

REDCap for Data Collection

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WHAT IS REDCAP?



Log In



Please log in with your user name and password. If you are having trouble logging in, please contact [REDCap Support at CCTS](#).

Username:

Password:

Log In

[Forgot your password?](#)

Welcome to REDCap!

REDCap is a secure web platform for building and managing online databases and surveys. REDCap's streamlined process for rapidly creating and designing projects offers a vast array of tools that can be tailored to virtually any data collection

REDCap Features

Build online surveys and databases quickly and securely in your browser

Features

- Web-based and flexible
- Advanced data collection options
- Encrypted, password-protected data storage
- Data export compatibility with SPSS, SAS, Stata, R, and APIs

Research-oriented Features

- Randomization
- Study arms
- eConsent
- Event logging and audit trails
- Data Access Groups for multi-site projects

Request an Account

Visit <https://ccts-bsc.netlify.app/redcap/establish-your-account/> and follow the instructions.

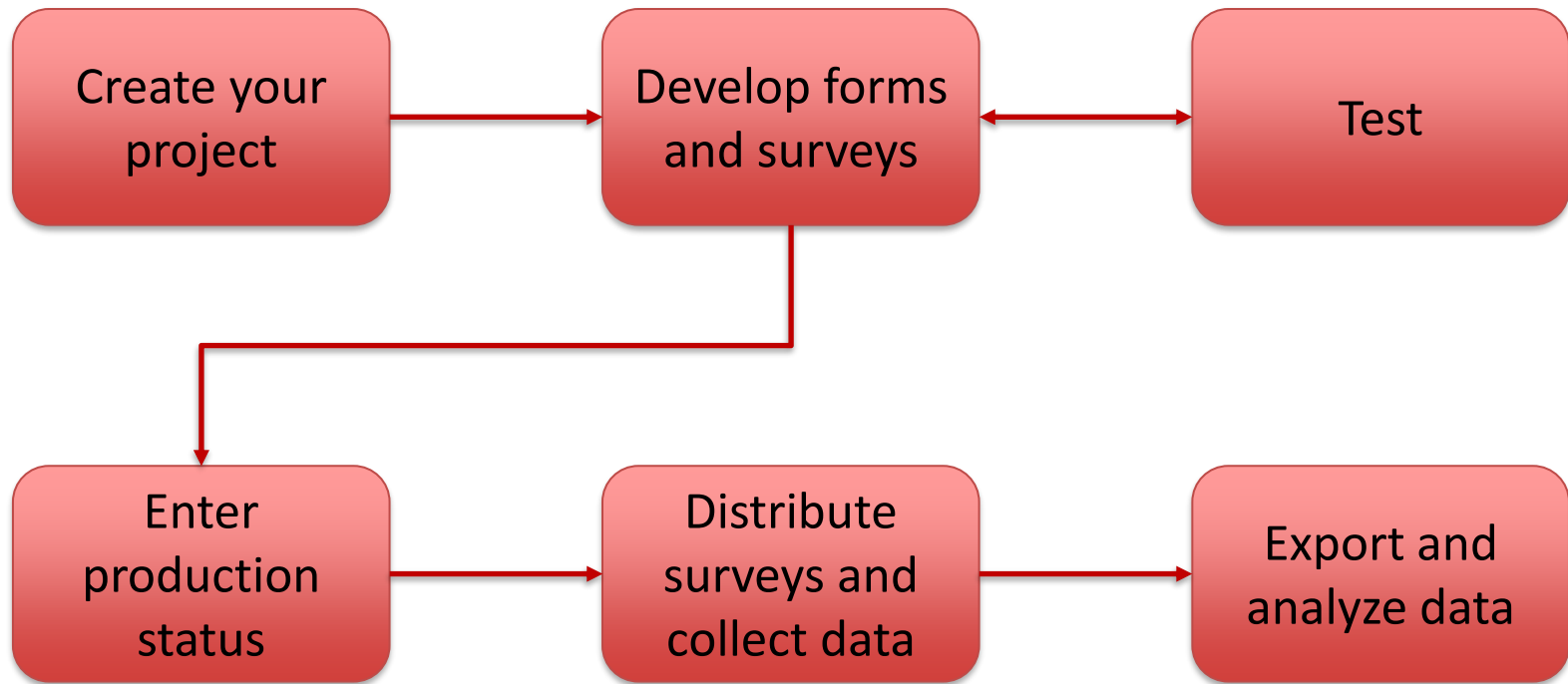
Full Access

- “Creator or owner” accounts
- Must have uic.edu email address
- Can create new projects

Access Only

- “Collaborator” accounts
- Must be UIC-affiliated
 - Can be from another institution
- Can join and manage existing projects

General Project Workflow



For a more comprehensive introduction...

- [Training resources](#)
 - Vanderbilt videos
 - CCTS videos
 - User Guide (under development)
- [Terms of Use](#)
- [Practice sheets](#)
- [REDCap Help & FAQ](#)

SURVEYS IN REDCAP

Surveys vs. Forms

Forms

Require login to access
(authenticated users only)

Surveys

Can be accessed without
logging in via a URL (public
or private)

Form view

Intake Assign record to a Data Access Group? --select a group--

Adding new Record ID 16.

Event: **Event 1**

Record ID: 16

First Name	Last Name	Preferred Name	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Comments

