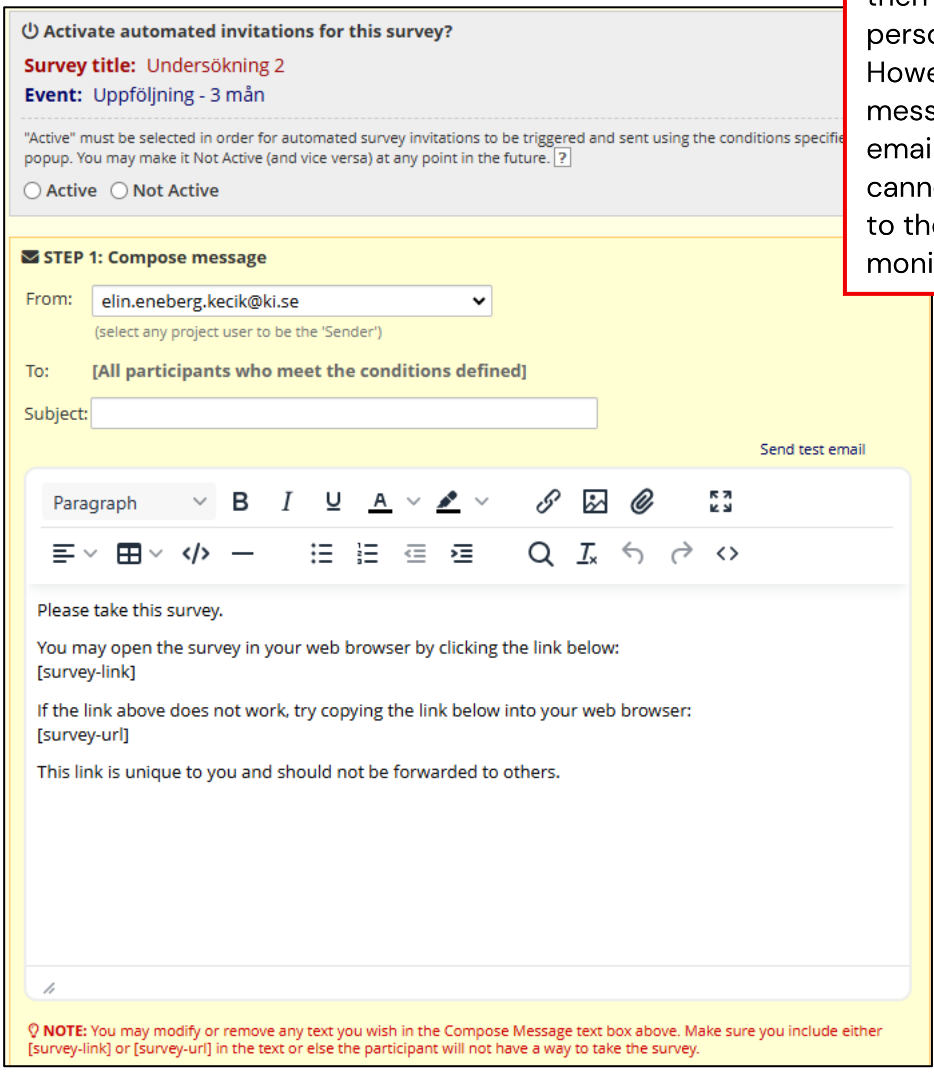
To set up an ASI, navigate to the *Online Designer* tab and click on "+Automated Invitations" for the specific survey you want to be sent out. If you are using a longitudinal project, you will be able to set up ASI's for every event of each instrument.



