

Navigation Sheet – Surveys and invitations

Compliance & Data Office

Research Support & External Relations



**Karolinska
Institutet**



Contents

Introduction.....	3
REDCap instruments: forms vs. surveys	4
Enable surveys in your project.....	4
Public vs. individual survey links	5
Public survey link (one link to reach them all).....	5
Individual survey links & the <i>Participant list</i>	6
Adding participants.....	7
Compose manual survey invitation.....	8
Automated Survey invitations (ASI).....	10
Appendix – Survey Settings	14

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.

Data Collection Instruments		Form options:		Survey options:	
+ Create	a new instrument from scratch	Form Display Logic	Survey Queue	Auto Invitation options	Survey Login
Import	a new instrument from the official REDCap Instrument Library	Survey Notifications			
Upload	instrument ZIP file from another project/user or external libraries	e-Consent and PDF Snapshots			
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
instrument 1 (enabled as survey)	1			Choose action	Survey settings + Automated Invitations
instrument 2 (form)	0		Enable	Choose action	
instrument 3 (survey)	0			Choose action	Survey settings + Automated Invitations
instrument 4 (survey)	0			Choose action	Survey settings + Automated Invitations
instrument 5 (form)	0		Enable	Choose action	

Enable surveys in your project

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

[Project Home](#)
[Project Setup](#)
[Other Functionality](#)
[Project Revision History](#)
[Edit Project Settings](#)

Project status: Development Completed steps 0 of 9

Not started

Main project settings

[Disable](#)
[Use surveys in this project?](#) [VIDEO: How to create and manage a survey](#)

[Disable](#)
[Use longitudinal data collection with defined events?](#)

[Enable](#)
[Use the MyCap participant-facing mobile app?](#) [Learn more about MyCap](#)

[I'm done!](#)

[Modify project title, purpose, etc.](#)

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.

Data Collection Instruments		Form options:		Survey options:	
+ Create	a new instrument from scratch	Form Display Logic	Survey Queue	Auto Invitation options	Survey Login
Import	a new instrument from the official REDCap Instrument Library	Survey Notifications			
Upload	instrument ZIP file from another project/user or external libraries				
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Demografi	7			Choose action	Survey settings + Automated Invitations
Undersökning 1	4			Choose action	Survey settings + Automated Invitations
Undersökning 2	2			Choose action	Survey settings Automated Invitations

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.

Survey Distribution Tools

Public Survey Link
 Participant List
 Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

Public Survey URL:

Link Actions

Open public survey

Open public survey + Log out

Send me URL via email

Survey Access Code or QR Code

Link Customizations

Get Short Survey Link

Create Custom Survey Link

Get Embed Code

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

Survey Distribution Tools

Public Survey Link
 Participant List
 Survey Invitation Log

The Participant List allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Survey Response Status: Not Anonymous

Participant List belonging to [Initial survey] "Demografi" - Inskrivning
Remove all participants

Displaying 1 - 4 of 4
 Add participants
 Compose Survey Invitations
 Export list

Email	Record	Participant Identifier 	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
test@test.test	1	Disabled		-			
test2@test.test	2	Disabled		-			

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.

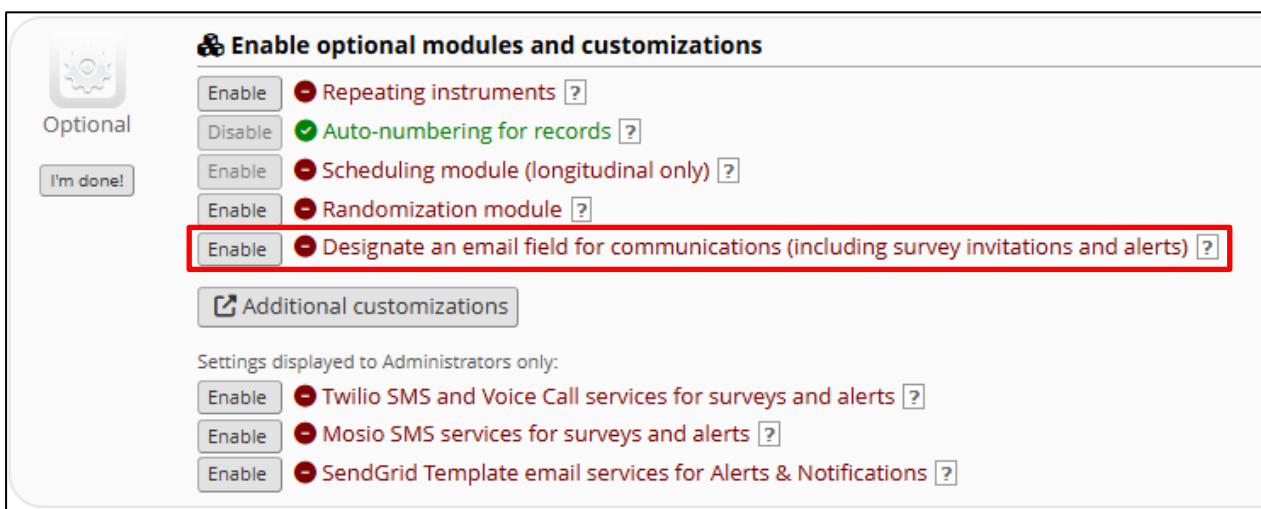
This is useful if you have a list of email addresses before you start the study.