Paragraph ↶ ↷

B I U ☰ ☰ ☰ ☰

☰ ☰ ☰ ☰ 🔍 <> Ix

Age

Form Status

Complete? Incomplete ▾

Lock this instrument? **Lock**

If locked, no user will be able to modify this instrument for this record until someone with Instrument Level Lock/Unlock privileges unlocks it.

Survey view

Intake AAA
⊕ ⊖

Please complete the survey below.

Thank you!

First Name	Last Name	Preferred Name	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Comments

Paragraph ↶ ↷

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☰ ☰ ☰ ☰ 🔍 <> Ix

Age

Approaches to Surveys

One survey

- One record per response
- Quick to design and administer

Multiple surveys

- Multiple surveys connected to one record
- Sequence can be immediate (Survey Queue) or scheduled
- Surveys can be conditionally skipped

Longitudinal data collection

- One record can repeat instruments or whole events

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Create a Project

+ Create a new REDCap Project

You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project at the bottom.

Project title:

Example Survey Project

Project's purpose:

How will it be used?

Practice / Just for fun ▾

Assign project to a Project Folder?

Project notes (optional):

*Description of the project's use or purpose
(displayed on the My Projects page)*

Project creation option:

Empty project (blank slate)

Upload a REDCap project XML file (CDISC ODM format) [?](#)

Use a template (choose one below)

Enable Surveys

UIC CENTER FOR CLINICAL AND
TRANSLATIONAL SCIENCE
UNIVERSITY OF ILLINOIS
AT CHICAGO
University of Illinois at Chicago
Center for Clinical and Translational Science

Example Survey Project

PID 12898

[Project Home](#)

[Project Setup](#)


[Other Functionality](#)

[Project Revision History](#)

[Edit project settings](#)

✔ **Your new REDCap project has been created and is ready to be accessed.**

You may now begin exploring your project and the many features available to you. Below are some instructions to help you get started.