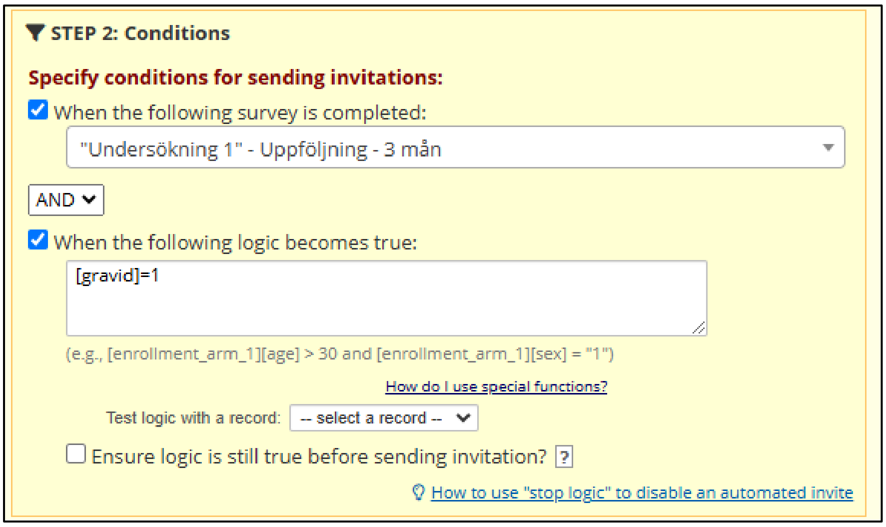
Similar to the manual survey invitations, you must go through a few steps to set up the ASI.

- Step 1 – Compose message
  If you are several users in your project, you can choose which email address to be used as the sender. When using a KI email address, this will be the address shown in the sender field, but when using an external email address, the sender will automatically be set to noreply-redcap@ki.se.

Note: When the noreply address is being used, study participants can still reach the study team by replying to the email, this will then be re-directed to the person who created the mail-out. However, potential bounce back messages (sent when a recipient email address is not correct or cannot be reached) will be sent to the noreply inbox, which is not monitored.

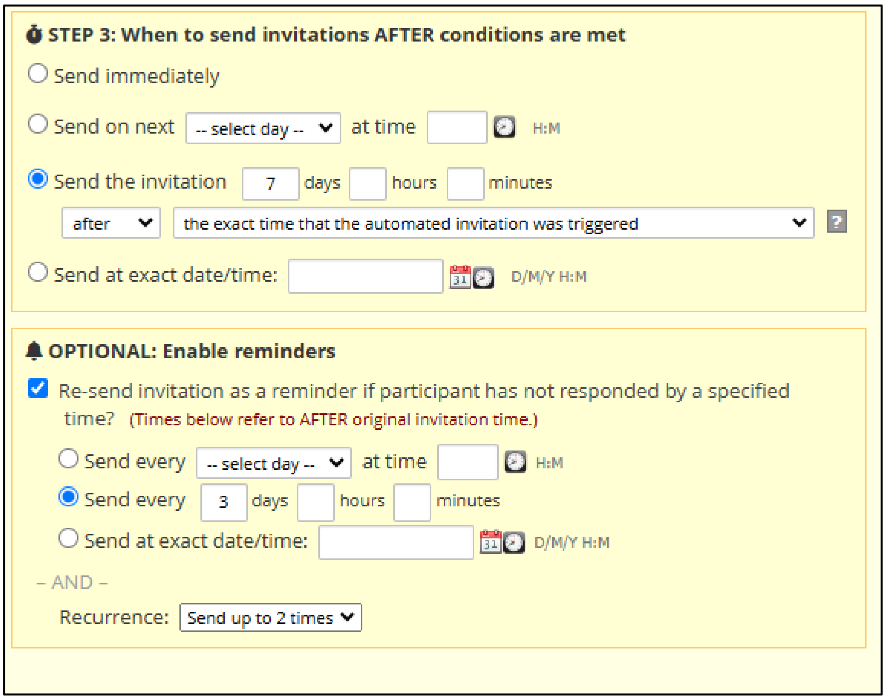


- Step 2 – Conditions
  You need to set up certain conditions that will trigger the survey invitation to be scheduled, e.g. a previous survey has been completed, or a certain answer was provided on a previous field.



- Step 3 – When to send invitations
  You need to enter when the invitation should be sent after the conditions set in step 2 have been met. If you have a previous field with a date, this can also be used to plan the invitation.

