

Foundations of REDCap Surveys

Design and Distribute



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What to Expect Today

1. Introduction
2. REDCap at MSU
3. Key Features for Survey Design
4. Survey Use Cases & Enhancements
5. Questions

Expected Audience

Individuals:

with experience in a different data collection and
working on limited experience with managing surveys in REDCap
management system for research

Other topics you may be interested in:

- [Overall introduction to REDCap and its features](#)
- [Building a Data-Driven Study](#)
- Advanced REDCap Survey Design
- Action Tags for customizing field functionality
- Security Measures, User Rights, and Access Groups



Coming soon



1. Introduction

BRIC and CTSI

- Assist researchers across the colleges with development, management, and implementation of clinical research
- Collaborative relationships starts from the pre-award stage, through the data collection period and continues through the analysis and presentation of findings

Plan / Propose

Budgeting Services
Letters of Support
Process Navigation
Recruitment Planning

Setup

Custom Development
Data Integrations
REDCap Training
Study Setup
Study Start-Up Planning

Manage

Clinical Research Coordination
Data Collection
Email and SMS Notifications
Research Facilities and Resources
ResearchMatch

Closeout

Data Sharing

2. REDCap at MSU

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Base

- Create and design projects
- Form modification after project starts
- Email survey distribution
- e-Consent
- Data quality processes
- Custom reporting
- External collaborators
- File storage

Premium

- Text based alerts and invitations
- API functions
- Mobile app (offline data capture)
- Access to the BRIC library of custom modules
- Customize and add features with BRIC developers

Qualtrics

- Familiar
- Looks and feels great out-of-the box
- Free for MSU users



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Do you consent to participating?

☐ Yes

☐ No

→

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Qualtrics

Lags behind REDCap:

- Projects that mix data entry with surveys
- Longitudinal projects
- Security features
- Data quality tools

For more you can:

1. [Check out our comparison graphic](#)
2. [Read about a testimonial](#)
3. [Chat with us!](#)

3. Key Features for Survey Design

REDCap Surveys Capabilities

- 📱 Account-free data entry
 - Enable data entry without a REDCap account
- ✉ Flexible survey distribution
 - Distribute via email, SMS, or direct link
- 📅 Longitudinal support
 - Event-based scheduling and repeated measures
- 🕶 Anonymous data collection
 - Option to collect responses without identifiers
- ✂ Mixed-mode projects
 - Combine surveys and data entry forms within one project

4. Survey Use Cases & Enhancements

Preview: 3 REDCap Survey Use Cases



A Simple Survey

A one-time survey

Distribution

- 🔗 Public Survey Link
- 📄 QR Code



A Repeating Survey

Same participant can complete the survey multiple times

Distribution

- 📄 Data Import Tool
- ✉️ Automated Survey Invitations



A Longitudinal Survey

Track participants across multiple defined events

Distribution

- 👤 Participant List
- ↓ Auto-continue



A Simple Survey

A Simple Survey



- Tripadvisor.com ranks Pizza House as the #1 pizza restaurant in East Lansing
- You question the validity of this ranking
- To gather local opinions, you design a REDCap survey to identify the community's actual favorite pizza place



A Simple Survey – Level up



Theme it

Custom survey theme options:

General:

Page Background Color 

Button Text Color 

Survey title and instructions:

Text Color 

Background Color 

Section headers:

Text Color 

Background Color 

Survey questions:

