

Survey Invitations and Responses

Following are the different ways you can send and collect responses for your REDCap survey. Whichever way you choose, be sure to thoroughly test it in DEVELOPMENT status before you move your project into PRODCUTION status.

1) Send a survey link in an email invitation or post the link on a webpage (Public Survey Link)

This is typically the simplest and fastest method. A link will be provided that you can send in an email or place into the HTML on a webpage. Individuals can take a survey as many times as they desire when this method is used. All responses are anonymous and not associated with who took the survey.

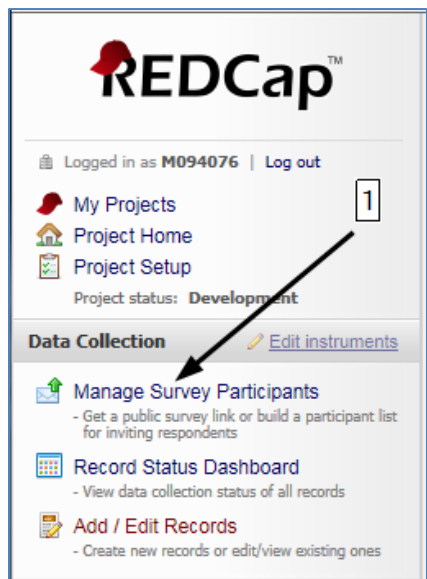
2) Build a list of participants and email them survey invitations (Participant List)

Participant email addresses can be uploaded into REDCap in order to build your Participant List, after which you may email survey invitations to anyone you choose from your list. This allows you to track who has responded and taken the survey, and if desired, you also have the additional option of identifying participants' responses (requires that you provide a Participant Identifier, such as a name, that will be attached to the participant's responses when you export your survey results). Using this method, once a participant has responded to the survey, they will not be able to take the survey again.

3) For either of the two invitation methods you have the option to enter responses manually

This option works well if you need to enter survey responses yourself, such as in the case of having paper survey forms completed by some of the participants.

To work with survey invitations or responses start by clicking on the “Manage Survey Participants” link (1) found in the left hand panel.



Public Survey Link

Make sure you are viewing the “Public Survey Link” tab (1). While you are developing your survey you can test it by using the “Open public survey” (2) button. This is especially important if your survey contains any branching logic or calculated fields. The “Open public survey” (2) button can also be used to anonymously record results for someone who filled out a paper version of the survey. Whenever you wish to share your survey with others you can either copy (4) or email (3) the public link to yourself. The link then can be posted on a web site or distributed by you in an email which you compose and send. If you are placing the link on a web page you will need the specific HTML code, click on the “Get embed code to place link on a webpage” (5) link.

The screenshot shows the 'Manage Survey Participants' interface. At the top, there is a header with a green up arrow icon and the text 'Manage Survey Participants' (1). Below this header are three tabs: 'Public Survey Link' (1), 'Participant List', and 'Survey Invitation Log'. The 'Public Survey Link' tab is selected. Below the tabs, there is a paragraph of text explaining the public survey link feature. A callout (5) points to the text 'Get embed code to place link on a webpage'. Below the text, there is a section titled 'Public Survey URL:' followed by a text box containing the URL 'https://redcap2.mayo.edu/redcap/surveys/?s=X24Qzx'. To the right of the text box is a 'Copy to clipboard' button (4). Below the URL section, there are two buttons: 'Open public survey' (2) and 'Send me URL via email' (3). Arrows point from the callout numbers to their respective elements: 1 points to the 'Public Survey Link' tab, 2 points to the 'Open public survey' button, 3 points to the 'Send me URL via email' button, 4 points to the 'Copy to clipboard' button, and 5 points to the 'Get embed code to place link on a webpage' text.

Manage Survey Participants (1)

Public Survey Link (1) | 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 requiring 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. [Get embed code to place link on a webpage](#) (5)

Public Survey URL: [Copy to clipboard](#) (4)

[Open public survey](#) (2) | [Send me URL via email](#) (3)

Participant List

Use the “Participant List” (1) tab if you want to do any of the following:

- Have REDCap send out your survey invitations either immediately or at a scheduled date and time.
- You want to track who has responded to your survey.
- For identified surveys, you want to view the participant’s survey response.

You start by building a distribution list using the “Add participants” (2) button. There will be examples on the next display for you to follow. Once you have built your distribution list you can distribute your survey by using the “Compose Survey Invitations” (3) button. On this page you will specify when the survey should be sent, who it is from, specify the email subject line and compose the email message. You can either send it to all participants or select only certain individuals. In this example you can see that all five participants have been sent the survey (4) and that two of the five have already completed the survey (5).

Manage Survey Participants

Public Survey Link Participant List Survey Invitation Log

The Participant List option 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' but² in the table below). Unless an Identifier³ is used, all survey responses collected are considered anonymous. [More details](#)

Participant List belonging to [Initial survey] "Secondary OR Clinical Base" (2) Disable (3)

Displaying 1 - 50 of 151 Add participants Compose Survey Invitations

Remove all participants Export list

Email	Participant Identifier (optional)	Link	Invitation Scheduled?	Invitation Sent?	Responded?
Abcejo.Arnoley@mayo.edu (ID 16)	Arnoley Abcejo	-	-		
abenstein.john@mayo.edu	John Abenstein		-		
Aganga.Devon@mayo.edu	Devon Aganga		-		
Amundson.Adam@mayo.edu (ID 12)	Adam Amundson	-	-		
Arendt.Katherine@mayo.edu	Katherine Arendt		-		

In this example Participant Identifiers (6) were added for each email address. All survey responses collected are considered anonymous unless an identifier is used. Participant Identifiers are optional and must be enabled before they can be added. Enable participant Identifiers by clicking on the button shown in the column “Participant Identifier (optional)” (7). The button toggles between Enabled and Disabled.

