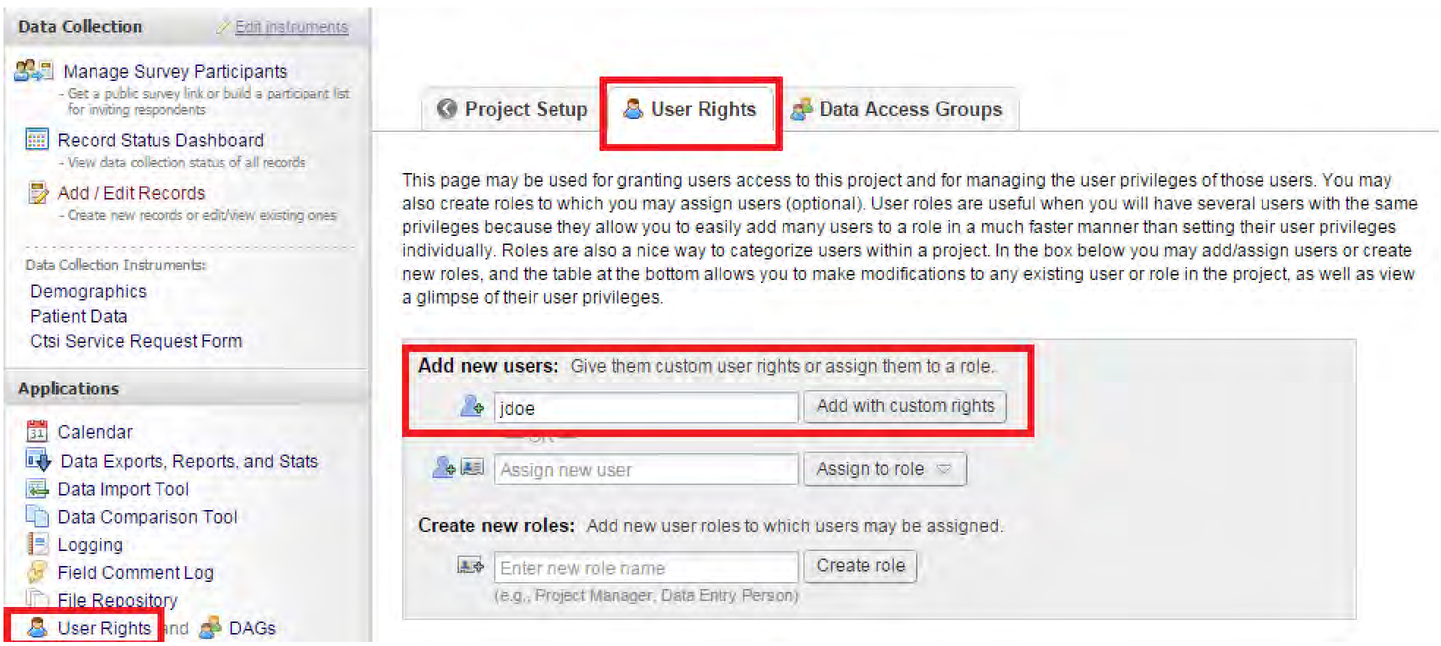
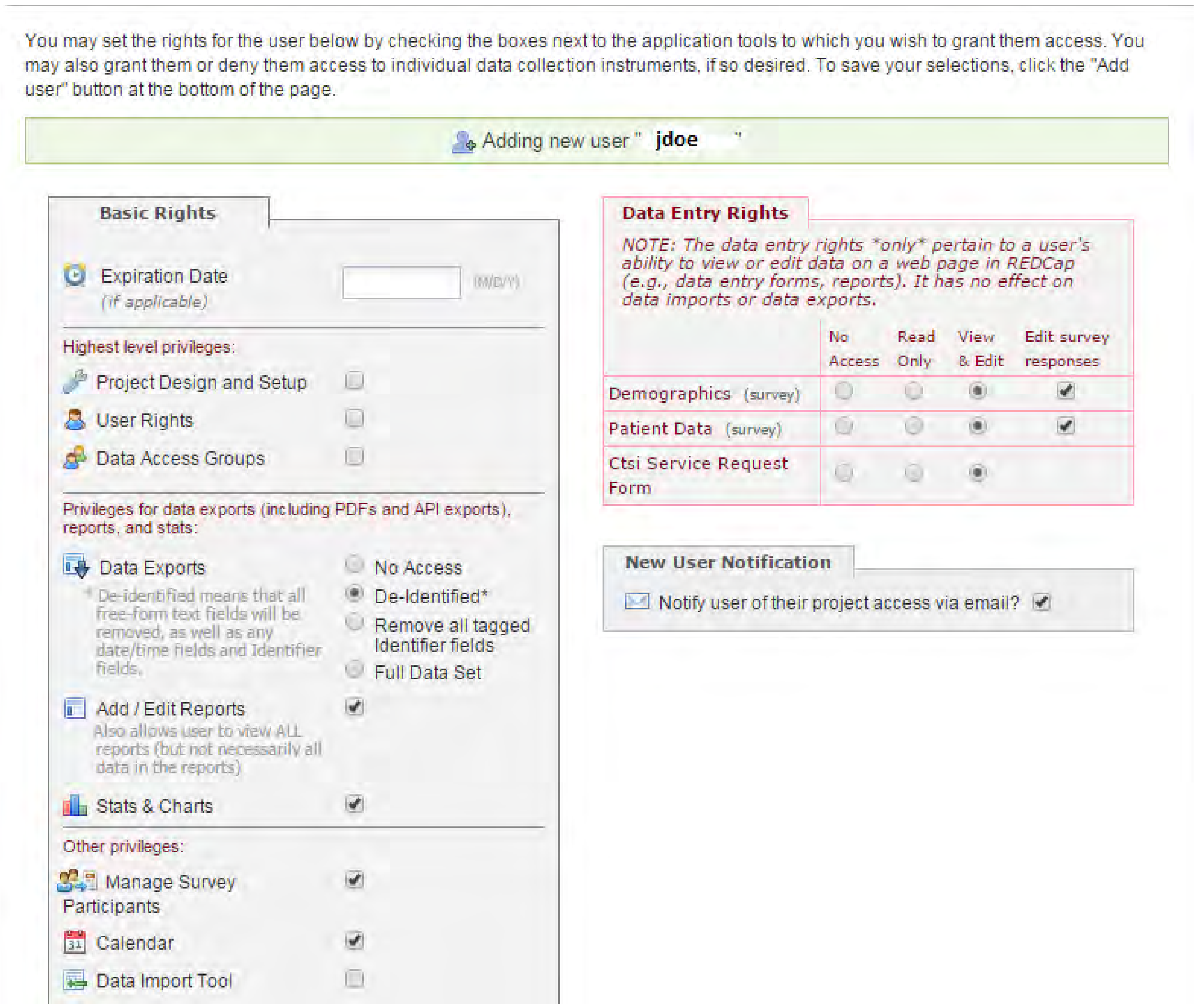
REDCap – How to add a User to a project

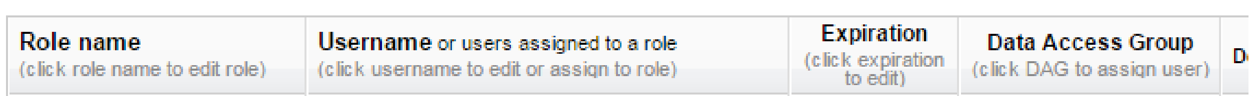
- Navigate to the User Rights hyperlink, located on the left side of the project screen. This hyperlink will open the User Rights tab.
- In the 'Add with Custom Rights' text box, enter the username of the individual you want to add to the project. For example, if the individuals email is: jdoe@gwu.edu,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



- 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.



- 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.



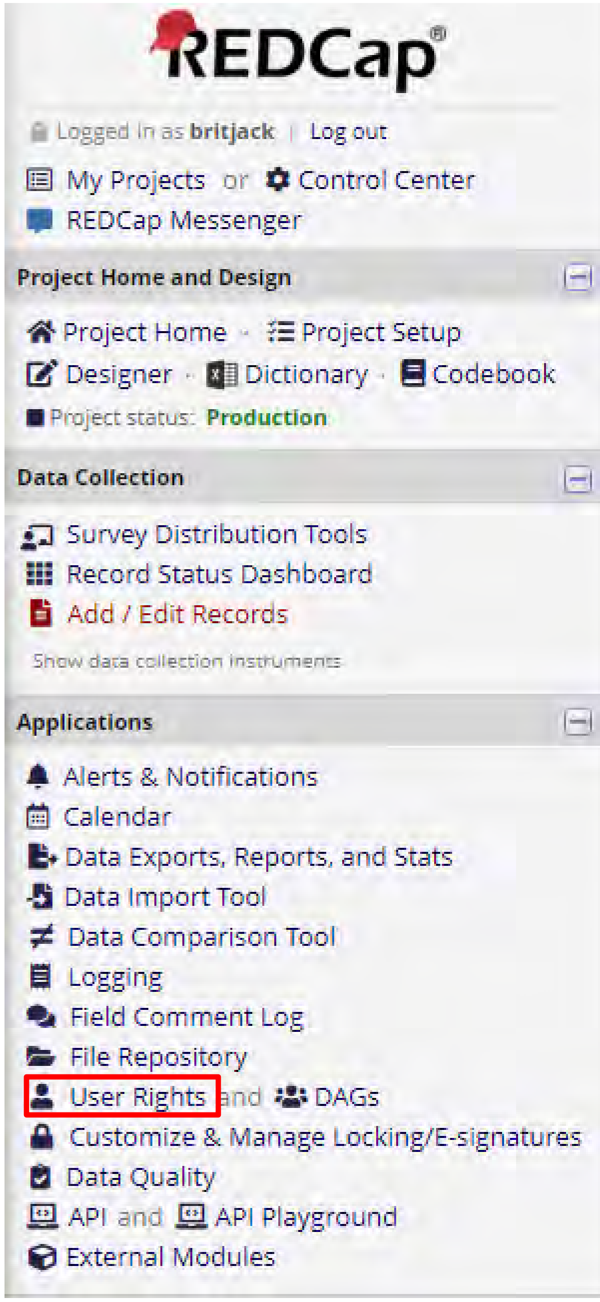
Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration to edit)	Data Access Group (click DAG to assign user)	D

REDCap - How To Enable an Email Notification for Survey Responses

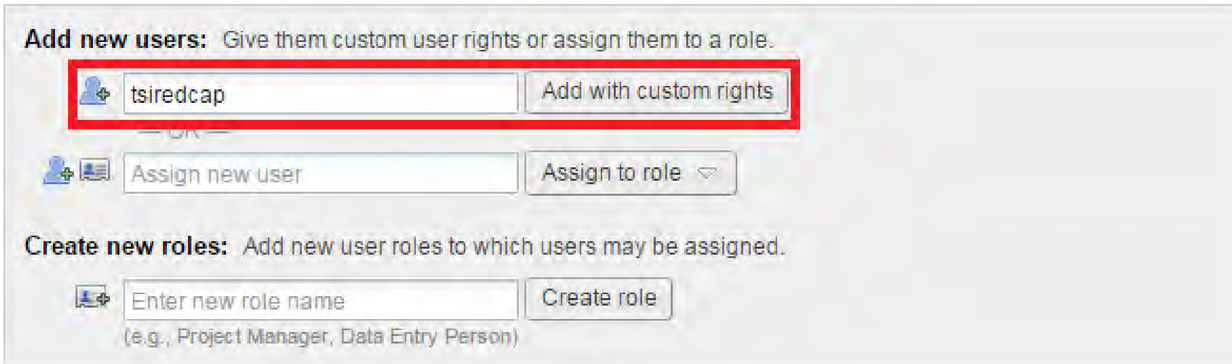
Individual users may be added to receive survey notifications each time a participant completes a survey.