Project status:  Development

Completed steps **0** of **7**



Not
started

[I'm done!](#)

Main project settings

Use surveys in this project? [?](#)

[VIDEO: How to create and manage a survey](#)

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

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

Create an Instrument

Example Survey Project PID 12898

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

- [+ 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 options:

[Form Display Logic](#)

Instrument name	Fields	View PDF	Instrument actions
Form 1	1		Choose action ▾

Add Fields

Current instrument: **Form 1**

Preview instrument

 Variable: record_id

Record ID

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

Add Field

Add Matrix of Fields

Import from Field Bank

Common Field Types

- Multiple-choice
- Open text
- File upload
- Slider
- Calculations

File'. Below the text is a 'Field Type:' label followed by a dropdown menu. The dropdown menu is open, showing a list of field types: '---- Select a Type of Field ----', 'Text Box (Short Text, Number, Date/Time, ...)', 'Notes Box (Paragraph Text)', 'Calculated Field', 'Multiple Choice - Drop-down List (Single Answer)', 'Multiple Choice - Radio Buttons (Single Answer)', 'Checkboxes (Multiple Answers)', 'Yes - No', 'True - False', 'Signature (draw signature with mouse or finger)', 'File Upload (for users to upload files)', 'Slider / Visual Analog Scale', 'Descriptive Text (with optional Image/Video/Audio/File Attachment)', 'Begin New Section (with optional text)', and 'Dynamic Query (SQL)'."/>

Add New Field

You may add a new project field to this data collection instrument by completing the fields below form on this page. For an overview of the different field types available, you may view the [File](#)

Field Type: ---- Select a Type of Field ----

- Select a Type of Field ----
- Text Box (Short Text, Number, Date/Time, ...)
- Notes Box (Paragraph Text)
- Calculated Field
- Multiple Choice - Drop-down List (Single Answer)
- Multiple Choice - Radio Buttons (Single Answer)
- Checkboxes (Multiple Answers)
- Yes - No
- True - False
- Signature (draw signature with mouse or finger)
- File Upload (for users to upload files)
- Slider / Visual Analog Scale
- Descriptive Text (with optional Image/Video/Audio/File Attachment)
- Begin New Section (with optional text)
- Dynamic Query (SQL)

Enable as a Survey

Project Home

Project Setup

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VIDEO: [How to use this page](#)

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[Import](#) a new instrument from the official [REDCap Instrument Library](#)

[Upload](#) instrument ZIP file from another project/user or [external libraries](#)

Form options:

[Form Display Logic](#)

Survey options:

[Survey Queue](#) [Auto Invitation options](#) [Survey Login](#)

[Survey Notifications](#)


Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Form 1	1		Enable	Choose action	

Survey Settings

Basic survey options:


- Title
- Introductory text











Basic Survey Options:

 **Survey Title**














Form 1

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

 **Survey Instructions**
(Displayed at top of survey after title)

Paragraph ▾ — **B** *I* U          

↶ ↷

Please complete the survey below.


Thank you!

Survey Settings

Design options:


- Fonts and colors
- Header logo

Survey Design Options:

 **Width of survey on page**
Set a custom width as a percentage of the webpage that the survey will take up.

Fixed width (default) ▾


Note: The percentage page width settings are fully dependent on the participant's screen size. This setting will not be applied when viewing the survey on mobile devices.

 **Logo**
(Optional: display an image above the survey title)


Add new logo:
 No file selected.

(Images wider than 600 pixels will be downsized to fit page.)


Hide survey title on survey page when display logo

 **Use enhanced radio buttons and checkboxes?**
Includes Yes/No and True/False fields


Standard radios and checkboxes ▾ [Show example](#)

 **Size of survey text**

Large ▾

 **Font of survey text**

Open Sans ▾

 **Survey theme**

Default ▾

Survey Settings


Customizations:

- Numbering and pagination
- Submission behavior
- Confirmation emails
- Response limits and expiration dates

Survey Customizations:

Question Numbering

For custom numbering, each question's number will be blank by default until manually added via the Online Designer or Data Dictionary.

Auto numbered 

Pagination

One page or multiple pages? Section headers, which begin new sections on the instrument, will serve as the page break in a multi-page survey, in which each page will begin with a section header.

Single page 

Display page numbers at top of survey page

Hide the 'Previous Page' button (i.e., Back button) on the survey page
(prevents respondents from going back to previous pages)

Allow participants to download a PDF of their responses at end of survey?