- 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.



Enable optional modules and customizations

Optional

I'm done!

Enable	Repeating instruments ?
Disable	Auto-numbering for records ?
Enable	Scheduling module (longitudinal only) ?
Enable	Randomization module ?
Enable	Designate an email field for communications (including survey invitations and alerts) ?

Additional customizations

Settings displayed to Administrators only:

Enable	Twilio SMS and Voice Call services for surveys and alerts ?
Enable	Mosio SMS services for surveys and alerts ?
Enable	SendGrid Template email services for Alerts & Notifications ?

- 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.

Survey Distribution Tools

[Public Survey Link](#)
[Participant List](#)
[Survey Invitation Log](#)

The Participant List allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Survey Response Status: Not Anonymous ?

Participant List belonging to [Initial survey] "Demografi" - Inskrivning
 Remove all participants

Displaying 1 - 4 of 4
 + Add participants
Compose Survey Invitations
Export list

Email	Record	Participant Identifier Enable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
test@test.test	1	Disabled		-			
test2@test.test	2	Disabled		-			

- 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.

Send a Survey Invitation to Participants

Info
Survey title: Demografi
Event: Inskrivning

When should the emails be sent?
☒ Immediately
☐ At specified time:
The time must be for the time zone UTC, in which the current time is 17/12/2024 09:47.

Enable reminders
☐ Re-send invitation as a reminder if participant has not responded by a specified time?

Compose message
From: (select any project user to be the 'Sender')
To: [All participants selected from Participant List]
Subject:

[Send test email](#)

Paragraph **B** *I* U **A**

Please take this survey.
 You may open the survey in your web browser by clicking the link below:
 [survey-link]
 If the link above does not work, try copying the link below into your web browser:
 [survey-url]
 This link is unique to you and should not be forwarded to others.

NOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.

[How to use Piping in the survey invitation](#) Reminder: Never pipe private info (e.g., PII, PHI) into emails.

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.

🔌 **Activate automated invitations for this survey?**

Survey title: Undersökning 2
Event: Uppföljning - 3 mån

"Active" must be selected in order for automated survey invitations to be triggered and sent using the conditions specified in the popup. You may make it Not Active (and vice versa) at any point in the future. [?]

☐ Active ☐ Not Active

✉ **STEP 1: Compose message**

From: (select any project user to be the 'Sender')

To: [All participants who meet the conditions defined]

Subject:

Send test email

Paragraph **B** *I* U **A**

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:
[survey-url]

This link is unique to you and should not be forwarded to others.

🔔 **NOTE:** You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.

- 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 2: Conditions

Specify conditions for sending invitations:

☒ When the following survey is completed:

"Undersökning 1" - Uppföljning - 3 mån

AND

☒ When the following logic becomes true:

[gravid]=1

(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")

[How do I use special functions?](#)

Test logic with a record: -- select a record --

☐ Ensure logic is still true before sending invitation? [?](#)

[How to use "stop logic" to disable an automated invite](#)

- 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.

STEP 3: When to send invitations AFTER conditions are met

☐ Send immediately

☐ Send on next -- select day -- at time H:M

☒ Send the invitation 7 days hours minutes

after the exact time that the automated invitation was triggered

☐ Send at exact date/time: D/M/Y H:M

OPTIONAL: Enable reminders

☒ Re-send invitation as a reminder if participant has not responded by a specified time? (Times below refer to AFTER original invitation time.)