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

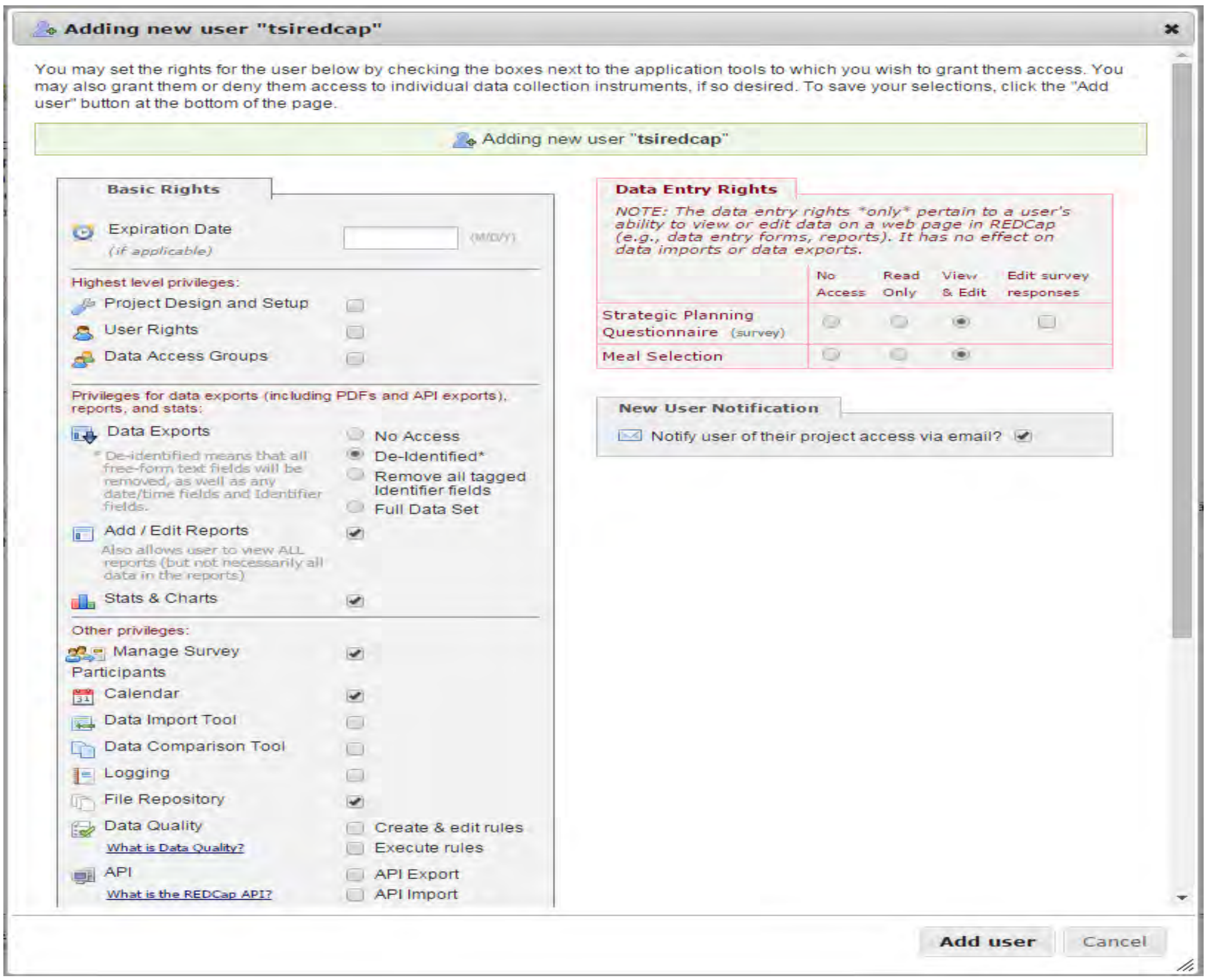
- To add a user as a survey notification recipient, first add them as a User to the project.
  - Navigate to the Tool Bar on the left-hand side of the screen. Select User Rights.



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

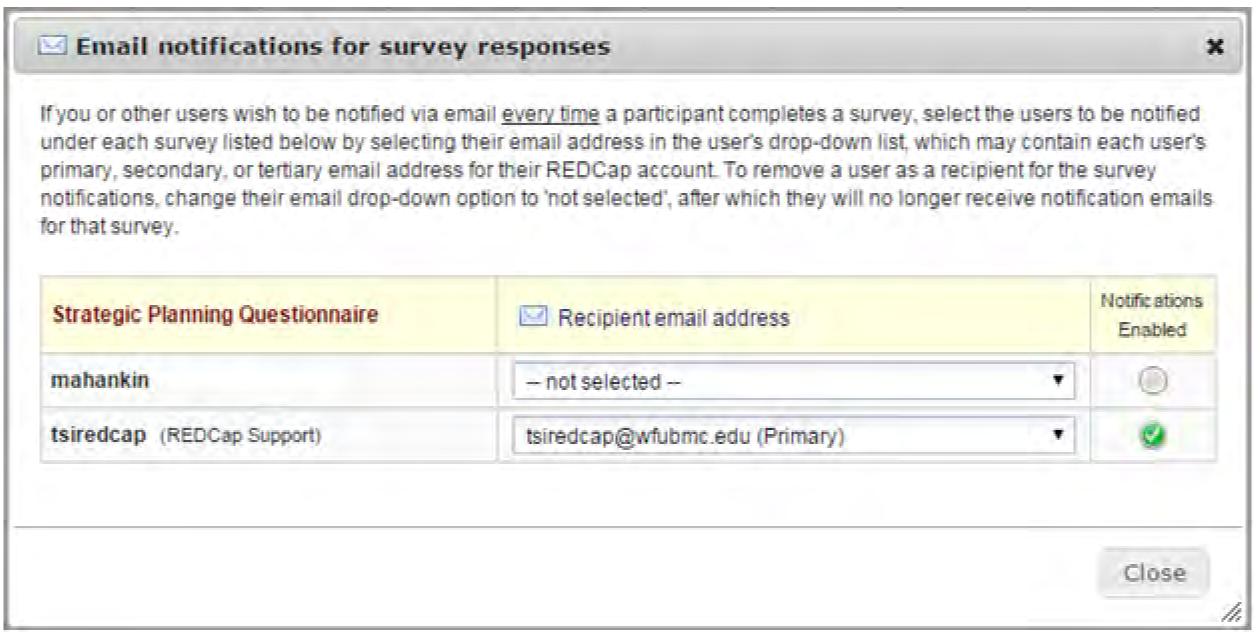


- The User Rights pop-up will appear where you can designate rights to the user. Click Add User.



- 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.

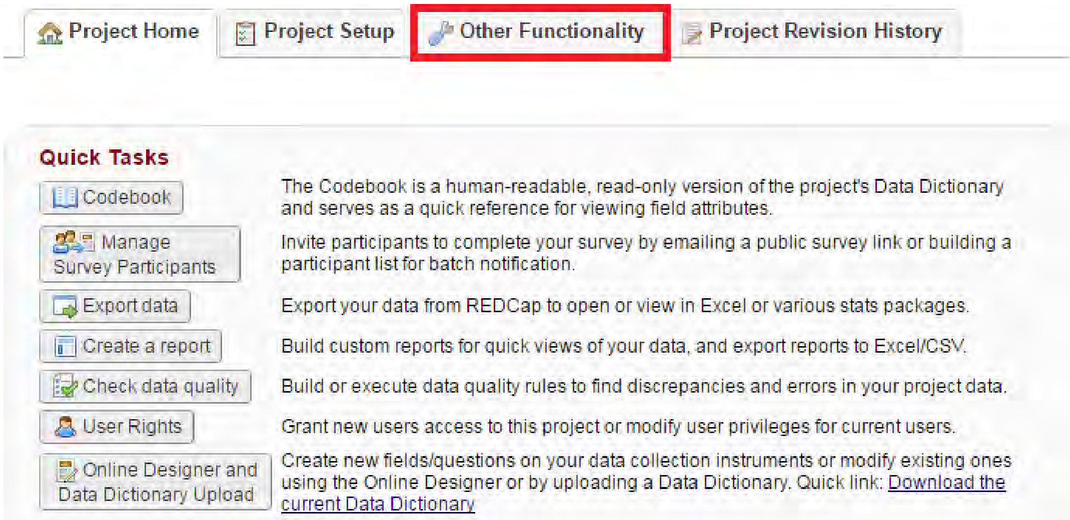
- Select the email address next to the recipient you would like to receive email notifications.



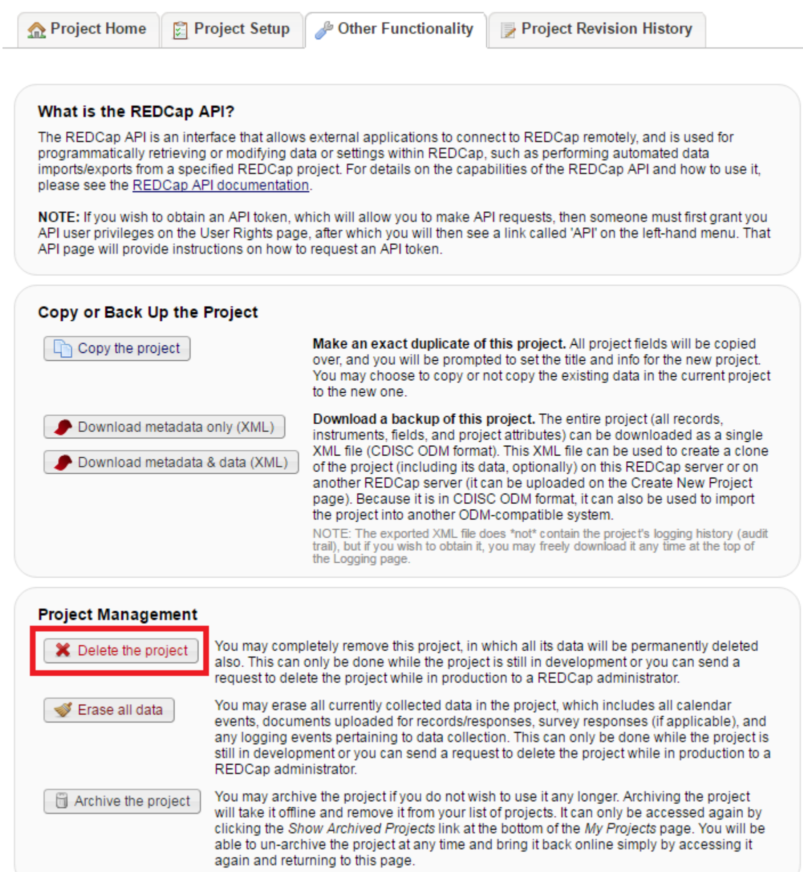
- If the account (or individual user) has not logged into REDCap prior to this event, which may happen at times with generic email addresses, please first log the account/user into REDCap using the account's/user's credentials. (If you are unsure of the account password, contact IT for this information.) 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.

REDCap – How to Archive or Delete a Project

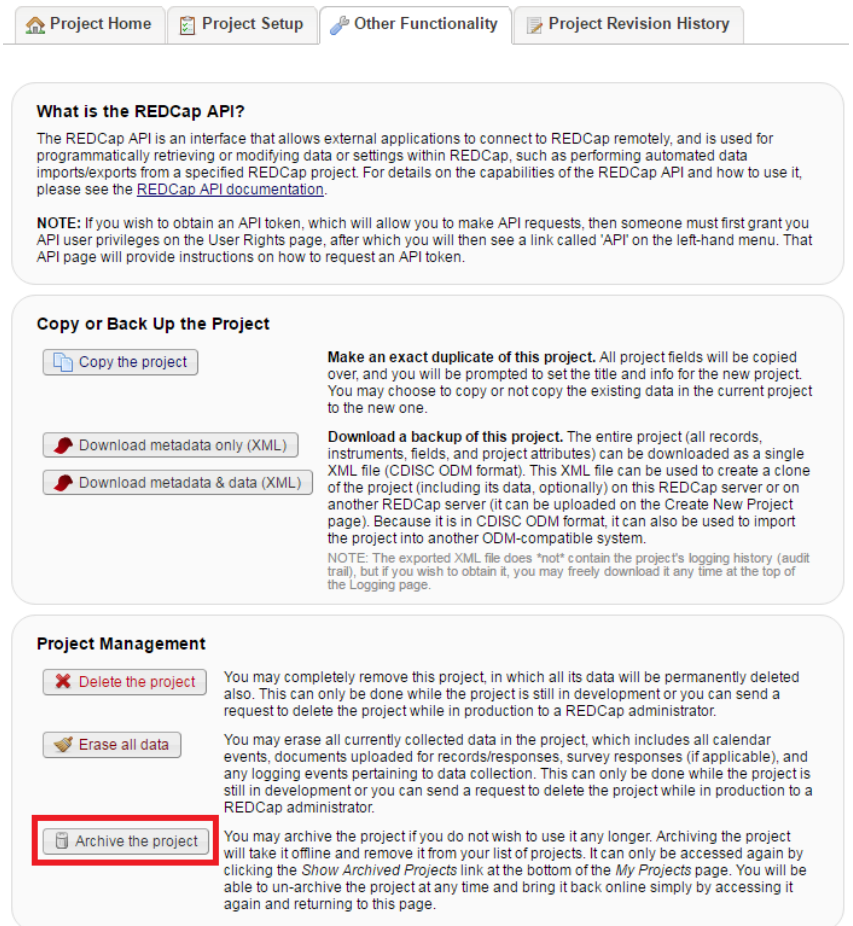
- From the Project Home page, select ‘Other Functionality.’



