REDCap – How to add a User to a project

- Navigate to the User Rights hyperlink, located on the left side of the project screen. This hyperlink will open the User Rights tab.
- In the 'Add with Custom Rights' text box, enter the username of the individual you want to add to the project.
 For example, if the individuals email is: jdoe@gwu.edu, you will enter jdoe into the text box. Please do not enter the full email address.
- Click 'Add with Custom Rights.'

Data Collection			
Get a public survey link or build a participant list for inviting respondents	Project Setup	🚨 User Rights	A Data Access Groups
Record Status Dashboard	L		
Add / Edit Records - Create new records or edit/view existing ones	This page may be used for also create roles to which ye privileges because they allo	granting users acce ou may assign users ow you to easily add	ss to this project and for managing the user privileges of those users. You may s (optional). User roles are useful when you will have several users with the sam many users to a role in a much faster manner than setting their user privileges
Data Collection Instruments: Demographics Patient Data Ctsi Service Request Form	Add new users: Give th	a nice way to catego he bottom allows yo eges.	orize users within a project. In the box below you may add/assign users or create u to make modifications to any existing user or role in the project, as well as view
Applications	Idea	ion custom user ng	Add with custom rights
📴 Calendar	Ince		Add with cuaton rights
Data Exports, Reports, and Stats Data Import Tool	Assign new use	91	Assign to role 🤝
Data Comparison Tool Elegging	Create new roles: Add	new user roles to w	hich users may be assigned.
😼 Field Comment Log	Enter new role	name	Create role
File Repository	(e.g., Project Man	ager, Data Entry Pers	on)

- Note: If the user has not logged into REDCap previously, their full name will not appear when you are typing in their username. It is okay to continue typing in their username and then selecting their specific rights. Once the new user logs into REDCap, the project will appear on their My Projects list.
- An 'Adding New User' popup box will appear. Designate the appropriate rights for the individual. Click 'Add User' when completed.

You may set the rights for the user below by checking the boxes next to the application tools to which you wish to grant them access. You may also grant them or deny them access to individual data collection instruments, if so desired. To save your selections, click the "Add user" button at the bottom of the page.

Basic Rights		Data Entry Rights				
Expiration Date (if applicable)	(64/6/2)	NOTE: The data entry ability to view or edit o (e.g., data entry form data imports or data e	rights *c data on a s, report exports.	only* p a web p s). It h	ertain to age in F as no el	a user's REDCap ffect on
Highest level privileges:			No	Read	View & Edit	Edit survey
Project Design and Setup	0	Demographics (survey)	0	0	۲	
👃 User Rights	0	Patient Data (survey)	0	0	۲	
🝰 Data Access Groups	D	Ctsi Service Request	Q	0	۲	
Privileges for data exports (including reports, and stats:	PDFs and API exports),	1000				
😼 Data Exports	No Access	New User Notificatio	n			
⁴ De-identified means that all	De-Identified*	Notify user of their project access via email?				
removed, as well as any	Remove all tagged Identifier fields					
fields.	Full Data Set					
Add / Edit Reports Also allows user to view ALL reports (but not necessarily all data in the reports)	۲					
🚹 Stats & Charts						
Other privileges:						
Manage Survey Participants	2					
📅 Calendar	2					
	-					

- If the user has logged into REDCap before, you will have the option to send them an email, notifying them of their project access. If they have not yet logged into REDCap, you will not see this option
- The new user will appear in the Username list on the User Rights tab. A summary of their access will appear as well.

Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration to edit)	Data Access Group (click DAG to assign user)	D

REDCap - How To Enable an Email Notification for Survey Responses

Individual users may be added to receive survey notifications each time a participant completes a survey.

Generic email accounts (i.e. tsiredcap) may also be added to receive notifications as well.

- To add a user as a survey notification recipient, first add them as a User to the project.
 - Navigate to the Tool Bar on the left-hand side of the screen. Select User Rights.

REDCap	
Logged in as britjack Log out	
 My Projects or Control Center REDCap Messenger 	
Project Home and Design	
☆ Project Home → 注 Project Setup	
🖸 Designer - 📓 Dictionary - 🚍 Codebo	ook
Project status: Production	
Data Collection	
Survey Distribution Tools	
III Record Status Dashboard	
📓 Add / Edit Records	
Show data collection instruments	
Applications	
Alerts & Notifications	
🛗 Calendar	
B+ Data Exports, Reports, and Stats	
-Data Import Tool	
≠ Data Comparison Tool	
Logging	
Field Comment Log	
File Repository	
File Repository	
 File Repository User Rights and A DAGs Customize & Manage Locking/E-signal 	tures
 File Repository User Rights and S DAGs Customize & Manage Locking/E-signal Data Quality 	tures
 File Repository User Rights and A DAGs Customize & Manage Locking/E-signal Data Quality API and A API Playground 	tures

o Enter the username or name of the individual into the first text box and click Add with Custom Rights



• The User Rights pop-up will appear where you can designate rights to the user. Click Add User.

button at the bottom of the page	cess to individual data collect	tion instruments, if so desired.	To save	your se	elections.	click the Add
	🔒 Adding ne	ew user " tsiredcap "				
Basic Rights		Data Entry Rights				
Expiration Date (if applicable)	(M/CV/Y)	NOTE: The data entry ability to view or edit (e.g., data entry form data imports or data	rights *c data on a s, report exports.	only* p web p s). It h	ertain to bage in P las no el	a user's REDCap fect on
Highest level privileges:			No	Read	View	Edit survey
Project Design and Setup		Strategic Planning	Access	Only	()	Tesponses
Deta Access Groups		Questionnaire (survey)	10	0	(0)	-
Data Access Groups	0	Mear Selection	12			
Privileges for data exports (including eports, and stats:	PDFs and API exports),	New User Notificati	on			
Data Exports	No Access	Notify user of their	project a	ccess v	ia email	2 2
De-identified means that all free-form text fields will be removed, as well as any date/time fields and identifier fields.	 De-Identified* Remove all tagged Identifier fields Full Data Set 					
Add / Edit Reports Also allows user to view ALL reports (but not necessarily all data in the reports)						
Stats & Charts						
Other privileges:						
	1.00					
Anage Survey Participants						
Manage Survey Participants 31 Calendar						
Articipants Participants Calendar Data Import Tool	2					
Manage Survey Participants Calendar Data Import Tool Data Comparison Tool	8 0 0					
Manage Survey Participants Calendar Data Import Tool Data Comparison Tool	8					
Manage Survey Participants Calendar Data Import Tool Data Comparison Tool Logging File Repository	8					
Manage Survey Participants Calendar Data Import Tool Data Comparison Tool Logging File Repository Data Quality What is Data Quality2	Create & edit rules Execute rules					

Navigate to the Project Set-Up tab and click on the Online Designer. This will open the Online Designer tab.
 Click on the Survey Notifications button.

	Modify your data collection instruments (survey and	forms) in Draft Mode
Optional	Once in production, you may still modify or add fields to the projec using the Online Designer (online method) or by uploading a Data may use either method or both. Quick links: <u>Download PDF of all o</u> current Data Dictionary	t, if you desire. This may be done by either Dictionary (offline method), in which you tata collection instruments OR <u>Download the</u>
	Go to 👷 Online Designer or 🛛 🔀 Data Dictionary	
	@ Project Setup 🥭 Online De	signer 💣 Data Dictionary
		To VIDEO: How to use this page
	The Online Designer will allow you to make your web browser. NOTE: While in develop	y project modifications to fields and data collecton instruments very easily using only ment status, all field changes will take effect immediately in real time.
		Survey options: Add new instrument:
	Data Collection Instruments	E Survey Queue Survey Login A Creste a new Instrument from scratch
		Survey Notifications
	Instrument name	Fields Were Enabled as Instrument actions Survey-related options
	Strategic Planning Questionnaire	12 💆 🔮 - Rename 🕷 Dearer 🖉 Survey settings - Automated invitations
	Meal Selection	0 💆 Ehade Renzore Reparts

 \circ $\;$ Select the email address next to the recipient you would like to receive email notifications.

you or other users wish to be notified via e nder each survey listed below by selecting rimary, secondary, or tertiary email address otifications, change their email drop-down or that survey.	mail <u>every time</u> a participant completes a survey, select the users to their email address in the user's drop-down list, which may contain s for their REDCap account. To remove a user as a recipient for the option to 'not selected', after which they will no longer receive notifi	o be notified 1 each user's 1 survey cation email
Strategic Planning Questionnaire	🖾 Recipient email address	Notifications Enabled
mahankin	- not selected V	۲
tsiredcap (REDCap Support)	tsiredcap@wfubmc.edu (Primary)	۲
and a company	raneorab@moonic.eou (r miar/)	

• If the account (or individual user) has not logged into REDCap prior to this event, which may happen at times with generic email addresses, please first log the account/user into REDCap using the account's/user's credentials. (If you are unsure of the account password, contact IT for this information.) Once the account/user has been logged into REDCap, the email address should appear on the Email Notification for Survey Responses email selection pop-up.

• From the Project Home page, select 'Other Functionality.'

Project Home	Project Setup	🤌 Other Functionality	Project Revision History				
Jujek Tasks							
Codebook	The Codebook and serves as a	is a human-readable, read-on I quick reference for viewing fi	ily version of the project's Data Dictionary eld attributes.				
Survey Participants	Invite participan participant list fo	Invite participants to complete your survey by emailing a public survey link or building a participant list for batch notification.					
🔜 Export data	Export your data	a from REDCap to open or vie	w in Excel or various stats packages.				
Create a report	Build custom re	ports for quick views of your d	ata, and export reports to Excel/CSV.				
Check data quality	Build or execute	e data quality rules to find disc	repancies and errors in your project data.				
🚨 User Rights	Grant new user	s access to this project or mod	lify user privileges for current users.				
Data Dictionary Uplo	nd ad Create new field using the Online current Data Did	Create new fields/questions on your data collection instruments or modify existing using the Online Designer or by uploading a Data Dictionary. Quick link: <u>Downloa</u> current Data Dictionary					

- **To delete the project:** Under Project Management, select 'Delete the project.' A pop-up window will display. Type "DELETE" in the text box and hit the 'Delete the project' button.
 - Note: This will permanently delete the project, and you will not be able to retrieve any data or forms from this project once it has been deleted.



- To archive the project: Under Project Management, select 'Archive the project.'
 - Note: You can still access archived projects from the My Projects page by scrolling to the bottom of your projects list and selecting 'Show Archived Projects.'

A Project Home 📓	Project Setup	Just Contractionality	Project Revision History			
What is the REDCap	API?					
The REDCap API is an in programmatically retrievin imports/exports from a sp please see the <u>REDCap.</u>	terface that allows ng or modifying da lecified REDCap p API documentatior	external applications to conn ta or settings within REDCap, roject. For details on the capa 1.	ect to REDCap remotely, and is use such as performing automated data bilities of the REDCap API and how	d for a to use it,		
NOTE: If you wish to obta API user privileges on the API page will provide inst	iin an API token, w e User Rights page tructions on how to	hich will allow you to make AF a, after which you will then see request an API token.	PI requests, then someone must first a link called 'API' on the left-hand r	grant you nenu. That		
Copy or Back Up the	e Project					
Copy the project		Make an exact duplicate of over, and you will be prompt You may choose to copy or r to the new one.	this project. All project fields will be ed to set the title and info for the new lot copy the existing data in the curr	e copied w project. ent project		
 Download metada Download metada 	ta only (XML)	Download a backup of this instruments, fields, and proje XML file (CDISC ODM forma of the project (including its d another REDCap server (it c page). Because its in CDIS the project into another ODM	project. The entire project (all recor ct attributes) can be downloaded a t). This XML file can be used to crea ata, optionally) on this REDCap ser an be uploaded on the Create New C ODM format, it can also be used t I-compatible system.	ds, s a single tte a clone ver or on Project o import		
		NOTE: The exported XML file d trail), but if you wish to obtain it, the Logging page.	oes *not* contain the project's logging hi you may freely download it any time at t	story (audit he top of		
Project Managemen	t					
X Delete the project	You may comp also. This can request to dele	letely remove this project, in v only be done while the project te the project while in product	which all its data will be permanently t is still in development or you can s ion to a REDCap administrator.	/ deleted end a		
🖋 Erase all data	You may erase events, docum any logging ev still in develop REDCap admi	e all currently collected data in the project, which includes all calendar nents uploaded for records/responses, survey responses (if applicable), and wents pertaining to data collection. This can only be done while the project is pment or you can send a request to delete the project while in production to a inistrator.				
Archive the project	You may archiv will take it offlin clicking the Sh able to un-arch again and retu	ve the project if you do not wis he and remove it from your list ow Archived Projects link at th nive the project at any time and rning to this page.	h to use it any longer. Archiving the of projects. It can only be accessed e bottom of the <i>My Projects</i> page. Y d bring it back online simply by acce	project again by ou will be essing it		

REDCap – Automated Survey Invitations

Automated survey invitations allow a user to send invitations immediately or at a designated time in the future when certain conditions have been met.

Option 1: Using the public survey link to initiate a Record ID in the project

Step 1:

• To create automatic survey invitations, first enable the forms to be used as surveys

Step 2:

• The initial survey will need to capture email addresses of participants in order for the automated survey invitations to send. Please create a field on the initial survey for email addresses. Ensure the validation for that field is set for 'email.'

Add New	/ Field		×
You may add button at th different fiel	d a new project field to this data collection ins e bottom. When you add a new field, it will be d types available, you may view the 🎲 <u>Field T</u>	trument by completing the added to the form on this <u>ypes video (4 min)</u> .	e fields below and clicking the Save s page. For an overview of the
Field Type:	Text Box (Short Text, Number, Date/Time,) 🔻	
Question N Displayed only o Field Label	umber (optional) n the survey page	Variable Name (utilize email ONLY letters, numbers, and u	ed in logic, calcs, and exports) Enable auto naming of variable based upon its Field Label?
Email		How to use [9] Smart Vari	ables // Piping
		Validation? (optional)	Email 🔻
		– or –	None
		Enable searching with	Date (D-M-Y)
		choose ontology to	Date (M-D-Y)
Action Tag	gs / Field Annotation (optional)	choose ontology to	Date (Y-M-D)
Learn about	@ Action Tags or <u>using Field Annotation</u>	Required?* No * Prompt if field is blank	Datetime (D-M-Y H:M) Datetime (M-D-Y H:M) Datetime (Y-M-D H:M)
		Identifier? 🖲 No 🔘	Datetime w/ seconds (D-M-Y H:M:S)
		Does the field contain identifyi	Datetime w/ seconds (M-D-Y H:M:S)
		Custom Alignment	Datetime w/ seconds (Y-M-D H:M:S)
		Alian the position of the field of	Email
		Align the position of the field o	Letters only
		Field Note (optional)	Number
		Small reminder text displayed	Number (1 decimal place)
			Number (2 decimal places)
			Number (3 decimal places)
			Number (4 decimal places)
			Phone (North America)

Step 3:

• Navigate to the Project Setup tab and locate the 'Enable optional modules and Customizations' bubble. Click Enable for the 'Designate an email field to use for invitations to survey participants.'

	Main project settings
	Disable O Use surveys in this project? ? S VIDEO: How to create and manage a survey
Not started	Enable Subscription with defined events? ?
I'm done!	Modify project title, purpose, etc.
	Design your data collection instruments & enable your surveys
Not started	Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: Download PDF of all instruments OR Download the current Data Dictionary Go to Online Designer Or Data Dictionary Explore the REDCap Shared Library Have you checked the Check For Identifiers page to ensure all identifier fields have been tagged? Learn how to use Smart Variables Piping Action Tags
	Enable optional modules and customizations
1	Enable 🥥 Repeatable instruments ?
Optional	Disable Auto-numbering for records ?
I'm done!	Enable Scheduling module (longitudinal only) ?
	Enable 🤤 Randomization module ?
	Enable Oesignate an email field for sending survey invitations ?
	Enable G Twilio SMS and Voice Call services for surveys ?
	Additional customizations

The 'Enable' button will open a pop-up box where you will select the variable name used for the 'Email' field.



Step 4:

• On the Online Designer tab, click on 'Automated Invitations' for the first survey to be sent with the automated invitation.

A Project Home	;≘ Project Setup	Ponline Designer	D D	ata Dictiona	iry		
			🖸 Creat	e snapshot of	nstruments	VIDEO: How to use t	his page
e Online Designer wil b browser. NOTE: Wh	l allow you to make p tile in development s	project modifications t tatus, all field changes	o fields a will take	nd data colle effect imme	ection instruments diately in real time	very easily using o	nly your
	Survey options:		Add new	instrument:			
Data Collection	IE Survey Queue	🚏 Survey Login	Create	a new instr	ument from scratch		(theory a)
instruments	Survey Notificat	tions	© Upload	instrumen	t ZIP file from anothe	er project/user or <u>ex</u>	ternal libraries @
Instrument name		Field	Is View PDF	Enabled as survey	Instrument actions	Survey-related opt	ions
Instrument name Demographics		Field 20	Is View PDF	Enabled as survey	Instrument actions	Survey-related opt	ions + Automated Invitations

Step 5:

• Define the conditions for the survey – Compose the message, define the conditions, set the time for the invitation to be sent, optional: enable reminders to be sent if the survey is not completed, and finally activate the survey invitation.

In this example, we will send the Satisfaction Survey immediately after the Demographics Survey is completed.

Define Conditions for Automated Survey Invitatio	ns x
nstructions: In this pop-up you may define your conditions for auton ongitudinal project) listed in the Info box below. <u>Tell me more</u>	nated survey invitations that will be sent out for the survey (and event, if a
🗐 Info	STEP 2: Conditions
Survey title: Satisfaction Survey	Specify conditions for sending invitations:
STEP 1: Compose message	✓ When the following survey is completed:
	"Demographics"
From: jraiken@wakehealth.edu	AND V
(select any project user to be the 'Sender')	When the following logic becomes true:
To: [All participants who meet the conditions defined]	
Subject: Blassa complete the survey	
Subject. Please complete the survey	(e.g., [age] > 30 and [gender] = "1") How do Luse special functions?
Compose Preview Send test email	Test logic with a record: select record V
Please take this survey.	Ensure logic is still true before sending invitation?
You may open the survey in your web browser by clicking	STEP 3: When to send invitations AFTER conditions are met
the link below:	Send immediately
[survey-link]	Send on next select day V at time
If the link above does not work, try copying the link below	
into your web browser:	oays nours minutes
	Send at exact date/time:
ONOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-	
url] in the text or else the participant will not have a way to take the survey.	I OPTIONAL: Enable reminders
You may use HTML formatting in the email message: bold, <u> underline,</u>	Re-send invitation as a reminder if participant has not responded by a
<i>italics, link, etc.</i>	specified time? (Times below refer to AFTER original invitation time.)
How to use Piping in the survey invitation	Send every eselect day at time

Observations:

• As participants complete the initial survey and provide their email address, the Participant List will begin to fill with the email addresses. Notice that the individuals Record ID number will appear beside their name.

	rticipants						
Public Survey Link	😤 Participant List	Survey Invitation Log					
he Participant List option allo t is also possible to identify a nust first be enabled by clicki nonymous unless you 1) are	ows you to send a cus n individual's survey ar ng the 'Enable' button using Participant Iden	tomized email to anyone in your lis nswers, if desired, by providing an Io in the table below). Note: All survey tifers or 2) have enabled the design	st and track v dentifier for ea responses co ated email fie	who respond ach participa ollected are o ld for invitat	ds to your int (this fea considered ions. More	surve ature detai	ey.
Participant List belonging	to [Initial survey] "Den	nographics" 🔻				Rem	ove all participants
Participant List belonging	to [Initial survey] "Den	nographics" Compose Survey Invitations				Rem	ove all participants
Participant List belonging Displaying 1-1 • of 1 Email	to [Initial survey] "Den	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Rem	ove all participants Export list Survey Access Code and QR Code

On the Survey Invitation Log, we can see that the 'view past invitations' show the automatic email invitation for ٠ the Satisfaction Survey has been sent.

