

Design a Screening Survey

CCTS Biostatistics Core

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Scenario

Your research team wants to design an eligibility screening survey for potential study participants. Inclusion criteria are age (at least 18 years old) and a current diagnosis of Type 2 diabetes.

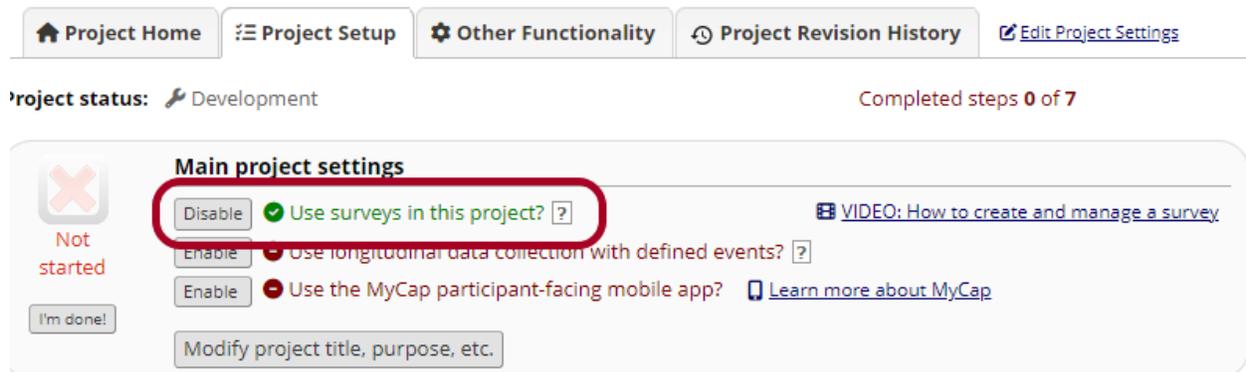
After respondents complete the screening, they should be directed one of two ways, based on whether they meet the inclusion criteria.

1. If eligible: Respondents will be redirected to the enrollment survey.
2. If ineligible: Respondents will see a message informing them that they're not eligible.

Project Setup

Enable Surveys Projectwide

On the Project Setup page, make sure surveys are enabled for the project.



The screenshot shows the 'Project Setup' page with a navigation bar containing 'Project Home', 'Project Setup', 'Other Functionality', 'Project Revision History', and 'Edit Project Settings'. Below the navigation bar, the project status is 'Development' and 'Completed steps 0 of 7'. The 'Main project settings' section is visible, with a red circle highlighting the 'Use surveys in this project?' option, which is currently enabled (checked). Other options include 'Use longitudinal data collection with defined events?' (disabled) and 'Use the MyCap participant-facing mobile app?' (disabled). A video link 'VIDEO: How to create and manage a survey' is also present.

Online Designer

Create Screening Instrument

On the Online Designer page, create the screening instrument. If it will be shared via a public link (e.g., a URL that can be posted on a flyer or a public website), it must be the first instrument in the project. Include eligibility-related questions.

Tip: If you collect date of birth in a field called "dob", you can calculate age with the following formula:
`rounddown(datediff([dob], 'today', 'y'))`

Current instrument: **Pre-Screening Survey**

[Preview instrument](#)

Variable: participant_id

Participant ID

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Please fill out the information below.

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Variable: dob

Date of birth Today Y-M-D

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Variable: age

(Calculated) Age [View equation](#)

@HIDDEN

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Variable: has_diabetes

I currently have Type 2 Diabetes True False

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#) [reset](#)

Create Enrollment Instrument

Create the enrollment survey that will be shared with respondents who are eligible for your study.

Current instrument: **Participant Enrollment Survey**

[Preview instrument](#)

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Variable: first_name

First Name

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Variable: last_name

Last Name

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Variable: email

Email Address

Include Area Code

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Variable: ethnicity

Ethnicity

Hispanic or Latino
 NOT Hispanic or Latino
 Unknown / Not Reported
 reset

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Variable: race

Race

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

Enable Instruments as Surveys

On the Online Designer page, click **Enable** in the “Enabled as survey” column next to each instrument. This will ensure you can share the questionnaires with potential participants through a URL, rather than requiring them to log in to REDCap.

[Project Home](#)
[Project Setup](#)
[Online Designer](#)
[Data Dictionary](#)
[Codebook](#)

[VIDEO: How to use this page](#) [Create snapshot of instruments](#) Last snapshot: never [?](#)

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

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		<input checked="" type="checkbox"/> Form Display Logic		<input checked="" type="checkbox"/> Survey Queue <input checked="" type="checkbox"/> Auto Invitation options <input checked="" type="checkbox"/> Survey Login <input checked="" type="checkbox"/> Survey Notifications	
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Pre-Screening Survey	4		Enable	Choose action ▾	
Participant Enrollment Survey	8		Enable	Choose action ▾	

Survey Settings

When you enable surveys for an instrument, the Survey Settings page will open. You can also access this page later from the Online Designer. Survey Settings is where you will define REDCap's behavior based on your inclusion criteria.

The screenshot shows the 'Data Collection Instruments' interface. On the left, there are buttons for 'Create', 'Import', and 'Upload'. On the right, there are 'Form options' and 'Survey options' sections. Below these is a table of instruments:

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Pre-Screening Survey	4			Choose action ▾	Survey settings Automated Invitations
Participant Enrollment Survey	8		Enable	Choose action ▾	

Eligible Participants: Show Next Survey

Open Survey Settings for your screening survey. Scroll down to the Survey Termination Options section. To automatically direct eligible participants to your enrollment survey when they complete the screening, define the following settings:

- Check “Auto-continue to the next survey?”
- Define conditional logic based on the screening fields that define eligibility ([dob] and [has_diabetes])

Survey Termination Options:

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.

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

Ineligible Participants: Show Message

Define Survey Completion Text for ineligible participants. This will be shown instead of the enrollment survey if a respondent doesn't meet the conditional logic you defined above.

Survey Completion Text
(Displayed after survey is completed as 'thank you' text or as acknowledgement text)

Paragraph ▾ **B** *I* U A ▾

Thank you for taking the survey. Unfortunately, you're not eligible for this study.