- **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.'*



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.

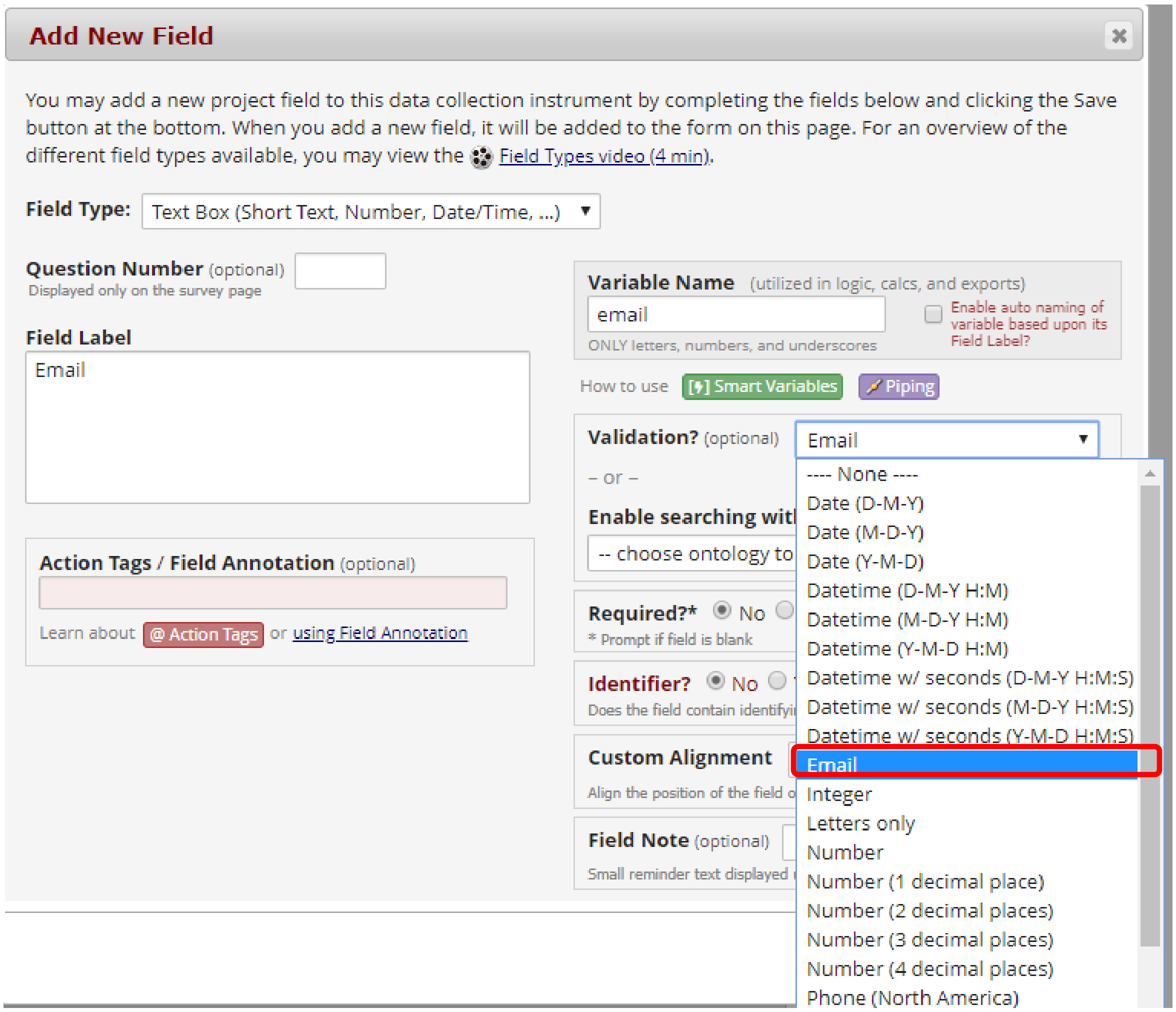
Option 1: Using the public survey link to initiate a Record ID in the project

Step 1:

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

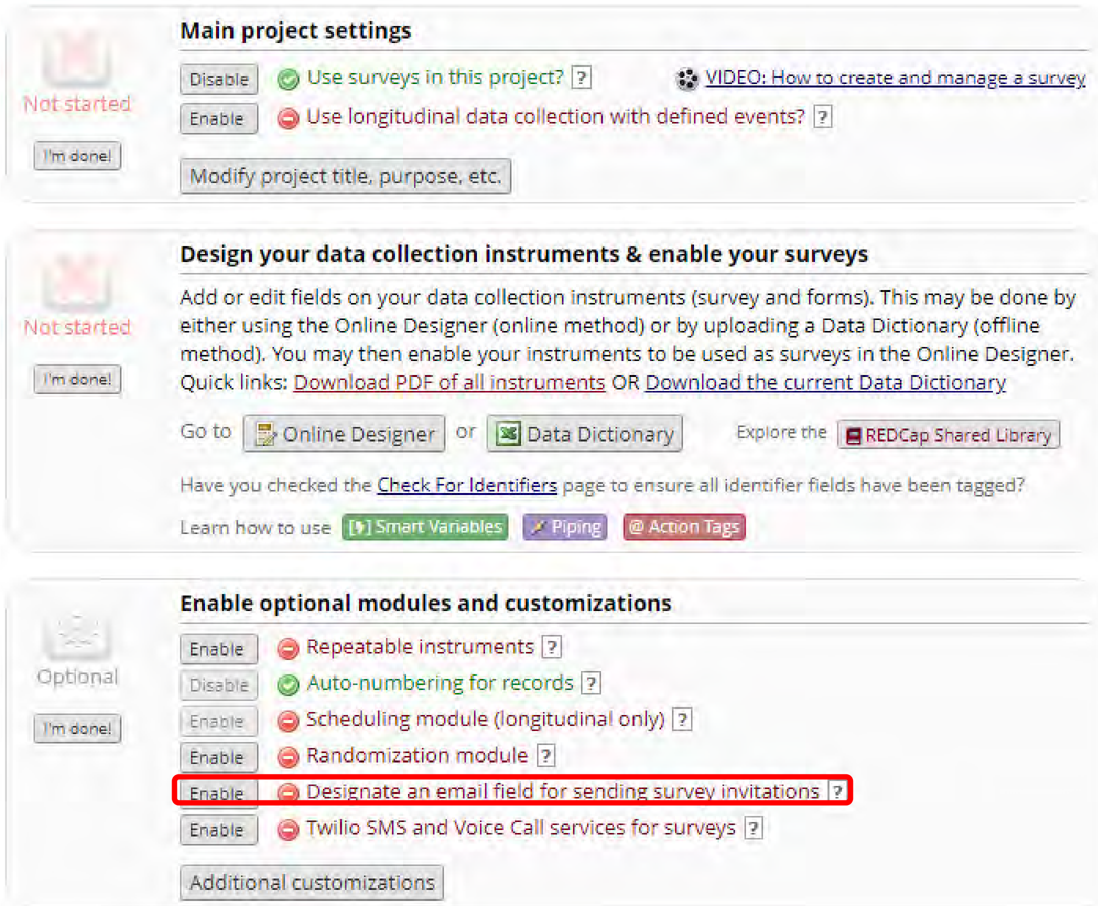
Step 2:

- 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.'

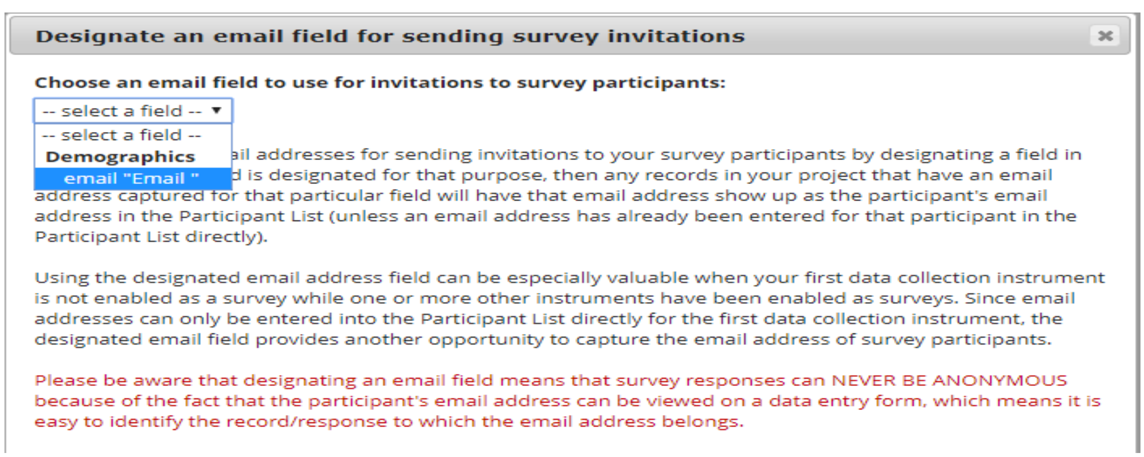


Step 3:

- 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.'

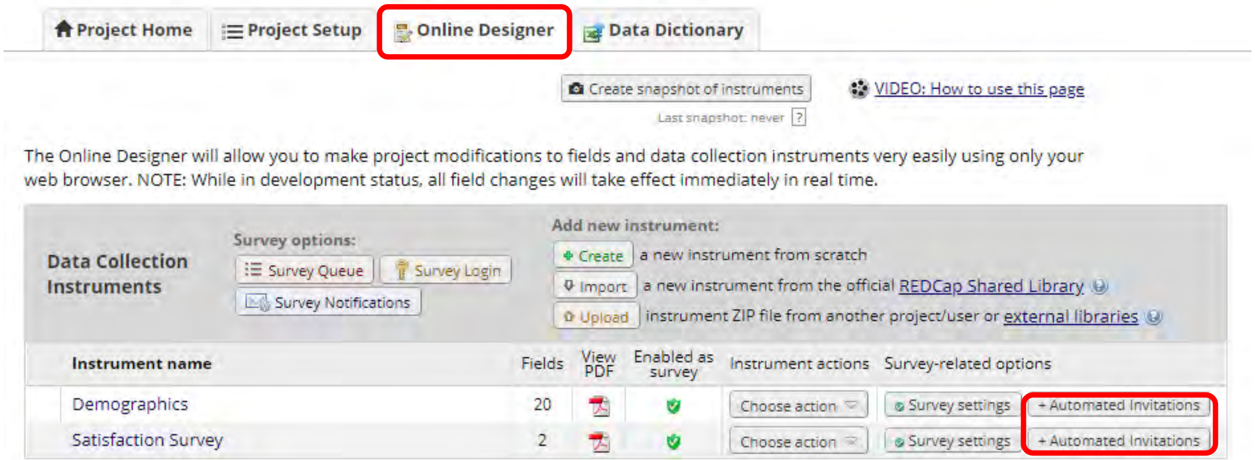


The 'Enable' button will open a pop-up box where you will select the variable name used for the 'Email' field.