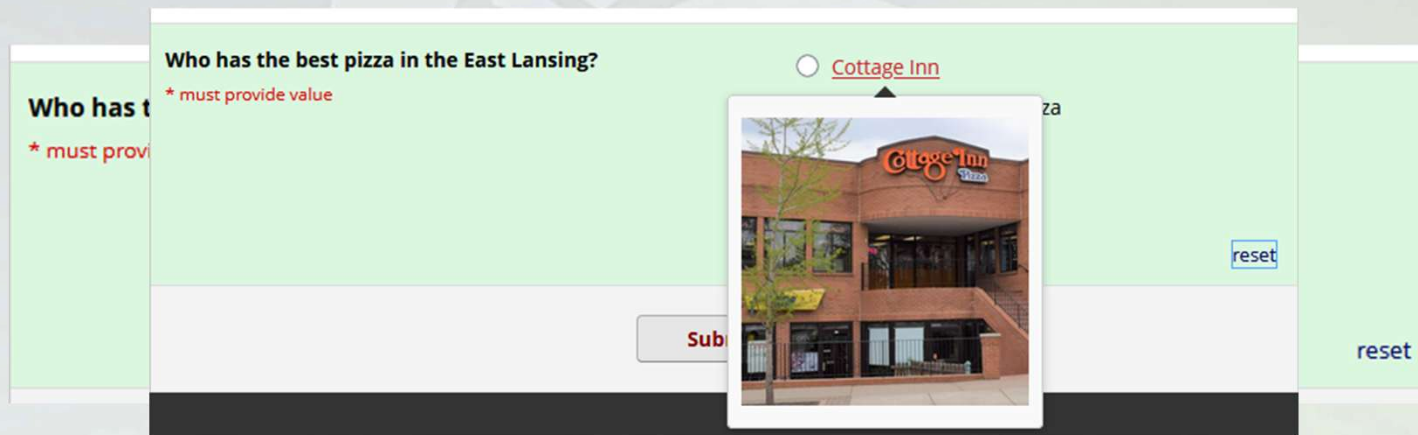
Text Color 

Background Color 

- Edit the **Survey Design Options** to create a unique theme that matches your project aesthetic

① Add Help

- Use **Descriptive Popups** to provide context for questions and responses



The screenshot shows a web form with a light green background. The main question is "Who has the best pizza in the East Lansing?" with a red asterisk and the text "* must provide value" below it. A radio button is selected next to the text "Cottage Inn". A descriptive popup is open, showing a photograph of the Cottage Inn restaurant. Below the question, there is a "Sub" button. To the right of the question, there is a "reset" button. At the bottom right, there is another "reset" button.

Who has the best pizza in the East Lansing?
* must provide value

☐ Cottage Inn

Who has t
* must provi

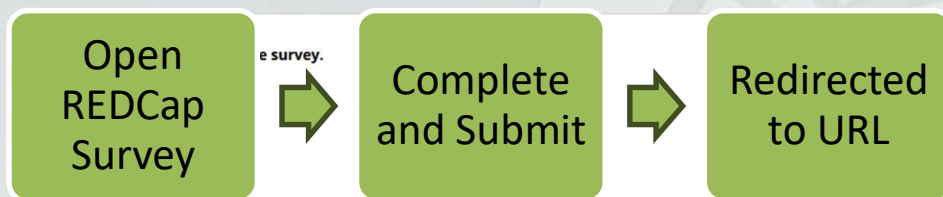
reset

Sub

reset

 Link Out

- **Redirect to a URL** to send your participants to a desired webpage



A Simple Survey – You give it a try



A quick note on Public Survey Links

Benefits

- Easy Distribution
 - Share a single link via email, website, flyers, or text with no login required
 - Built-in tools to generate QR codes and user-friendly links
- No automated tracking of participants
 - Preserve anonymity, if desired

Limitations

- No automated tracking of participants
 - Multiple responses per user are possible
 - Malicious actors



A Repeating Survey



A Repeating Survey

- You are interested in the sleep habits and dreaming behaviors of MSU students
- You want each participant to complete a Dream Diary each morning for two weeks
- You have a REDCap survey built, but need to deliver the survey 14 times





A Repeating Survey – Level Up



Auto Send

- Use **Automated Survey Invitations** to send out the survey each day

STEP 3: When to send invitations AFTER conditions are met

- ☐ Send immediately
- ☒ Send on next at time H:M
- ☐ Send the invitation days hours minutes
- ☐ after the exact time that the automated invitation was triggered
- ☐ Send at exact date/time: M/D/Y H:M

STEP 4: How many times to send it (repeating surveys only)

- ☐ Just once
- ☒ Multiple times on a recurring basis:
- ☒ Send every days after initially being sent.
Tip: A monthly recurrence can be approximated as 30.44 days.
- ☒ Send up to times total (including the first time sent).
Leave blank to continue triggering and sending forever.