Display a button for the participant to download a PDF file of their responses for the survey they just completed.

No 

This option will not be available if the Survey Auto-continue or Survey Queue auto-start option is enabled. Also, if a field utilizes the @HIDDEN action tag, it will not be displayed in the PDF.

Distribution

Public Survey Link

- One link for all respondents
- Responses can be anonymous
- Only available for first instrument

Participant List

- Custom links for all respondents
- Anonymous or identifiable
- Allows tracking of responses

Option 1: Public Survey Link

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 can share the link with your participants. Responses will be collected anonymously (unless the survey contains questions that require identifying information for each participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the same survey to be taken 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 which you can then click the link to begin taking your survey.

Public Survey URL:

Protect the public survey using the Google reCAPTCHA feature [?](#)

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

Option 2: Participant List

 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:** Anonymous* 

Participant List belonging to [Initial survey] "Form 1" ▾ Remove all participants

Displaying -- ALL -- ▾ of 0  Add participants  Compose Survey Invitations  Export list

Email	Record	Participant Identifier Enable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
No participants have been added							

Add participants

Add Emails to Participant List [X]

Copy and paste your list of participant email addresses, **one per line**.

Each participant starting on a new line

Example #1: john.williams@hotmail.com
Example #2: jimtaylor@yahoo.com
Example #3: putnamtr@gmail.com

[Add participants] [Cancel]

Compose Survey Invitations

Public Survey Link

Participant List

Survey Invitation Log

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Survey Response Status: Anonymous*

Participant List belonging to [Initial survey] "Form 1" ▾ Remove all participants

Displaying -- ALL -- ▾ of 0 Add participants **Compose Survey Invitations** Export list

Email	Record	Participant Identifier Enable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
No participants have been added							

Compose Survey Invitations

✉ Send a Survey Invitation to Participants
✕

Info

Survey title: Enrollment

Event: Event 1

When should the emails be sent?

Immediately

At specified time: M/D/Y H:M

The time must be for the time zone **America/Chicago**, in which the current time is **03/21/2023 10:35**.

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 [Link](#) `</>`

↩ ↪

Please take this survey.

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

Survey link:

Participant List Actions: -- check/uncheck participants -- ▼

(those who have not responded completely)

<input checked="" type="checkbox"/>	Email (1 selected)	Participant Identifier	Scheduled?	Sent?	Respon- ded?
<input checked="" type="checkbox"/>	1) rlane7@uic.edu		-		

Anonymous Mode




[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: Anonymous* 

Participant List belonging to [Initial survey] "Form 1" ▾ Remove all participants

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

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
rlane7@uic.edu		Enable Disabled		-		-	-

Participant Identifiers

[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] "Form 1" ▾ Remove all participants

Displaying 1 - 2 ▾ of 2 + Add participants ✉ Compose Survey Invitations 📄 Export list

Email	Record	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
1) rlane7@uic.edu				-		-	-
2) rlane7@uic.edu	<u>2</u>	Rachel Lane		-		-	-

Approaches to Surveys

One survey

- One record per response
- Quick to design and administer

Multiple surveys

- Multiple surveys connected to one record
- Sequence can be immediate (Survey Queue) or scheduled
- Surveys can be conditionally skipped

Longitudinal data collection

- One record can repeat instruments or whole events

First survey

- Distribute via public survey link
- Collect contact information, including email address
- Screen for eligibility



Second survey

- Distribute via:
 - Survey Queue
 - Personalized email invitation
- Only send to eligible participants

Create Multiple Surveys

[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

[+ 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 options:

[Form Display Logic](#)

Survey options:

[Survey Queue](#) [Auto Invitation options](#) [Survey Login](#)

[Survey Notifications](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Enrollment	2			Choose action v	Survey settings + Automated Invitations
Health Assessment	0			Choose action v	Survey settings + Automated Invitations

