Surveys

CCTS Biostatistics Core

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Overview

In REDCap, a survey is a version of a data collection instrument that can be accessed through a public or private URL. It can be completed by a study participant without logging into REDCap. All surveys can also be accessed in form view by logged-in study staff.

How to Use Surveys in REDCap

One survey

A project can contain a single data collection instrument, enabled as a survey. Each response corresponds to a single record in your project.

Use cases:

- Opinion poll
- Event registration

Multiple chained surveys

Create multiple surveys and allow each participant to respond to some or all of them. Each respondent can complete each survey once, and all responses by a single individual will be connected to one record.

Respondents can be led through surveys automatically in one sitting (Survey Queue) or invited to take follow-up surveys by email. Surveys in the sequence can be conditionally skipped based on earlier responses.

Use cases:

- Potential recruits complete a screening questionnaire. Eligible participants then complete a health survey.
- All participants complete an intake survey. Based on their reported age, they are then guided to either an adult or a child version of an assessment.

Longitudinal data collection

One individual can repeat instruments or whole events multiple times. All submissions of all surveys by an individual will be connected to one record.

Use cases:

- Study participants complete the same survey at baseline and 6 months later (defined events)
- Patients complete a health questionnaire at every appointment (open-ended repeating instrument)

Enabling Surveys in REDCap

Surveys are not enabled by default in REDCap projects. You must first enable surveys on the Project Setup page.

For each instrument you want to share as a survey, click the `Enable` button on the Online Designer.

Survey Settings

On the Survey Settings page, you can modify the appearance and behavior of your survey.

Basic Survey Options

- Edit the survey title and introductory text

Basic Survey Options:

🏷 **Survey Title**

Followup Survey

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

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

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Please complete the survey below.

Thank you!

🖊 How to use Piping here

Survey Design Options

• Customize fonts, colors, and logos

Survey Design Options: 🖼 Copy design to other surveys

↔ **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:
[Choose File] No file chosen
(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

T↕ **Size of survey text**

Large ▾

🅰 **Font of survey text**

Open Sans ▾

🎨 **Survey theme**

Default ▾   [Customize]

Survey Customizations

• Control numbering and pagination
• Customize Submit buttons
• Decide whether to show respondents a summary after submission

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.

Custom numbered ⌄

Question numbers will not display correctly if using auto numbering if some questions have branching logic employed. Question auto numbering has been automatically disabled because some of your survey questions use branching logic.

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.

Save a PDF of completed survey response to a File Upload field
A PDF copy of the survey response will be immediately stored in the field selected on the right whenever a participant completes this survey.

Current event ⌄   Disabled ⌄

☐ Store the translated version of the PDF (if using Multi-language Management)
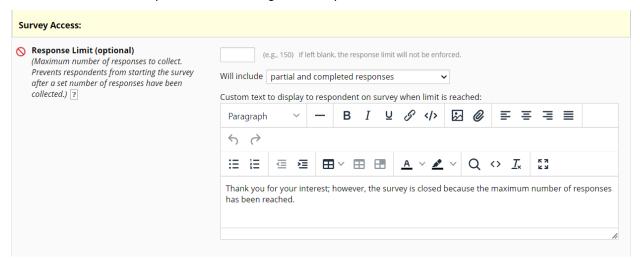
Choose a File Upload field from the drop-down above to enable this feature. Tip: If desired, the field may exist on the survey instrument that is triggering it, in which the field can be hidden on the survey page using the action tag @HIDDEN-SURVEY. Learn more

Survey Access

- Set response limits or expiration dates
- Decide whether respondents can change their responses

Survey Access:

Response Limit (optional)
(Maximum number of responses to collect. Prevents respondents from starting the survey after a set number of responses have been collected.) [?]

[   ] (e.g., 150)   If left blank, the response limit will not be enforced.

Will include [partial and completed responses   ⌄]

Custom text to display to respondent on survey when limit is reached:

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Thank you for your interest; however, the survey is closed because the maximum number of responses has been reached.

Survey Termination Options

- Draft confirmation emails
- Enable the eConsent framework

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., [enrollment_arm_1][age] > 30   How to use this

— OTHERWISE —

○ **Redirect to a URL**
   (Redirect to a webpage when survey is completed)

Provide a full URL, e.g. http://www.example.com/mypage.html, [survey-url:other_survey]
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— OR —

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

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Thank you for taking the survey.

Have a nice day!