Survey Invitations, Responses, Settings

Survey Invitation Methods

NOTE: All surveys are anonymous unless you take specific actions ***before*** collecting responses.

Invitation Method

	Public link: - In an Outlook email - On a web page - Embedded in a document	Unique link sent via Participant List *
Can the link be shared or used more than once	Yes	No
Are the responses anonymous	Yes	Yes (there is an option to override this behavior)
Can we track who was invited	No (the link can be forwarded and shared)	Yes
Can we track who completed the survey	No	Yes
Automated survey invitations	No	Yes
Automated survey reminders	No	Yes
Survey invitation log	No	Yes

* Participant List

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' button in the participant table). **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.

Survey Invitation & Responses

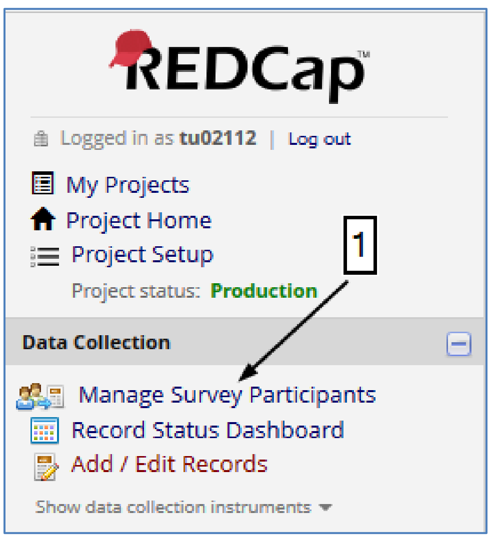
Following are the different ways you can send and collect responses for your REDCap survey. Whichever way you choose, be sure to thoroughly test it in DEVELOPMENT status before you move your project into PRODCUTION status.

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.

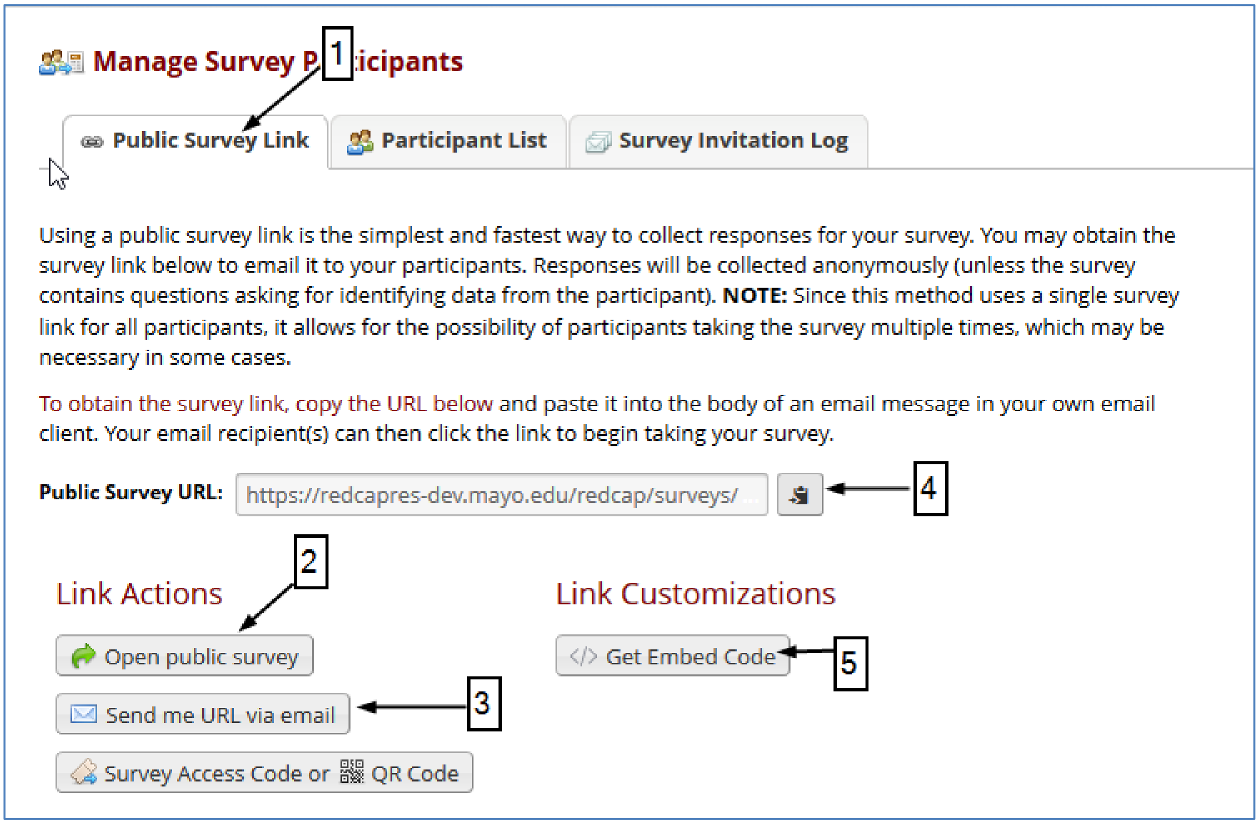
3) For either of the two invitation methods you have the option to enter responses manually
This option works well if you need to enter survey responses yourself, such as in the case of having paper survey forms completed by some of the participants.