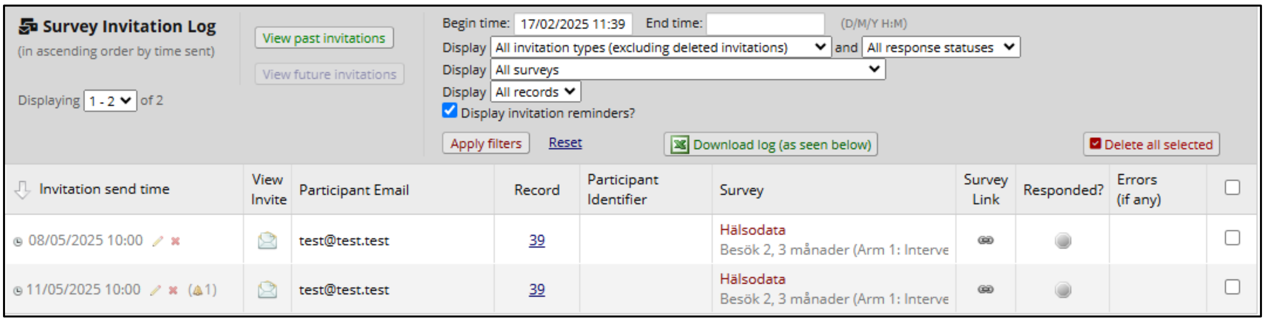
- Reminders (optional)
  You can choose to send out reminders, in case the participant doesn't complete the survey within a given time.



Once the conditions are met, the invitation will be scheduled. You can find all scheduled invitations (future and past) under *Survey Distribution Tools →* *Survey Invitation Log*. While in Development mode, we recommend you test your ASIs carefully and make sure they work as intended.

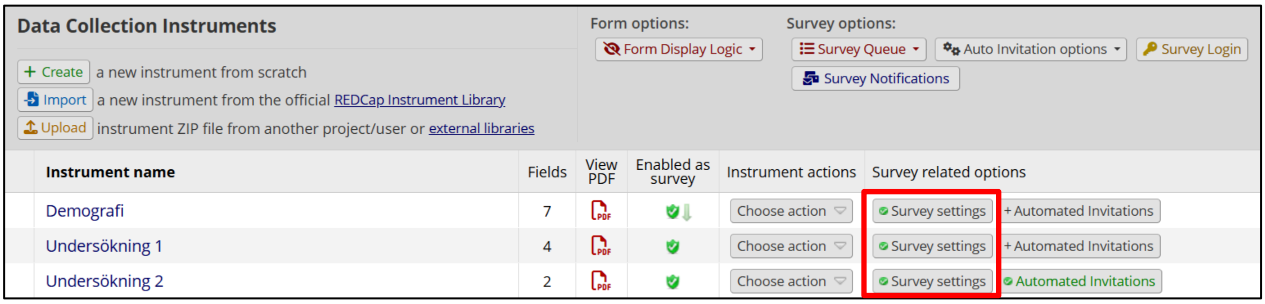
Please note:

- Any changes you make to the ASI settings will not affect invitations that have already been scheduled.
- If you delete a scheduled invitation (by clicking the red cross in the Invitation send time field), a new invitation cannot be planned for that same record using ASI. You will then need to create a manual invitation instead.



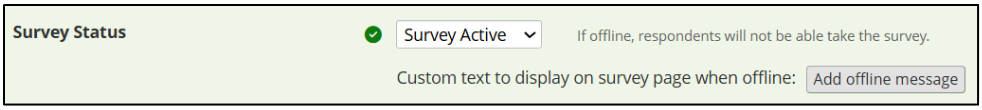
Appendix

This appendix gives an overview of the different functions and settings that can be found in a survey's *Survey Settings*.



Survey Status

Choose whether your survey is active or offline.