Step 4:

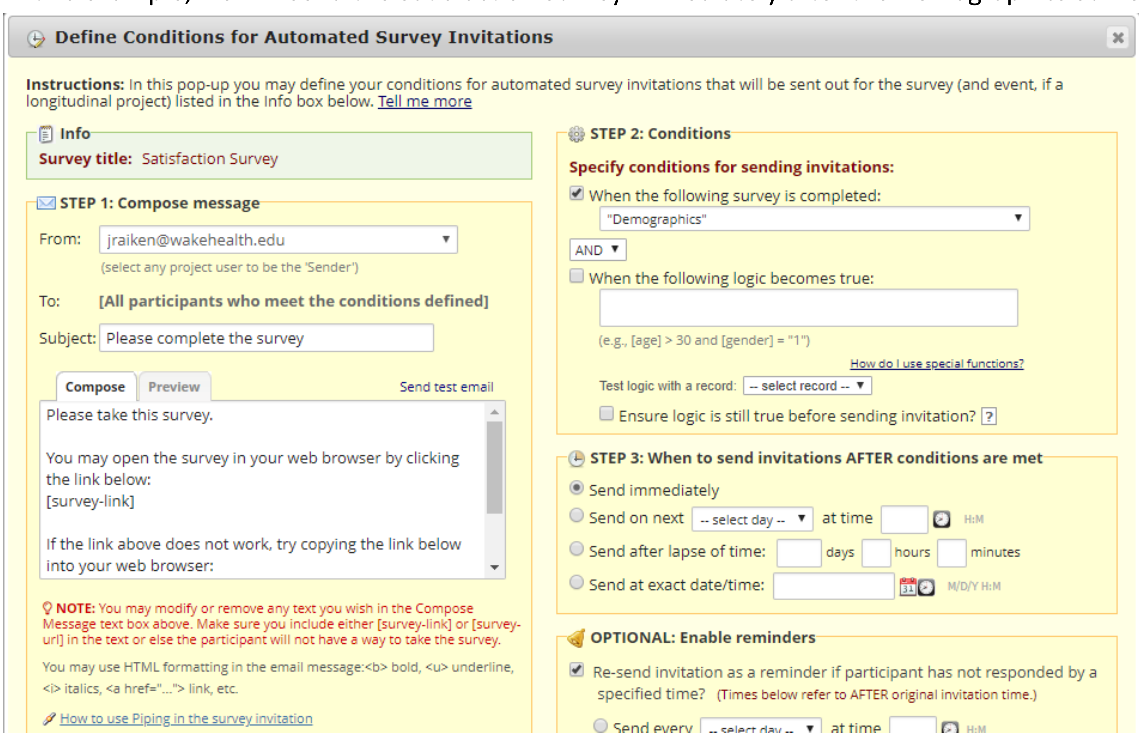
- On the Online Designer tab, click on 'Automated Invitations' for the first survey to be sent with the automated invitation.



Step 5:

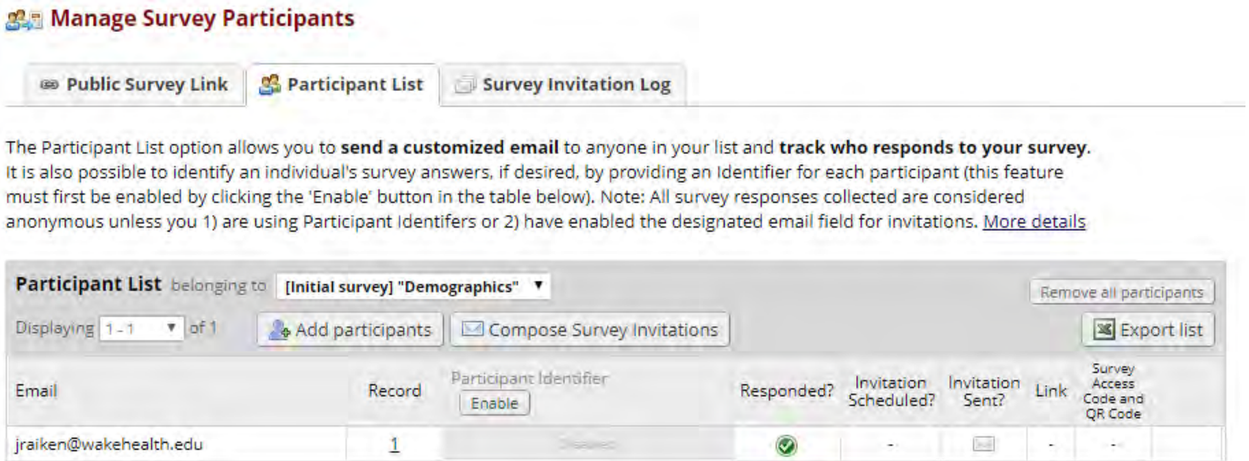
- Define the conditions for the survey – Compose the message, define the conditions, set the time for the invitation to be sent, optional: enable reminders to be sent if the survey is not completed, and finally activate the survey invitation.

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

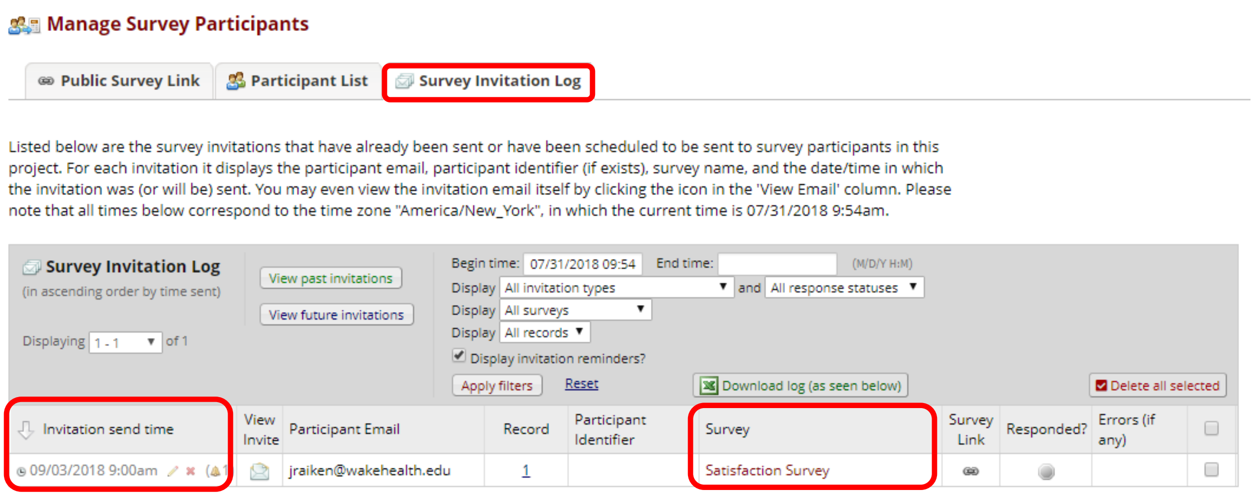


Observations:

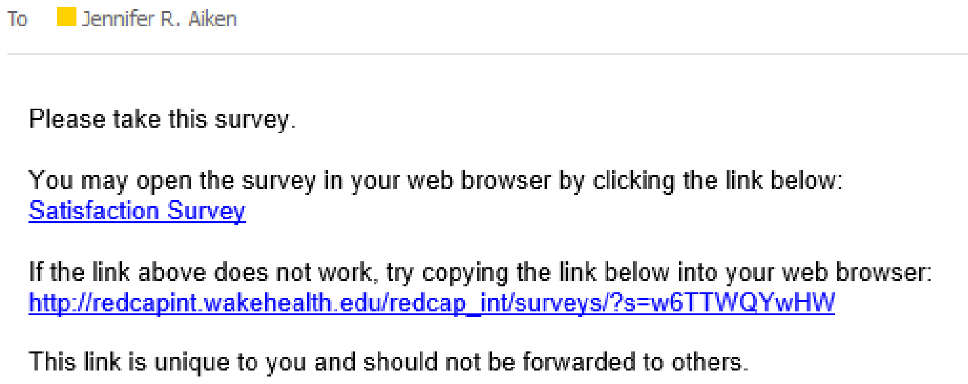
- As participants complete the initial survey and provide their email address, the Participant List will begin to fill with the email addresses. Notice that the individuals Record ID number will appear beside their name.



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



- 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:
http://redcapint.wakehealth.edu/redcap_int/surveys/?s=w6TTWQYwHW

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

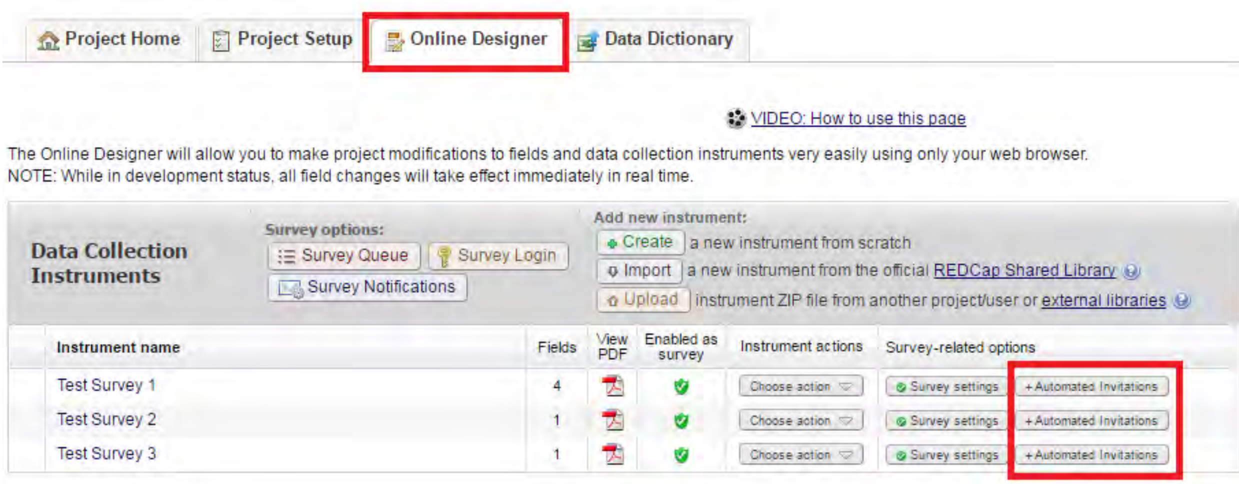
Option 2: Using the participant list to begin the automatic survey invitations

Step 1:

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

Step 2:

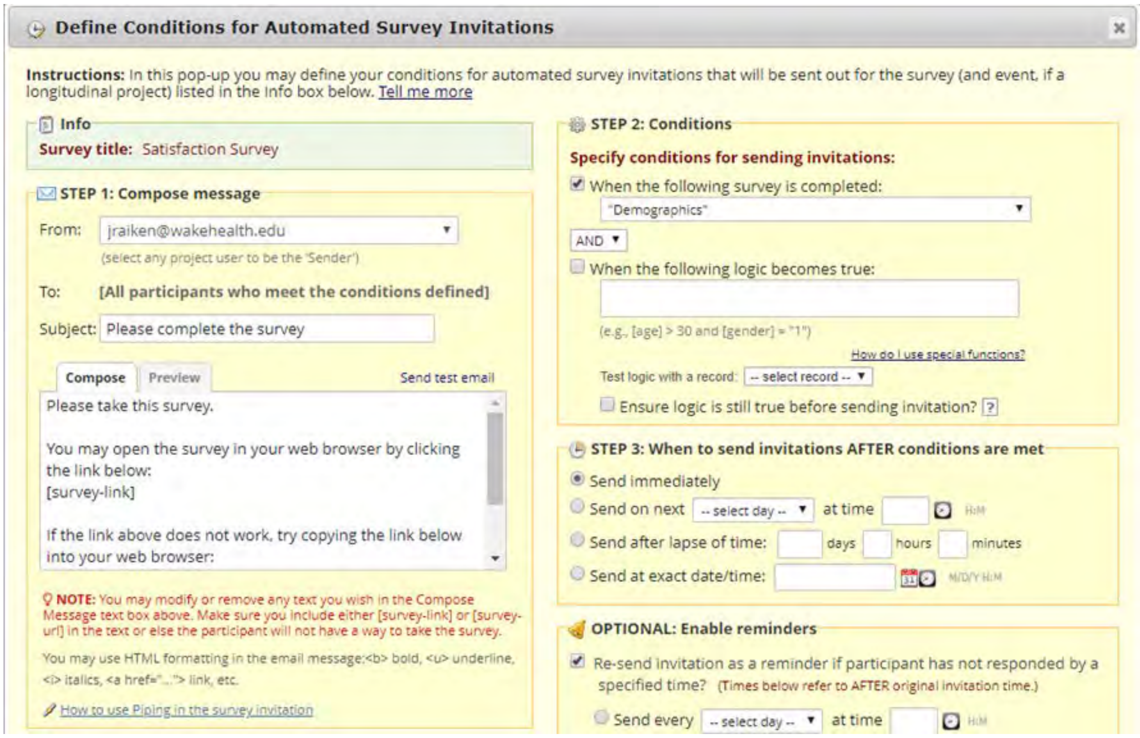
- On the Online Designer tab, click on 'Automated Invitations' for the first survey to be sent with the automated invitation.