Distribution

- Public survey link (first survey only)
- Survey Queue
- Automated Survey Invitations
- Alerts & Notifications

Survey Queue

- Available from Online Designer
- Guide participants through multiple surveys
- Use conditional logic
- Auto-start option

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[Import](#) a new instrument from the official [REDCap Instrument Library](#)

[Upload](#) instrument ZIP file from another project/user or [external libraries](#)

Form options:

[Form Display Logic](#)

Survey options:

[Survey Queue](#) [Auto Invitation options](#) [Survey Login](#)

[Survey Notifications](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Enrollment	2			Choose action	Survey settings + Automated Invitations
Health Assessment	0			Choose action	Survey settings + Automated Invitations

Set up Survey Queue

Activated?	Survey Title	Display survey in the Survey Queue when...	Auto start?
Event 1			
 Not activated Activate	"Enrollment" - Event 1	<input type="checkbox"/> When the following survey is completed: <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">-- select a survey --</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AND</div> <input type="checkbox"/> When the following logic becomes true: How to use this <div style="border: 1px solid #ccc; height: 20px; margin-bottom: 5px;"></div> <small>(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")</small> Test logic with a record: -- select record --	<input type="checkbox"/>
 Activated Deactivate	"Health Assessment" - Event 1	<input checked="" type="checkbox"/> When the following survey is completed: <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">"Enrollment" - Event 1</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">AND</div> <input type="checkbox"/> When the following logic becomes true: How to use this <div style="border: 1px solid #ccc; height: 20px; margin-bottom: 5px;"></div> <small>(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")</small> Test logic with a record: -- select record --	<input checked="" type="checkbox"/>

Distribution

- Public survey link (first survey only)
- Survey Queue
- Automated Survey Invitations
- Alerts & Notifications

Collect Email Address

Edit Field ✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date/Time, ...) Codebook

Question Number (optional)
Displayed only on the survey page

Field Label Use the Rich Text Editor ?

Email Address

Action Tags / Field Annotation (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)

email Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#)

[Field Embedding](#)

Validation? (optional)

Email

-- OR --

-- select ontology service --

Required?* No Yes
* Prompt if field is blank


Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

Save **Cancel**

Project Email Address



Optional

I'm done!

Enable optional modules and customizations

- 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 Clinical Data Pull from EHR [?](#)
- Enable Twilio SMS and Voice Call services for surveys and alerts [?](#)
- Enable SendGrid Template email services for Alerts & Notifications [?](#)

Project Email Address

Designate an email field for communications (including survey invitations and alerts) ✕

Choose an email field to use for invitations to survey participants:

-- select a field -- ▼

-- select a field --

Form 1

email "Email"

By
Th
&

direct specific email communications to the email address provided.
s, automated survey invitations, survey confirmation emails, and Alerts
for that purpose, then any records in your project that have an email
address captured for that particular field will have that email address show up as the participant's email
address in the Participant List (unless an email address has already been entered for that participant in the

Automated Survey Invitations

- Available from Online Designer
- Send email invitations to designated project or survey email addresses
- Use conditional logic
- Define timing
- Send reminders

Data Collection Instruments

+ 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 options: Form Display Logic

Survey options: Survey Queue, Auto Invitation options, Survey Login, Survey Notifications

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Enrollment	2			Choose action	Survey settings + Automated Invitations
Health Assessment	0			Choose action	Survey settings + Automated Invitations

Define Conditions for Automated Survey Invitations (ASI)

In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. [Tell me more](#)

Activate automated invitations for this survey?

Survey title: Health Assessment
Event: Event 1

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

Active Not Active

STEP 1: Compose message

From: Display name (optional) rlane7@uic.edu
(select any project user to be the "Sender")

To: [All participants who meet the conditions defined]

Subject:

Send test email

Paragraph

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.