📾 Public Survey Link	🝰 Participant List	🖾 Survey l	nvitation L	.og					
Listed below are the survey in project. For each invitation it o the invitation was (or will be) s note that all times below corre Survey Invitation Log	vitations that have alre lisplays the participant ient. You may even view espond to the time zon	ady been sent email, particip v the invitatior e "America/Ne Begir	or have be bant identifi n email itse w_York", in n time: 07/31	en scheduled to ier (if exists), su If by clicking the which the curr 1/2018 09:54 En	b be sent to survey participar rvey name, and the date/time e icon in the 'View Email' colui ent time is 07/31/2018 9:54ar d time:	nts in this e in which mn. Please n. //Y H:M)			
(in ascending order by time sent) Displaying 1 - 1 • of 1	View past invitation	Displ	ay All invitat ay All survey ay All record	ion types	▼ and All response statu	ises 🔻			
		App	splay invitations	<u>Reset</u>	Download log (as seen be	low)		Delete all se	elected
Invitation send time	View Invite Participant Em	ail	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)	
🖲 09/03/2018 9:00am 🥒 🗶 (🌢	1 🖄 jraiken@wakel	nealth.edu	1		Satisfaction Survey	69			C

- In this example, we set the original email to send immediately after Demographics Survey was submitted. Example email based on our email composition input:
 - To 📃 Jennifer R. Aiken

Please take this survey.

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

If the link above does not work, try copying the link below into your web browser: <u>http://redcapint.wakehealth.edu/redcap_int/surveys/?s=w6TTWQYwHW</u>

This link is unique to you and should not be forwarded to others.

Option 2: Using the participant list to begin the automatic survey invitations

Step 1:

• To create automatic survey invitations, first enable the forms to be used as surveys.

Step 2:

• On the Online Designer tab, click on 'Automated Invitations' for the first survey to be sent with the automated invitation.

IN Project nome	Project Setup	🛃 Online Designer	Bata Diction	ary		
				VIDEO: How to u	ise this page	
e Online Designer will DTE: While in developn	allow you to make proje nent status, all field char	ect modifications to fields an nges will take effect immedia	d data collection i ately in real time.	nstruments very easily	using only your we	b browser.
	Survey option	s:	Add new instru	ment;		
Data Collection	i≡ Survey C	ueue	Create a	new instrument from sc	ratch	
	a man service of the					
Instruments	Survey 1	Notifications	o Import a	new instrument from the	e official <u>REDCap S</u>	Shared Library @
Instruments	Survey 1	Notifications	o Import a	new instrument from the Instrument ZIP file from a	e official <u>REDCap S</u> another project/use	Shared Library (9) er or <u>external libraries</u>
Instruments	Survey 1	Notifications	View Enabled PDF survey	new instrument from the nstrument ZIP file from a as Instrument actions	e official <u>REDCap S</u> another project/use Survey-related opti	Shared Library () er or <u>external libraries</u> ions
Instruments Instrument name Test Survey 1	Survey 1	Notifications Field:	Import a O Import a O Upload in View Enabled PDF survey Survey	new instrument from the Instrument ZIP file from a as Instrument actions Choose action 호기	e official <u>REDCap S</u> another project/use Survey-related opti	Shared Library () er or <u>external libraries</u> ions +Automated Invitations)
Instruments Instrument name Test Survey 1 Test Survey 2	Survey 1	Notifications Field: 4 1	Import a O Import a O Upload in View Enabled PDF Survey S Ø	new instrument from the Instrument ZIP file from a Instrument actions Choose action 호 Choose action 호	e official <u>REDCap S</u> another project/use Survey-related opti © Survey settings © Survey settings	Shared Library () er or <u>external libraries</u> ions +Automated Invitations) +Automated Invitations)

Step 3:

• Define the conditions for the survey – Compose the message, define the conditions, set the time for the invitation to be sent, optional: enable reminders to be sent if the survey is not completed, and finally activate the survey invitation.

In this example, we will send the Satisfaction Survey immediately after the Demographics Survey is completed.

Info				STEP 2: Conditions	
Survey t	itle: Satisfaction Sur	ey		Specify conditions for sending invitations:	
	1: Compose message			When the following survey is completed:	
rom:	iraiken@wakehealth	edu	1	"Demographics"	
o. 1	(select any project user to	be the 'Sender')	fined1	AND When the following logic becomes true:	
ubject:	Please complete the	survey	incoj	(e.g., [age] > 30 and [gender] = "1")	
Comp	ose Preview	Send te	st email	Test logic with a record: select record Y	
Please t	ake this survey.		-	Ensure logic is still true before sending invitation? ?	
You may the link [survey- If the lin into you	y open the survey in y below: -link] ak above does not wo ar web browser:	our web browser by clickii k, try copying the link belo	ng ow	Send immediately Send on nextselect day dayshoursminutes	
NOTE: 1 Message t url) in the You may t	You may modify or remove text box above. Make sum text or else the participa use HTML formatting in th	any text you wish in the Com you include either [survey-link t will not have a way to take th e email message: bold, <u></u>	pose] or [survey- le survey. - underline,	Send at exact date/time: MIDIVISION OPTIONAL: Enable reminders Re-send Invitation as a reminder if participant has not responded b	iy
<1> Italics,	 link, etc. use Piping in the survey.	nvitation		specified time? (Times below refer to AFTER original invitation time.)	

Step 4:

• Navigate to the *Manage Survey Participants* link, then the *Participant List* tab. Click on 'Add Participants' to begin building the participant list.

(isless surger a strengthment									
Data Collection	ments (=)	🚓 Manage Survey Pa	articipants						
Manage Survey Participants - Get a public survey link or build a p list for inviting respondents	5 participant	@ Public Survey Link	😤 Participant List	Survey Invitation Log					
Record Status Dashboard - View data collection status of all re Add / Edit Records - Create new records or edit/view ex Show data collection instruments +	cords	The Participant List option al It is also possible to identify a must first be enabled by click anonymous unless you 1) are	lows you to send a cust an individual's survey an king the 'Enable' button e using Participant Ident	omized email to anyone in your li swers, if desired, by providing an lo in the table below). Note: All survey ifers or 2) have enabled the design	st and track v dentifier for ea v responses co ated email fie	vho respond ach participa illected are o ld for invitat	ds to your int (this fea considered ions. <u>More</u>	surve ature detai	.y. Is
Applications	Ξ	Participant List belonging	g to [Initial survey] "Dem	ographics" 🔻				Rem	ove all participants
Data Exports, Reports, and	Stats	Displaying 1.1 T of 1	Add participants	Compose Survey Invitations					Export list
Data Import Tool Data Comparison Tool Store		Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
Field Comment Log		No participants have been add	ded						

Step 5: Enter the email addresses, one per line.

• Note: If you want to enable the Participant Identifier option, click on 'enable' before entering the email addresses. As you are entering emails, you can add an identifier behind the email address using a comma as the separator. For example: ctsiredcap@gwu.edu, REDCap Admin

Add Emails to Participant List

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

ctsiredcap@wakehealth.edu test@test.com abc@abc.com	
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

The names will then appear in the Participant List chart.

Participant List belonging to	[Initial survey] "Dem	ographics" 🔻				Rem	ove all part	icipants
Displaying 1-3 T of 3	Add participants	Compose Survey Invitations					🗷 Exp	ortlist
Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
abc@abc.com		Internet				69		remove
ctsiredcap@wakehealth.edu			10	-		(66)		remove
test@test.com						69		remove

Step 6:

• Click on 'Compose Survey Invitations.' This will open a pop-up box where you can complete the invitation information.

Note: When using the Participant List to email survey links, the link is specific to the participant. Please encourage the participants **not** to forward their emails with the link to other participants.

×

Survey title: Demographics	Participant List	Actions:	check/unc	heck pa	rticipants	•
When should the emails be sent?	Email (3 selected)	Participant Identifier	Scheduled?	Sent?	Respon ded?	
At specified time:	abc@abc.com		±			
The time must be for the time zone America/New_York, in which the current time is	Ctsiredcap@wakehealth.edu		+			
013 12 10 10103.	test@test.com			10.0		
 Enable reminders Re-send invitation as a reminder if participant has not responded by a specified time? 						
Enable reminders Re-send invitation as a reminder if participant has not responded by a specified time? Compose message						
Enable reminders Re-send invitation as a reminder if participant has not responded by a specified time? Compose message From: jraiken@wakehealth.edu To: [All participants selected from Participant List]						
Enable reminders Re-send invitation as a reminder if participant has not responded by a specified time? Compose message From: jraiken@wakehealth.edu To: (All participants selected from Participant List) Subject: Please complete the survey						

Observations:

• As participants complete the initial survey, the Participant List will have a green bubble with a checkmark in the 'Responded?' column.

Public Survey Link	Se Participant List	Survey Invitation Log						
he Participant List option al is also possible to identify a nust first be enabled by click nonymous unless you 1) are Participant List belonging	ows you to send a cust an individual's survey ar ing the 'Enable' button a using Participant Ident to (Initial survey) "Derr	tomized email to anyone in your lin nswers, if desired, by providing an lo in the table below). Note: All survey tifers or 2) have enabled the design nographics"	st and track v dentifier for ea / responses co ated email fie	vho respond ach participa illected are o ld for invitat	Is to your nt (this fea onsidered ions. <u>More</u>	surve ature detai	ey. Is	icinants
Displaying 1-4 V of 4	Add participants	Compose Survey Invitations]				🗷 Exp	ort list
Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
mail ibc@abc.com	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	remov
mail bc@abc.com tsiredcap@wakehealth.edu	Record	Participant Identifier Enable	Responded?	Invitation Scheduled? -	Invitation Sent?	Link œ	Survey Access Code and QR Code	remov
Email abc@abc.com :tsiredcap@wakehealth.edu raiken@wakehealth.edu	Record	Participant Identifier Enable Costeel Costeel Costeel	Responded?	Invitation Scheduled? - -	Invitation Sent?	Link es	Survey Access Code and QR Code	remov remov

• On the Survey Invitation Log, we can see that the 'view past invitations' show the automatic email have been sent.

🔧 Manage Survey Participants

🐵 Public Survey Link 🛛 🥵 Participant List

Survey Invitation Log

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. For each invitation it displays the participant email, participant identifier (if exists), survey name, and the date/time in which the invitation was (or will be) sent. You may even view the invitation email itself by clicking the icon in the 'View Email' column. Please note that all times below correspond to the time zone "America/New_York", in which the current time is 07/31/2018 10:16am.

Survey Invitation Log (in ascending order by time sent) Displaying 1-2	Vi	ew past invitations Disp ew future invitations Disp Disp Disp ew future invitations Disp	n time: lay All invitati lay All survey: lay All records isplay invitation oly filters	End tir on types s on reminders? <u>Reset</u>	me: 07/31/2018 10:16 (N/D/Y H.M)			🗹 Delete all sel	ected
$\ensuremath{\frac{1}{2}}$ Invitation send time	View Invite	Participant Email	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)	
© 07/31/2018 10:13am		jraiken@wakehealth.edu	1		Demographics	-	0		
07/31/2018 10:14am		jraiken@wakehealth.edu	1		Satisfaction Survey	69			

REDCap - How to enable and use the Biomedical Ontology Field

An ordinary text field on a survey or data entry form can have a special feature enabled that provides auto-suggest functionality for real-time searching within biomedical ontologies, such as RxNorm, ICD-9, ICD-10, Snomed CT, LOINC, etc.

To enable a field for the Biomedical Ontology use:

- 1. Create a <u>Text Box</u> Field.
- Enable searching within a biomedical ontology: select the ontology you would like to use from the drop-down list. Once a selection is made from this drop-down list, the only values that will be saved in this field will be values from the search list. You will not be able to type any free-form text into this field unless it is a valid value from the search list.

Add New	/ Field			×
You may add button at th different fiel	d a new project field to this data collection instru e bottom. When you add a new field, it will be a d types available, you may view the 🐼 <u>Field Typ</u>	ument by completing th dded to the form on thi <u>es video (4 min)</u> .	e fields below a s page. For an c	and clicking the Save overview of the
Field Type:	Text Box (Short Text, Number, Date/Time,)	•		
Field Label				
Diagnosis		Variable Name (utiliz diagnosis ONLY letters, numbers, and u How to use [9] Smart Var	ed in logic, calcs, a underscores	and exports) Enable auto naming of variable based upon its Field Label?
		Validation? (optional)	None	×
Action Tag	s / Field Annotation (optional)	- or - Enable searching wit	hin a biomedio	cal ontology ?
Learn about	@ Action Tags or <u>using Field Annotation</u>	choose ontology to AAO - Amphibian Gro AAT - Art & Architectu ABA-AMB - Allen Brain ABD - Anthology of B ACGT-MO - Cancer Re ADALAB - AdaLab ont ADALAB - AdaLab ont ADALAB-META - AdaL ADAR - Autism DSM-A ADMIN - Nurse Admin ADO - Alzheimer's dis	search ss Anatomy On ire Thesaurus n Atlas (ABA) Ac iosurveillance D search and Ma tology .ab-meta ontology nistrator sease ontology l History and Li	ntology dult Mouse Brain Ontolc Diseases Inagement ACGT Master Dgy
		AERO - Anatomical Ent AERO - Adverse Even AGRO - AGRonomy O	ity Ontology t Reporting Ont ntology	cology

Some commonly used biomedical ontologies are:

- a. CPT
- b. ICD 9 CM
- c. ICD 10 CM
- d. ICD 10 PCS
- e. LOINC
- f. NCFRT
- g. RxNORM
- h. SNOMEDCT
- 3. <u>Field Label</u>: Name the field with a label or question that best represents the ontology selected. For example, you could name the field as the selected ontology or with a question such as, "What is the patient diagnosis?"
- 4. <u>Variable name</u>: Provide a variable name that describes what you are capturing, but try to keep the variable name as short as possible. For example, you could use the ontology name (ex: rxnorm) as the variable name.
- 5. Click on <u>Save</u> for the field type.

🥔 🛅 🥡 🚰 🗶 Variable: diagnosis	
Diagnosis	
Add Field	Add Matrix of Fields

6. The new field is now a dynamic field. When you begin typing in a keyword into the field, the system will automatically generate a drop down of selections based on the ontology and keyword.

For example, the ICD10CM ontology was selected for the field below. When entering a keyword of 'park' for Parkinson's disease into this field, notice the drop-down list that begins to generate.

Diagnosis	0	park	Type to begin searching	
	·	[Y92.412] Parkway as the	e place of occurrence of the	external cause
		[G20] Parkinson's diseas	e	
		[Y92.481] Parking lot as t	the place of occurrence of th	ne external cause
		[G21.19] Other drug indu	uced secondary <mark>park</mark> insonisi	m
		[A52.19] Other symptom	atic neurosyphilis	
		[I45.6] Pre-excitation syn	drome	
		[G31.83] Dementia with l	Lewy bodies	
		[G21.4] Vascular <mark>park</mark> ins	onism	
		[Y92.831] Amusement pa	ark as the place of occurrent	ce of the external cause
		[G21.11] Neuroleptic ind	uced <mark>park</mark> insonism	
		[G21.2] Secondary parki	nsonism due to other extern	al agents
		[G21.1] Other drug-induc	ed secondary <mark>park</mark> insonism	ı _
				¥

When the selection is made for Parkinson's disease, the field will prefill with the disease in red letters with the correct code.

Data Entry view:

Diagnosis B Parkinson's disease G20

- 7. The data export Excel fields will appear as this:
 - o CSV/Microsoft Excel (labels) output:



 CSV/Microsoft Excel (raw data) output: The raw value that is saved for the field is the 'notation' (often an alpha-numeric code) for the given ontology.

	A	J
1	record_id	diagnosis
3	2	G20

REDCap – How to Copy Instruments from One Project to Another

If you have an instrument in Project #1 that you have created and would like to use in Project #2, you can copy the instrument from your original project via downloading the instrument ZIP file and then uploading that file into your new project.

• Navigate to the Online Designer in Project #1, and click on the "Choose action" dropdown button next to the instrument you would like to copy. In the example below, we are copying in the instrument, "Baseline Questionnaire." Select "Download Instrument ZIP."

D	ata Collection astruments	Survey options:		dd new i Create Import Upload	a new instr a new instr a new instr instrumen	ument from scratch rument from the offi It ZIP file from anothe	cial <u>REDCa</u> er project/u	<u>p Shared</u> user or <u>ext</u>	Library 🔒 ternal libraries 🧕
	Instrument name		Fields	View PDF	Enabled as survey	Instrument actions	Survey-re	lated opti	ons
\$	Baseline Questionr	naire	7	-		Choose action 🤝	o Survey	settings	+ Automated Invitations
	Week 1		3	-		@ Rename	Y	settings	Automated Invitations
	Week 2		3	-		🕒 Сору	У	settings	+ Automated Invitations
	Week 3		3	-		* Delete		settings	+ Automated Invitations
				-		Download instrum	nent ZIP		

- Save the ZIP file to your computer and note the folder that you saved it in.
- Open Project #2, and navigate to the Online Designer. Click on the "Upload" button under the "Add new Instrument" header.

	Cumint antions:	Add new instrument:
Data Collection	survey options.	Create a new instrument from scratch
Instruments	:= Survey Queue	Import a new instrument from the official REDCap Shared Library
instruments	Survey Notifications	Upload nstrument ZIP file from another project/user or <u>external libraries</u>

• A popup window will appear. Select the "Choose File" button, and locate the ZIP file that you previously saved to your computer.



• After selecting your ZIP file, click "Upload instrument ZIP." You should then see a popup window that says the document was successfully uploaded. If there were any variables name in your uploaded instrument that already existed in Project #2, REDCap will automatically rename those variables and will notify you here.



- The instrument will appear at the bottom of your list of instruments, but you can drag it to appear anywhere in the list.
- Note: If the copied instrument was a survey, the survey settings will not copy over to the new project. You will need to re-enable the survey functionality and set the appropriate survey settings in the new project.

REDCap – How to create a new project using a Data Dictionary from another project

To create a project using a Data Dictionary from another REDCap project:

• Create the shell of a Project by entering and selecting the appropriate information then click "Save & Proceed." Note: Be sure to select "Create an empty project (blank slate) " for the Start Project question.

Project Title	
Brief Description	
What is the purpose of this	project?
Select	Ŧ
tart project from scratch or l	begin with a template?
Use a template (choose)	one below)
Create an empty project	(blank slate)
Are you working with exter	nal collaborators who need access to this project? (please note that you can import/export data with

	1	
Save & Proceed	or	Cancel & Choose a different REDCap

Select...

v

• From the Project Setup tab, click on the Data Dictionary.

Project I	lome	Project Setup	Join Provident Provident America Contraction Provident America Provident America Providence Provide	Project Revision History
oject status:	Ø Develo	opment		Completed steps 0 o
	Desig	gn your data coll	ection instruments	
Not started	Add o Desig either curren	r edit fields on your da ner (online method) o method or both. Quic <u>it Data Dictionary</u>	ata collection instruments. This r by uploading a Data Dictiona k links: <u>Download PDF of all d</u>	s may be done by either using the Online ary (offline method), in which you may use <u>ata collection instruments</u> OR <u>Download the</u>
	Go to You m	Online Designe	r or Data Dictionary	ents in the REDCap Shared Library

• Once on the Data Dictionary tab, select "Choose File" and then select the Data Dictionary from your saved files. *Note: Please be sure the Data Dictionary is saved in a .csv format prior to upload.*

	Project Setup	🛃 Online Designer	📑 Data Dictionary	
				VIDEO: How to use this page
Th eiti On ma	is module will allow you her using the Online D e Iline Designer may helj ay be more helpful if yo	u to create new data collect esigner or Upload Data Di p you get some initial fields u will be adding a large nu	tion instruments/surveys of ctionary (see tabs above s/forms built quickly or to r imber of fields for this proj	or edit existing ones. Changes may be made by), in which you may use either method or both. The nake quick edits, but using the Data Dictionary file lect.
Th off yo	is module may be used line method called the u may construct your p	I for making changes to the Data Dictionary. The Data I roject fields and afterward P	project, such as adding r Dictionary is a specifically upload the file here to cor	new fields or modifying existing fields, by using an / formatted CSV (comma delimited) file within which nmit the changes to your project.
Cli bu en	ck the 'Browse' or 'Cho tton. Once your file has sure that all the formati	ose File' button below to se s been uploaded, changes ting in your Data Dictionary	elect the file on your comp will NOT immediately be is correct before official (outer, and upload it by clicking the 'Upload File' made but will be displayed and checked for errors to changes are made to the project.
Ne If y <u>de</u> als	ed some help? ou wish to view an exa <u>monstration file</u> , or you so see the instructions l	Imple of how your Data Dic I may view the <u>Data Diction</u> listed on the <u>Help & FAQ</u> .	tionary may be formatted. <u>ary Tutorial Video (10 mir</u>	, you may download the <u>Data Dictionary</u> <u>ງ)</u> . For help setting up your Data Dictionary, you may
Ste	eps for making project 1.) <u>Download the curre</u> 2.) Edit the Data Dictio 3.) Upload the Data Di 4.) The changes will be	t changes: ant Data Dictionary nary (see the <u>Help & FAQ</u> fi ictionary using the form bel- e made to the project after 1	or help) ow the Data Dictionary has b	een checked for errors
	Upload your Data Format for min/max v	Dictionary file (CSV file validation values for date a	format only) nd datetime fields: MM/	DD/YYYY or YYYY-MM-DD V
	Upload File	a Diction Titest.csv		

• Review the notification box for any warnings or errors. Once these are addressed, click "Commit Changes" to complete the upload process.