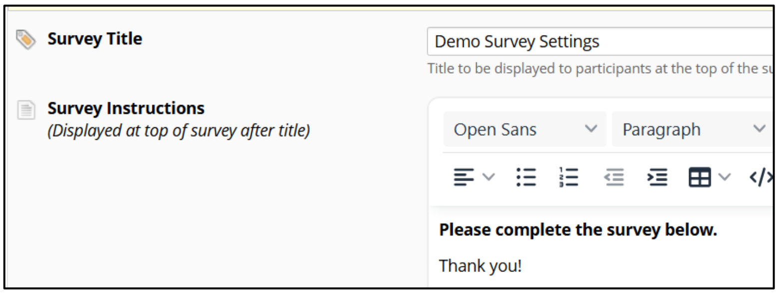
Set the survey to "Survey offline" once data collection is complete to prevent new participants being able to complete the survey, or existing participants to change their survey responses (if this option is enabled further down in *Survey Settings*).

Basic Survey Options

Survey Title & Survey Instructions

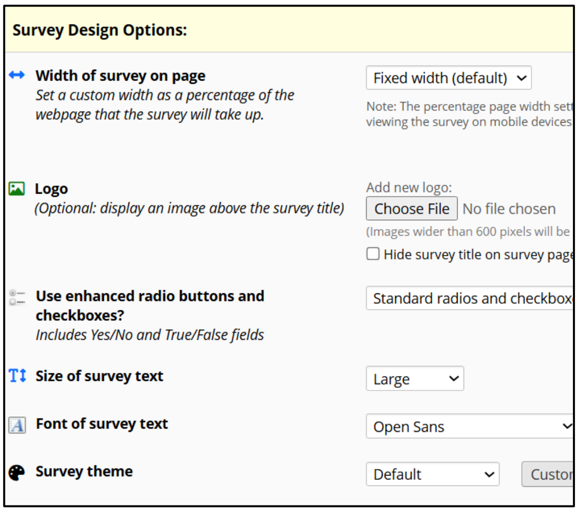
The survey title and instructions are visible to participants when opening the survey. By default, REDCap uses the name of your instrument as the survey title. However, you may change the title here in *Survey Settings* if you want your participants to see a different title.

You can also change the survey instructions from the standard text below to something more tailored to your study.



Survey Design Options

In this section, you can alter the appearance of your survey by changing its width, appearance of the radio buttons and checkboxes, the size and font of your survey text, or the survey theme. You can also add your own logo to the survey page.



Survey Customizations

- Question numbering: Choose whether questions in your surveys are automatically numbered or to number them yourself and alternatively not have numbers for your questions ("custom numbered").
- Pagination: Choose whether all fields/questions in the survey are displayed on one page or across several pages. If you want to display your survey over several pages, you need to use section headers when building your survey (*Add Field – Select a Type of Field – Begin New Section*)
- Allow participants to download a PDF copy of their responses at the end of survey
- Survey-specific email invitation field: It is possible to set an email field for overall communications on the *Project Setup* Page. However, if a survey should be sent to a different person (whose email address is collected in REDCap), it is possible to define a specific email address for only that survey. As a result, survey invitation links for that survey are now sent to this specific email address.
- Display the font resize options at the top of the survey page
- Allow survey respondents to view aggregate survey results after completing the survey?
- Text-To-Speech functionality
- Show or hide the Submit buttons

- Customize the text of the Submit buttons (the text on all buttons can also be altered via the Multi-Language Management (MLM), see more about this in our Navigation sheet about MLM).

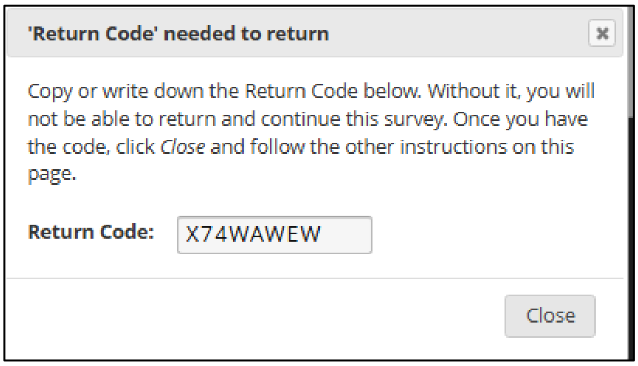
Survey Access

It is possible to limit participants' access to the surveys in your project; these settings are optional.