Adding the identifiers can be done either when you are building the distribution list or after it has been built, but must be done before a participant responds. Participant Identifiers are optional and must be enabled before they can be added. The button toggles between Enabled and Disabled. To see the survey responses for a participant click on the completed icon (8). You can manually enter a survey response on behalf of a participant by clicking on the link icon (9) for that individual.

Manage Survey Participants

 Public Survey Link

 Participant List

 Survey Invitation Log

The Participant List option 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 answer⁶ desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the⁷ table below). Unless an Identifier is used, all survey responses collected are considered anonymous. [More details](#)

Participant List belonging to [Initial survey] "Secondary OR Clinical Base" 						
Displaying 1 - 50 of 151		 Add participants	 Compose Survey Invitations	 Remove all participants		
		 Export list				
Email	Participant Identifier (optional) 	Link	Invitation Scheduled?	Invitation Sent?	Responded?	
Abcejo.Arnoley@mayo.edu (ID 16)	Arnoley Abcejo	-	-			remove
abenstein.john@mayo.edu	John Abenstein		-			remove
Aganga.Devon@mayo.edu	Devon Aganga		-			remove
Amundson.Adam@mayo.edu (ID 12)	Adam Amundson	-	-			remove
Arendt.Katherine@mayo.edu	Katherine Arendt		-			remove

Set Survey Offline

Use the following steps to move your Production Survey offline. Once a survey is offline it is no longer accessible by participants but can be activated again at a later date. Setting your survey offline is different than changing your REDCap project status to inactive. With your survey offline you still have the ability to export your survey results, create and run reports, use the graphical data view, or run data quality checks. If your REDCap project status is inactive you lose all the reporting functionality with the exception of being able to export your collected survey results.

Here is how to take your survey offline:

1. Click on Project Setup
2. Click on Online Designer
3. Click on Survey Settings
4. Select Survey Offline
5. Click "Save Changes" at the bottom of the page

Center for Clinical and Translational Science

REDCap Project - Single Survey

Logged in as m094076 | Log out

Projects
Project Home
Project Setup
Project status: **Production**

Data Collection

- Manage Survey Participants
- Record Status Dashboard
- Add / Edit Records

Data Collection Instruments:

- Birthday Survey
- Wedding Survey
- Anniversary Survey

Applications

- Calendar
- Data Export Tool
- Data Import Tool
- Data Comparison Tool
- Logging
- File Repository
- User Rights
- Record Locking Customization
- E-signature and Locking Mgmt
- Graphical Data View & Stats
- Data Quality
- Report Builder
- Upgrade 5.0.20 Announcement

Help & Information

- Help & FAQ
- Video Tutorials
- Suggest a New Feature

If you are experiencing problems, please contact your REDCap administrator.

Project status: **Production**

Main project settings

Complete!

☐ Enable ☒ Use longitudinal data collection with repeating forms? [?](#)

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

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

Enable optional modules and customizations

Complete!

☐ Disable ☒ Auto-numbering for records [?](#)

☐ Enable ☒ Scheduling module (longitudinal only) [?](#)

☐ Enable ☒ Randomization module [?](#)

☐ Enable ☒ Designate an email field to use for invitations to survey participants [?](#)

[Additional customizations](#)

Move your project to production status

Complete!

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will then need to be approved by a REDCap administrator before taking effect.

Set up project bookmarks (optional)

Optional

☐ I'm done!

Go to [Add or edit bookmarks](#)

User Rights and Permissions

Optional

☐ I'm done!

Go to [User Rights](#) or [Data Access Groups](#)

Modify your data collection instruments (survey and forms) in Draft Mode

Optional

Once in production, you may still modify or add fields to the project, if you desire. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method), in which you may use either method or both. Quick links: [Download PDF of all data collection instruments](#) OR [Download the current Data Dictionary](#)

[Online Designer](#) or [Upload Data Dictionary](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Data Collection Instruments					
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Birthday Survey	15				3 Survey settings Notifications + Automated Invitations
Wedding Survey	3		Enable		
Anniversary Survey	3		Enable		

[Project Setup](#)
[Online Designer](#)
[Modify survey settings](#)

You may edit the survey's basic information by modifying the fields below and clicking the Save Changes button.

Modify survey settings for data collection instrument "Birthday Survey" [Cancel](#)

Survey Status

Survey Active

Survey Offline

4

If offline, respondents will not be able take the survey.

Survey Design Options:

Survey Title

Birthday Survey

Title to be displayed to participants at the top of the survey page

Question Numbering

Auto numbered

▼

☒ **Survey Acknowledgement Text**
(Displayed after survey is completed)

Thank you for taking the survey.

Have a nice day!

B *I* U | ABC — HTML

5

Save Changes

-- Cancel--

Delete Survey

Delete Survey: Please note that deleting the survey will NOT delete any responses