	Project Setup	Online Designer	📑 Data Dictionary	
Th eiti On ma	is module will allow you her using the Online De line Designer may help ly be more helpful if you	u to create new data collect e signer or Upload Data Dic o you get some initial fields, u will be adding a large nur	tion instruments/surveys (c tionary (see tabs above /forms built quickly or to n mber of fields for this proj	VIDEO: How to use this page or edit existing ones. Changes may be made by), in which you may use either method or both. The nake quick edits, but using the Data Dictionary file ect.
6	 Your document wa No errors or warning The uploaded data (excluding 'Form \$ 	as uploaded successfull ngs were found in the doc a dictionary contains 10 f Status' fields, which are a	ly and awaits your con ument. fields, which will replac automatically generated	nfirmation below. e the 1 fields that currently exist in the project by REDCap).
	Are you ready to co (Click the button belo Commit Changes	ommit the changes to th ow to submit the changes	ne project from the up s.)	loaded Data Dictionary?

- A successful message will display if the commitment was successful.
- Return to the Project Setup tab to continue creating or editing the project.

REDCap – Data Access Groups (DAG)

Data Access Groups (DAGs) restrict viewing of data within a database. A typical use of DAGs is a multi-site study where users at each site should only be able to view data from their site but not any other sites. Users at each site are assigned to a group and will only be able to see records created by users within their group.

- To create a Data Access Group, go to the *User Rights* application and then click on the "Data Access Groups" tab.
- Enter the Group Name and select 'Add Group.'
- The Group Name will then appear in the Data Access Groups table. You can add as many DAGs as needed.

ana y	Project Setup	a User Righ 🙇	nts 🛃 🛃 Da	ta Access Groups					
				S VIDEO: How t	o use Data	Access	Groups		
ccess to certain project r ecords created by users v access another group's	ecords may be limited I within that group. This r data.	by using Data Ac may be useful in 1	cess Groups, the case of a i	in which only users with multi-site or multi-group p	in a given project tha	Data Acc t requires	ess Grou that gro	ip can acce ups not be a	ess able
elow you can create Dat you wish. To rename an ser to a Data Access Gro ccess Group, the user w ew records on data entry electing 'No Assignment'	a Access Groups for thi existing Data Access G oup by selecting the use ill be able to see ONLY y forms, in reports, and	is project and affe Group, simply clic ername and grou the project recor in exported data	erward assign k the group n p name belov ds created by sets. Users ca	any current user to that ame in the table below a w and then clicking the 'A themselves and others i an be un-assigned from a	group. You nd type the ssign' butt in that grou a group by	u may de e new na con. Once up. This i v selecting	lete the g me. You assigne ncludes t g the use	rroup at any may assign d to a Data being able t r name and	/time ia to t
Create new groups:	Add new data access g	roups to which u	isers may be a	assigned.					
Create new groups: Test Group A Assign user to a grou Assign user	Add new data access g up: Users may be assi Select User ▼ to	Add Group Add Group igned to any data No Assignme	isers may be a] a access grou nt] ▼ Ass	assigned. p.					
Create new groups: Test Group A Assign user to a grou Assign user [Data Access Groups	Add new data access g up: Users may be assi Select User V to Users in group	Add Group Add Group igned to any data [No Assignme	isers may be a a access grou nt] ▼ Ass Number of records in group	p. bign Unique group name @ (auto-generated)	Delete group?				
Create new groups:	Add new data access g up: Users may be assi Select User V to Users in group	Add Group Add Group igned to any data [No Assignme	isers may be a a access grou nt] ▼ Ass Number of records in group 0	p. Junique group name () (auto-generated) test_group_a	Delete group?				

Adding a user to a DAG:

- All users must first be added to the project on the *User Rights* page. Once the users have been added to the project, you can then assign them to a Data Access Group. To assign a user, navigate back to the "Data Access Groups" tab and click on the dropdown beside 'Assign User.' Select the appropriate username and then select the appropriate Data Access Group from the next dropdown list. Then click on "Assign."
- The username will then appear within the 'Users in group' column of the Data Access Group table.

Enter new g	roup name	Add Grou	p			
Assign user to a gro	oup: Users may be ass	signed to any da	ata access grou	p.		
🛕 Assign user	mharbour (Mary Beth	Barrack) 🔻 to	Test Group A	•	Assign	
Data Access Groups	Users in grou	p	Number of records in group	Unique (auto-g	group name 📦 enerated)	Delete group?
Data Access Groups Test Group A	Users in grou mharbour (Mar	p ry Beth Barrack)	Number of records in group 0	Unique (auto-g	group name 😡 enerated) pup_a	Delete group?

- If you are a Data Access Group member and are creating a record, the record will automatically be assigned to your Group.
- If you are a Global User (i.e., you are not assigned to a DAG) and are creating a record but need to add that record to a Data Access Group, select the group from the 'Assign a record to a Data Access Group?' dropdown list. Complete the record information and click 'Save Record.'

Basic Demography Form

	Assign record to a Data Access Group?	- select a group		
Adding new Study ID 557		select a group [No Assignment]		
Study ID	557	Ashburton		
Contact Information				
First Name	Minnie			
Last Name	Mouse			

Additional Information:

- Any user not assigned to a group has global access within the project. This type of unassigned user can access all records in the project.
 - <u>Global Access User</u> To see a list of the records within a Data Access Group, navigate to the Record Status Dashboard. Select a group from the dropdown list for 'Displaying Data Access Group.' The Dashboard will reflect only those records within the specified Data Access Group.
 - <u>Group Member</u> If you are a DAG group member, the records on this page will include only those within the group you are assigned.
- Record creation:

If the project has record auto-numbering enabled, then when a DAG member creates a record, a unique DAG ID is prepended to the record number.

- In the example below, records 1-6 were created by a Global Access User.
- A DAG member of Test Group A created the bottom two records. Notice on the Global Access record list that those records have a unique ID appended to the record ID as compared to the records entered by the Global Access User.

- The DAG member can only see records that were created by him/herself, records that were created by other members of the same DAG, or records that were created by the Global Access User AND were assign to his/her DAG.
- The Global Access User can see ALL project records, regardless of DAG.

	Displaying	Data Access	Group A	LL 🔻	Displaying	Data Access	Group Test	t Group A 🔻	
	Displaying	record "1"	through "122	-2" of 8 records	Displaying	record "12	2-1" through	"122-2" 🔻	of 2 record
I	Displaying:	nstrument sta	atus only <u>L</u>	ock status only	Displaying:	instrument sta	atus only <u>Lo</u>	ock status o	<u>nlv</u>
	Record ID	My First Instrument	My Second Instrument		Record ID	My First Instrument	My Second Instrument		
	1	0	0		122-1	۲	۲		
	2	0	0		122-2	۲	۲		

- As noted above, Global Access Users can manually assign a record to a Data Access Group.
 - To assign a record, open the record's instrument and select the DAG in the top right corner.
 - The record ID will remain the same. However, the Global Access User can change the record ID to add the prepended Data Access Group ID. Note: The Global Access User must have the appropriate user rights to "Rename Records" in order to change the record ID.
 - A Data Access Group ID is created for each group. Ensure the correct prepended ID is used when editing the record ID.

Record Home Page

3

4 5 6 122-1 122-2 Ø

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.





Rename record "557	, n	×
Rename record " 557 " to t 122-7	he following record name	r

REDCap – How to import data from an Excel file

- Create the project and fields/questions within REDCap.
 - Note: Before importing real data, move the project to PRODUCTION status.
- Once the project is in Production, navigate to the *Data Import Tool*.
- Please review the detailed instructions on the Data Import Tool page.

Project status: Production	
Data Collection	🔜 Data Import Tool
Manage Survey Participants Record Status Dashboard Add / Edit Records Show data collection instruments 💌	This module may be used for importing data into this project from a CSV (comma delimited) file or alternatively from an XML file in CDISC ODM format. Below are the steps you will need to follow in order to import your data successfully into this project.
Applications	🗷 CSV import 🔤 CDISC ODM (XML) import
 Calendar Data Exports. Reports, and Stats Data Import Tool Data Comparison Tool Logging Field Comment Log File Repository User Rights and DAGs Data Quality Seternal Modules 	Instructions: 1.) Click the link below to download your data import template as a CSV (comma delimited) file. Save it locally to your computer and then open it to begin filling it with the data you wish to import. Image: Download your Data Import Template (with records in rows) OR Image: Download your Data Import Template (with records in columns) 2.) In each column of the Data Import Template file that you downloaded, place the data for each record that you
Reports	wish to import. Once all your data has been added, save the file.
1) Test Report	 Be sure not to change the variables/Held Names in the file or an error may occur. Also, for all of the 'dropdown' or 'radio' fields in the project, you must make sure that the numerical
Help & Information	value (rather than the text value) is entered in those cells, or else it cannot be processed.
 I Help & FAQ Video Tutorials Suggest a New Feature CTSI How To Guides ✓ Contact REDCap administrator 	 Any empty rows or columns in the file can be safely deleted before importing the file. Doing this reduces the upload processing time, especially for large projects. 3.) Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button. 4.) Once your file has been uploaded, the data will NOT be immediately imported but will be displayed and
	checked for errors to ensure that all the data is in correct format before it is finally imported into the project.
	Record format: The file to be uploaded has its records stored as separate Rows Format for date and datetime values: MM/DD/YYYY or YYYY-MM-DD Allow blank values to overwrite existing saved values? No, ignore blank values in the file (default) Name the imported records automatically (force record auto-numbering) No, use the record name provided Image: Upload your CSV file: Choose File No file chosen Upload File

- Download the Data Import Template.
- Save the Data Import Template locally to your computer. Begin completing the template with the data to be imported.
 - Note: Each record will need a RECORD ID before the data can be imported.
 - o Save the file in the .CSV (comma delimited) format.

To follow is an example:

	А	В	С	D	E	F	G	Н	I. I.	J
1	record_id	date	report	receive_time	dispatch_time	enroute_time	onscene_time	incident_close	disposition	location
2	1abc	1/5/2015	Emergency	1/5/2015 9:39	9:40:00 AM	9:49:00 AM	9:52:00 AM	10:00:00 AM	No treatment, No Transport	2
3	2abc	1/19/2015	Non-Emergency	1/19/2015 12:07	12:08:00 PM	12:12:00 PM	12:18:53 PM	12:43:24 PM	No treatment, No Transport	2
4	3abc	2/1/2015	Emergency	2/1/2015 11:57	11:57:00 AM	12:00:00 PM	12:04:00 PM	12:45:00 PM	No treatment, No Transport	2
5	4abc	2/5/2015	Emergency	2/5/2015 12:42	12:42:30 PM	12:46:00 PM	12:48:00 PM	1:15:15 PM	No treatment, No Transport	2
6	5	2/9/2015	Emergency	2/9/2015 9:16	9:16:30 AM	9:24:00 AM	9:28:00 AM	10:49:42 AM	No treatment, No Transport	2
7	6	2/9/2015	Non-Emergency	2/9/2015 9:16	9:16:30 AM	9:24:00 AM	9:28:00 AM	10:49:42 AM	No treatment, No Transport	2
8	7	2/18/2015	Emergency	2/18/2015 16:53	4:55:00 PM	5:08:00 PM	5:10:00 PM	5:46:00 PM	No treatment, No Transport	2
9	8	2/19/2015	Emergency	2/19/2015 20:40	8:40:00 PM	8:55:38 PM	8:57:41 PM	9:14:57 PM	No treatment, No Transport	2
10	9	2/23/2015	Non-Emergency	2/23/2015 18:19	6:20:00 PM	6:27:00 PM	6:30:00 PM	6:46:00 PM	No treatment, No Transport	2
11	10	2/24/2015	Non-Emergency	2/24/2015 8:15	8:16:00 AM	8:22:00 AM	8:26:00 AM	9:00:00 AM	No treatment, No Transport	2

- Once the data is ready to be imported, navigate back to the *Data Import Tool*. Click on 'Choose File.'
 Select the file then and select Upload File.
- Review the import for any errors.

Your document was uploaded successfully and is ready for review. You are now required to view the Data Display Table below to approve all the data before it is officially imported into the project. Follow the nstructions below.								
Instructions for Data Review								
The data you uploaded from the file is displayed in the Data Display Table below. Please inspect it carefully to ensure that it is all correct. After eviewing it, click the 'Import Data' button at the bottom of this page to import this data into the project.								
KEY for Data Display Table below								
Black text = New Data								
Gray text = Existing data (will not change)								
(Red text) = Data that will be overwritten								
Red box = error								
Orange box = warning								

DATA DISP	DATA DISPLAY TABLE										
record_id	date	report	receive_time	dispatch_time	enroute_time	onscene_time	incident_close	disposition	location		
1abc (new record)	1/5/2015	Emergency	1/5/2015 9:39	9:40:00 AM	9:49:00 AM	9:52:00 AM	10:00:00 AM	No treatment, No Transport	2		
								No			

• When you have finished reviewing, click on 'Import Data.'

Do you wish to import the new data (displayed above) into the project?							
Click the button below to import the data.)							
Import Data							

Best Practices when importing:

- When importing date fields, ensure all dates for the variable are in the same format.
- Text can only be imported into Text Box (Short Text) or Notes Box (Paragraph Text) fields.
- When importing multiple choice (Single Answer radio button or dropdown), ensure the raw value that correlates to the appropriate text selection is in the field associated with the variable name. You cannot import the text (label) values into multiple choice fields.

REDCap – Creating a report

The Report Builder allows a user to create customized reports that are queried in real time.

How to create a report:

- Click on the "Data Exports, Reports, and Stats" hyperlink located on the left navigation bar.
- Click on "Create New Report."
 - Enter a Name for the Report.
 - o User Access:
 - <u>All Users</u> refers to all users that have access to the project.
 - <u>Custom User Access</u> allows a user to restrict viewing access to certain users.
 - Note: If a particular report's access is restricted **from** a user who has 'Add/Edit Reports' rights on the User Rights section, then that user will still be able to view and edit the report.

STEP 1							
🚓 User Access: Choose who sees this report on their left-hand project menu 👔							
🖲 All users	– OR –	Custom user access	(Choose specific users, roles, or data access groups who will have access)				

- Fields to include: Select the fields to be included in the report. There are three (3) ways to add fields to the report:
 - <u>Quick Add</u> is a checklist format of all the fields/variables within the project. A user can check the boxes for the variables individually.
 - <u>Add all fields from the selected instrument</u> is a quick way to add **all** the fields/variables from a particular form.
 - <u>Dropdown list</u>: click on the blue arrow, then the field to the left becomes a dropdown list of all the variables within the project.
 - <u>Surveys</u>: if you would like the survey identifier (if used) and survey timestamp fields included in the report, then click the checkbox.
 - In this example, we want to see the following fields on the report: Study ID, Name, Date of Birth, Gender, Pregnant, and Candy

Field 1	study_id "Study ID"	ABI	Instrument: Demographics		
Field 2	name "Name"	ABI	Instrument: Demographics	3	
Field 3	dob "Date of Birth"	ABI	Instrument: Demographics		
Field 4	gender "Gender"	ABI	Instrument: Demographics		
Field 5	preg "Pregnant?"	ABI	Instrument: Demographics		
Field 6	candy "What is your favorite type of candy? 🔻	ABI	Instrument: Test 3	3	
Field 7	Type variable name or field label				

- Filters (optional): This section allows a user to filter the report for certain information.
 - Example: We only want individuals born on 8/22/2016 and 8/23/2016.

Filters:

Filters (op	tional)				Operato	or / Valu	e e	mers and AND/	OH JODIC
Filte	r1 d	lob "Date of Birth"	•	AB	=	۲	08-22-2016	31 MiDer	*
OR V Filte	r 2 d	lob "Date of Birth"	•	ABI	=	٠	08-23-2016	31 M-D-Y	×
AND	•								
Filte	r 3 📃 -	- select a field	۲	ABI		۲			

Results:

Demographics

Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
<u>9</u> 5	5	08-23-2016	Male (1)		Hershey's Kisses (3)
2 Johnson, Joe	Johnson, Joe	08-22-2016	Male (1)		Snickers (1)
4 test	test	08-22-2016	Male (1)		M&Ms (5)
Z Test	Test	08-23-2016	Female (2)	No (0)	
5 test 2	test 2	08-22-2016	Female (2)	No (0)	Three Musketeers (2)
8 Test Form	Test Form	08-23-2016	Male (1)		Three Musketeers (2)
3 Test Test	Test Test	08-22-2016	Female (2)	No (0)	
6 Testing	Testing	08-23-2016	Female (2)	No (0)	

- Live Filters (optional): Live filters can be used on the report page for filtering data in real time. Only multiple choice fields can be used with these filters. Up to three (3) live filters can be assigned.
 - In this example, we have assigned 'Gender' and 'What is your favorite candy?'

Live Filters (o	ptional)	Live Filters can be selected on the report page for dynamically filtering data in real time. Only multiple choice fields can be used as Live Filters (as well as Events, if longitudinal, and Data Access Groups, if any exist).
Live Filter 1	gender "Gender"	•
Live Filter 2	candy "What is your	avorite type of candy?' 🔻
Live Filter 3	select a field	τ

Order the Results (optional): The results will automatically order by Record ID unless indicated otherwise.
 In this example, we selected the order by 'Name'

STEP 4			
21 Order the	Results (optional)		
First by	name "Name"	▼ (AB))	Ascending order 🔻
Then by	Type variable name of field label		Ascending order
Then by	Type variable name or field label		Ascending order

- Click on 'Save' for the report.
- Based on the examples in this guide, here is the report.

Number of results returned: 8 Total number of records queried: 11	Stats & Charts	Export Report	Print Page	/ Edit Report
	Live filters: [Gende	r] Vhat is you	r favorite type of car	ndy? •

Demographics

Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
<u>9</u> 5	5	08-23-2016	Male (1)		Hershey's Kisses (3)
2 Johnson, Joe	Johnson, Joe	08-22-2016	Male (1)		Snickers (1)
4 test	test	08-22-2016	Male (1)		M&Ms (5)
Z Test	Test	08-23-2016	Female (2)	No (0)	
<u>5</u> test 2	test 2	08-22-2016	Female (2)	No (0)	Three Musketeers (2)
8 Test Form	Test Form	08-23-2016	Male (1)		Three Musketeers (2)
<u>3</u> Test Test	Test Test	08-22-2016	Female (2)	No (0)	
6 Testing	Testing	08-23-2016	Female (2)	No (0)	

The live filters allow a user to further filter the report results.
 For example, of the results, we only want to see individuals who like Three Musketeers.

Number of results returned: 2 Total number of records queried: 11

Stats &	Charts	4	Exp	port Report	Print Page	/ Ed	it Report
Live filters:	[Gende	r]	•	Three Musk	eteers		Reset

Demographics

Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
5 test 2	test 2	08-22-2016	Female (2)	No (0)	Three Musketeers (2)
8 Test Form	Test Form	08-23-2016	Male (1)		Three Musketeers (2)

• Navigate to the Project Setup tab, click on the Data Dictionary.

	Design your data collection instruments & enable your surveys				
Not started	Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: <u>Download PDF of all instruments</u> OR <u>Download the current Data Dictionary</u>				
	Go to 📴 Online Designer or 💌 Data Dictionary Explore the EREDCap Shared Library				
	Have you checked the Check For Identifiers page to ensure all identifier fields have been tagged?				
	Learn how to use [7] Smart Variables / Piping @ Action Tags				

• Once on the Data Dictionary tab, select 'Download the current Data Dictionary.'

A Project Home	i≡ Project Setup	Online Designer	对 Data Dictionary
			~

VIDEO: How to use this page

This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.

This module may be used for making changes to the project, such as adding new fields or modifying existing fields, by using an offline method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV (comma delimited) file within which you may construct your project fields and afterward upload the file here to commit the changes to your project.

Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button. Once your file has been uploaded, changes will NOT immediately be made but will be displayed and checked for errors to ensure that all the formatting in your Data Dictionary is correct before official changes are made to the project. **Snapshot note:** A snapshot of your project's current Data Dictionary will be created automatically during the Data Dictionary upload process before committing the new Data Dictionary. The snapshot can later be accessed and downloaded from the Project Revision History page.

Need some help?

If you wish to view an example of how your Data Dictionary may be formatted, you may download the <u>Data Dictionary</u> <u>demonstration file</u>, or you may view the <u>Data Dictionary Tutorial Video (10 min</u>). For help setting up your Data Dictionary, you may also see the instructions listed on the <u>Help & FAQ</u>.

Steps for making project changes:

- 1.) Download the current Data Dictionary 🕱
- 2.) Edit the Data Dictionary (see the $\underline{\mathsf{Help}\ \&\ \mathsf{FAQ}}$ for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

Upload your Data Dictionary file (CSV file format only) Format for min/max validation values for date and datetime fields: MM/DD/YYYY or YYYY-MM-DD Choose File No file chosen Upload File

• The file will download in a .csv format.

<u>REDCap – Edit a field</u>

- If the project is in development mode, please follow the steps below.
- If the project is in production mode, please refer to the the *Making Changes while in Production* Guide.

Step 1:

Click on Edit Instruments



• Select the instrument to edit and then click on the pencil icon

Project Setup	🛃 Online Designer	📑 Data Dictionary					
					VIDEO: How to us	se this page	
Online Designer will web browser. NOTE:	allow you to make project While in development sta	modifications to fields and tus, all field changes will ta	data co ke effe	ollection instru ct immediatel	iments very easily u y in real time.	sing only	
Data Collect Add	k to modify instrument new fields/questions to th rument or modify existing s.	e Survey Login	A	dd new instru ♦ Create a n ♀ Import a n	ment: ew instrument from ew instrument from	scratch the official <u>REDCa</u>	o Shared Library
one			12	12 Upload jins	trument ZIP file from	ranourer projection	er or <u>external libraries</u> (e
Instrument name	~	Fields	View	Enabled as survey	Instrument ZIP file from	Survey-related opt	ions
Instrument name		Fields 5	View PDF	Enabled as survey	Instrument ZIP file from	Survey-related opt	en or <u>external libraries</u> (e ions + Automated Invitations

• Select the pencil icon on the field you would like to edit.

🥜 🛅 🐨 🚰 🗶 Variable: pass	
Did the student pass the test?	
	Add Field Add Matrix of Fields

• The field will open in edit mode where the question and any details may be edited. Make the necessary changes and click save.

You may add a new project field to this data collection instrument by completing the fields below and clicking the Sabutton 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 Selield Types video (4 min). Field Type: Text Box (Short Text, Number, Date/Time,) Question Number (optional) Displayed only on the survey page Field Label Did the student pass the test? Validation? (optional) Comparison of the survey page on the survey page on the student pass the test? Action Tags / Field Annotation (optional) Learn about @ Action Tags or using Field Annotation Identifier? No Yes	Edit Field		
Field Type: Text Box (Short Text, Number, Date/Time,) Question Number (optional)	You may add a new project field to this data collection button at the bottom. When you add a new field, it will different field types available, you may view the S Field	nstrument by completing the fields below and clicking the s be added to the form on this page. For an overview of the <u>d Types video (4 min)</u> .	Save
Question Number (optional) Displayed only on the survey page Field Label Did the student pass the test? Variable Name (utilized in logic, calcs, and exports) pass Did the student pass the test? How to use formar Variables formation (optional) -or - Enable searching within a biomedical ontology ? - choose ontology to search Required?* No Yes Prompt if field is blank Identifier? No Yes	Field Type: Text Box (Short Text, Number, Date/Time) 🔻	
Field Label ONDY letters, numbers, and underscores Field Label? Did the student pass the test? How to use (Smart Variables) Field Label? How to use Smart Variables Field Label? Validation? (optional) None Or Enable searching within a biomedical ontology ? choose ontology to search * Learn about @ Action Tags or using Field Annotation * No * Yes * Identifier? No * Yes * *	Question Number (optional) Displayed only on the survey page	Variable Name (utilized in logic, calcs, and exports) pass	g of n its
Did the student pass the test? How to use [*] Smart Variables Piping Validation? (optional) -or - Enable searching within a biomedical ontology ? - choose ontology to search Required?* No Yes Prompt if field is blank Identifier? No Yes	Field Laber	ONLY letters, numbers, and underscores Field Label?	
Validation? (optional) - Or - Enable searching within a biomedical ontology ? - choose ontology to search * Choose ontology to search * Required?*	Did the student pass the test?	How to use [+] Smart Variables Piping	
Action Tags / Field Annotation (optional) Learn about @ Action Tags or using Field Annotation Required?*		Validation? (optional) None	•
Action Tags / Field Annotation (optional) Learn about @ Action Tags or using Field Annotation choose ontology to search Required?* No Yes Prompt if field is blank Identifier? No Yes		Enable searching within a biomedical ontology ?	
Learn about @ Action Tags or using Field Annotation Required?* Required?* No Yes Identifier? No Yes	Action Tags / Field Annotation (optional)	choose ontology to search	
Identifier? No Yes	Learn about @ Action Tags or <u>using Field Annotation</u>	Required?* No Yes Prompt if field is blank	
Does the field contain identifying information (e.g., name, SSN, address)?		Identifier? No Yes Does the field contain identifying information (e.g., name, SSN, address)	2
Custom Alignment Right / Vertical (RV)		Custom Alignment Right / Vertical (RV)	
Align the position of the field on the page		Align the position of the field on the page	
Field Note (optional)		Field Note (optional)	1
Small reminder text displayed underneath field		Small reminder text displayed underneath field	-

• The pop-up box will close and return to the list of fields for the instrument.


REDCap – Enable an Instrument as a Survey

• Step 1: On the Project Setup page and under "Main project settings," select the Enable button next to "Use surveys in this project?"

A Project H	lome	∏ Project Setup	Other Functionality	O Project Revision History					
Project status:	/ Deve	lopment		Completed steps	0 of 7				
	Main	project settings							
	Enable	🗐 🥥 Use surveys	in this project? 🔋	VIDEO: How to create and manage a su	urvey				
Not started	Enable	nable 🔵 Use longitudinal data collection with defined events? ?							
I'm done!	Modi	fy project title, purp	oose, etc.						

• Step 2: Create your data collection instrument. Once you have created your instrument, go to the Online Designer and select the Enable button next to your instrument name, under the "Enabled a survey" column header.

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.

	Survey options:	A	dd new i	nstrument:
Data Collection	= Survey Queue	a U	• Create	a new instrument from scratch
Instruments	Survey Quede B Survey cogn	9 6	Import	a new instrument from the official <u>REDCap Shared Library</u> 🥹
	Co Survey Nouncations	Ŀ	O Upload	instrument ZIP file from another project/user or external libraries
Instrument name		Fields	View PDF	Enabled a Instrument actions Survey-related options
My First Instrument		4	-	Enable Choose action 🗢
survey 2		1	-	Enable Choose action 🖘

• This will bring you into the Survey Settings, where you can give your survey a title, add survey instructions, edit the survey design options, and add other survey customizations.

📅 Project Home 🛛 🚍 Project Setup 📑 Online	e Designer 🛛 😰	Set Up N	y Survey
---	----------------	----------	----------

You may utilize any data collection instrument as a survey by enabling the instrument on this page. Data may still be collected on the instrument via normal data entry on the form, but enabling it as a survey allows for the additional option of collecting data via survey by respondents.

Set up my survey for data collection instrument '	Demographics" Cancel
Basic Survey Options:	
📎 Survey Title	My First Instrument
	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!
	B / U AN A→型· 新春香香香 → 注注 常様 44 +***
	How to use Piping here
Survey Design Options:	
Logo (Optional: display on image above the survey title)	Add new logo: Choose File No file chosen (Images wider than 600 pixels will be downsized to fit page.)
	If using a logo, hide survey title on survey page?

• When you are finished editing your survey settings, scroll down to the bottom of the page and select "Save Changes." Your instrument is now enabled as a survey.

Send confirmation email (optional)? (Email the respondent when they complete the survey)	No T
	Save Changes
	Cancel

REDCap – How to import documents from the REDCap Shared Library (Adaptive Instruments)

• Click on the Project Setup tab and select 'Online Designer.'

A Project H	Home 😑 Project Setup 🗐 Other Functional	ity 🕤 Project Revision History
Project status:	✔ Development	Completed steps 0 of
	Main project settings	
	Disable 🔘 Use surveys in this project? ?	SIDEO: How to create and manage a surve
Not started	Enable 🤤 Use longitudinal data collection with	h defined events? ?
l'm done!	Modify project title, purpose, etc.	
	Design your data collection instruments &	enable your surveys
the state of the s	Add or edit fields on your data collection instrum	ents (survey and forms). This may be done by
Not started	method). You may then enable your instruments	to be used as surveys in the Online Designer.
I'm done!	Quick links: <u>Download PDF of all instruments</u> OR	Download the current Data Dictionary
	Go to 🛃 Online Designer or 📓 Data Diction	Explore the REDCap Shared Library
	Have you checked the <u>Check For Identifiers</u> page to e	nsure all identifier fields have been tagged?
	Learn how to use [9] Smart Variables 2 Piping	Action Tags

• Select 'Import' under 'Add new instrument.'

Project Setup	👺 Online Designer	📓 Data Dictionary	
		VIDEO: How to use this page	
o Onlino Docionor will a	low you to make project		
ur web browser NOTE: \	While in development stat	nodifications to fields and data collection instruments very easily using only us, all field changes will take effect immediately in real time	
ur web browser. NOTE: \	While in development stat	addincations to fields and data collection instruments very easily using only us, all field changes will take effect immediately in real time. Add new instrument:	
Data Collection	Survey options	Add new instrument:	
Data Collection	Survey options	and data collection instruments very easily using only us, all field changes will take effect immediately in real time. Add new instrument: exe	(

• Enter keywords into the search box then click on 'Search the library.'

Retu	rn te	RE	DCa	p																				Sea	rch	Libra	.,
Kan					D		ne.									Sea	arch o	ption	is:					Lib	rary	Metri	cs
hey	wor	as	earc	an.	P	ROI	/115	_												_				My :	Activity	/	
						0					1					Mini	mum d	ownloa	ads:	0				Inst	itution	Activit	/
						S	earc	ch th	ie libi	ary						Rec	ent ad	ditions		show	all	۲		Con	sortiur	n Activ	vity
	_				_		_	-	_					_		Cura	ated by	REDI	.00?	sho	w all 🔻	1		RE	DLOO	2	
															-					1.23.2				RED	LOC	Login	
	0	2	4	5	C.	7	0	9	10	11	12	13	14	15	16	17	18	10	20	21	22	23	24	25	26	27	-

• Select the correct form from the list then click on 'Import into my REDCap project.'

Title		Downloads
Neuro-QOL Bank v1.0	- Ability to Part. in SRA ★ [Adaptive instrument]	25
Details: Institution: Contact: Contact email: Submitted by: Description: Acknowledgement:	REDLOC Brenda Minor brenda.minor@vanderbilt.edu Brenda Minor Neuro-QOL Bank v1.0 - Ability to Part. in SRA For information on how to interpret CAT scores, see Scoring Manuals. Acknowledgment: David Cella, Assessment Centers ^M , and the PROMIS Health Organization on behalf of the National Institute for Neurological Disorders and	<u>View as web page</u> <u>View as PDF</u> Import into my REDCap project
Terms of use: Last updated:	Stroke (NINDS) View full acknowledgment TERMS AND CONDITIONS FOR USE OF NEURO-QOL INSTRUMENTS 6/24/2013 Neuro-QoL instruments measuring a variety of domains are available for adult and pediatric self-report in English and Spanish (see www.neuroqol.org). ANY PUBLICATION OR PRESENTATION OF RESULTS OBTAINED FROM STUDIES CONDUCTED USING THESE INSTRUMENTS SHOULD INCLUDE A STATEMENT THAT INDICATES WHICH NEURO Show more May 1, 2015	
	Title Neuro-QOL Bank v1.0 Details: Institution: Contact: Contact email: Submitted by: Description: Acknowledgement: Terms of use: Last updated:	Title Neuro-QOL Bank v1.0 - Ability to Part. in SRA ★ [Adaptive instrument] Details: Institution: REDLOC Contact: Brenda Minor Contact email: brenda.minor@vanderbilt.edu Submitted by: Brenda Minor Description: Neuro-QOL Bank v1.0 - Ability to Part. in SRA For information on how to interpret CAT scores, see Scoring Manuals. Acknowledgement: Acknowledgment: David Cella, Assessment Center™, and the PROMIS Health Organization on behalf of the National Institute for Neurological Disorders and Stroke (NINDS) View full acknowledgment Terms of use: TERMS AND CONDITIONS FOR USE OF NEURO-QOL INSTRUMENTS 6/24/2013 Neuro-QoL instruments measuring a variety of domains are available for adult and pediatric self-report in English and Spanish (see www.neuroqol.org). ANY PUBLICATION OR PRESENTATION OF RESULTS OBTAINED FROM STUDIES CONDUCTED USING THESE INSTRUMENTS SHOULD INCLUDE A STATEMENT THAT INDICATES WHICH NEURO Show more Last updated: May 1, 2015

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Shared Content Agreement copyright owner.	×
TERMS OF USE TERMS AND CONDITIONS FOR USE OF NEURO-QOL INSTRUMENTS 6/24/2013	
Neuro-QoL instruments measuring a variety of domains are available for adult and pediatric self-report in English and Spanish (see www.neuroqol.org).	
ANY PUBLICATION OR PRESENTATION OF RESULTS OBTAINED FROM STUDIES CONDUCTED USING THESE INSTRUMENTS SHOULD INCLUDE A STATEMENT THAT INDICATES WHICH NEURO-QOL INSTRUMENTS WERE USED, AND REFERENCE THE NEURO-QOL WEBSITE (WWW.NEUROQOL.ORG) FOR FURTHER INFORMATION.	
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✓ I agree with the terms of use	Ŧ
I agree I do not agree	

• Review the REDCap Notice that no changes can be made to the document. You can adjust the name of the document for your project. Click on 'Add.'

OTE: This data collection instrument has been previously downloaded from the REDCap Shared Library. roceeding with this process will result in a new duplicate copy being downloaded from the library and lided as a new instrument in the project. Add the imported instrument with the name Neuro-QOL Bank v1.0 - Ability to Part. in SRA NOTICE: The instrument you are downloading from the Shared Library is a computer adaptive test (CAT), which neans that its questions are generated dynamically using previous answers. Adaptive instruments behave a little ifferently in REDCap than traditional instruments. For instance, once the instrument has been downloaded, you will not e able to modify any fields on the instrument at any time. The instrument will also be automatically enabled as a survey	u have chosen to load a data collection inst your instrument and click the Add button to ded to this REDCap project.	trument from the REDCap Shared Library. Please provide a name complete the import process, after which the instrument will be
Add the imported instrument with the name Neuro-QOL Bank v1.0 - Ability to Part. in SRA NOTICE: The instrument you are downloading from the Shared Library is a computer adaptive test (CAT), which nears that its questions are generated dynamically using previous answers. Adaptive instruments behave a little lifferently in REDCap than traditional instruments. For instance, once the instrument has been downloaded, you will not e able to modify any fields on the instrument at any time. The instrument will also be automatically enabled as a survey	OTE: This data collection instrument has b oceeding with this process will result in a ided as a new instrument in the project.	been previously downloaded from the REDCap Shared Library. new duplicate copy being downloaded from the library and
NOTICE: The instrument you are downloading from the Shared Library is a computer adaptive test (CAT) , which neans that its questions are generated dynamically using previous answers. Adaptive instruments behave a little lifferently in REDCap than traditional instruments. For instance, once the instrument has been downloaded, you will not be able to modify any fields on the instrument at any time. The instrument will also be automatically enabled as a survey	Add the imported instrument with the nam	Neuro-QOL Bank v1.0 - Ability to Part. in SRA
is read-only.	NOTICE: The instrument you are downloading eans that its questions are generated dynamical ifferently in REDCap than traditional instruments. e able to modify any fields on the instrument at a this project, and if surveys have not yet been er istrument can only be taken in survey form. If the s read-only.	g from the Shared Library is a computer adaptive test (CAT) , which Ily using previous answers. Adaptive instruments behave a little For instance, once the instrument has been downloaded, you will not ny time. The instrument will also be automatically enabled as a survey nabled for use in this project, then that too will be enabled. This adaptive e data entry form is viewed for this instrument, all fields will be displayed

• You should receive an import successful notice. Click on 'Return to Previous Page' to return to the Online Designer.



• Once you have returned to the Online Designer, you should see the imported instrument in the list.

Data Collection Instruments	Survey options: IE Survey Queue Reverse Survey Notifications	Login	A	d new instru Create a n Import a n Upload ins	ment: ew instrument from ew instrument from strument ZIP file fron	scratch the official <u>REDCa</u> n another project/ut	o Shared Library 🕑 ser or <u>external libraries</u> 🥹
Instrument name		Fields	View PDF	Enabled as survey	Instrument actions	Survey-related opt	ions
Test		134	-	۷	Choose action 🤝	Survey settings	+ Automated Invitations
Grip Strength		4	1	Enable	Choose action 🤝		
Reaction Time		8	1	Enable	Choose action 👳		
Scores		9	-	Enable	Choose action 🤝		
If Then		6	-	1	Choose action 🤝	Survey settings	+ Automated Invitations
Neuro-QOL Bank v1.0 - Abilit	y to Part. in SRA (Adaptive)	182	Z	3	Choose action 🗢	Survey settings	+ Automated Invitations

• The Adaptive Scoring instruments are imported as surveys and cannot be edited. To open this document for data entry, locate the patient and click on their form. In the right corner, click on Survey Options then click on Open Survey.

Data Collection	Etin instruments			VIDEO: Basic data entry
Get a public survey li for inviting responde	Participants ink or build a participant list nts	Actions: Download PDF of instrumer	lity to Part in SPA	
- View data collection	ashboard status of all records	Neuro-QOE Bailk VI.0 - Abi		
Add / Edit Record	ds	Adaptive Instrument		
- Create new records (or edit/view existing ones	This instrument is a computer adaptiv	e test (CAT), so its questions are generated dyn	amically based on answers
Record ID 2 Test Tes	t 2 Select other record	given. Because it is dynamic, it can o and uneditabled. To begin the adaptiv	only be taken in survey form, and all fields below e instrument, click the Open Survey button below	are thus permanently locked v.
Data Collection Instrumen	its;			
Test			Invitation status:	Survey options 🗢 🗢
Grip Strength				
Reaction Time		Editing existing Record ID 2 Test	Test 2	Copen survey
Scores If Then		Record ID	2	Compose survey invitation
Neuro-QOL Bar	nk v1.0 - Ability to	Form Status		Survey Access Code and
Part. in SRA		Complete?	H Incomplete #	QR Code
Applications		Complete:	Incompiete *	
Palandar			- Cancel -	
Data Exports, Re	eports, and Stats	Acknowledgment: David Cella, Assessm for Neurological Disorders and Stroke (N	ent Center™, and the PROMIS Health Organization IINDS) View full acknowledgment	on behalf of the National Institute

• The Open Survey will open the form in the Survey Format where the data entry may begin.

Apps 😈 TSI REDCap Portal 🗬 REDC	ap External Super REDCap Internal Super REDCap HOME Google Gro Neuro-OOL Bank v1.0 - Ability to Part. in SRA	oup REDCa 🚺 Outlook	Capture 🛞 GoToMeeting Resize fon	REDCap Develo
	Please complete the survey below. Thank you!		0.0	
	In the past 7 days I am able to do all of the activities with friends that people expect me to do	 Never Rarely Sometimes Often Always 	reset	
	Next Page >>			
	Acknowledgment: David Cella, Assessment Center*", and the PROMIS Health Neurological Disorders and Stroke (NINDS) View full acknowledgment	h Organization on behalf	of the National Institute for	
	Powered by VANDER	AILT		

Longitudinal Projects in REDCap

Consider these 3 questions:

- 1. Will you be collecting the same data multiple times over time throughout the project?
- 2. Is this a structured study where participants will have a definite amount of visits over a defined period time?
- 3. How do you want your data to look when you export them?