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.

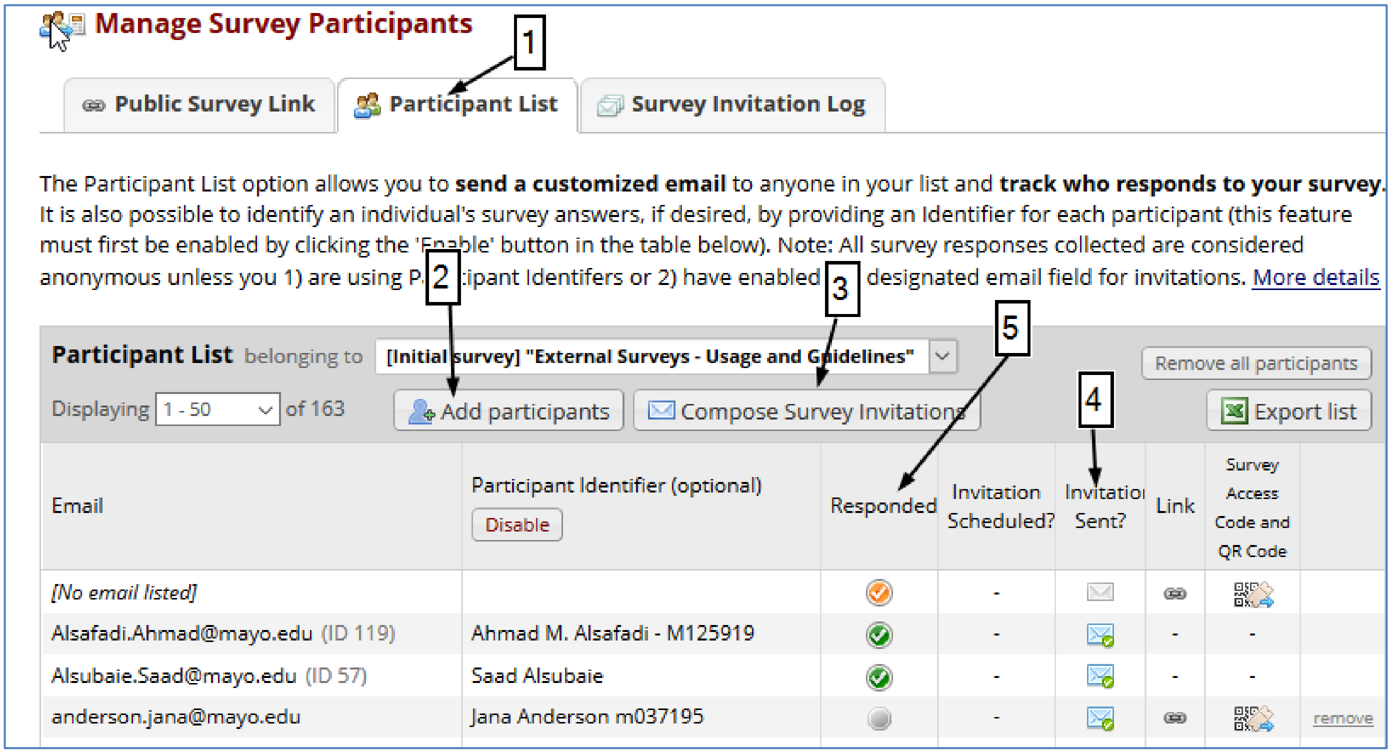


Participant List

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

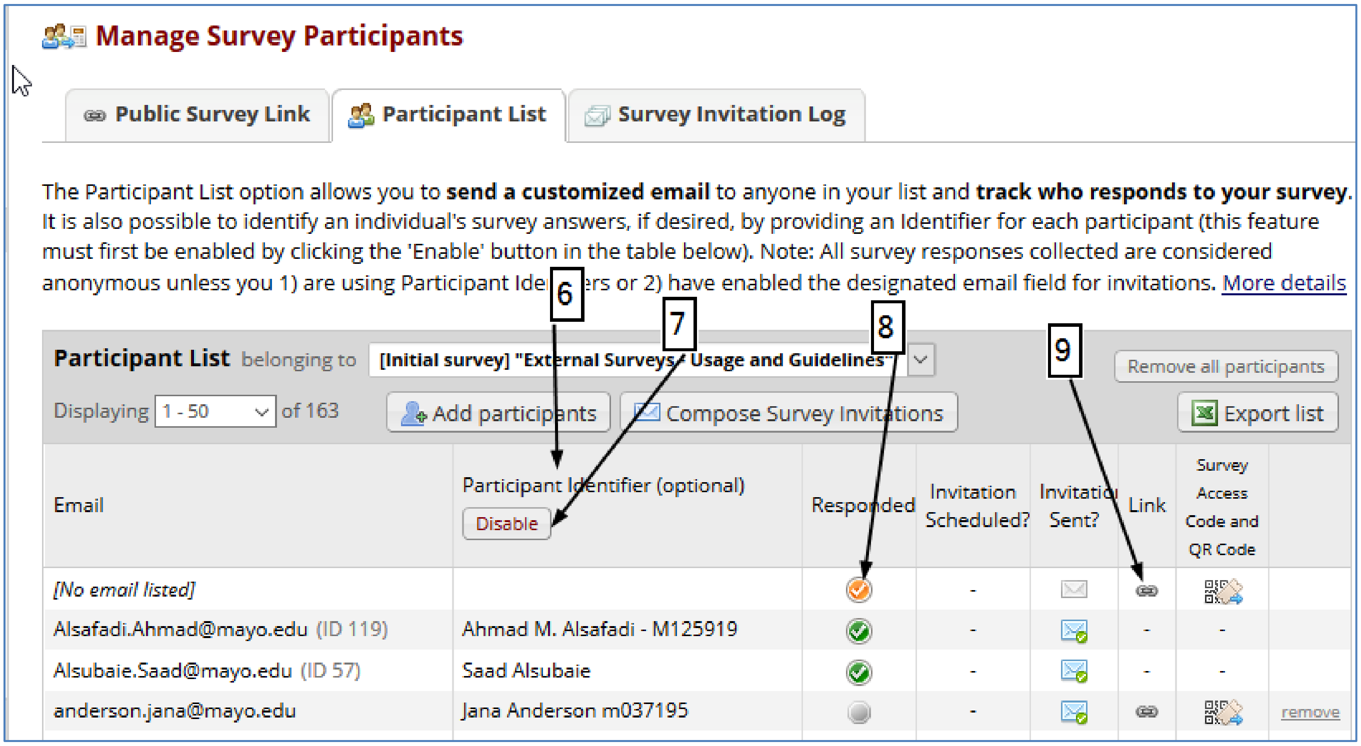
- Have REDCap send out your survey invitations either immediately or at a scheduled date and time.
- You want to track who has responded to your survey.
- For identified surveys, you want to view the participant's survey response.