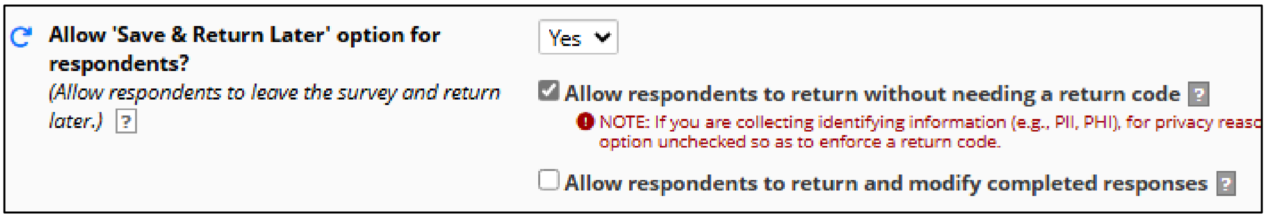
- Response Limit: You can set a maximum number of responses for each survey. Once that number has been reached, REDCap will not allow new participants to complete the survey.
- Time Limit for Survey Completion: When sending individual survey links, you can define how much time a participant gets to complete the survey from the time the survey link is sent out to them. Participants will not be able to complete the survey after the time limit has passed.
- Survey Expiration Date: You can set a date after which the survey is no longer accessible to participants (i.e. the survey will become inactive).
- Allow "Save & Return Later" option for respondents: As a default, participants are not able to leave and return to the survey to continue completion or edit their responses ("No").

However, it is possible to change this option so that participants can come back to the survey and continue adding to it ("Yes").

In that case, participants would click on the button "Save & Return Later" on the bottom of the survey page and would then have to write down a **return code**. This code is needed to be able to re-enter the survey at a later time. The participant can choose to have this code sent to their email address.



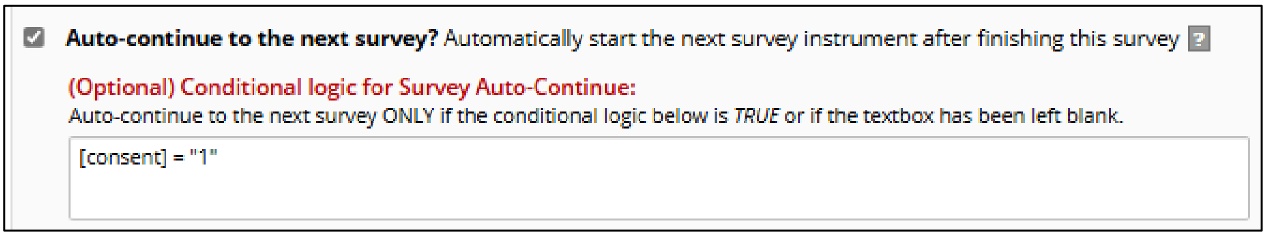
It is possible to **allow participants to return to the survey without needing a return code**. Just keep in mind that anyone could theoretically click on the survey link and access the online survey in that case.



Finally, you can allow participants to **edit already completed responses** (KI does not recommend using this setting).

<u>Survey Termination Options</u>

- <u>Auto-continue to the next survey</u>: If you have several surveys in *Online Designer* and want participants to complete more than one in the same sitting, you can link the surveys by activating this functionality. In that case, participants are automatically sent on to the next survey once they reach the end of the previous survey.