Step 3:

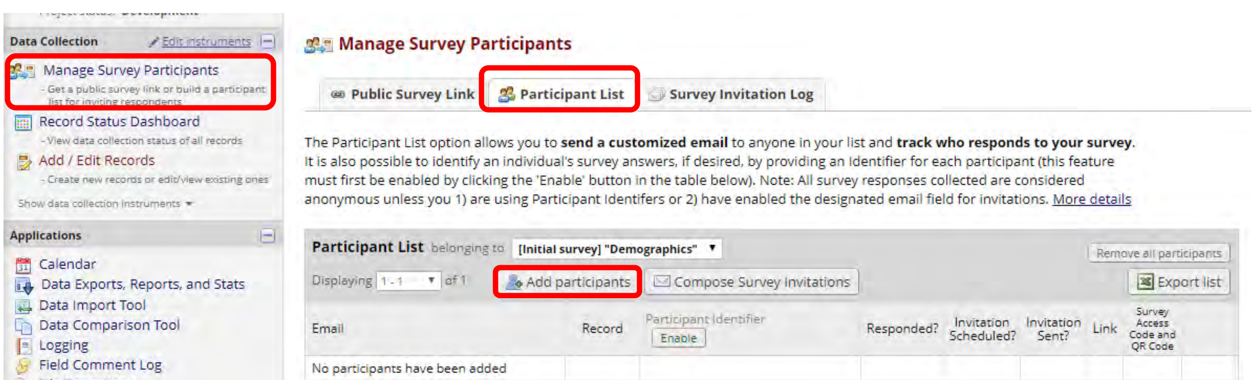
- Define the conditions for the survey – Compose the message, define the conditions, set the time for the invitation to be sent, optional: enable reminders to be sent if the survey is not completed, and finally activate the survey invitation.

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



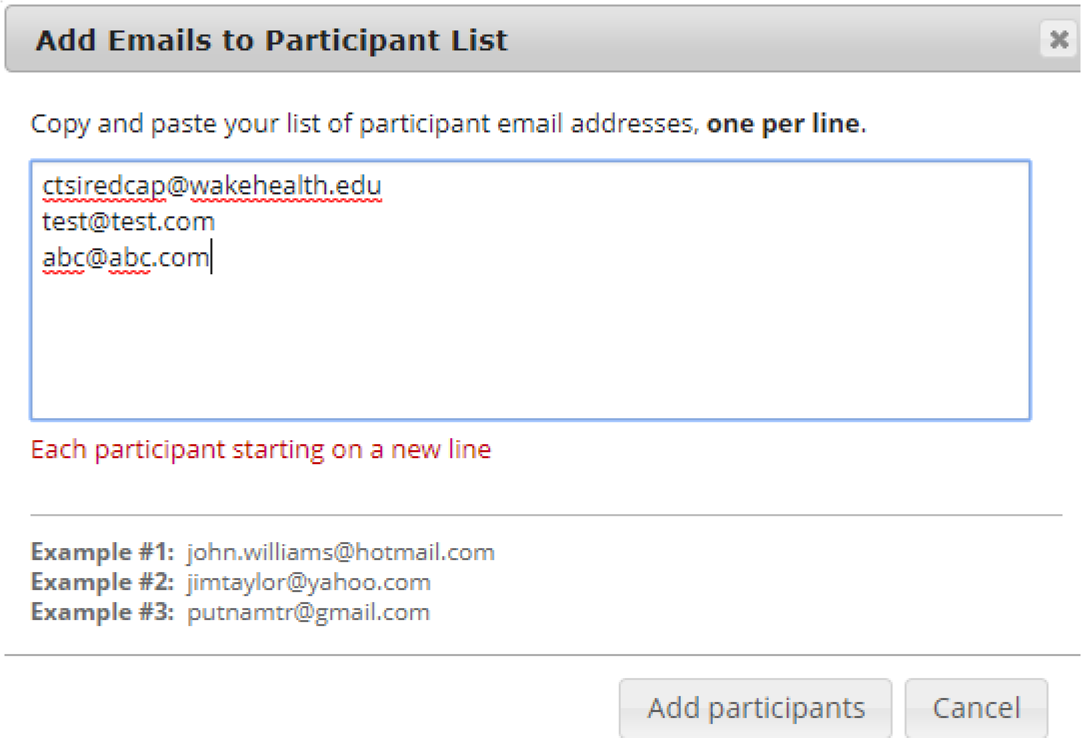
Step 4:

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

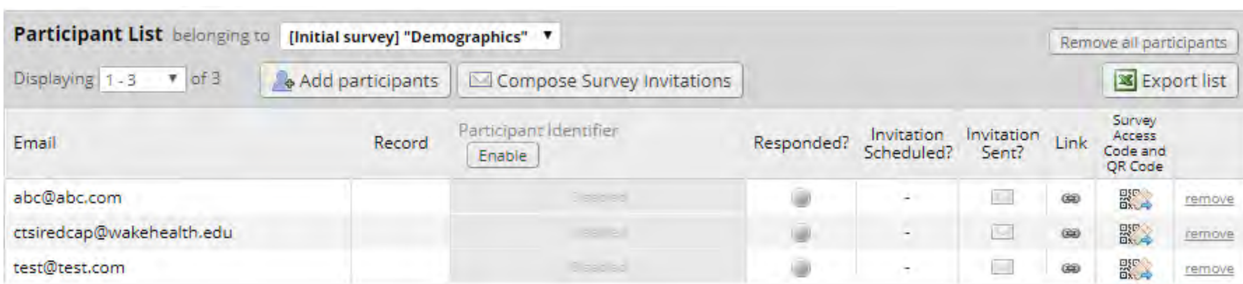


Step 5: Enter the email addresses, one per line.

- 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

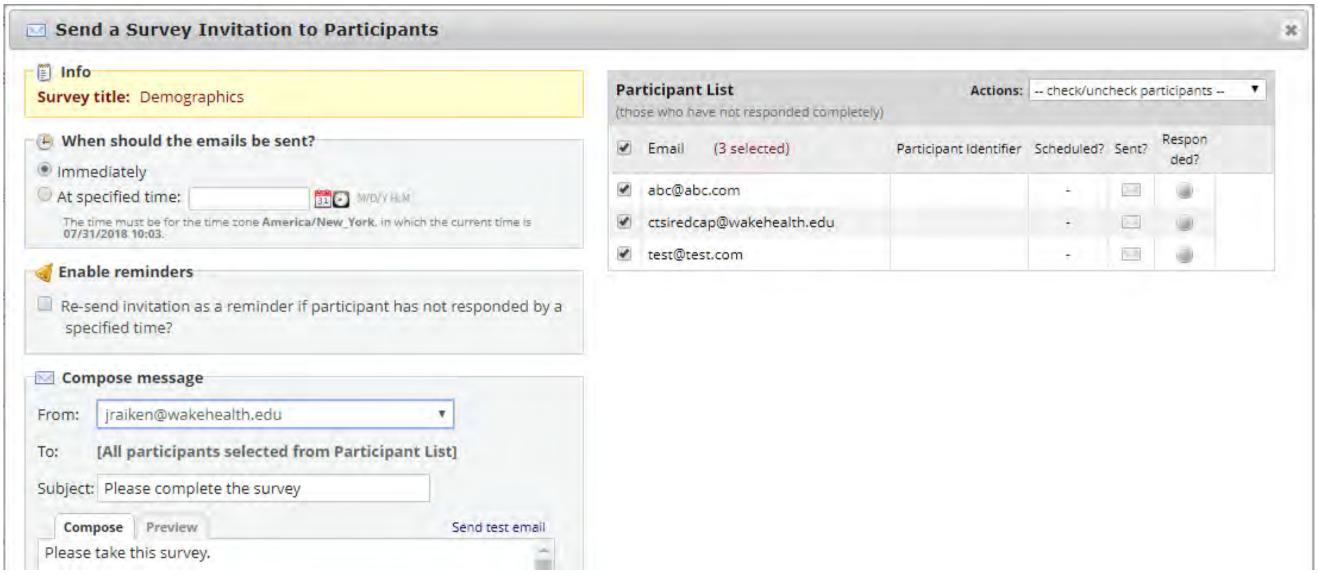


The names will then appear in the Participant List chart.



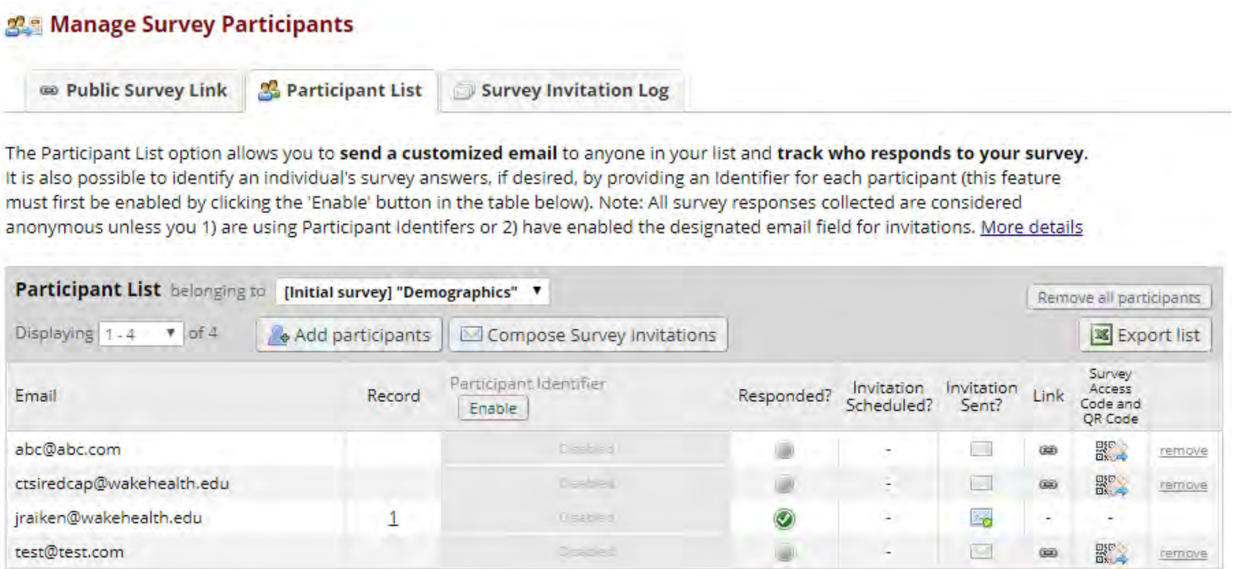
Step 6:

- 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.