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).



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.



Note: Your REDcap project may contain multiple surveys but you can only build a distribution list for the first survey. The distribution lists for the subsequent surveys are automatically built based on who takes your first survey. Another restriction with multiple surveys is that they must be taken sequentially, 1, 2, 3 etc. As an example, a participant cannot skip survey 1 and start with some other survey.

Survey Settings

Each survey has a unique set of survey settings which are listed in the following table. Many of these settings are optional or have a default value.

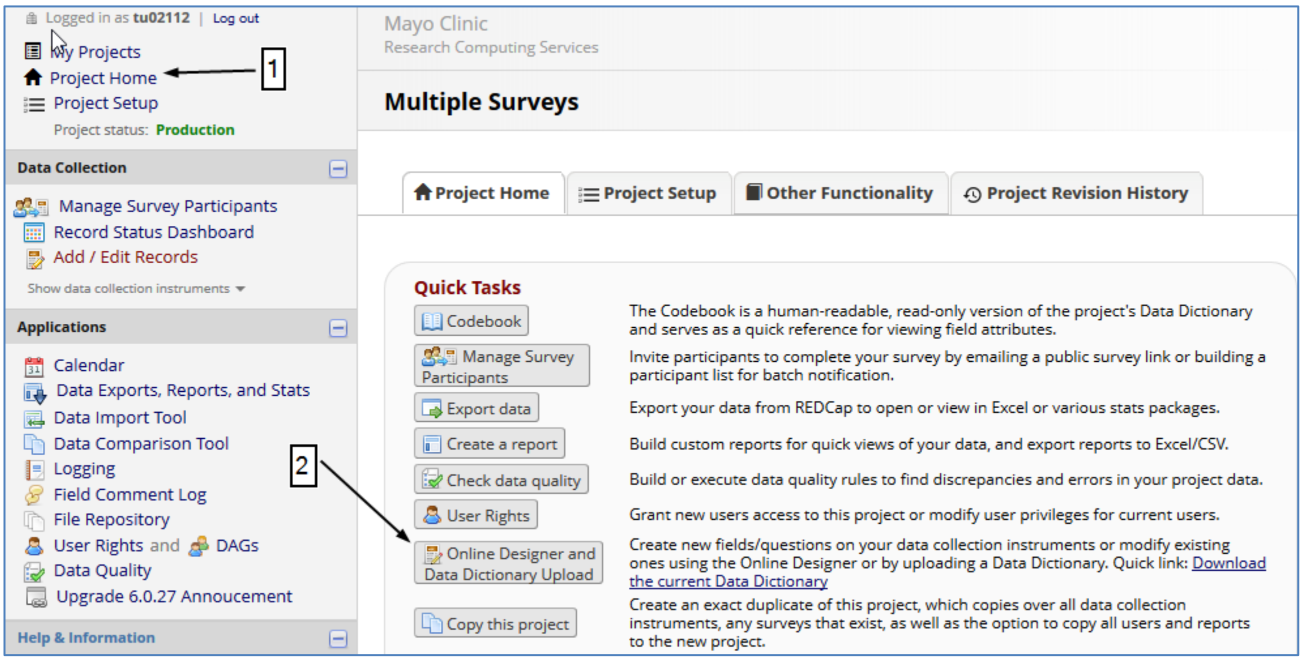
Survey Settings	***Description***
Survey Status	If offline, respondents will not be able take the survey.
Survey Title	Title to be displayed to participants at the top of the survey page.
Survey Instructions	Displayed at top of survey after title.
Logo	Display an image above the survey title.
Use enhanced radio buttons & checkboxes Size of survey text Font of survey text Survey theme	Used to control the look and feel of the survey.
Question Numbering	Auto numbering will be disabled is any of your survey questions use branching logic
Question Display Format	One page or multiple pages?
For 'Required' fields, display the red 'must provide value' text on the survey page.	If 'No', then it will NOT display the following text beneath all 'Required' fields: * must provide value
Allow survey respondents to view aggregate survey results after completing the survey.	After completing the survey, participants can view ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent's answers will be highlighted in the results.
Text-To-Speech functionality	Allows text on survey page to be read audibly to participants.
Survey Expiration	Time after which the survey will become inactive.
Allow 'Save & Return Later' option for respondents?	Allow respondents to leave the survey and return later.)
Auto-continue to next survey	Automatically start the next survey instrument after finishing this survey
Redirect to a URL	Redirect to a webpage when survey is completed
Survey Completion Text	Displayed after survey is completed as 'thank you' text or as acknowledgement text