STEP 2: Conditions

Specify conditions for sending invitations:

When the following survey is completed:
 --- select a survey ---

AND

When the following logic becomes true:

(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 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 AFTER conditions are met

Send immediately

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

Send the invitation after time lapse of days hours minutes

Send at exact date/time: M/D/Y H:M

OPTIONAL: Enable reminders

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

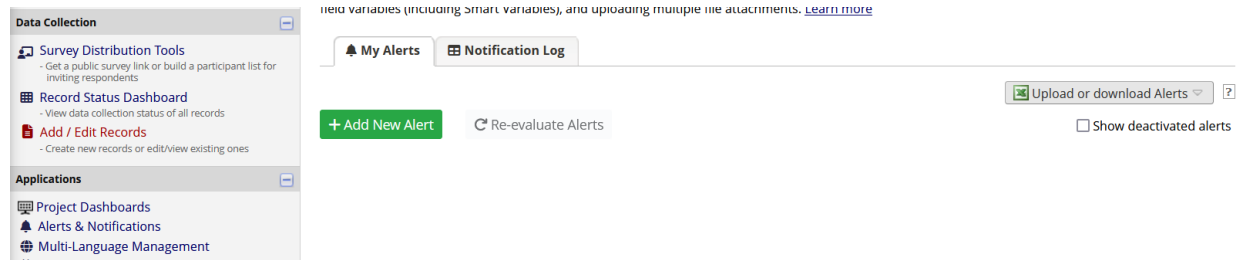
Save Save & Copy to... Cancel

Distribution

- Public survey link (first survey only)
- Survey Queue
- Automated Survey Invitations
- Alerts & Notifications

Alerts & Notifications

- Available from Applications
- Send invitations to:
 - Designated email addresses
 - Any email field
 - Manually entered email addresses
- Use conditional logic
- Define timing
- Send reminders



Create new alert ✕

You may define the settings for your alert in Steps 1-3 below. After clicking the Save button at the bottom, your alert will immediately become active and may be triggered at any time thereafter. If you would like to remove or stop using an alert, it may be deactivated at any time. You may modify an existing alert at any time, even after some notifications have already been sent or scheduled.

Title of this alert:

STEP 1: Triggering the Alert

A) How will this alert be triggered? **When a record is saved on a specific form/survey***

If conditional logic is *TRUE* when a record is saved on a specific form/survey*
 When conditional logic is *TRUE* during a data import, data entry, or as the result of time-based logic ⓘ

B) Trigger the alert...

when is saved with any form status (excludes data imports)

C) Trigger Limit: Trigger the alert...

(The trigger limit determines where and to what extent within a record that the alert will be triggered.)

* The alert will not be re-triggered if the form/survey is saved again, unless it is set to send Every time in Step 2 below.

STEP 2: Set the Alert Schedule

Approaches to Surveys

One survey

- One record per response
- Quick to design and administer


Multiple surveys

- Multiple surveys connected to one record
- Sequence can be immediate (Survey Queue) or scheduled
- Surveys can be conditionally skipped

Longitudinal data collection

- One record can repeat instruments or whole events

Option 1: Longitudinal Data Collection



Not started

I'm done!

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](#)

Modify project title, purpose, etc.

Define Events



In progress

I'm done!

Define your events and designate instruments for them

Upload or download arms/events

Arm 1: **Arm 1** +Add New Arm

Arm name: **Arm 1** [Rename Arm 1](#)

	Event # [event-number]	Event Label [event-label]	Custom Event Label [optional]	Unique event name (auto-generated) [event-name]	Event ID (auto-generated, unchangeable) [event-id]
✏️ ✖️	1	Event 1		event_1_arm_1	65716
✏️ ✖️	2	Followup		followup_arm_1	65717
Add new event		<input style="width: 100%; height: 20px;" type="text"/> <small>Descriptive name for this event</small>	<input style="width: 100%; height: 20px;" type="text"/> <small>Custom Event Label (optional)</small> <small>Example: [visit_date], [weight] kg</small>		

Designate Instruments



In progress

I'm done!