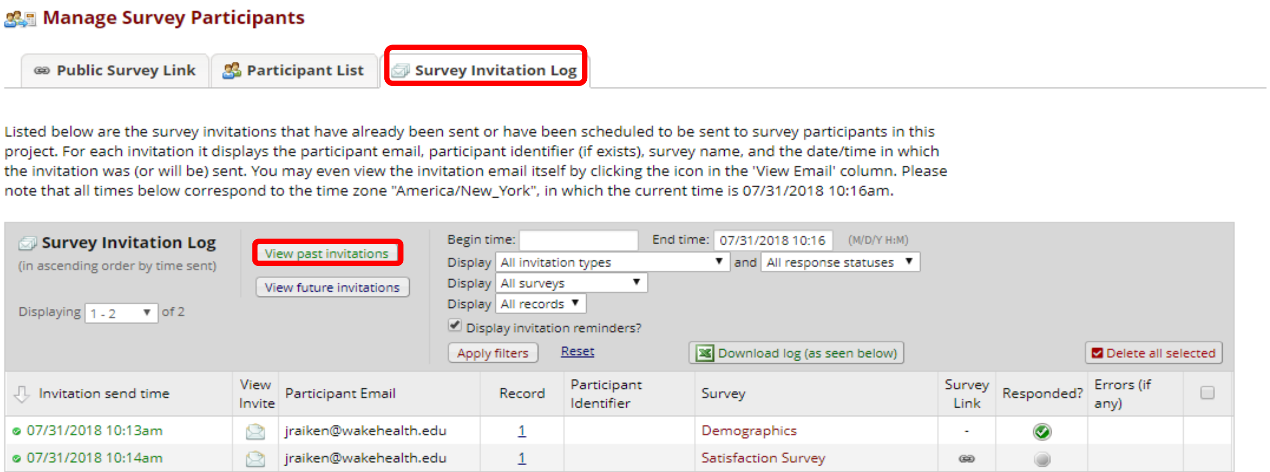


Observations:

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



- 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)
View past invitations
View future invitations
Displaying 1 - 2 of 2
Begin time:
End time: 07/31/2018 10:16 (M/D/Y H:M)
Display All invitation types and All response statuses
Display All surveys
Display All records
Display invitation reminders?
Apply filters
Reset
Download log (as seen below)
Delete all selected
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
-
07/31/2018 10:14am
jraiken@wakehealth.edu
1
Satisfaction Survey

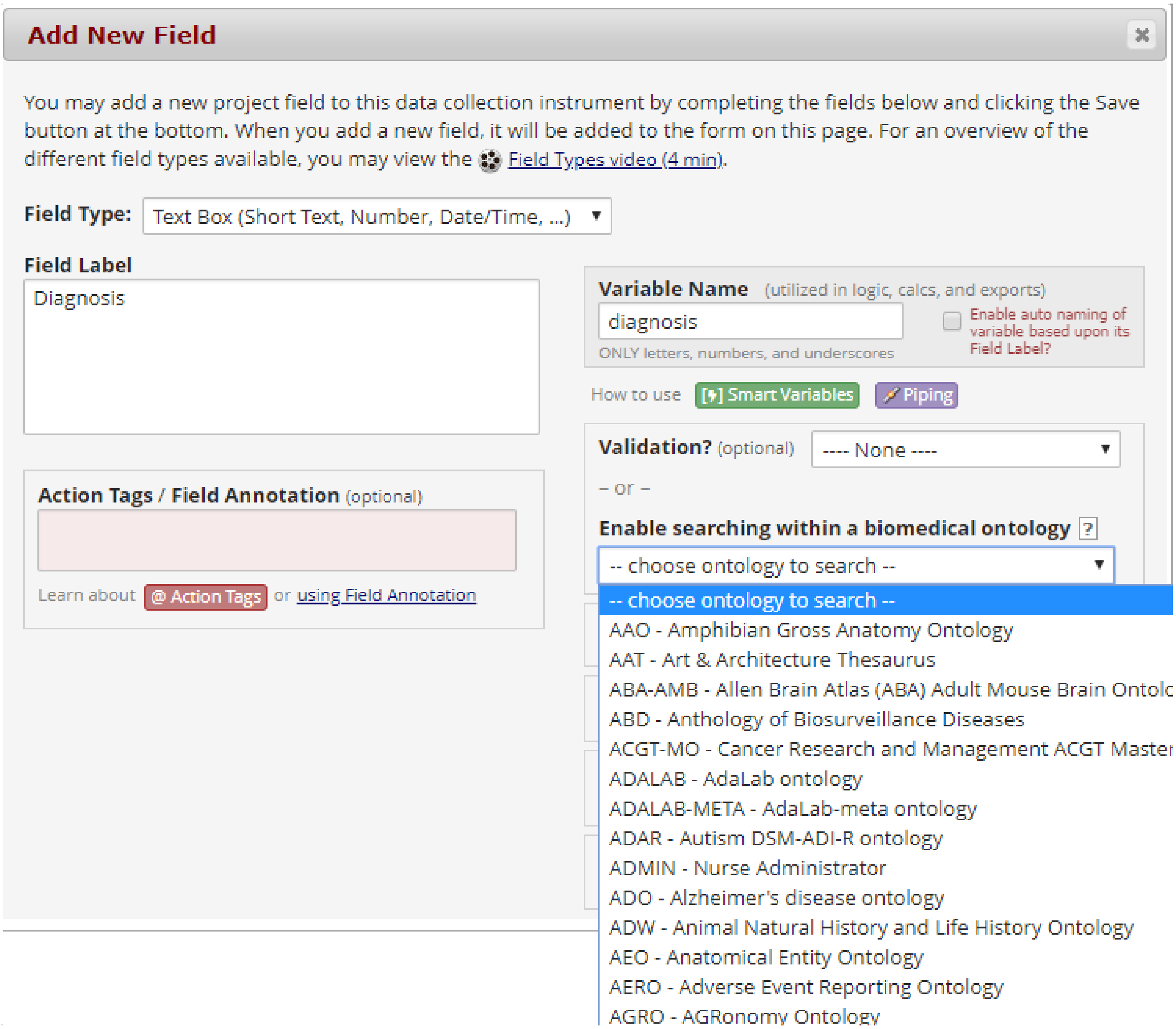
REDCap – How to enable and use the Biomedical Ontology Field

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 Text Box Field.

2. 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.



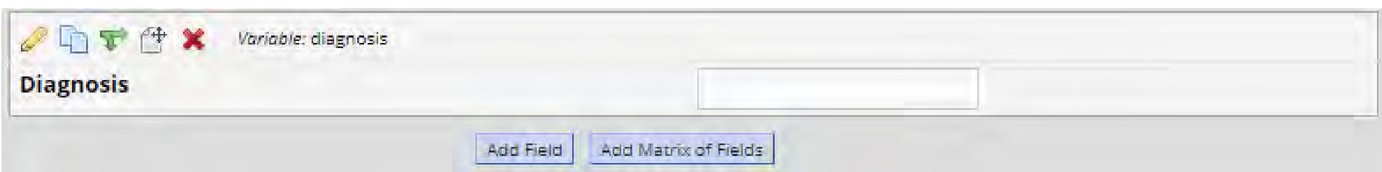
Some commonly used biomedical ontologies are:

a. CPT
b. ICD 9 CM
c. ICD 10 CM
d. ICD 10 PCS
e. LOINC
f. NCFRT
g. RxNORM
h. SNOMEDCT

3. Field Label: 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?”

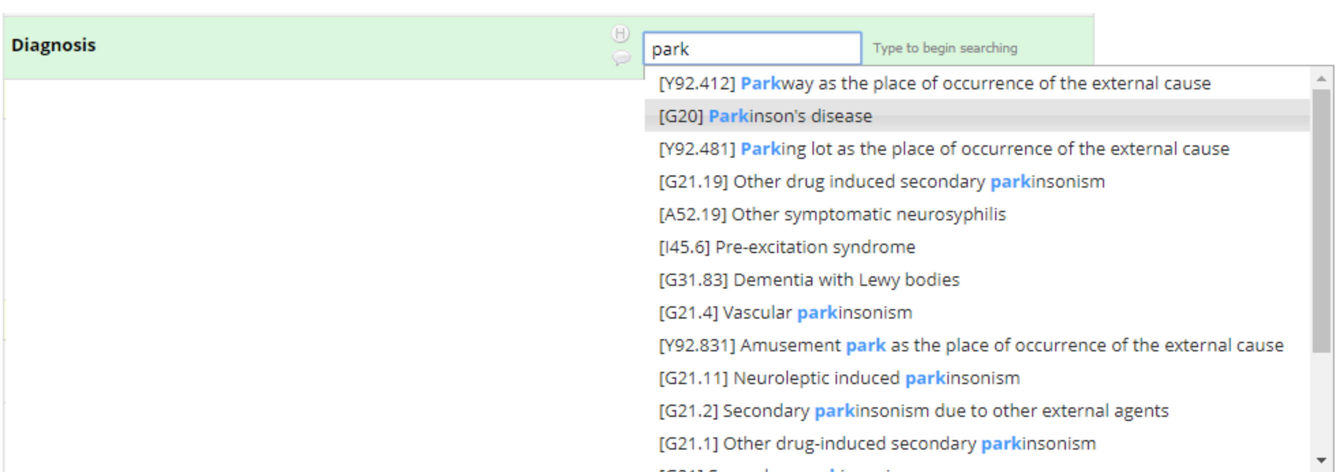
4. Variable name: Provide a variable name that describes what you are capturing, but try to keep the variable name as short as possible. For example, you could use the ontology name (ex: rxnorm) as the variable name.

5. Click on Save for the field type.



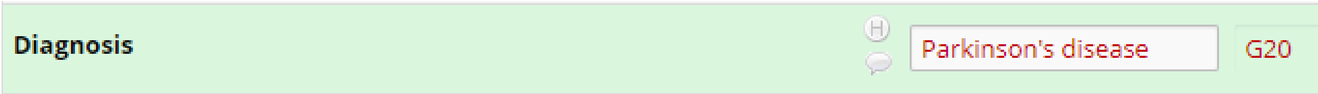
6. The new field is now a dynamic field. When you begin typing in a keyword into the field, the system will automatically generate a drop down of selections based on the ontology and keyword.

   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.



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:



7. The data export Excel fields will appear as this:

- CSV/Microsoft Excel (labels) output:

	A	J
1	Record ID	Diagnosis
3	2	Parkinson's disease

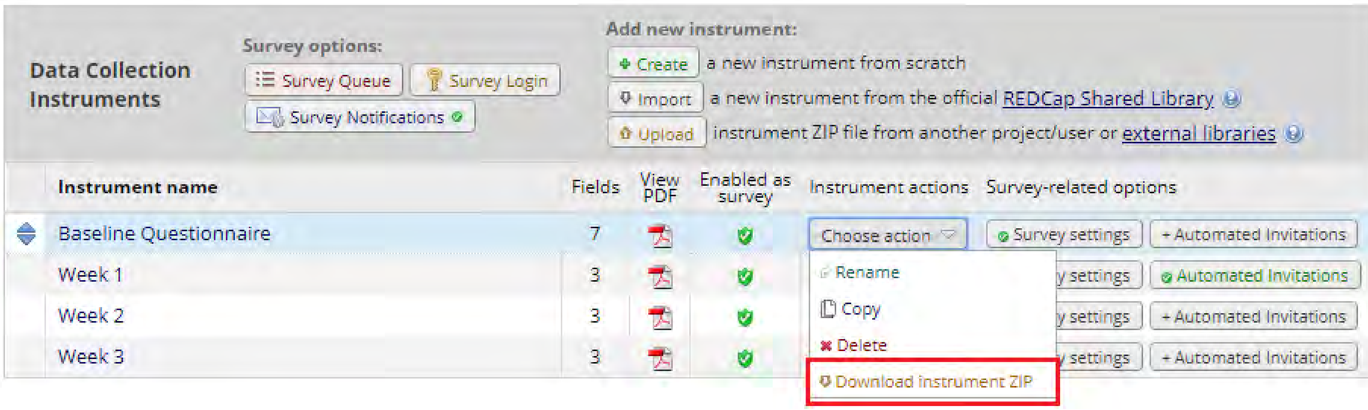
- CSV/Microsoft Excel (raw data) output:
  The raw value that is saved for the field is the ‘notation’ (often an alpha-numeric code) for the given ontology.

	A	J
1	record_id	diagnosis
3	2	G20

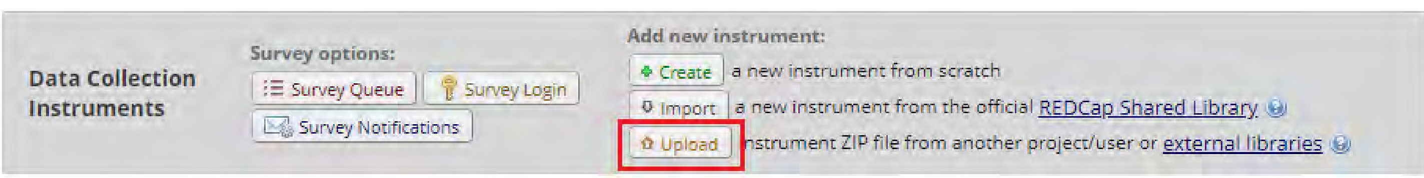
REDCap – How to Copy Instruments from One Project to Another

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.