Learn about [Data Collection Strategies for Repeating Surveys](#)



Paste & Go

- Use the **Data Import Tool** to load in participant emails into your project automatically
 - Create a 'survey enabler' field that can turn on and off participant invitations easily

	A	B	C
1	record_id	email	survey_enabler
2	1	participant_1@somewhere.com	1
3	2	participant_2@somewhere.com	1
4	3	participant_3@somewhere.com	1
5	4	participant_4@somewhere.com	1
6	5	participant_5@somewhere.com	1
7	6	participant_6@somewhere.com	1
8	7	participant_7@somewhere.com	1
9	8	participant_8@somewhere.com	1
10	9	participant_9@somewhere.com	1



Time out

- Add a **Time Limit for Survey Completion** to only allow participants a certain amount of time to submit their response each day

Time Limit for Survey Completion (optional)

(The amount of time that each respondent has to complete the survey based on when they were initially sent the survey invitation. Note: This feature excludes public survey links and is not applicable for survey links sent via Alerts & Notifications.)

days hours minutes

If the respondent loads the survey after this time has passed, it will not allow them to begin or continue the survey. (If all are left blank, the time limit will not be enforced.)



A Repeating Survey – Level up



A Longitudinal Study



A Longitudinal Study

- You are interested in stress and coping among first-year teachers
- You hope to measure the following
 - Anticipated stress levels
 - Confidence in classroom management
 - Preparedness for lesson planning
 - Actual stress levels experienced
 - Coping strategies developed
 - Burnout symptoms or resilience scores



A Longitudinal Study – ‘Level up’

Schedule ahead

- Use **Automated Survey Invitations** Schedule the Survey to automatically send invitations after 1 year

☒ When the following logic becomes true:

[baseline_arm_1][teacher_survey_complete] = '2'

(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")

🔑 STEP 3: When to send invitations AFTER conditions are met

☐ Send immediately

☐ Send on next at time H:M

☐ Send the invitation after time lapse of days hours minutes

☒ Send at exact date/time: M/D/Y H:M



Chain on

- Turn on **Auto-continue** so the Feedback survey starts immediately following the Follow-up Teacher Survey

Data Collection Instrument	Baseline (1)	Follow-up (2)
Teacher Survey (survey)	✓	✓
Feedback (survey)		✓

Unlinked Data Collection

- To maintain survey anonymity while still controlling access, avoid collecting email as a data field and use the Participant List
 - This allows responses to remain anonymous, even if participation is restricted

 Survey Response Status: Anonymous* 

Participant List belonging to [Initial survey] "Teacher Survey" - Baseline Remove all participants								
Displaying 1 - 3 of 3		 Add participants		 Compose Survey Invitations		 Export list		
Email	Record	Participant Identifier Enable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
		Disabled		-		-	-	
		Disabled		-		-	-	
jonesky9@msu.edu		Disabled		-		-	-	

Record ID	Baseline	Follow-up	
	Teacher Survey	Teacher Survey	Feedback
<u>1</u>			
<u>2</u>			
<u>3</u>			

Summary

- We covered 3 methods for survey distribution
- Many ways to customize the user experience
- Depending on your survey design and what you hope to deliver, REDCap has flexible options to meet your needs
- To hear more about REDCap Seminars and REDCap Helpdesk hours in the future, please join our listserv!

Request Access Today!

- Fill out our contact form to start the process

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Contact Us

Want to know more about how CTSI can help you?
Please tell us a bit more information so we can connect you with the right person.
You can expect to hear back from us within three business days.

First Name:
* must provide value

Last Name:
* must provide value

If applicable, MSU College and Department / Unit

Email:
* must provide value

Phone:

5. Questions