Define your events and designate instruments for them

Create events for re-using data collection instruments and/or set up scheduling.

Go to [Define My Events](#) or [Designate Instruments for My Events](#)

[Begin Editing](#)

[Save](#)

[Select All](#) | [Deselect All](#)

Data Collection Instrument	Event 1 (1)	Followup (2)
Enrollment (survey)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Health Assessment (survey)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Event-Specific Invitations

Data Collection Instruments

+ 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 options:

Form Display Logic

Survey options:

Survey Queue Auto Invitation options Survey

Survey Notifications

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Enrollment	2			Choose action	Survey settings + Automated Invitations
Health Assessment	0			Choose action	Survey settings + Automated Invitations

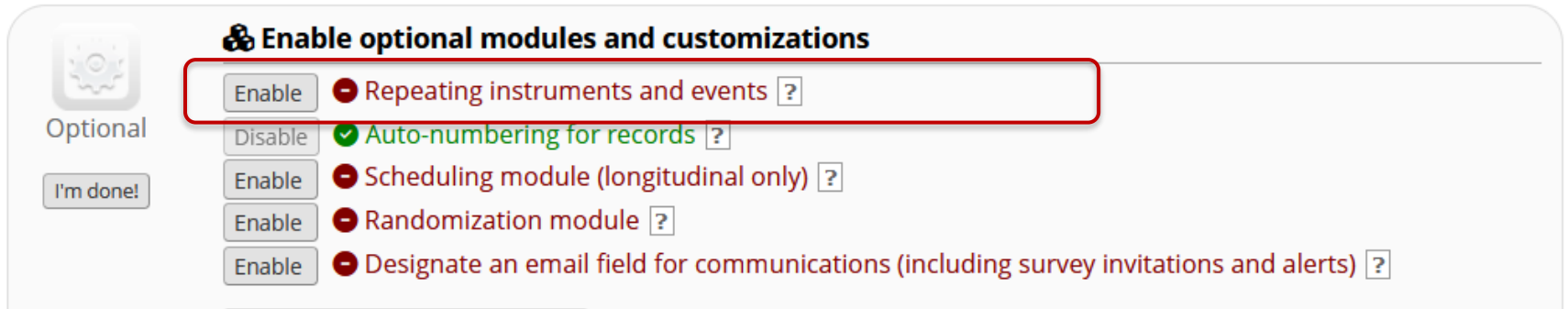
Automated Invitations ✕

Click the buttons below to set up or modify automated survey invitations.

+ Set up Event 1

+ Set up Followup

Option 2: Repeating Instruments and Events



The screenshot shows a settings panel titled "Enable optional modules and customizations". On the left side, there is a gear icon, the word "Optional", and a button labeled "I'm done!". The main area contains a list of five items, each with a control button and a text label. The first item, "Repeating instruments and events", is highlighted with a red rectangular box. The second item, "Auto-numbering for records", is marked with a green checkmark. The other three items are marked with red minus signs.

Control	Module/Customization
Enable	Repeating instruments and events ?
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) ?

Repeating Instruments and Events

x

Repeating instruments and events

An excellent way to collect repeating data in REDCap is to use repeating instruments and/or repeating events. This is sometimes called one-to-many data collection. Some examples may include but are not limited to the following: data from multiple visits or observations, concomitant medications, adverse events, or repetitive surveys (daily, weekly, etc.).

Below you can specify a data collection instrument or a whole event of instruments to be infinitely repeatable, in which each repeating instrument or event can be repeated a different number of times for each record. You may set any event in the project to be repeatable *or* alternatively set selected instruments to be repeatable within an event. **The 'Repeat Entire Event' option means that all the event's instruments will repeat together and stay connected, whereas the 'Repeat Instruments' option implies that the instruments will repeat separately and independently from each other on that event.** Once an instrument or event is set to repeat, you will see options on the Record Home Page to add another instance of the instrument/event for the currently selected record.