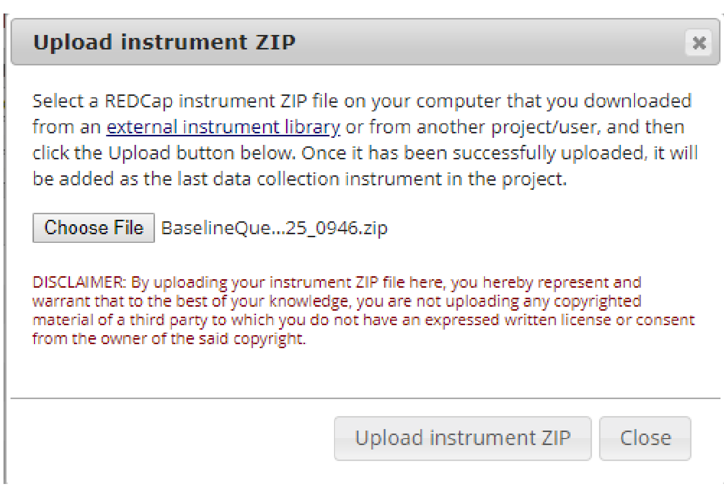
- Navigate to the Online Designer in Project #1, and click on the "Choose action" dropdown button next to the instrument you would like to copy. In the example below, we are copying in the instrument, "Baseline Questionnaire." Select "Download Instrument ZIP."



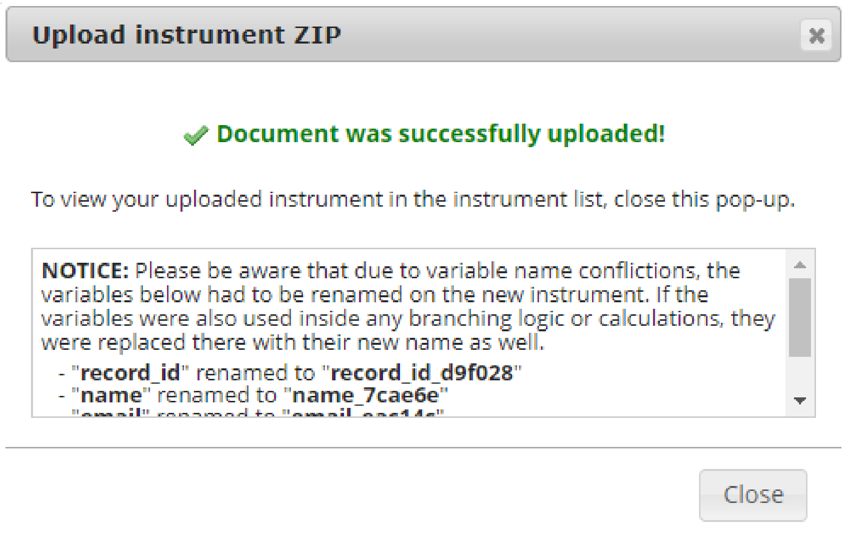
- Save the ZIP file to your computer and note the folder that you saved it in.
- Open Project #2, and navigate to the Online Designer. Click on the "Upload" button under the "Add new Instrument" header.



- 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.



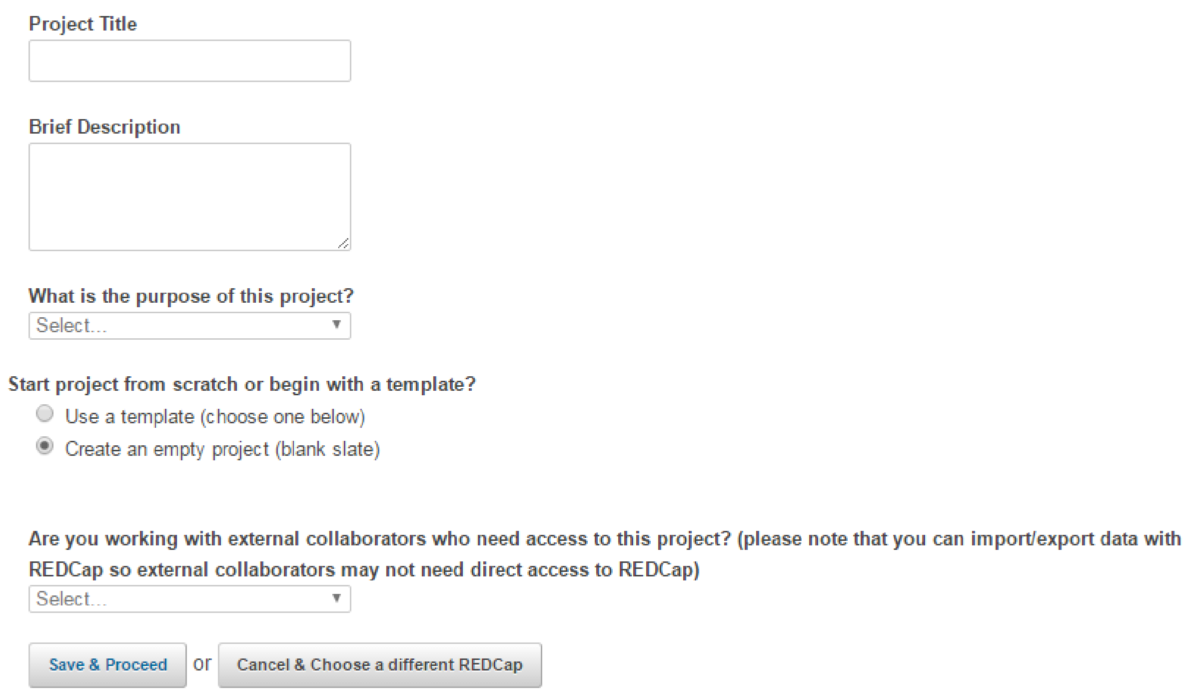
- The instrument will appear at the bottom of your list of instruments, but you can drag it to appear anywhere in the list.

- 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.

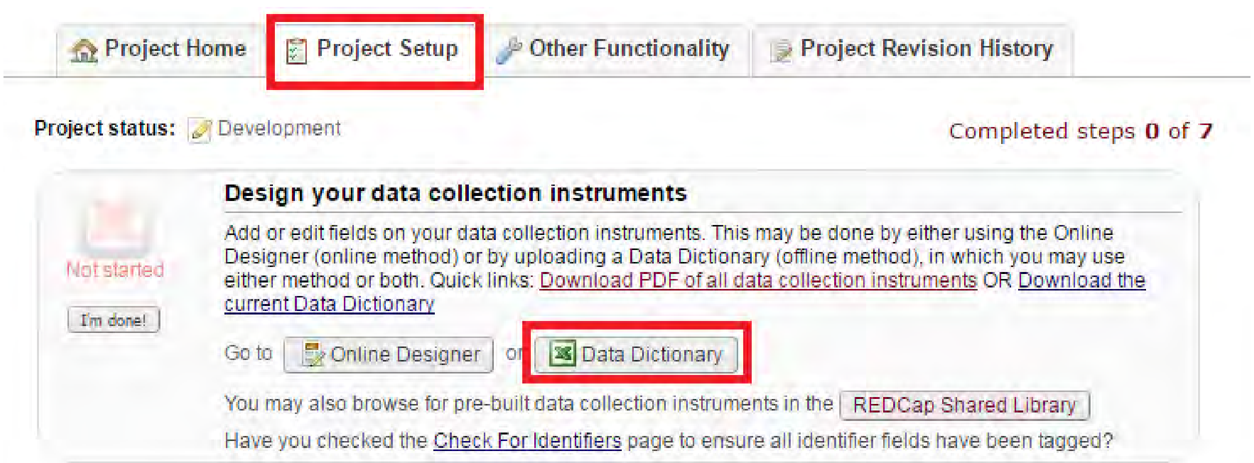
REDCap – How to create a new project using a Data Dictionary from another project

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

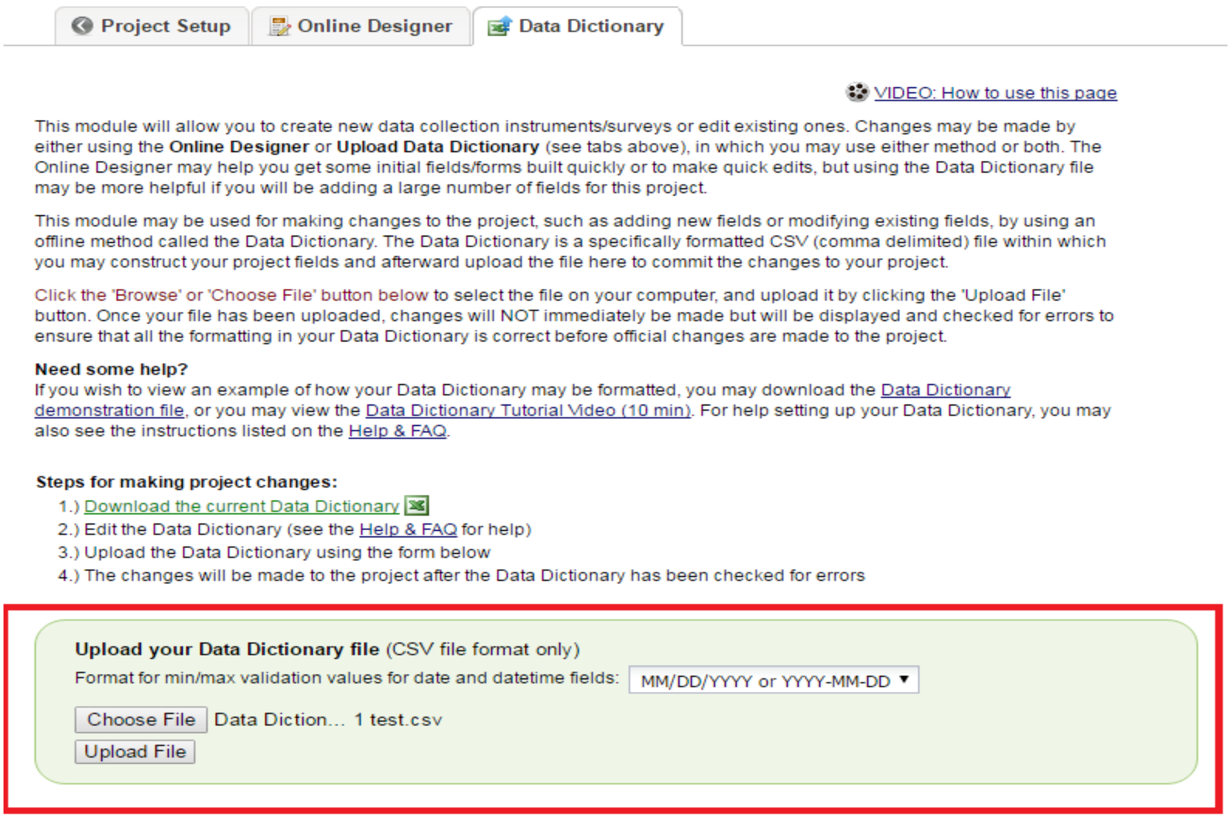
- Create the shell of a Project by entering and selecting the appropriate information then click "Save & Proceed." *Note: Be sure to select "Create an empty project (blank slate) " for the Start Project question.*



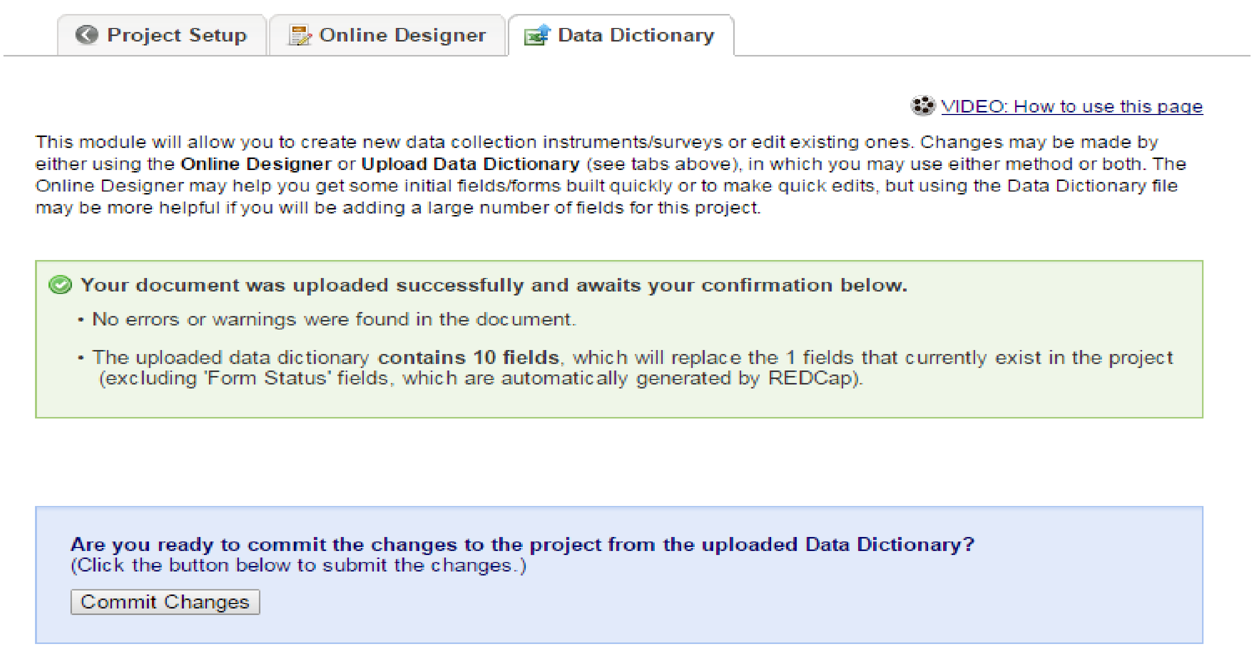
- From the Project Setup tab, click on the Data Dictionary.