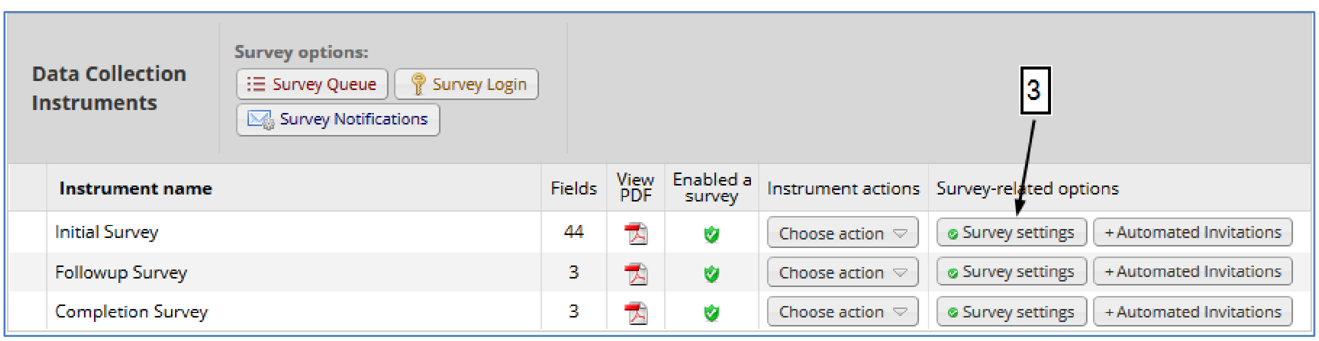
Set Survey Offline

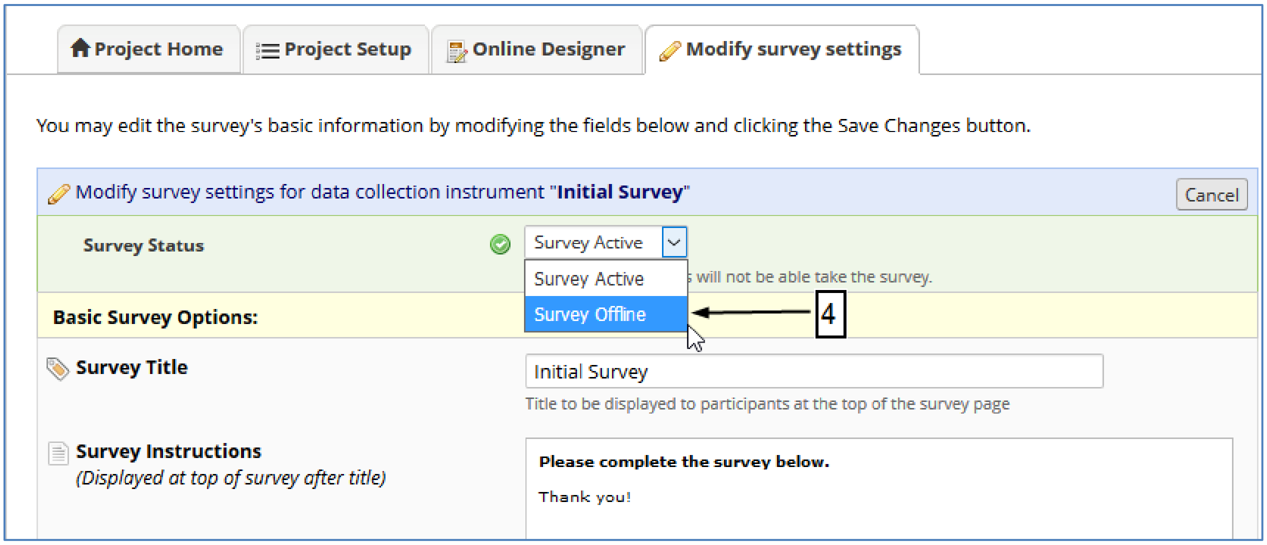
Use the following steps to move your Production Survey offline. Once a survey is offline it is no longer accessible by participants but can be activated again at a later date. Setting your survey offline is different than changing your REDCap project status to inactive. With your survey offline you still 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.