Event Name	Repeat entire event or selected instruments?	Instrument name (select instruments to repeat)	Custom label for repeating instruments (optional) ⓘ Example: [visit_date], [weight] kg
Event 1	-- not repeating --	<input type="checkbox"/> Enrollment <input type="checkbox"/> Health Assessment	<input style="width: 100%;" type="text"/> <input style="width: 100%;" type="text"/>
Followup	-- not repeating --	<input type="checkbox"/> Health Assessment	<input style="width: 100%;" type="text"/>

-- not repeating --

Repeat Entire Event (repeat all instruments together)




Repeat Instruments (repeat independently of each other)

Strategies for Repeating Surveys

Data Collection Strategies for Repeating Surveys

Collecting survey data in a repeating fashion can be done efficiently and with minimal setup by using a repeating survey, which is a survey that is enabled as a repeating instrument or (if a longitudinal project) a survey instrument utilized on a repeating event. However, it can sometimes be difficult to know which features to use with repeating surveys to collect repetitive survey data most effectively. The information below presents multiple data collection options for repeating surveys. Each option has its own pros and cons that should be weighed carefully based on your situation. It is important to point out that the options below are not mutually exclusive and can be used in combination together for multiple surveys within a project.

Different ways to collect data for a repeating survey

	 "Repeat the survey" button at end of survey	 Automated Survey Invitations (ASIs)	 Alerts & Notifications
Description	Utilize the "Repeat the survey" button that can be enabled to appear at the end of the survey to allow participants to keep adding new repeating instances over and over again for the survey.	Utilize an Automated Survey Invitation that will be repeatedly sent at an a recurring interval.	Utilize an alert that will be repeatedly sent at an a recurring interval, in which the alert will contain a specially-formatted survey link for the repeating survey.
Activation process and usage	Enable the "Repeat the survey" option on the Survey Settings page, and participants will be able to enter multiple instances' worth of data in a back-to-back fashion (i.e., in one sitting), in which the "Repeat the survey" button will be displayed at the end of the survey. Additionally, if you are utilizing the Survey Queue feature, and the participant has been given their survey queue link, they will be able to enter new repeating survey instances whenever they wish on the survey queue page.	Click the 'Automated Invitations' button for the repeating survey in the Online Designer, and then fill out the 'How many times to send it' section in the ASI popup to designate how often and how many times the invitations should be repeated.	Create an alert on the Alerts & Notifications page, and then fill out the 'Send it how many times?' section in the alert popup to designate how often and how many times the notifications should be repeated. The message of the alert must contain the Smart Variable <code>[survey-link]</code> and <code>*MUST*</code> be appended with <code>[new-instance]</code> . For example, if the unique instrument name of your repeating survey is "daily_survey", then you would use <code>[survey-link:daily_survey]</code> <code>[new-instance]</code> . This will create a survey link in the alert that will always point to a new, not-yet-created instance of the repeating survey.
Does it work with repeating			

Advanced Topics

- Modifying survey responses
- Stop actions
- Survey Login
- Survey Notifications
- Piping and embedding;
advanced formatting
- Required fields
- Smart variables
- Action Tags
 - @HIDESUBMIT
 - @HIDDEN
- Scheduling
- Twilio (SMS and phone surveys)

General Reminders

- Test everything in Development Status
 - Test all field types, branching logic
 - Test alerts & notifications
 - Try to break things
- Move to Production Status
 - Only collect real data in Production Status
 - Some project changes will be restricted

Get Help

- [Terms of Use](#)
- [Training resources](#)
- [Practice sheets](#)
- [REDCap Help & FAQ](#)
- [Contact REDCap Admins](#)
- Monthly Q&A and community meeting
 - Third Thursday of every month at 1pm
 - All active users are invited by email