Question #1: Will you be collecting the same data multiple times overtime throughout the project?

If you will be asking the same questions over a period of time, you may want to consider using the longitudinal module.

In this project, the "Monthly Clinical Data" questionnaire would be asked during all four visits/events of the study so the longitudinal study module was a good fit for this project. If the longitudinal module were not used, the fields/questions on this questionnaire would have needed to be created four times in the online designer or data dictionary in order to allow for these data to be collected.

Data Collection Instrument	Baseline	Month 1 (2)	Month 2 (3)	Month 3 and Final Visit (4)
Demo Demographics Form (survey)	۲			
Monthly Clinical Data (survey)	۲	۲	۲	۲
Completion Data				۲

Study ID 1 Hall, Timothy

Question #2: Is this a structured study where participants will have a definite amount of visits over a defined period time?

- Longitudinal projects are best used for studies that are very structured and don't go on indefinitely.
- This is especially the case when the Longitudinal module is used in conjunction with the Scheduling feature.
- All events are created and defined during project development. Once a project has been moved into "Production Mode" longitudinal events cannot not be created or redefined without the assistance of a REDCap administrator.

Question #3: How do you want your data to look when you export them?

In the **traditional data collection model**, each project record is stored independently as a separate row of data, which can be seen when exported.

Below shows a spreadsheet of data for sleep variables that were collected at four time points. The sleep variables needed to be created four times within the REDCap project. Thus, each sleep variable has its own column in the data export.

		v	Notice t ariables times	hat the s were rep s for each	ame sleep peated fou n event) Jr											
	1	Classic vs Lo	lassic vs Longitudinal spreadsheet.xlsx														
		А	D	E	К	М	N	Т	V	W	AC	AE	AF	AL			
					insomnia			insomnia severity			insomnia severity			insomnia severity			
Notice that					_severity	falling_		_index_c	falling_	staying_	_index_c	falling_	staying_	_index_c			
there is one			falling_	staying_	_index_c	asleep_	staying_	omplete_	asleep	asleep_	omplete	asleep	asleep_	omplete			
row for each	1	record_id	asleep	asleep	omplete	2	asleep_2	2	_3	3	_3	_4	4	_4			
record	2	1	2	0	2	2	1	2	2	0	2	2	0	2			
	3	2	1	1	2	1	1	2	1	1	2	1	1	2			
	4	3	3	2	2	3	2	2	3	2	2	3	2	2			
	5	4	1	0	2	1	0	2	1	0	2	1	0	2			
	6																
	7																

Question # 3 How do you want your data to look when you export them? (cont.)

For **longitudinal projects**, each row of data actually represents that particular time-point (event) per database record.

For example, if four events are defined for the project, one record will have four separate rows of data when exported. The data export will include a column "redcap_event_name" indicating the unique event name for each row. This question in particular should be discussed with the statistician or the person carrying out the data analysis.



Longitudinal Setup

Enabling longitudinal data collection will allow you to use the same form or survey at multiple events. For instance, you may create a demographics form which you will use at Baseline but then a questionnaire that you may want to use at V1, V2, and V3. If there is one form or survey that will be used multiple times for a participant, you would want to enable longitudinal data collection use.

When you enable the longitudinal data collection, you will have a step on your project setup screen that will allow you to define your events and then designate the forms you will be using at each event.



Define your Events and Designate Instruments

After you have defined your events, you must designate instruments for events. Check the boxes where you want each form to appear. If you do not check a box for a form, it will not appear when you are entering data. Each form must be attached to at least one event.

name: A	Arm 1	1 New Arm		Rename Arm 1	
	Event#	Event Name	Unique event name 🔞 (auto-generated)	Define your Events:	
0 ×	1	Baseline	baseline_arm_1	Title the Event	
0 🗙	2	Month 1	month_1_am_1	Create multiple arms if you	ur
0 ×	3	Month 2	month_2_arm_1	project requires this	- -
/ X	4	Month 3 and Final Visit	month_3_and_final_arm_1	project requires this	
Add ne	w event				
	and a sub- to all				
		Descriptive name for this event		Beom Edward Save Select All Deselect	ect All
Des Sel	ignate ect w	e Instruments for hich Data Collectio	Events:	Begin Entring Save Select All Deselect Data Collection Instrument Baseline 1 (1) Month 1 (2) Month 1 (2)	ect All Month 2 (3) (4
Des Sele Inst	ignate ect w rume	e Instruments for hich Data Collection ent is used at each	Events: on Event	Begin Entring Save Select All Deselect Data Collection Instrument Baseline (1) Month 1 (2) Month 1 (2) Month 1 (2) Demo Demographics Form (survey) Image: Collection Instrument Image: Collection Instrument Image: Collection Instrument	ect All Month 2 (3) (4
Des Seli Inst	ignate ect w rume	e Instruments for hich Data Collection ent is used at each	Events: on Event	Begin Edwing Save Select All Deselect Data Collection Instrument Baseline (1) Month 1 (2) Month 1 (2) Month 1 (2) Demo Demographics Form (survey) Image: Collection Instrument Image: Co	Month 2 (3) (3) (4) (4) (4) (4) (4) (4) (4) (4) (4) (4

REDCap – How to Make Changes in Production

• Step 1

- Navigate to the Project Setup tab for the project.
- o Click on 'Online Designer' under 'Design your data collection instruments & enable your surveys.'

	Design your data collection instruments & enable your surveys
Complete!	Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: <u>Download PDF of all instruments</u> OR <u>Download the current Data Dictionary</u>
	Go to 📴 Online Designer 🛛 or 📧 Data Dictionary
	Learn how to use [•] Smart Variables 🖉 Piping @ Action Tags

- Step 2
 - The system will navigate the user to the Online Designer tab.
 - o Click on 'Enter Draft Mode.'

♠ Project Home
NOTE: The project is currently in PRODUCTION status, and thus changes cannot be made in real time to the project as when in Development status. However, changes to the project may be drafted in DRAFT MODE, after which such changes will be reviewed and approved by a REDCap administrator. Once those changes are approved, you will then receive an email confirmation informing you that those changes have taken effect on your production project.
Would you like to enter DRAFT MODE to begin drafting changes to the project?
Enter Draft Mode

The system will provide a green Success notification that you have entered the Draft Mode.



- Step 4
 - Begin making any changes to the Forms/Instruments by hovering over the Form/Instrument and clicking on the pencil icon.

Data Collection Instruments	Survey options:	ey Login	A	dd new instru ● Create a n ● Import a n ● Upload ins	ment: lew instrument from ew instrument from strument ZIP file from	scratch the official <u>REDCap Shared Library</u>
Instrument name		Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Demographics 2		5	-	0	Choose action 🤝	Survey settings + Automated Invitations
Daily Diaries		3	-	۲	Choose action 🤝	Survey settings + Automated Invitations
Treatment Survey		1	7	0	Choose action 🗢	Survey settings + Automated Invitations

- Step 5
 - Once all changes have been made. Click on 'Submit Changes for Review.' This selection will automatically email the CTSI REDCap Administrators and notify them that project changes have been requested.



- Step 6
 - o The status of the Online Designer will change to 'Awaiting review of project changes.'
 - The user may review the summary of submitted changes by clicking on 'View a detailed summary of all drafted changes.'

Awaiting review of project changes

Your drafted changes to the project were submitted and will first be reviewed and approved by a REDCap administrator. When the changes have been approved, you will receive an email notification stating that those changes have taken effect on your production project.

If you have any questions regarding this, please contact CTSI REDCap Team (ctsiredcap@wakehealth.edu).

Q. While your changes are pending, you may still view a detailed summary of all drafted changes

- Step 7
 - If the CTSI REDCap Administrator has any questions regarding the changes, they will reach out to the submitter via email.
 - Once the CTSI REDCap Administrator has committed the changes, the user will be notified via email.

REDCap – How to Use the Data Dictionary (within a project)

This guide will assist with merging multiple forms (instruments) within one project into one single form (instrument).

- Step 1
 - Navigate to the Project setup tab and select 'Data Dictionary.'

A Project I	lome	i≡ Project Setup	Other Functionality	① Project Revision History	
roject status:	≁ Dev	elopment		Completed step:	s 0 of :
	Mair	n project settings			
	Disa	ble 🔘 Use surveys	in this project? ?	VIDEO: How to create and manage a	surve
Not started	Enab	le 🥥 Use longitud	dinal data collection with de	fined events? ?	
I'm done!	Mod	dify project title, purp	oose, etc.		
	Desi	gn your data colle	ection instruments & ena	able your surveys	
	Add	or edit fields on your	data collection instruments	s (survey and forms). This may be do	ne by
Notstarted	meth	od). You may then e	esigner (online method) or t nable your instruments to b	by uploading a Data Dictionary (offlin he used as surveys in the Online Desi	gner.
I'm done!	Quic	k links: Download PD	F of all instruments OR Dov	vnload the current Data Dictionary	
	Go to	Online Design	er or 💌 Data Dictionary	Explore the REDCap Shared Libr	ary
	Have	you checked the Chec	k For Identifiers page to ensur	e all identifier fields have been tagged?	
	Learn	how to use [11] Smar	Variables Z Piping @ Artic	nn Tags	

• Step 2

• Download the Data Dictionary and save it to your computer as a .csv file.

I Project nome	i≡ Project Setup	🛃 Online Designer	굴 Data Dictionary	
				😵 VIDEO: How to use this pa
This module will allow using the Online Desig Designer may help you more helpful if you will	you to create new dat gner or Upload Data I get some initial fields I be adding a large nu	a collection instruments Dictionary (see tabs ab s/forms built quickly or t mber of fields for this pr	s/surveys or edit existing ove), in which you may to make quick edits, but roject.	g ones. Changes may be made by either use either method or both. The Online using the Data Dictionary file may be
This module may be us offline method called t you may construct you	sed for making change he Data Dictionary. Th ir project fields and af	es to the project, such as ne Data Dictionary is a s terward upload the file l	s adding new fields or n pecifically formatted CS here to commit the cha	oodifying existing fields, by using an / (comma delimited) file within which nges to your project.
Click the 'Browse' or 'C Once your file has bee	hoose File' button bel n uploaded, changes v	ow to select the file on y will NOT immediately be	our computer, and uple made but will be displa	ad it by clicking the 'Upload File' buttor ved and checked for errors to ensure
that all the formatting of your project's currer the new Data Dictionar	in your Data Dictionar nt Data Dictionary will ry. The snapshot can la	y is correct before offici be created automatical ater be accessed and do	al changes are made to ly during the Data Diction winloaded from the Pro-	the project. Snapshot note: A snapsho nary upload process before committin ject Revision History page.
that all the formatting of your project's curren the new Data Dictionan Need some help? If you wish to view an e <u>demonstration file</u> , or y also see the instruction	in your Data Dictionar nt Data Dictionary will y. The snapshot can la example of how your f you may view the <u>Data</u> ns listed on the <u>Help 8</u>	y is correct before offici be created automatical ater be accessed and do Data Dictionary may be a Dictionary Tutorial Vid FAQ.	al changes are made to ly during the Data Diction wonloaded from the Pro formatted, you may dow <u>eo (10 min)</u> . For help se	the project. Snapshot note: A snapshot nary upload process before committin ject Revision History page. vnload the <u>Data Dictionary</u> tting up your Data Dictionary, you may

- To move all the variables from the various forms to one form, edit this column to reflect the form name you want to retain.
 - In this example, we want to retain the 'test' form and move all the variables from the other forms to the 'test' form.

Before

Variable /	Form Name	Section H	Field Type	Field Lab	e Choices, (Field Not	Text Valio	d Text Valid	Text Valid	Identifier	Branching	Required	Custom A	Question	Matrix Gr	Matrix Ra	Field Ann	otation
record_id	my_first_instrument		text	Record ID)													
name	my_first_instrument		text	Name of	participant	:												
mrn	my_first_instrument		text	MRN#														
gender	my_first_instrument		radio	gender	0, male	1, female												
email	my_first_instrument		text	Email			email											
pass	my_first_instrument		radio	Did the st	1, Yes 2,	No 3, Ma	aybe 99, I	Retake										
where	my_first_instrument		radio	Where?	1, Classro	om 2, Gy	m				[pass]⇔'i	1'						
group	my_first_instrument		radio	randomiz	a1, group a	2, group	b											
approved	approval		yesno	approved	1?													
calendar2	approval		file	[calendar]													
statistics	test		yesno	statistics	?													
active	test		yesno	active pro	oject?													
date	test		text	If yes, da	te?						[active] = '	1'						
negative	test		radio	testing n	e -1, No 0,	Yes -9, N	Maybe											
active2	test2		descriptiv	Active Pr	oject? [aug	gust_arm_1	1][active]											
active3	test2		descriptiv	If yes, da	te? [augus	t_arm_1][0	date]											

After

														_		
Variable /	Form Name	Section HeField Type	Field Labe Choic	es, CField Not	e Text Valio	d Text Valio	Text Valid I	dentifier	Branching	Required	Custom A	Question	Matrix Gr	c Matrix Ra	r Field Anno	otation
record_id	test	text	Record ID													
name	test	text	Name of particip	ant:												
mrn	test	text	MRN#													
gender	test	radio	gender 0, ma	e 1, female												
email	test	text	Email		email											
pass	test	radio	Did the st 1, Yes	2, No 3, M	aybe 99, I	Retake										
where	test	radio	Where? 1, Cla	sroom 2, Gy	m				[pass] 🔿	1'						
group	test	radio	randomiz: 1, gro	ip a 2, group	b											
approved	test	yesno	approved?													
calendar2	test	file	[calendar]													
statistics	test	yesno	statistics?													
active	test	yesno	active project?													
date	test	text	If yes, date?						[active] =	'1'						
negative	test	radio	testing ne -1, No	0, Yes -9, I	/laybe											
active2	test	descriptiv	Active Project?	august_arm_	L][active]											
active3	test	descriptiv	If yes, date? [au	gust_arm_1][date]											

- Save the changes to your computer as a .csv file.
- Step 4
 - Return to the Data Dictionary tab and select "Choose File." Select the revised .csv file and then click on "Upload File."



- Step 5
 - The system will return a notification of your changes. If the changes are acceptable, click on "Commit Changes."



If the changes were committed, a Successful message will then appear.

- Step 6
 - Navigate to the Online Designer. Review and confirm the variables moved to the appropriate instrument.

Project Setup	Online Designer	📑 Data Dictionary				
					VIDEO: How to us	e this page
e Online Designer will a ur web browser. NOTE:	allow you to make project While in development sta	modifications to fields and tus, all field changes will ta	data ci ake effe	ollection instri ect immediate	uments very easily u ly in real time.	sing only
Data Callestin	Survey options	5:	A	dd new instru	ment: ew instrument from :	scratch
Instruments	E Survey Qu	eue	Ĩ	Ø Import a n	ew instrument from t	the official REDCap Shared Library 😡
	Survey No	otifications	C	O Upload ins	strument ZIP file from	another project/user or external libraries
Instrument name		Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options

REDCap – How to Move a Project to Production

Before moving a project from development mode into production mode, please ensure you have tested the project thoroughly. Once the project is in production mode, changes can still be made but must be submitted to a CTSI REDCap Administrator to be committed to the project. Please refer to the *REDCap - Making Changes while in Production* Guide for more information.

- Step 1
 - Navigate to the Project Setup tab for the project. The last checklist item is "Move your project to production status." Click on 'Move project to production.'
- Step 2

Not started	Move your project to production status							
	Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.							
	Go to Move project to production							

- A pop-up notice will appear with the red box pre-checked to 'Delete ALL data, calendar events, documents uploaded for records/responses, and (if applicable) survey responses'. If you have entered test data that needs to be deleted prior to moving to production, please leave this box checked. *Real data should not be entered while in development mode. If you have accidentally entered real data, then you should select 'Keep All Data saved so far.'*
- o Click on 'Yes, Move to Production Status.'

Move Project To Production Sta	atus?	э
Are you sure you wish to leave the DEVEL PRODUCTION status so that real data ma below, all current collected data, calenda all will remain untouched as the project is	OPMENT stage? If you proceed, the project will be r y be collected. If you select the 'Delete ALL data' op r events, and uploaded documents will be deleted, s moved to production.	noved to tion otherwise
📩 Have you checked the Check For Ident	iffers page to ensure all identifier fields have been	tagged?
Keep existing data or delete?		
O Keep ALL data saved so far.		
 Delete ALL data, calendar events, d responses (if applicable), and any l 	locuments uploaded for records/responses, survey ogging events pertaining to data collection.	
Once in production, you will not be able t can make edits in Draft Mode, which will REDCap administrator before taking effec	o edit the project fields in real time anymore. Howe be auto-approved or else might need to be approve ct.	ever, you ed by a
		_

- Step 3
 - o If you have selected to delete all the data, then another warning will appear.
 - After reviewing the box, make the appropriate selection.

	I A TANA TANA TANA TANA TANA TANA TANA T	
Message	from webpage	×
?	DELETE ALL DATA? Are you sure you really want to delete all existing data when the project is moved to production? If not, click Cancel and change the setting inside the yellow box.	
	OK Cancel	

• Step 4

• The system will provide a notification that the project has been moved to Production status. You may confirm the status by referring to the top-left corner of the screen:



REDCap - Steps to move a record from one project to another project

For the process detailed below, the variable names and form names must be identical

Before beginning this process, confirm the record number being transferred does NOT already exist in the new project

Step 1

• Within the project containing the record currently, create a report for the specific record (to include all the fields to be transferred with the record). Add a filter to the report to only pull in the information for the record to be transferred. Once the report is created, click Save.

Data Collection	t instruments	Data Exports, Rep	oorts, and Stats				VIDEO: How to use Data Exports, Re	eports, and Stats
Manage Survey Participa - Get a public survey link or build a for inviting respondents	ants a participant list	💠 Create New Rep	port 📑 My Repor	ts & Exports	PD	F & Oth	er Export Options	
Scheduling - Generate schedules for the calles using your defined events Record Status Dashboarr - View data collection status of all Add / Edit Records - Create new records or edit/view	ndar d records existing ones	You may create a new re as you wish, and you car displayed on the project ways, including using co to your list of reports, afte	eport by selecting the fie n choose which users m s left-hand menu for an mplex AND/OR logic. W er which you may immed	lds/variables be ay view this rep one to whom yo /hen you are fin liately begin vie	flow that y ort. You w ou have g ished, clic wing then	ou want vill also n iven acco k the Sav n or expo	to include in the report. You may add as eed to provide a name for your report, ess. You can filter the results returned in ye Report button at the bottom. The new rting them.	many fields to your repor hich will then be the report in a variety of report will then be added
Applications		Name of Report:	Data Transfer o	f Record #7	9			
rehaele0	_							
Data Exports, Reports, and Data Comparison Tool Data Comparison Tool Data Comparison Tool Dida Comment Log Field Comment Log File Repository	nd Stats	STEP 1 STEP 1 User Access: Cl All users - DR	noose who sees this Custom user	report on the access (Choos	ir left-ha	nd proj	ect menu 💽 es, or data access groups who will have acc	essi
 User Rights and PAG Record Locking Customiz E-signature and Locking Data Quality API and Playgro 	Gs zation Mgmt und	STEP 2	e in report 🛛 💿	Quick Add		Ad	d all fields from selected instrument:	ose instrument 🔻
Reports	* Edit réports	Field 1	record_id "Login Iden	tification"	۲	ABI	Instrument: Demographics	×
Data Transfer Test		Field 2	name "Full Name"		۲	RB	Instrument: Demographics	*
l Help & Information		Field 3	email "email address		۲	RE	Instrument: Demographics	×
Help & FAQ		Field 4	dob "DOB"		•	AB	Instrument: Demographics	×
Video Tutorials		Field 5	candy "What kind of candy do you like?"			ABI	Instrument: Demographics	×
If you are experiencing problems	olease	Field 6	demographics_comp	lete "Complete?		RBI	Instrument: Demographics	×
contact your REDCap administra	itor.	Field 7	date "Date"		۲	ABI	Instrument: Daily Diaries	×
STEP 3	all events fo	or each record ret	urned ?		0.00		How to use filters a	nd AND/OR lodic
Inters (option:	ai)			10-1	Ope	rator	/ value	
Filter 1	record_	id "Login Identificatio	on" 🔻	ABI	=		• 7	
T MOT T	in All e	vents	۲					*
AND *								_
	select	a field	•	AB)	=		•	
Filter 2	in Alle	woote	-					
	Alle	wents						

Switch format: Use advanced logic

Step 2

• Once the Report is saved, click on *Export* and download the report in raw format. Save the data to your computer.