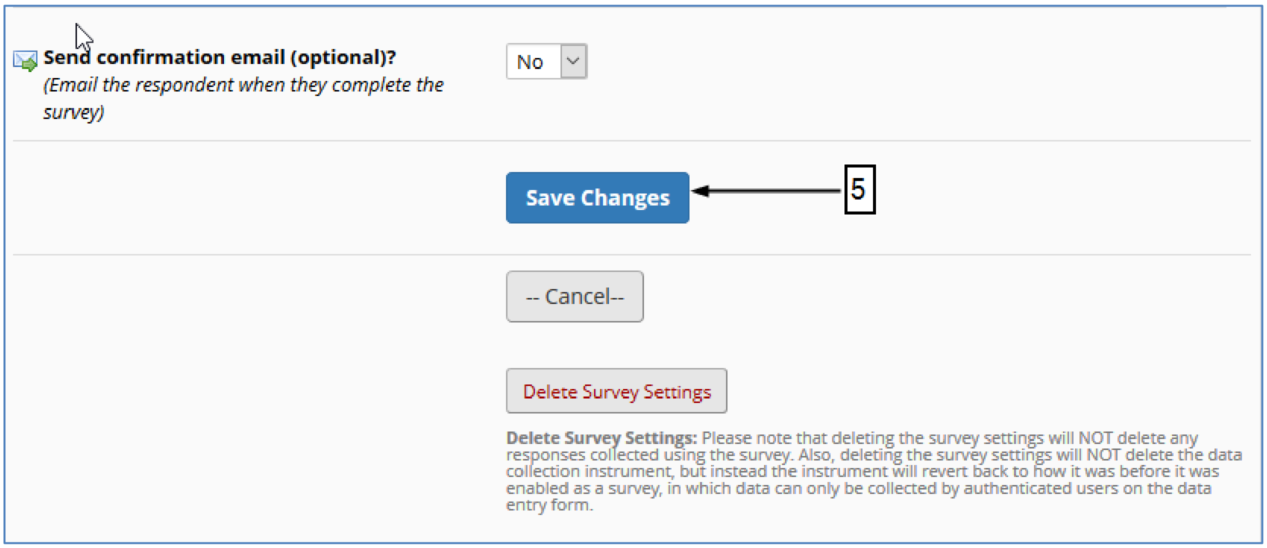
Here is how to take your survey offline:

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






Project Home
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 "Initial Survey"
Cancel
Survey Status
Survey Active
Survey Active
Survey Offline
will not be able take the survey.
4
Basic Survey Options:
Survey Title
Initial Survey
Title to be displayed to participants at the top of the survey page
Survey Instructions
(Displayed at top of survey after title)
Please complete the survey below.
Thank you!


Send confirmation email (optional)?
(Email the respondent when they complete the survey)
No
Save Changes
5
-- Cancel--
Delete Survey Settings
Delete Survey Settings: Please note that deleting the survey settings will NOT delete any responses collected using the survey. Also, deleting the survey settings will NOT delete the data collection instrument, but instead the instrument will revert back to how it was before it was enabled as a survey, in which data can only be collected by authenticated users on the data entry form.