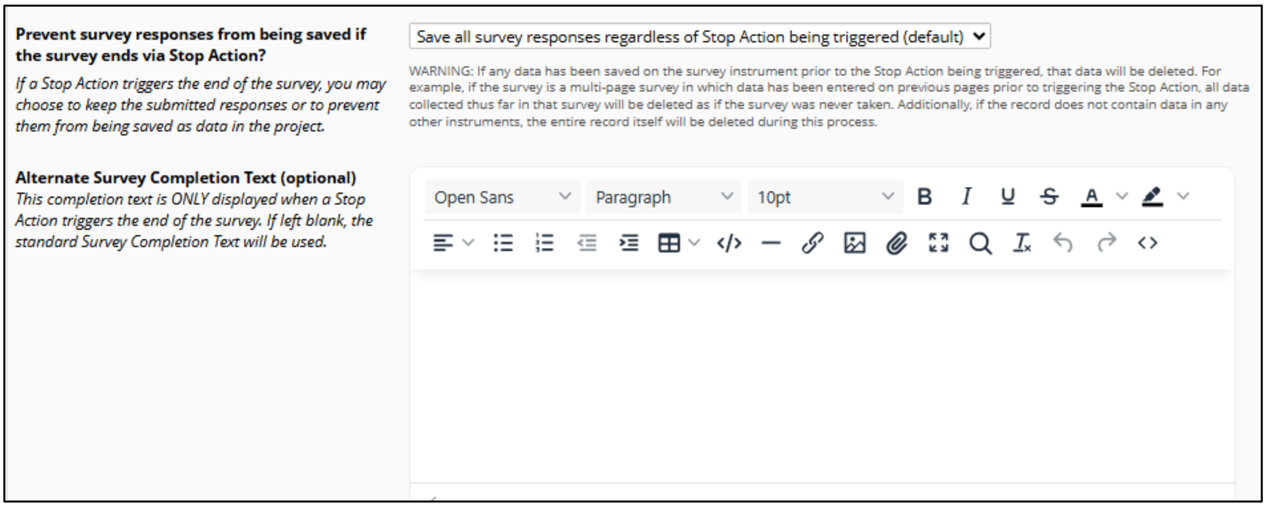
Note that you will have to add conditional logic if the survey contains a stop-function as auto-continue overwrites the stop-function (participants will skip the rest of the survey if a stop-function is triggered but will then still be forwarded to the next survey if conditional logic is not added).

- Redirect to a URL once the survey is completed

- Survey Completion Text: This section comes with a standard text participants see after completing the survey. However, you can change this text to make the completion text more personal and tailored to your study.

Options related to Survey Stop Actions

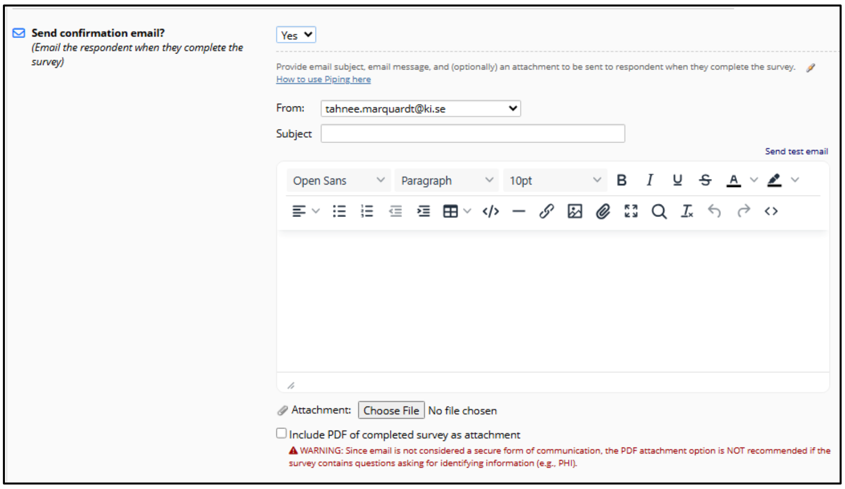
If using stop-functions in your survey, you can add a custom text that participants see if a stop-function is triggered (Note: you can only add one custom text per survey). When a stop action is triggered, another pop-up window appears, before the custom text appears. To change the text in this pop-up window, you must enter translations into the Multi-Language Management (MLM) module. Please refer to the specific Navigation sheet on MLM on how to use this function.



In addition, you can decide whether survey responses where a stop function is triggered will be saved in REDCap or not.

Send confirmation email

The last functionality in survey settings enables you to send a confirmation email to participants after they complete the survey.



This confirmation email can include text with more information and even attached files. Additionally, it is possible to include a PDF of the completed survey as an attachment. However, KI does not recommend that survey data is sent to participants in this way since sensitive personal data should not be sent through emails where we cannot guarantee who the recipient of the data will be.