Choo	se expor	t format	De-identification options (optional)
۲		CSV / Microsoft Excel (raw data)	The options below allow you to limit the amount of sensitive information that you are exporting out of the project. Check all that apply.
-		C	Remove all tagged Identifier fields (tagged in Data Dictionary)
9	X	CSV / Microsoft Excel (labels)	Hash the Record ID field (converts record name to an unrecognizable value)
2	SPSS	SPSS Statistical Software	Free-form text: Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.) Remove Notes/Essay box fields
	-		Date and datetime fields:
37	§ sas	SAS Statistical Software	Remove all date and datetime fields OR —
			Shift all dates by value between 0 and 364 days (shifted smount determined by algorithm for each record) <u>What is date shifting?</u>
0.9	R	R Statistical Software	Also shift all survey completion timestamps by value between 0 and 364 days (shifted amount determined by algorithm for each record)
			Deselect all options
0 (SICIE	Stata Statistical Software	

Step 3

• Log into the project that the data will be transferred into. Click on the *Data Import Tool*. Please note the instructions.



Step 4

• If the project that the data is being transferred from has the same variable names and form names as the project the data is being transferred into, then click on *choose file* to upload the data you extracted in Step 2. Once the file is selected, click on *upload file*.

Record format: The file to be uploaded has its records stor Format for date and datetime values: MM/DD/YYYY or Y	red as separate Rows ▼
Allow blank values to overwrite existing saved values?	No, ignore blank values in the CSV file (default)
Choose File No file chosen	

Step 5

• You should receive a notice saying: 'Your document was uploaded successfully and is ready for review.' The Instructions for data review are noted on this REDCap screen. Review the import of data and confirm the import is to the correct variable names.

Sour document was uploaded successfully and is ready for review. You are now required to view the Data Display Table below to approve all the data before it is officially imported into the project. Follow the instructions below.								
Instructions for Data Review								
The data you uploaded from the file is displayed reviewing it, click the 'Import Data' button at the	The data you uploaded from the file is displayed in the Data Display Table below. Please inspect it carefully to ensure that it is all correct. After eviewing it, click the 'Import Data' button at the bottom of this page to import this data into the project.							
KEY for Data Display Table below								
Black text = New Data								
Gray text = Existing data (will not change)								
(Red text) = Data that will be overwritten								
Red box = error								
Orange box = warning								

DATA DISPLAY TABLE										
record_id	redcap_event_name	name	email	dob	candy	demographics_complete	date	sleep	leg	daily
7 (new record)	baseline_arm_1	Data Transfer Test Record 7	abc@342.com	8091945	5	2				
7 (new record)	12_day_prior_to_su_arm_1									
7 (new record)	2_week_post_surger_arm_1									

Do you wish to import the new data (displayed above) into the project? (Click the button below to import the data.)

Step 6

• If the import is correct, click on *Import Data* to complete the process.

```
Do you wish to import the new data (displayed above) into the project?
(Click the button below to import the data.)
Import Data
```

If the import was successful, you will receive a successful notice.

Import Successful! 3 records were created or modified during the import.
The data you uploaded from the file was successfully imported into the project. If you wish to import more data, you may use the box above to select another file on your computer.

Step 7

• Navigate to the Record Status Dashboard and locate the imported record. Verify the information was imported to the correct variable names and forms.

Data Collection Collection	Record Status Dash	board (all re	cords)							
Manage Survey Participants - Get a public survey link or build a participant list. for inviting respondents Cheduling - Generate schedules for the calendar using your defined events Record Status Dashboard - View data collection status of all records	Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tablwindow in your browser to view that record on that particular data collection instrument. Please note that if your form- level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.									
Add / Edit Records - Create new records or edit/view existing ones	Displaying record "1" through	ugh "mmh8541"	 of 14 re 	cords						
Applications	Displaying: Instrument status	only Lock statu	s only All	status types						
Calendar Data Exports, Reports, and Stats Data Import Tool	Login Identification	Demographics Baseline	Treatment Survey Baseline	Treatment Survey 1-2 day prior to surgery	Daily Diaries 1	Daily Diaries 2	Daily Diaries 3	Daily Diaries 4	Treatment Survey 2 week post surgery	
Logging	1 Mary Heart	۲	0	0	۲	۲	۲	0	0	
Field Comment Log	2 Abc	۲	0	0	۲	0	0	0	0	
File Repository	3 Mary Moore	۲		0	۲	0	0	۲	0	
Coser Rights and Brocks DAGS Record Locking Customization	4	۲	0	0	0	\bigcirc	0		0	
Service and Locking Mgmt	5 All In One	۲	۲	0	0	0	0	\bigcirc	\odot	
Data Quality	6 Data Transfer Test	۲	۲	0	0		0	0	۲	
	7 Data Transfer Test Record 7	۲	۲	۲	0	\bigcirc	Ø	0	۲	

Contact REDCap@gwu.edu immediately if the information was imported incorrectly.

• Navigate to the Project Setup tab and then to the Online Designer.

	Design your data collection instruments & enable your surveys									
Not started	Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: Download PDF of all instruments OR Download the current Data Dictionary									
	Go to 🔛 Online Designer or 🔳 Data Dictionary Explore the 🖪 REDCap Shared Library									
	Have you checked the Check For Identifiers page to ensure all identifier fields have been tagged?									
	Learn how to use [1] Smart Variables 🖉 Piping 🔞 Action Tags									

• Click on Survey Settings next to the survey you would like to make inactive.

	Curron antipage	Add new instrument:								
Data Collection Instruments	Survey options.		Create	a new instr						
	E Survey Queue Survey Login	40	Import	Library 🥑						
	Survey Notifications	0	a Upload instrument ZIP file from another project/user or external libraries							
Instrument name		Fields	View PDF	Enabled as survey	Instrument actions	Survey-related opti	ions			
Service Request		95		U	Choose action 📼	© Survey settings	+Automated Invitations			

• Click on the Survey Status – change to Survey "Offline." This will prevent users from being able to access the survey. Click "Save Changes" at the bottom of the page to save this setting.

tion by modifying the fields belo	ow and clicking the Save Changes button.	
ection instrument "Service Req	uest"	Cance
🧯 Survey Offline 🗸		
If offline, responde	nts will not be able take the survey.	
	ection instrument "Service Requ Survey Offline If offline, responde	ection instrument "Service Request"

REDCap: How to migrate project from CTSI to GWU

- Login to CTSI (or any REDCap system where the project you want to move is located).
- Choose the project you want to migrate/move from the project list.
- Once you are at the project home page, click "Other Functionality"

REDCap	ResearchIT and	l Cyberinfrasti	ucture PID	30					
 Logged in as b ♦ Log out 	😭 Project Home	/Ξ Project Setup	🗈 Other Funct	ionality	၅ Project Revision History	Edit project settings			
 My Projects or Control Center REDCap Messenger 		La contrata							
🌡 View project as user: 🔤 select a user 💌	The tables below po statistics, and upco	The tables below provide general dashboard information, such a statistics, and upcoming calendar events (if any).				a sers with access to this project, general project			
Project Home and Design					ct is not us	ed as a template Add			
☆ Project Home · ≔ Project Setup ☑ Designer · I Dictionary · Codebook	Current Users ((4)	自 Project Sta	tistics					
Project status: Production	User	Expires	Records in pro	oject	111				
Data Collection 📃		ver	Most recent activity		02-14-2021 16:12				
Survey Distribution Tools			Space usage f	or docs	0.16 MB				
Record Status Dashboard Add / Edit Records		Jer 🗄 Upcoming Calendar I			Events (next 7 days)				
Show data collection instruments		vér	Time	Date	Description				
Applications		ver			No upcoming events				
Alerts & Notifications Calendar Data Exports, Reports, and Stats Data Import Tool									

• On the "other functionality" page, scroll down to "Copy or Backup Project" section.



NOTE: There are many options here for exporting your project. We recommend selecting "Download metadata & data" and also selecting "Survey and survey settings" if your project has a survey(s).

• Once you select "Download metadata & data" this screen will appear.



NOTE: There are many options for de-identification if you choose to use them.

• When everything looks acceptable, select "Export Entire Project (metadata & data)" in the bottom right



- This will be the next screen alerting that your file is ready for download. Select the icon to the right to download the file.
 - Keep this file in a safe place, we will need it again.
- Go and login to GWU REDCap (or the instance where you are moving the project)
- Click the "New Project" tab on the top bar.



Once on the New Project page, select "Upload a REDCap Project XML File"
 Then select the XML file we downloaded in the above steps.

You may begin the creation of a at the bottom.	new REDCap project on your own by completing the form below and clicking the Create Project button
Project title:	
	Title to be displayed on project webpage
Purpose of this project: How will it be used?	Select One 🗸
Project notes (optional): Comments describing the project's use or purpose that are displayed on the My Projects page.	
Start project from scratch	O Create an empty project (blank slate)
or begin with a template?	🔍 Upload a REDCap project XML file (CDISC ODM format) ?
Start project from scratch or begin with a template?	○ Create an empty project (blank slate) ● Upload a REDCap project XML file (CDISC ODM format) ? ■ Select XML file: Choose File No file chosen

NOTE: You will have to re-enter the project title and purpose again before proceeding.

Your project should now be available in the new REDCap instance.

TIPS:

- Review your project to make sure everything migrated safely.
- If you used or use any external modules in the CTSI REDCap instance that you would also want available in the GWU instance, please reach out to an administrator at <u>REDCap@gwu.edu</u>.

The Public Survey Link is **only to the first instrument/form** in the REDCap project. If you have multiple surveys that need a Public Link, you will have to create separate REDCap projects for each.

A Project Home	≡ Project Setup	Ponline Designer	j ≣ Da	ata Dictiona	ary		
			Creat	e snapshot of	instruments	VIDEO: How to use t	his page
e Online Designer w ur web browser. NO	ll allow you to make p TE: While in developm	project modifications to ent status, all field cha	o fields a nges wil	nd data coll l take effect	ection instruments immediately in rea	very easily using or I time.	nly
Survey options:		A	dd new i • Create	a new instr	ument from scratch		
Instruments III Survey Queue Survey Login			o Import	a new instr instrumen	rument from the offi It ZIP file from anoth	cial <u>REDCap Shared</u> er project/user or <u>exi</u>	Library 😔 ternal libraries ອ
Instrument name		Fields	View PDF	Enabled as survey	Instrument actions	Survey-related opti	ons
Service Request		95		9	Choose action 🖘	Survey settings	+Automated Invitations
Follow Up		45		9	Choose action 🐨	Survey settings	Automated Invitations
in the second se		2		Enable	Choose action 🐨		
Capture				in the second second	-		
Satisfaction Surve	ey End	28		Enable	Choose action		

- Step 1
 - To obtain the public link to the first instrument/form/survey, click on 'Survey Distribution Tools.'



- Step 2
 - This will open the Public Survey Link tab.

- To obtain the general link to the survey, highlight and copy the link located in the Public Survey URL box. You can alternatively select "Send me URL via email" to have REDCap email you the public survey link.
- To open the survey, click on "Open Public Survey." This will open the survey in a format in which the survey can be taken.

Survey Distribution Tools



Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey 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 your own email client. Your email recipient(s) can then click the link to begin taking your survey.



REDCap – How to Open a Follow-Up Survey

Ensure the follow-up forms have been enabled as surveys. For assistance on enabling the survey functionality, please refer to the *How to enable the survey functionality* guide.

- Step 1
 - To open a follow-up survey for a participant, navigate to the Record Status Dashboard



Record Status Dashboard (all records)

Dashboard displayed: [Default dashboard]

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

data ertain data o a Data	Legend for status icons: Incomplete Incomplete Unverified Partial Survey Response Complete Complete Complete Survey Response
/ Create cl	stom dashboard

ALL (5) V records per page

Displaying	record	Page 1	of 1: "1"	through "5"	✓ of 5 re	cords
Displaying:	Instrume	ent stati	us anly	Lock statu	s only All	status type
Record ID	Service Request	Follow Up	Capture	Satisfaction Survey End	Research Studio Expert Satisfaction Survey	
1	۲		0	0	0	
2	۷	۲	0	0	0	
3	0	0	.001	100	(iii)	

Step 2

3 4 5

• Locate the Record for which the next survey needs to be completed.

- Click on the grey bubble under the appropriate Survey header.
- This will open the Data Entry Form for that record's survey.

Invitation status: 🧿 📃 Survey options
1
Today M-3-4
phenders
0.0
Expand
Active
Incomplete
Save & Exit Form Save &

- Step 3
 - Once in the Data Entry view, click on the "Survey Options" dropdown and then select "Open Survey."
 - This will open the form in the Survey view where the participant may enter and submit their information.

Follow Up

	Invitation status: 🕕 📃 Survey options
Editing existing Record ID 1	i Open survey
Record ID Initial Follow-Up Email Sent * must provide value	1 C Log out + Open survey Compose survey invitation Toda Survey Access Code and OP Code
CTSI employee that initiated follow-up / triaged request * must provide value	phenders
General Comments	
Request Status * must provide value	Active
Form Status	
Complete?	Incomplete
	Save & Exit Form Save & 👻
	Cancel

Survey		0.0
Henderson, Tripp, Please complete the survey be Thank you!	low.	
Initial Follow-Up Email Sent	Today -	5
*must provide value		
CTSI employee that initiated follow- request	up / triaged [survey respondent]	1
* must provide value		
General Comments		
		Expand
Request Status	Active 🔽	
* must provide value		
	Submit	

REDCap – Piping

Piping allows a user to insert previously collected data into a form or survey within the same REDCap project.

Piping can be used to insert data into text in the following places:

- Field Label
- Field Note
- Section Header
- Matrix field column headers
- Option labels for multiple choice fields (radio, drop-down, checkbox)
- Slider field labels (i.e. text displayed above slider bar)
- Custom record locking text (if defined, displayed at bottom of form)
- Survey Instructions
- Survey Completion Text
- Survey invitation emails (sent via Participant List or Automated Invitations) includes both subject and message
- Custom text displayed at top of Survey Queue
- Inside the URL for a survey's 'Redirect to a URL' setting

To pipe in previously collected data, insert the variable name in brackets where you want the collected data to appear.

For example, if the information you want to pipe in is a patient's date of birth, you will use the assigned variable name for that question within brackets:

Variable Date of Request * must provide value Collected Data Variable	
Voriable: contact_name Individual is Requesting Service on [date] * must provide value	a question
p7-26-2018 Today M-D-Y	
Individual is Requesting Service or 07-26-2018 * must provide value	The response to the question is piped into another question

Data can be piped into the places from the bulleted list above from any types of fields.

If you are piping data **from** a multiple choice field (i.e. radio or dropdown), the response will appear as the text (label) value, not the raw data value.

In this example, we are piping in the data associated with the question, "Did the student pass?" (variable name=*pass*). The piped field will appear as:

🥜 🔖 🐨 🚰 🚳 🗶 🛛 Variable: pass	raw values for this example	
Did the student pass?	◯ Yes 1 ◯ No ⁰	
The response associated with the [pass] variable is piped in as:	The response of the piped in variable appea	
🖉 📄 🥽 🏕 🐭 Variable : score	What was the student's test score	
What was the student's test score?	What was the student's test score?	

If you are piping data **from** a non-multiple choice field type (i.e. notes field or text field), the response will appear as the literal value.

In this example, we are piping in the data associated with the field, "Name of Individual Requesting Service" (variable name=*contact_name*). The data is being piped into the survey completion text:

Voriable: contact_nam Name of Individual Requesting Ser * must provide value	e vice	Test, Thisisa
📎 Survey Title	Survey	
Survey Instructions (Displayed at top of survey after title)	Title to be displaye [contact_name], Thank you!	ed to participants at the top of the survey page
Survey		
Test, Thisisa, Please complete the Thank you!	survey below	

To cross-event pipe in longitudinal projects, include the event name in brackets before the variable name in brackets. The event name is located on the 'Define My Events' page.
For example, "What is your name?" is included in Event 1, but you are working in a form within another Event. The piping should appear as: [event_1_arm_1][name]

rm 1: Arm	Add +	Jew Arm		Upioad or downloa	a arms/events
m name:	Arm 1				Rename Arm
	Event #		Event Name	Custom Event Label	Unique event name () (auto-generated)
2 X	ŕ	Event 1			event_1_ann_1
2×	2	Event 2			event_2_arm_1
Add ne	ew event				
		Descriptive na	ame for this event	Custom Event Label (optional) Example: [visit_date], [veight] kg	

To remove the survey functionality, complete the following steps:

• Navigate to the Online Designer tab. Click on "Survey Settings" next to the instrument that you no longer want to be a survey.

A Project Home	E Project Setup	Online Desi	gner	Di Di	ata Dictiona	ary		
e Online Designer wil	allow you to make r	roject modificati	ons to	Creat Last snap	te snapshot of pshot: 09/27/20	instruments 17 9:10am ?	VIDEO: How to use t	his page
ur web browser. NOT	E: While in developm	ent status, all fiel	d cha	nges wil	l take effect	immediately in rea	l time.	
Data Collection	Survey options:	- Current area	A	dd new i • Create	a new instr	ument from scratch		
Instruments	Survey Notifica	tions	- C	0 Import	a new instr instrumen	rument from the offi t ZIP file from anoth	cial <u>REDCap Shared</u> er project/user or <u>ex</u>	Library 🥹 ternal libraries 🚽
Instrument name			Fields	View PDF	Enabled as survey	Instrument actions	Survey-related opti	ions
Service Request			95	-	۷	Choose action 🖘	Survey settings	+ Automated Invitations
Follow Up			45	-	1	Choose action 🖃	Survey settings	Automated Invitations
Capture			2	- 75	Enable	Choose action		
Satisfaction Surve	y End		28	-	1	Choose action =	Survey settings	+Automated Invitations
a second share a	most Catlefaction Cu	F3 (59) (0	-	Feable	Channes antique -		

• This will open the Modify Survey Settings page. Navigate to the bottom of the page and locate the "Delete Survey Settings" button. Notice the disclaimer underneath the button.



- Click on the "Delete Survey Settings" button. A second disclaimer will appear. If you are certain you want to remove the survey functionality, click on Delete Survey.
- Note: This will not delete the instrument. It will only remove the survey functionality.

Delete this instrument's survey se	ettings?	
Please note that deleting the survey settin using the survey. Also, deleting the survey instrument, but instead the instrument w enabled as a survey, in which data can onl data entry form.	ngs will NOT delete any responses collected settings will NOT delete the data collection ill revert back to how it was before it was y be collected by authenticated users on the	
NOTICE: If this survey is deleted, all participar associated with this survey, and all survey link this survey. Any email invitations that have be deleted. Additionally, all survey responses wil removed, as seen in a data export file or on th survey, you may enable the data collection in lose all the survey-related information mentio	nts will be removed from your Participant Lists and return codes will cease to function for een scheduled to be sent for this survey will be I have their 'survey completion' timestamp he data entry form. If you choose to delete the strument as a survey again, but you will still oned thus far.	
	Delete Survey Settings Cancel	

• The user will receive a successful deletion notice.

Survey successfully deleted!	×
The survey has been successfully deleted. You will now be redirected ba Online Designer.	ack to the
	Close

• Once the user clicks on "Close," the system will return the user to the Online Designer tab. Notice the survey functionality is no longer enabled.

A Project Home	\equiv Project Setup	Online Designer	j∎ D	ata Diction	ary		
			Crea Last sna	te snapshot of pshot: 09/27/20	finstruments	VIDEO: How to use t	his page
he Online Designer wi our web browser. NO	ill allow you to make p TE: While in developm	project modifications to nent status, all field char	fields a nges wi	and data coll ll take effect	ection instruments immediately in real	very easily using o I time.	nly
	Survey options:	A	dd new	instrument:			
Data Collection	Survey Ouque	Suprey Login	Create	a new instr	rument from scratch		
Instruments	Comment Natifiers	Jurvey Login	Ø Impor	a new inst	rument from the offic	tial <u>REDCap Shared</u>	Library @
	C Survey Nounca	uons	o Uploar	instrumen	it ZIP file from anothe	er project/user or <u>ex</u>	ternal libraries 🥪
Instrument name		Fields	View	Enabled as survey	Instrument actions	Survey-related opt	ons
Service Request		95	-	۷	Choose action	Survey settings	+Automated Invitations
Follow Up		45	-		Choose action	Survey settings	Automated Invitations
Capture		2	-	Enable	Choose action =		
Satisfaction Surve	ey End	28	-	Enable	Choose action 😑		
Research Studio	Expert Satisfaction Su	rvev 9	-	Enable	Choose action		

REDCap – Repeating Events

- Before enabling the repeating event functionality, first build all of your forms in either the Online Designer or Data Dictionary and then create your events and designate your forms to your events.
- Once all forms have been built and designated to the appropriate events, navigate to the Project Setup page. Under "Enable optional modules and customizations," select the Enable button next to "Repeatable instruments and events."