☐ Send every -- select day -- at time H:M

☒ Send every 3 days hours minutes

☐ Send at exact date/time: D/M/Y H:M

– AND –

Recurrence: Send up to 2 times

Appendix – Survey Settings

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

Data Collection Instruments		Form options:		Survey options:	
+ Create a new instrument from scratch Import a new instrument from the official REDCap Instrument Library Upload instrument ZIP file from another project/user or external libraries		Form Display Logic		Survey Queue Auto Invitation options Survey Login Survey Notifications	
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Demografi	7			Choose action	Survey settings + Automated Invitations
Undersökning 1	4			Choose action	Survey settings + Automated Invitations
Undersökning 2	2			Choose action	Survey settings Automated Invitations

Survey Status

Choose whether your survey is active or offline.

Survey Status		Survey Active	If offline, respondents will not be able take the survey.
Custom text to display on survey page when offline:			Add offline message

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 Title	Demo Survey Settings
	Title to be displayed to participants at the top of the survey
Survey Instructions (Displayed at top of survey after title)	<div>Open Sans Paragraph</div> <div> </div> <p>Please complete the survey below.</p> <p>Thank you!</p>

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 Design Options:

- Width of survey on page:** Fixed width (default) Note: The percentage page width settings are fully dependent on the device viewing the survey on mobile devices.
- Logo:** (Optional: display an image above the survey title) No file chosen (Images wider than 600 pixels will be downsized to fit) ☐ Hide survey title on survey page when displaying logo
- Use enhanced radio buttons and checkboxes?** ☐ Standard radios and checkboxes [Show examples](#) Includes Yes/No and True/False fields
- Size of survey text:** Large
- Font of survey text:** Open Sans
- Survey theme:** Default

Tip: KI's colour palette

Among other things, you can customize the survey theme to reflect Karolinska Institutet's colours. [KI's colour palette](#), including colour codes, can be found on the Staff Portal. Click on "Customize" next to *Survey theme* and change text and background colours to your liking.

Survey theme Default [Exit customization](#)

Custom survey theme options:

General:	Survey title and instructions:	Section headers:	Survey questions:
Page Background Color <input type="button" value="Choose Color"/>	Text Color <input type="button" value="Choose Color"/>	Text Color <input type="button" value="Choose Color"/>	Text Color <input type="button" value="Choose Color"/>
Button Text Color <input type="button" value="Choose Color"/>	Background Color <input type="button" value="Choose Color"/>	Background Color <input type="button" value="Choose Color"/>	Background Color <input type="button" value="Choose Color"/>

Once you are done, you can click on "Save custom theme" and name the colour theme you just created. You can then reuse that theme in other projects in the future.

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”).

 Allow 'Save & Return Later' option for respondents? <div style="float: right;">No ▾</div>	 Allow 'Save & Return Later' option for respondents? <div style="float: right;">Yes ▾</div>
---	--

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.


'Return Code' needed to return ✕

Copy or write down the Return Code below. Without it, you will not be able to return and continue this survey. Once you have the code, click *Close* and follow the other instructions on this page.

Return Code: X74WAWEW

Close

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.

 Allow 'Save & Return Later' option for respondents? <i>(Allow respondents to leave the survey and return later.)</i> ?	<div style="text-align: right;">Yes ▾</div> <div> <input checked="" type="checkbox"/> Allow respondents to return without needing a return code ? </div> <div style="font-size: 0.8em; color: red; margin-top: 5px;"> NOTE: If you are collecting identifying information (e.g., PII, PHI), for privacy reasons this option unchecked so as to enforce a return code. </div> <div> <input type="checkbox"/> Allow respondents to return and modify completed responses ? </div>
--	---

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

Survey Termination Options

- Auto-continue to the next survey: 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.

☒ **Auto-continue to the next survey?** Automatically start the next survey instrument after finishing this survey ?

(Optional) Conditional logic for Survey Auto-Continue:
 Auto-continue to the next survey ONLY if the conditional logic below is *TRUE* or if the textbox has been left blank.

[consent] = "1"

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.

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


☒ **Send confirmation email?**
(Email the respondent when they complete the survey)















Provide email subject, email message, and (optionally) an attachment to be sent to respondent when they complete the survey. 
[How to use Pagine here](#)


From:

Subject:

[Send test email](#)

Open Sans ▾
Paragraph ▾
10pt ▾
B I U S A ▾


 Attachment: No file chosen

☐ Include PDF of completed survey as attachment

▲ WARNING: Since email is NOT considered a secure form of communication, the PDF attachment option is NOT recommended if the survey contains questions asking for identifying information (e.g., PHI).

personal data should not be sent through emails where we cannot guarantee who the recipient of the data will be.