	Enable	Repeatable instruments and events ?
otional	Disable	Auto-numbering for records ?
Isonel	Enable	Scheduling module (longitudinal only) ?
dones	Enable	Randomization module ?
	Enable	Designate an email field to use for invitations to survey participants ?

• A window will pop up where you will select the event(s) that you want to repeat. You also have the option of repeating instruments within the events. Finally, if you are repeating instruments, you can pipe in field(s) from that instrument to create a custom label for each repeat instance on the Record Home Page (not shown in the screenshot below). When finished, select "Save."

Rep	eatable instrument	s and events			x
An ex one-to conco	ccellent way to collect repe p-many data collection. So pmitant medications, adve	eating data in REDCap is to use repo me examples may include but are r rse events, or repetitive surveys (da	eatable instruments and/or repeat not limited to the following: data fr aily, weekly, etc.).	able events. This is sometimes calle om multiple visits or observations,	d
Below instru *or* a instru repea on the	v you can specify a data c iment or event can be repe lternatively set selected in uments will repeat togeth at separately and indeper e Record Home Page to ac	ollection instrument or a whole even sated a different number of times for istruments to be repeatable within a ner and stay connected, whereas t indently from each other on that ev dd another instance of the instrumer	t of instruments to be infinitely re- each record. You may set any ev- n event. The 'Repeat Entire Even the 'Repeat Instruments' option vent. Once an instrument or even th/event for the currently selected	peatable, in which each repeating vent in the project to be repeatable nt' option means that all the event's implies that the instruments will t is set to repeat, you will see options 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	
	Screening Visit	not repeating V	 Baseline Questionnaire Vitals 		
~	Follow-Up Visit	Repeat Entire Event (repeat	✓ Vitals✓ Follow-Up Form	W W	
	Final Visit	not repeating	Vitals Close-Out Form		
				Save Cancel	

• You have now successfully enabled the repeating event functionality. The Record Home Page will display the repeating events as shown in the table on the next page.

Record Home Page

Choose action for record 📼

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event. If you wish, you may modify the events below by navigating to the <u>Define My Events</u> page.

Legend for status icons: Incomplete Incomplete (no data saved) ? Unverified Many statuses (all same) Complete Many statuses (mixed)

Record ID 1 successfully edited	fully edited				
	Record ID 1				
Data Collection Instrument	Screening Visit	Follow- Up Visit (#1)	(#2)	+ 403 hew (#3)	Final Visit
Baseline Questionnaire	۲				
Vitals	۲	۲	۲		0
Follow-Up Form					
Close-Out Form					0

• In order to add a new instance of your repeating event, you can click the "Add new" button above the final instance (in this example, #3).

REDCap – Repeating Instruments

- Before enabling the repeating instrument functionality, first build all of your forms in either the Online Designer or Data Dictionary.
- Once all forms have been built, navigate to the Project Setup page. Under "Enable optional modules and customizations," select the Enable button next to "Repeatable instruments."

		optional modules and customizations
Same -	Enable	Repeatable instruments ?
ptional	Disable	Auto-numbering for records ?
mdonal	Enable	Scheduling module (longitudinal only) ?
in done:	Enable	Randomization module ?
	Enable	Designate an email field to use for invitations to survey participants ?

• A window will pop up where you will select the instrument(s) that you want to repeat. You also have the option of piping in field(s) from that instrument to create a custom label for each repeat instance on the Record Home Page. When finished, select "Save."

Repeatab	le instruments		x
An excellent This is somet following: data surveys (daily	way to collect repeating data in REDCap is to use imes called one-to-many data collection. Some e a from multiple visits or observations, concomitan y, weekly, etc.).	e repeatable instruments and/or repeatable events. examples may include but are not limited to the nt medications, adverse events, or repetitive	
Below you ca be repeated o longitudinal m another instar then be displa and easy nav	n specify a data collection instrument to be infini- ver and over again (a different number of times for odule. Once an instrument is set to repeat, you wanted of the instrument for the currently selected re used as a table near the bottom of the Record Ho igation within them.	tely repeatable, which means that an instrument ca or each record) even without enabling REDCap's will see options on the Record Home Page to add cord. All instances of a repeating instrument will me Page, thus allowing viewing of the instances	an
Repeat this instrument?	Instrument name	Custom label for repeating instruments (optional) () Example: [visit_date], [weight] kg	
	Baseline Questionnaire		
	Visit 1		
	Visit 2		
	Medications	[medname]	
		Save Cancel	

 You have now successfully enabled the repeating instrument functionality. The Record Home Page will display the repeating instrument(s) below the main instrument list with the custom label (in this example it is the medication name).

Record Home Page

The grid I currently access th	below displays the selected record. Y hat form/event.	form-by-forn ′ou may click	n progress of data of on the colored sta	entered for the atus icons to	Legend for sta	atus icons: Incomplete (no data saved) ? Many statuses (all same)
C Choo	ose action for recor	rd 📼			Complete	Many statuses (mixed)
Reco	ord ID 1 successfu	ully edited				
	Record I	D 1				
Data	Collection Instru	iment	Status			
Baseline	e Questionnaire	(
Visit 1		0	\supset			
Visit 2		0	C			
Medicati	ions					
Repeatir	ng Instruments					
Medicat	tions					
1	۲	Advil				
2	۲	Zyrtec				
3		Zoloft				
	+ 4	Add new				

• In order to add a new instance of your repeating instrument, you can click the (+) icon next to the stacked bubbles in the first table or click the "Add new" button below the list of repeating instruments in the second table.

REDCap – Survey Participant List

If responses <u>do not</u> need to be anonymous, you may use the participant list to capture email addresses to send participants multiple surveys and have the data linked. Below are three (3) options.

Option 1: The project's first instrument is a survey and you want to use the public URL to capture email addresses for follow-up surveys

Step 1: Ensure the survey functionality is enabled:

#1) On the Project Setup tab

	O Project Revision History	Other Functionality	≡ Project Setup	Project Home
eps 0 of 7	Completed ste		elopment	t status: 🎤 Dev
			n project settings	Mair
e a survey	VIDEO: How to create and manage	in this project? 🔋	ble 🕝 Use surveys	Disa
	ined events? ?	linal data collection with def	le 🤤 Use longitud	tarted Enab
		oose, etc.	dify project title, purp	done! Moo

#2) Each individual form that will be a survey is also enabled on the Online Designer tab

A Project Home	Project Setup	Online Designer	×	Data	a Dictionary		
						VIDEO: How to u	se this page
TE: While in development	status, all field chan Survey option	et modifications to fields iges will take effect imm	ediate	Add n	eal time.	uments very easily nt:	using only your web browser.
Data Collection Instruments	i≣ Survey Q	ueue 💡 Survey Logi Notifications	in	o Un o Un	nport a new pload instri	r instrument from so instrument from the ument ZIP file from a	ratch e official <u>REDCap Shared Library</u> another project/user or <u>external libraries</u>
Instrument name		F	ields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Instrument name Registration		F	fields 4	View PDF	Enabled as survey	Instrument actions	Survey-related options Survey settings + Automated Invitations

Step 2: If you want to use the public URL to capture email addresses of participants in order for subsequent surveys to be sent to the same participants, then create a field on the initial survey for email addresses. Ensure the validation for that field is set for 'Email.'

Edit Field	1		×
You may add a bottom. When may view the	a new project field to this data collection instrument t you add a new field, it will be added to the form on t Field Types video (4 min).	oy completing the fields be his page. For an overview	low and clicking the Save button at the of the different field types available, you
Field Type:	Text Box (Short Text, Number, Date/Time,)	•	
Field Label	How to use Piping		
Email addres	55	Variable Name (utilized email ONLY letters, numbers, and	during data export) Enable auto naming of variable based upon its Field Label?
		Validation? (optional)	None •
		– or – Enable searching wit	None Date (D-M-Y) Date (M-D-Y)
Field Anno	otation (optional)	choose ontology to	Date (Y-M-D)
Explanatory no	tes - not displayed on any page ?	Required?* No Prompt if field is blank	Datetime (M-D-Y H:M) Datetime (Y-M-D H:M)
		Identifier? No	Datetime w/ seconds (D-M-Y H:M:S) Datetime w/ seconds (M-D-Y H:M:S) Datetime w/ seconds (Y-M-D H:M:S)
		Custom Alignment	Email Integer Letters only
		Field Note (optional)	Number Number (1 decimal place) Number (2 decimal places)
			Number (3 decimal places) Number (4 decimal places) Phone (North America) Social Security Number (U.S.)

Step 3: Navigate to the Project Setup tab and locate the 'Enable optional modules and Customizations' bubble. Click Enable for the 'Designate an email field to use for invitations to survey participants.'

A Project H	lome	≡ Project Setup	Other Functionality	Project Revision History
Project status:	Deve	lopment		Completed steps 0 of 7
	Main	project settings		
Material	Disab	le 🔘 Use surveys	in this project? 🔋	VIDEO: How to create and manage a survey
INGC STATIEU	Enabl	e 😂 Use longitud	dinal data collection with def	fined events? ?
I'm done!	Mod	ify project title, purp	oose, etc.	
	Desig	gn your data colle	ection instruments & ena	able your surveys
Not started	Add o either metho	r edit fields on your using the Online Do od). You may then e	data collection instruments esigner (online method) or b nable your instruments to b	s (survey and forms). This may be done by by uploading a Data Dictionary (offline be used as surveys in the Online Designer.
I'm done!	Quick	links: Download PD	F of all instruments OR Dow	vnload the current Data Dictionary
	Go to	💆 Online Designe	er or 🗷 Data Dictionary	Explore the REDCap Shared Library
	Have)	ou checked the Chec	<u>k For Identifiers</u> page to ensur	e all identifier fields have been tagged?
	Learn	how to use [1] Smar	t Variables Piping @ Actio	on Taga
	Enab	le optional modu	les and customizations	
1997	Enabl	e 🛛 😂 Repeatable	instruments ?	
Optional	Disab	e SAuto-numbe	ering for records ?	
I'm done!	Enabl	e Scheduling r	module (longitudinal only)	
	Enabl	e 🧧 🧿 Randomizat	ion module 👔	
	Enabl	e 🥥 Designate a	n email field for sending sur	vey invitations [?]
	Enabl	e 🔤 Twilio SMS a	and Voice Call services for su	irveys ?
	Addi	tional customization	25	

The 'Enable' button will open a pop-up box where you will select the variable named used for the 'Email' field.

Designate an email	field for	sending	survey	invitations	
--------------------	-----------	---------	--------	-------------	--

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

select a field	
----------------	--

Manage Survey Participants

You can capture email addresses for sending invitations to your survey participants by designating a field in your project. If a field is designated 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 Participant List directly).

V

Using the designated email address field can be especially valuable when your first data collection instrument is not enabled as a survey while one or more other instruments have been enabled as surveys. Since email addresses can only be entered into the Participant List directly for the first data collection instrument, the designated email field provides another opportunity to capture the email address of survey participants.

Please be aware that designating an email field means that survey responses can NEVER BE ANONYMOUS because of the fact that the participant's email address can be viewed on a data entry form, which means it is easy to identify the record/response to which the email address belongs.

NOTE: If the participant's email address has already been captured directly in the Participant List, then that email address will supersede the value of the email field here when survey invitations are sent to the participant. Also, if the email invitation field exists on multiple longitudinal events, on a repeating instrument, or on a repeating event, the field's value will be syncronized across all instances/events so that changing it in one location will change the value across all events/instances where the field appears.

Survey-specific email invitation field: While the email invitation field discussed here is a project-level setting, it is helpful to know that there also exists a survey-level email invitation field option that can be utilized for particular surveys in the project (whereas the project-level field would be applied to ALL surveys). A survey-specific email invitation field can be enabled for any given survey, in which you can designate any email field in your project to use for sending survey invitations for that particular survey. Thus, you can collect several email addresses (e.g., for a student, a parent, and a teacher) and utilize each email for a different survey in the project. Then you can send each person an invitation to their own survey, after which all the survey responses get stored as one single record in the project. See the 'Survey Settings' page in the Online Designer for this survey-level setting.

Step 4: As participants complete the initial survey and provide their email address, the Participant List will begin to fill with the email addresses. Notice that the individuals Record ID number will appear beside their name.

- Public Survey Link	Participant List	Survey Invitation Log					
The Participant List option allow t is also possible to identify an must first be enabled by clickin anonymous unless you 1) are u	ws you to send a cust individual's survey an g the 'Enable' button i Ising Participant Ident	omized email to anyone in you swers, if desired, by providing in the table below). Note: All su ifers or 2) have enabled the de	ur list and track v an Identifier for e Irvey responses co signated email fie	vho respond ach participa bliected are o ld for invitat	ds to your ant (this fea considered ions. <u>More</u>	surve ature detai	ey. Is
Participant List belonging to	[Initial survey] "Servio	ce Request"				Rem	ove all participants
Displaying 1-5 🗸 pî 5	Add participants	Compose Survey Invitatio	ons				Export list
Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5			-	1 102	680	
1) mharbour@wakehealth.edu	2		0	5			
2) mharbour@wakehealth.edu	3		0		100	4	4
3) mharbour@wakehealth.edu	4		۵	121			

30

Cancel

Save

Step 5: To send the individuals the follow-up survey, navigate to the Participant List and select the 'Participant List belonging to' from the drop down then click on 'Compose Survey Invitations.'

🚰 Manage Survey Par	ticipants						
- Public Survey Link	🎒 Participant List	Survey Invitation Log					
he Participant List option allo is also possible to identify an rust first be enabled by clickir nonymous unless you 1) are o Participant List belonging b	ws you to send a cust individual's survey ar ig the 'Enable' button using Participant ident (Initial survey) "Servi	comized email to anyone in your lis inswers, if desired, by providing an to in the table below). Note: All survey ifers or 2) have enabled the design ce Request"	t and track v lentifier for e responses co ated email fie	vho respond ach participa ollected are o ld for invitat	ds to your ant (this fea considered ions. <u>More</u>	surve ature detai	ey.
Displaying 1-5 V of 5	Add participants	Compose Survey Invitations					Export list
Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5			-	1 100	680	
)) mharbour@wakehealth.edu	2		0	-			17
2) mharbour@wakehealth.edu	3		۲			-	4
3) mharbour@wakehealth.edu	<u>.4</u>		0				
1 1 5 1 1 10					-		inter-

Complete the information and then click 'Send Invitations.'

Note: When using the Participant List to email survey links, the link is specific to the participant. Please encourage the participants **not** to forward their emails with the link to other participants.

Only the names of individuals who completed the prior survey will be in this list. The system will pre-check the names of the individuals. If you decide against sending a follow-up survey to an individual, you can uncheck their name manually.

Option 2: A project's first instrument is a survey and you want to use the participant list

This option is available when you have a list of participant emails and you want to send them a link to the survey within REDCap. Using this option, you can choose to keep the survey(s) anonymous.

Step 1: The first form must be enabled as a survey. Refer to Option 1, Step 1 above to ensure the forms have been enabled as surveys.

Step 2: Navigate to *Manage Survey Participants* and then the *Participant List* tab. Click on 'Add Participants' to begin building the participant list.

- Public Survey Link	🛃 Participant List	Survey Invitation Log					
ne Participant List option all is also possible to identify a iust first be enabled by click nonymous unless you 1) are Participant List belonging	ows you to send a cust n individual's survey an ng the 'Enable' button using Participant Ident	comized email to anyone in your lis iswers, if desired, by providing an ic in the table below). Note: All survey ifers or 2) have enabled the design ce Request"	st and track v dentifier for e v responses co ated email fie	/ho respond ach participa illected are o ld for invitat	is to your ant (this fea considered ions. <u>More</u>	surve ature detai	ey. Is
Displaving 1.5 V př.5	Add participants	Compose Survey Invitations	1			1.2.11	Export list
imail	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
@wakehealth.edu	Record 5	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu) mharbour@wakehealth.edu	Record 5 2	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link so	Survey Access Code and QR Code
Email a@wakehealth.edu 1) mharbour@wakehealth.edu 2) mharbour@wakehealth.edu	Record 5 2 3	Participant Identifier (optional)	Responded?	Invitation Scheduled? - -	Invitation Sent?	Link 080	Survey Access Code and QR Code or Dr
Email a@wakehealth.edu 1) mharbour@wakehealth.edu 2) mharbour@wakehealth.edu 3) mharbour@wakehealth.edu	Record 5 2 3 4	Participant (dentifier (optional)	Responded?	Invitation Scheduled? - - -	Invitation Sent?	Link 180 - -	Survey Access Code and QR Code

Step 3: Enter the email addresses, one per line.

Note: If you want to enable the Participant Identifier option, click on 'enable' before entering the email addresses. As you are entering emails, you can add an identifier behind the email address using a comma as the separator. For example, <u>REDCap@gwu.edu</u>, <u>REDCap</u> Admin. If you do not enable the Participant Identifier, the survey(s) will be anonymous.

Add Emails to Participant List		×
Copy and paste your list of participant email ad importing Identifiers for any participant, separa guidelines below.	dresses, one per line . If you are te them by commas following the	2
ctsiredcap@wakehealth.edu test@test.com		
Each participant starting on a new line Field Order: Email, Participant Identifier (optio	nal)	
Example #1: john.williams@hotmail.com Example #2: jimtaylor@yahoo.com, Jim Taylor Example #3: putnamtr@gmail.com, ID 4930-72		
	Add participants Cance	el

The names will then appear in the Participant List chart.

Step 4: Click on 'Compose Survey Invitations.' This will open a pop-up box where you can complete the invitation information.

Note: When using the Participant List to email survey links, the link is specific to the participant. Please encourage the participants **not** to forward their emails with the link to other participants.

Send a Survey Invitation to Participants							
Info Survey title: Service Request	Partic	ipant List	Actions:	- check/unch	ieck partii	cipants	~
When should the emails be sent?	Er Er	mail (2 selected)	Participant Identifier	Scheduled?	Sent? R	espond	
Immediately	✓ a(@wakehealth.edu (ID 5)		-		÷.	
At specified time: Mervil A The time must be for the time zone America/New_York, in which the current time is 07/23/2018 09:32	🗹 pl	henders@wakehealth.edu (ID 1)		÷			
🚽 Enable reminders							
Re-send invitation as a reminder if participant has not responded by a specified time?							
Compose message							
From: phenders@wakehealth.edu							
To: [All participants selected from Participant List]							
Subject:							
Compose Proview Send test email							
Please take this survey.							
You may open the survey in your web browser by clicking the link							
below: Isurvey-link1							
If the link above descent work the convinc the link below into							
your web browser:							
Q NOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.							
You may use HTML formatting in the email message: $<\!$							
How to use Piping in the survey invitation							
					1.000		
				Send Inv	vitation	s Ca	ncel

If a period of time has passed and participants have not completed the survey, you can use the 'Compose Survey Invitations' button to re-send the request.

Step 5: To send the individuals the follow-up survey, navigate to the Participant List and select the 'Participant List belonging to' from the drop down then click on 'Compose Survey Invitations.'

Public Survey Link	😤 Participant List	Su Su	rvey Invitation Lo	g					
Participant List option allow irvey. It is also possible to ide ature must first be enabled by illected are considered anony	is you to send a customia ntify an individual's surve clicking the 'Enable' butto mous. <u>More details</u>	zed email t y answers on in the tai	to anyone in your li , if desired, by prov ble below). Unless	st and track Iding an Ide an Identifiei	who respor ntifier for eac is used, all :	nds to you th participa survey res	ir ant (th ponse	is Is	
Participant List belonging	to [Initial survey] "Regi	stration"						Remove all pa	intícipan
Participant List belonging	to [Initial survey] "Regi	stration"	ose Survey Invitatio	ins				Remove all pa	nticipant port lis
Participant List belonging Alsplaying <u>1-3 v</u> of 3 Email	to [Initial survey] "Regi	stration"	Enable	ns Responded?	Invitation Scheduled?	Invitation Sent?	Link	Remove all pa Remove all pa Ex Survey Access Code and QR Code	articipan port lis
Participant List belonging Isplaying <u>1 - 3</u> ▼ of 3 mail nahankin@wakehealth.edu (ID 1	to [Initial survey] "Regi	stration"	Enable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Remove all pa Ex Survey Access Code and QR Code	erticipan port lis
Participant List belonging Displaying <u>1-3</u> • of 3 Email nahankin@wakehealth.edu (ID 1 nharbour@wakehealth.edu (ID 2	to [Initial survey] "Regi	stration" T	Enable	ns Responded?	Invitation Scheduled?	Invitation Sent?	Link	Remove all particular Survey Access Code and QR Code	erticipan port lis

Complete the information and then click 'Send Invitations.'

NOTE: Only the names of individuals who completed the prior survey will be in this list. The system will precheck the names of the individuals. If you decide against sending a follow-up survey to an individual, you can uncheck their name manually.



If you want to send the follow-up survey to participants even though they did not complete the initial survey, then you will need to create a separate REDCap project.

Option 3: The project's first instrument is a Data Entry form, but you want to use the participant list to send a survey that is an additional form

If you know the participant email addresses and want the participants to complete a survey at some point within the project, then you can complete the following steps to upload the email addresses to the Participant List for a future survey within the project.

Step 1: Ensure the forms to be used as surveys have been enabled. Refer to Option 1, Step 1 above to ensure the appropriate forms have been enabled as surveys.

Step 2: Create a field on the data collection form for email addresses. Ensure the validation for that field is set for 'Email.'

Edit Field	i		ж
You may add bottom. When may view the	a new project field to this data collection instrument you add a new field, it will be added to the form on Field Types video (4 min).	by completing the fields bel this page. For an overview o	low and clicking the Save button at the of the different field types available, you
Field Type:	Text Box (Short Text, Number, Date/Time,)	•	
Field Label	How to use Piping		
Email addres	55	Variable Name (utilized email ONLY letters, numbers, and	duning data export) Enable auto naming of variable based underscores upon its Field Label?
		Validation? (optional)	None •
Field Anno	otation (optional) CLearn about Action Tags	- or - Enable searching wit - choose ontology to Required?* No • * Prompt if field is blank Identifier? No • Does the field contain identify	None Date (D-M-Y) Date (M-D-Y) Datetime (D-M-Y H:M) Datetime (M-D-Y H:M) Datetime (Y-M-D H:M) Datetime w/ seconds (D-M-Y H:M:S) Datetime w/ seconds (M-D-Y H:M:S) Datetime w/ seconds (Y-M-D H:M:S) Email
		Align the position of the field of Field Note (optional) Small reminder text displayed	Integer Letters only Number Number (1 decimal place) Number (2 decimal places) Number (3 decimal places) Number (4 decimal places) Phone (North America)

Step 3: Navigate to the Project Setup tab and locate the 'Enable optional modules and Customizations' bubble. Click Enable for the 'Designate an email field to use for invitations to survey participants.'

A Project I	lome	j≣ Project Setup	Other Functionality	Project Revision History
roject status:	PDeve	elopment		Completed steps 0 of 7
	Main	project settings		
	Disab	le 🔘 Use surveys	in this project? ?	VIDEO: How to create and manage a survey
Notstarted	Enab	le 😂 Use longitud	dinal data collection with def	ined events? ?
I'm done!	100000		Concession of the second se	
	Mod	ify project title, purp	oose, etc.	
	Desi	en vour data colle	ction instruments & ena	ble vour surveys
	Add	gir your data cone	data callection instruments	(unaviored forme) This may be done by
Not started	either	r edit fields on your	esigner (online method) or b	y uploading a Data Dictionary (offline
	meth	od). You may then e	nable your instruments to b	e used as surveys in the Online Designer.
I'm done!	Quick	links: Download PD	F of all instruments OR Dow	inload the current Data Dictionary
	Go to	Conline Designe	er or 🗷 Data Dictionary	Explore the REDCap Shared Library
		and chard and the Char	le Care Indoneti Care a since ha come	all identifies fields have been transf?
	Have	you checked the <u>chec</u>	k For identifiers page to ensur	e an denumer neids have been tagged?
	Learn	how to use Smar	t Variables Piping @ Actio	on lags
	Enab	le optional modu	les and customizations	
1927	Enab	le 🛛 😂 Repeatable	instruments ?	
	Pr. 1			
Optional	Disac	ale 🛛 🖏 Auto-numbe	ering for records [?]	
Optional	Enab	le Scheduling	ering for records [?] module (longitudinal only) 🗄	
Optional	Enab Enab	e 💿 Auto-numbe 😳 Scheduling r Re 💿 Scheduling r Randomizat	ering for records 👔 module (longitudinal only) 🔅 ion module 👔	
Optional	Enab Enab	le 😅 Auto-numbe e 🤤 Scheduling i le 🤤 Randomizat le 🧔 Designate a	ering for records [?] module (longitudinal only) [ion module [?] n email field for sending sur	vey invitations ?
Optional I'm done!	Enab Enab Enab Enab	e Scheduling r Re Randomizat e Designate a e Twilio SMS a	ering for records [?] module (longitudinal only) [3 ion module [?] n email field for sending sur and Voice Call services for su	vey invitations ? Irveys ?

The 'Enable' button will open a pop-up box where you will select the variable named used for the 'Email' field.

Designate an email field for sending survey invitations		×
Choose an email field to use for invitations to survey participants:		
select a field 🗸		
You can capture email addresses for sending invitations to your survey participants by your project. If a field is designated for that purpose, then any records in your project i address captured for that particular field will have that email address show up as the p address in the Participant List (unless an email address has already been entered for t Participant List directly).	v designating that have an participant's hat participa	a field in email email nt in the
Using the designated email address field can be especially valuable when your first dat is not enabled as a survey while one or more other instruments have been enabled as addresses can only be entered into the Participant List directly for the first data collect designated email field provides another opportunity to capture the email address of su	ta collection surveys. Sin ion instrume urvey partici	instrument ce email ent, the pants.
Please be aware that designating an email field means that survey responses can NEVI because of the fact that the participant's email address can be viewed on a data entry easy to identify the record/response to which the email address belongs.	ER BE ANON form, which	YMOUS means it is
NOTE: If the participant's email address has already been captured directly in the Part email address will supersede the value of the email field here when survey invitations participant. Also, if the email invitation field exists on multiple longitudinal events, on a or on a repeating event, the field's value will be syncronized across all instances/event one location will change the value across all events/instances where the field appears.	icipant List, t are sent to ti a repeating ir s so that cha	hen that he nstrument, nging it in
Survey-specific email invitation field: While the email invitation field discussed here setting, it is helpful to know that there also exists a survey-level email invitation field on utilized for particular surveys in the project (whereas the project-level field would be a A survey-specific email invitation field can be enabled for any given survey, in which yo email field in your project to use for sending survey invitations for that particular surve collect several email addresses (e.g., for a student, a parent, and a teacher) and utilize different survey in the project. Then you can send each person an invitation to their ow all the survey responses get stored as one single record in the project. See the 'Survey Online Designer for this survey-level setting.	is a project- ption that ca pplied to ALI ou can desigr ey. Thus, you each email fi wn survey, af Settings' pag	level n be _ surveys). hate any can or a ter which ge in the
	Save	Cancel

Step 4: When creating a record for the participant, make sure to complete the email address field that was created above in Steps 2 and 3.

Service Request		
	Invitation status:	Survey options
Editing existing Record ID 1		
Record ID	1	
Date of Request	129-29-2017	
Name of Individual Requesting Service * must provide value	Henderson, Tripp	
Email		
* must provide value	phenders@wakehealt	th.edu
Department (Organization if outside of Wake Forest)	2.00	
* must provide value	CTSI	
Position		- E-
* must provide value	Research Support Stat	ff 🔽

Optional: Navigate to the Participant List tab and confirm the email address appears in the chart.

- Public Survey Link	S Participant List	Survey Invitation Log					
he Participant List option all is also possible to identify a rust first be enabled by click nonymous unless you 1) are	ows you to send a cust in individual's survey ar ing the 'Enable' button e using Participant Ident	comized email to anyone in your li- nswers, if desired, by providing an li- in the table below). Note: All survey lifers or 2) have enabled the design	st and track v dentifier for e y responses co ated email fie	/ho respond ach participa illected are c ld for invitati	ls to your int (this fea onsidered ons. <u>More</u>	surve ature detai	:y. <u>s</u>
articipant cisc belonging	initial survey] Servi					Rem	ove all participant
olsplaying 1-5 ∨ of 5	Add participants	Compose Survey Invitations					Export lis
imail	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
@wakehealth.edu	5			-	1 12	660	
mharbour@wakehealth.ed	й <u>2</u>		0				
) mharbour@wakehealth.ed	u <u>3</u>		0	-		-	4
mbarbour@wakeboalth.od	1 4		0		1	-	-
() Thindi Dour @wakenedich.eu			100				

Step 5: When you are ready to send the survey(s) to the participants, navigate to the Participant List and select the 'Participant List belonging to' from the drop down then click on 'Compose Survey Invitations.'

- Public Survey Link	🗳 Participant List	Survey Invitation Log					
he Participant List option all t is also possible to identify a nust first be enabled by click nonymous unless you 1) are	ows you to send a cust n individual's survey an ing the 'Enable' button i using Participant Identi	omized email to anyone in your lis iswers, if desired, by providing an lo in the table below). Note: All survey ifers or 2) have enabled the designa	t and track v lentifier for ea responses co ated email fie	vho respono ach participa ollected are c ld for invitati	is to your int (this fea ionsidered ions. <u>More</u>	surve ature detai	ey. Is
Participant List belonging	[Initial survey] "Service	ce Request"	1			Rem	ove all participants
Displaying 1.5 V of 5	Add participants	Compose Survey Invitations					Export list
							Survey
Email	Record	Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Access Code and QR Code
Email a@wakehealth.edu	Record	Participant (dentifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Access Code and QR Code
Email a@wakehealth.edu () mharbour@wakehealth.edu	Record 5 1 2	Participant (dentifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link so	Access Code and QR Code
Email a@wakehealth.edu 1) mharbour@wakehealth.edu 2) mharbour@wakehealth.edu	Record 5 1 2 3	Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link so	Access Code and QR Code
Email a@wakehealth.edu 1) mharbour@wakehealth.edu 2) mharbour@wakehealth.edu 3) mharbour@wakehealth.edu	Record 5 1 2 1 3 1 4	Participant (dentifier (optional)	Responded?	Invitation Scheduled? - - -	Invitation Sent?	Link	Access Code and QR Code

Complete the information and then click 'Send Invitations.'

NOTE: If you decide against sending a survey to a participant, you can uncheck their name manually.

When using the Participant List to email survey links, the link is specific to the participant. Please encourage the participants **not** to forward their emails with the link to other participants.

🕤 Info Survey title: Service Request	Participant List	Actions:	check/unc	héck par	ticipants	~
When should the emails be sent?	(those who have not responded completely) Final (2 selected)	Participant Identifier	Scheduled?	Sent?	Respond	
Immediately	a@wakebealth.edu (ID 5)					
At specified time:	henders@wakehealth.edu.//D.11			-	0.00	
The time must be for the time zone America/New York, in which the current time is 07/23/2018 09:32	Phenoersenancesenances					
🗧 Enable reminders						
Re-send invitation as a reminder if participant has not responded by a specified time?						
Compose message						
From: phenders@wakehealth.edu						
To: [All participants selected from Participant List]						
Subject:						
Compose Preview Send test email						
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:						
\overline{V} NOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.						
You may use HTML formatting in the email message: $<\!$						
How to use Piping in the survey invitation						
	-					

NOTE: Please be sure to test the project thoroughly to ensure the Survey Participant List is functioning correctly. Once you have tested the project, please place the project into production before collecting any real data. If the project requires IRB/IACUC approval, please ensure you have approvals before collecting any real data.

10

REDCap – Survey Queue

The Survey Queue displays a list of surveys to a participant on a single page. The queue contains the survey's **to be** completed as well as the surveys that have **already been** completed. Surveys are set to appear in the Survey Queue based on conditions set by a user, such as when a particular survey has been completed and/or if certain conditions have been met.

Section A: If the project forms are surveys

Step 1:

- To create a Survey Queue, first enable the forms to be used as surveys.
- Navigate to the Online Designer and click on Survey Queue.

In this example, all forms are surveys.



1

1

1

1

0

10

Step 2:

Test 2

Test 3

At the top of the Survey Queue box, a User can click on custom text to the top of the queue.

Add custom text to display at top of survey queue

to add any

Choose action 🤝 🛛 😨 Survey settings 🔰 + Automated Invitations

Choose action 🤝 💿 Survey settings 🛛 + Automated Invitations

Custom text to display at top of survey queue (optional) - If no custom text is provided, then this text will be displayed by default.	[Hide]
You may use Piping or HTML formatting in the custom text: bold, <u> underline, <i> italics, link, etc.</i></u>	use Piping

Step 3:

- Activate the survey(s) you want included in the queue then complete the 'Display survey in the Survey Queue when...' section for each survey.
 - The surveys can be displayed in the queue based on a) another survey being completed and/or b) based on a logic statement of variables with the project (this is covered in Section B below).
- If you want the survey to automatically start as soon as the condition is met, then click on the 'Auto Start?' checkbox.

<u>In this example</u>, we want the Test 1 survey to appear in the queue once the Demographics survey has been completed. Additionally, in this example, we want to automatically start the Test 1 survey as soon as the Demographics survey has been completed.

Please con	nplete the surveys below. Please co	ntact ABC with any questions. Thank you	
	You may use Piping or HTML for	rmatting in the custom text: bold, <u> underline, <i> italics, link, etc. // How to use</i></u>	Piping
Activated?	Survey Title	Display survey in the Survey Queue when	Auto
1	"Test 1"	When the following survey is completed:	۲
Activated		AND When the following logic becomes true: How to use this	
Deactivate		(e.g., [age] > 30 and (pender) = "1")	

Step 4:

• Continue activating the remaining surveys that will be used in the queue.

<u>To continue with the example</u>, we will want Test 2 and Test 3 to appear once the previous surveys have been completed, but we do not want the auto start functionality for these surveys.

ompleted (lil IOTE: The firs	the a 'to-do' list) as well as the surveys the a 'to-do' list) as well as the survey the survey is not displayed be	to a participant an off a single page, in which the queue comprises an surveys that are to be s that the participant has already completed. <u>Tell me more</u> w because it does not have a survey that comes before it for which to set conditions.	
Custom tex Please con	t to display at top of survey queue nplete the surveys below. Please co	(optional) – If no custom text is provided, then <u>this text</u> will be displayed by default. Intact ABC with any questions. Thank you	#de]
Activated?	Survey Title	matting in the custom text: -do- boid, -cu> underane, -lo- italics, -lo infet= > whit, etc. → How to use	Auto
Activated Deactivate	"Test 1"	When the following survey is completed:	
Activated Deactivate	"Test 2"	When the following survey is completed:	
Activated	"Test 3"	When the following survey is completed:	

• Once you have the queue created, click on 'Save.'

Step 5:

• To open a participant's survey queue and to provide them with their Survey Queue URL, navigate to a survey form within an individual's record.

- In the top right of the form, open the drop down selections for 'Survey Options.'
- Click on 'Survey Queue.'
- Note: The queue URL is specific to the participant. Please encourage the participants not to forward their URLs to other participants.

Test 1	Invitation status: 🔲 🛛 🗮 Survey options	17
Editing existing Study ID 7 Test Study ID Form Status	7 Open survey	invitation ode and
Complete?	Save and Continue Save and Continue	
	Cancel Delete Record (All forms) Additional delete options:	
	Delete data for THIS FORM only	

- The survey queue can act as a checklist for the participant. The individual is able to see the list of surveys that have been completed and the surveys that are remaining to be completed (Image 1).
- To obtain the participant's survey queue URL, click the 'Get link to my survey queue' button. This will open the options to a) copy the URL or b) to enter the participant's email address to automatically send the URL (Image 2).

Image 1

Have a nice day!		
≣ Survey Queue		Get link to my survey queue
Please complete the	urveys below. Please contact ABC with any questions.	Thank you
Status	Survey Title	
Completed	Test 1	
Begin survey	Test 2	

Get	link to my survey queue	×
To ol may ema	btain your survey queue link, which will allow you to return to your survey queue in the future, you copy and paste the link displayed in the text box below, or you may have it emailed to you at your il address.	
œ (Copy and paste the survey queue link	
	https://redcap.tsi.wfubmc.edu/redcap/surveys/?sq=Poo7UREY2s	
	Send the survey queue link in an email	
	* Your email address will not be stored	
	Close	

Section B: If the project contains traditional data collection forms and surveys

If the project contains traditional data collection forms and surveys, and the survey queue is dependent upon certain data collection forms (or variables within other forms) being completed prior to a survey appearing in the Survey Queue, then the 'Display the survey in the Survey Queue when...' section will utilize the 'when the following logic becomes true' option.

Step 1:

- Enable any forms that will be used as surveys (instead of as data collection instruments).
- If various forms will be traditional data collection instruments instead of surveys, please do not change them to surveys.
- Navigate to the Online Designer and click on Survey Queue.

In this example, the Demographics form and the Test 2 form will be traditional data collection forms.

Project Home	Project Setup	👺 Online Designer	📑 Dat	a Dictionar	f .			
				- 69	DEO: How to u	ise this page		
e Online Designer will OTE: While in developn	allow you to make proje nent status, all field char	ect modifications to fields and nges will take effect immedia	d data cately in n	ollection inst eal time.	ruments very easily	using only your web browser.		
	Survey option	15:	Add	new instrume	nt:			
Data Collection := Survey Queue Survey L			Login Create a new instrument from scratch					
Instruments	Survey I	Notifications	ol	pload instr	ument ZIP file from a	another project/user or <u>external libraries</u>		
Instrument name		Fields	View	Enabled as survey	Instrument actions	Survey-related options		
Demographics		6	1	Enable	Choose action 🤝			
Test 1		0	-	•	Choose action 🤝	Survey settings + Automated Invitations		
		0	-	Enable	Choose action 🤝			
Test 2								

Step 2:

• At the top of the Survey Queue box, a User can click on custom text to the top of the queue.

Add custom text to display at top of survey queue

to add any



Step 3:

- Activate the survey(s) you want included in the queue then complete the 'Display survey in the Survey Queue when...' section for each survey.
- If you want the survey to automatically start as soon as the condition is met, then click on the 'Auto Start?' checkbox.

In this example, we want the

- a) Test 1 survey to appear in the queue once the Demographics form has been completed. **and**
- b) Test 3 survey to appear in the queue once the Test 2 form has been completed.

Since the Demographics form and the Test 2 form are traditional data collection instruments, we will need to use the 'when the following logic becomes true' option.

For the purposes of this example, we want the Test 1 survey and the Test 2 survey to appear when the Demographics form and Test 2 form are marked 'Complete.'

1. Navigate to the codebook to determine the variable names for the complete variables. The codebook can be found on the Project Home page.

In this example, here are our variables from the codebook

7	demographics_complete	Section Header: Form Status Complete?		pdown Incomplete Unverified	
q	test 2 complete	Section Header: Form Status	2 dro	2 Complete	
9		Complete?	1	Incomplete Unverified Complete	

2. Return to the Survey Queue and enter the logic statement into the 'Display Survey when...' section. Click on Save.

Please cor	nplete the surveys below. Please co	ontact ABC with any questions. Thank you		
	You may use Piping or HTML fo	rmatting in the custom text: bold, <u> underline, <i> italics, link, etc. // How to use Pl</i></u>	iping	
Activated?	Survey Title	Display survey in the Survey Queue when	Auto	
4	"Test 1"	When the following survey is completed:		
V		select a survey 🔻		
Activated		AND V		
		When the following logic becomes true: How to use this		
Deactivate		[demographics_complete]="2"		
		(e.g., [age] > 30 and [gender] = "1"]		
1	"Test 3"	When the following survey is completed:		
		select a survey 🔻		
Activated		AND T		
		When the following logic becomes true: How to use this		
Deactivate		[test_2_complete]="2"		
		(e.g., [age] > 30 and [gender] = "1"]		

Continue with Step 5 above for obtaining the Survey Queue URL for the participant.

NOTE: Please be sure to test the project thoroughly to ensure the Survey Queue is functioning correctly.

Once you have tested the project, please place the project into production before collecting any real data. If the project requires IRB/IACUC approval, please ensure you have approvals before collecting any real data.