- 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 Dicitonary is saved in a .csv format prior to upload.*



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

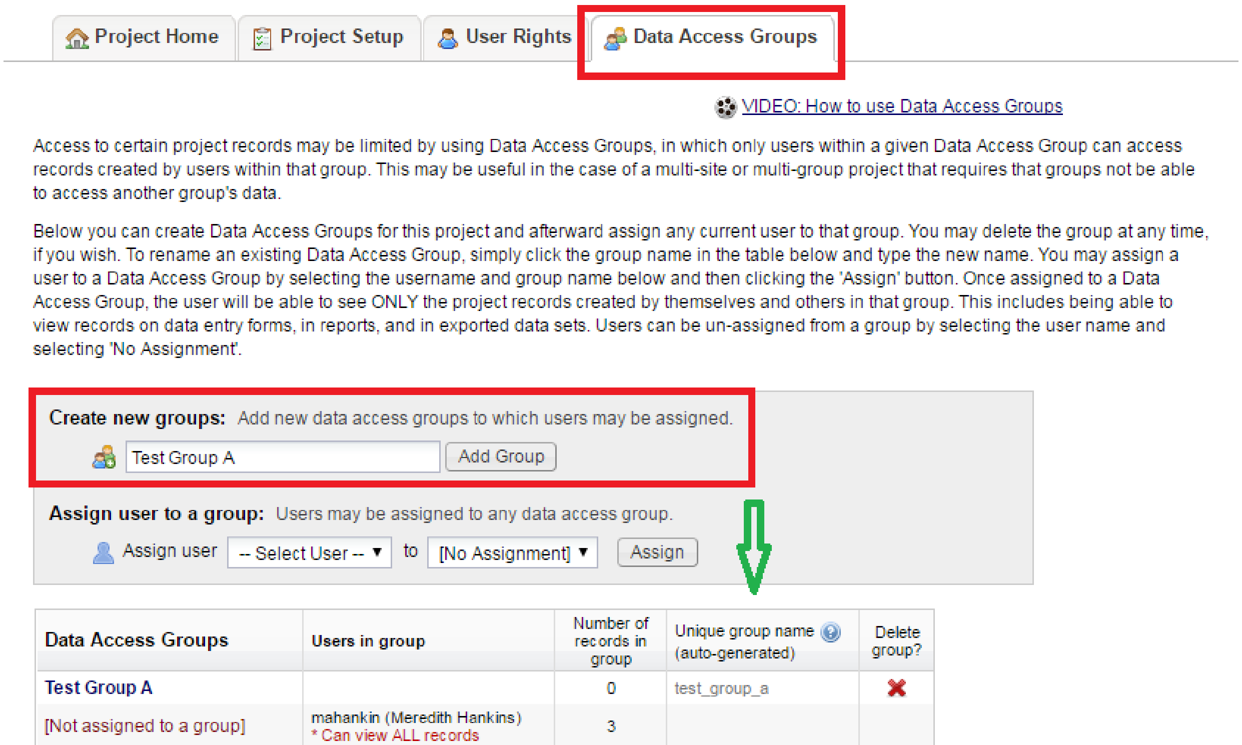


- A successful message will display if the commitment was successful.
- Return to the Project Setup tab to continue creating or editing the project.

REDCap – Data Access Groups (DAG)

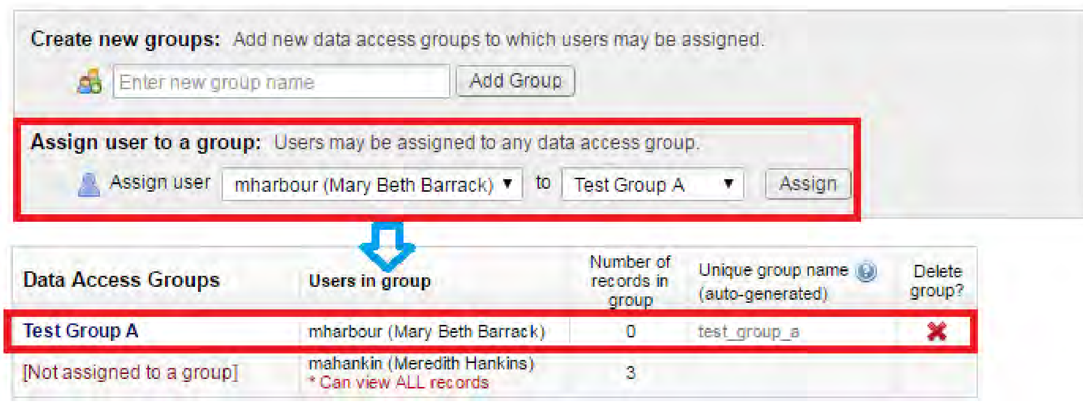
Data Access Groups (DAGs) restrict viewing of data within a database. A typical use of DAGs is a multi-site study where users at each site should only be able to view data from their site but not any other sites. Users at each site are assigned to a group and will only be able to see records created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

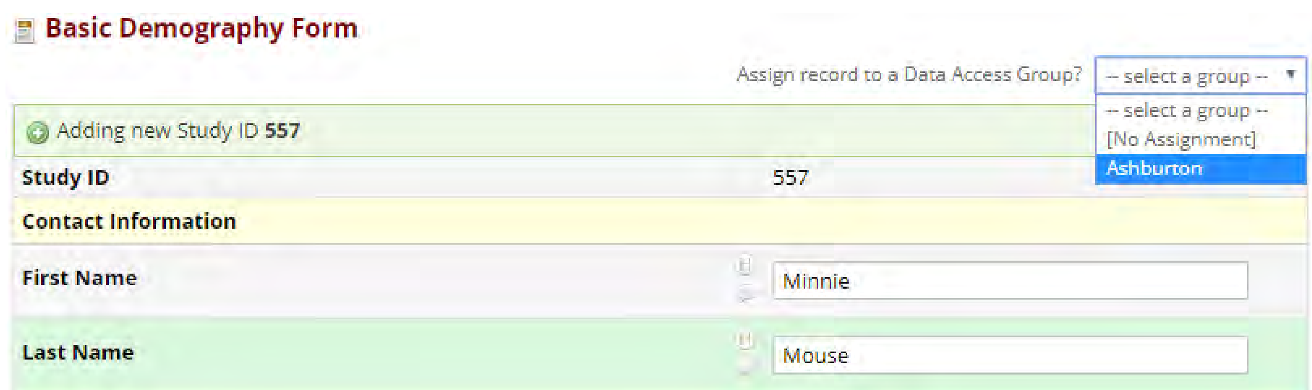


Adding a user to a DAG:

- 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.



- 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.'

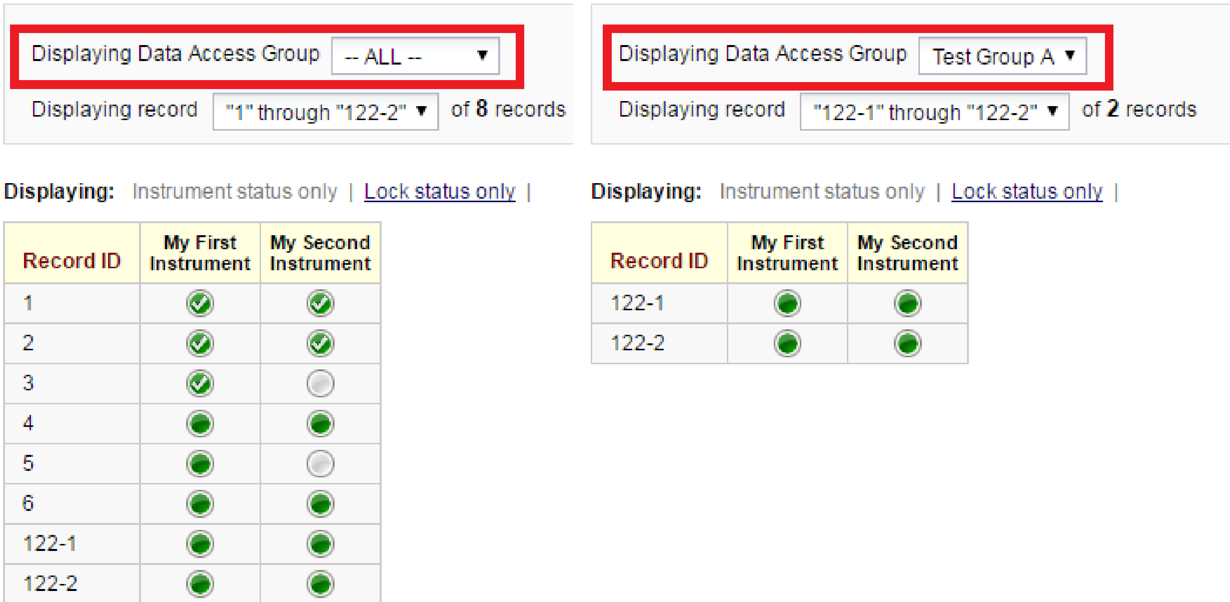


Additional Information:

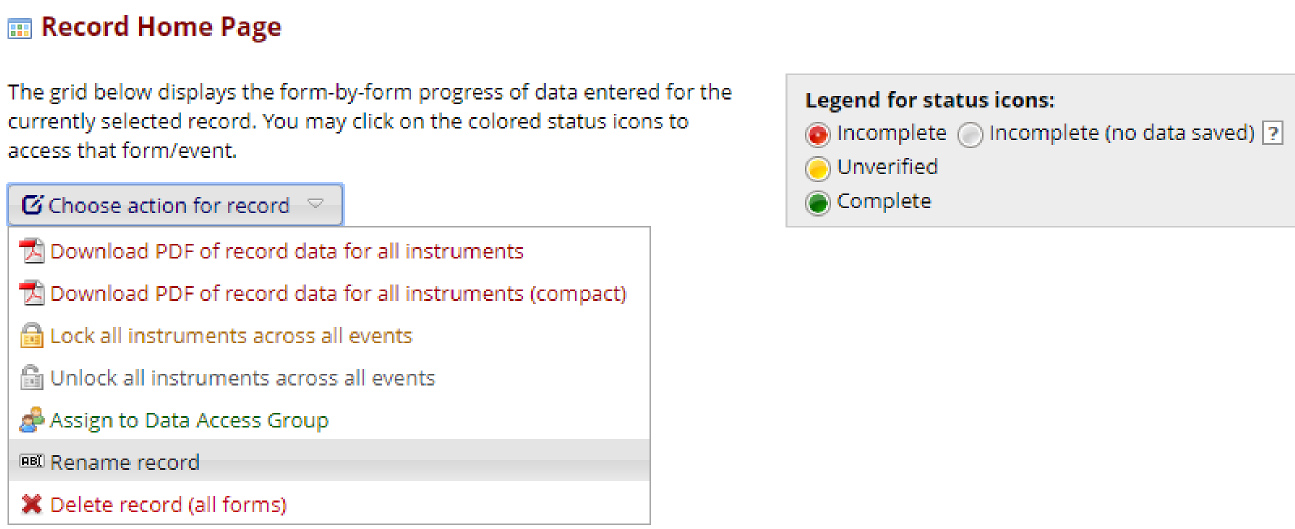
- Any user not assigned to a group has global access within the project. This type of unassigned user can access all records in the project.
  - Global Access User - To see a list of the records within a Data Access Group, navigate to the Record Status Dashboard. Select a group from the dropdown list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

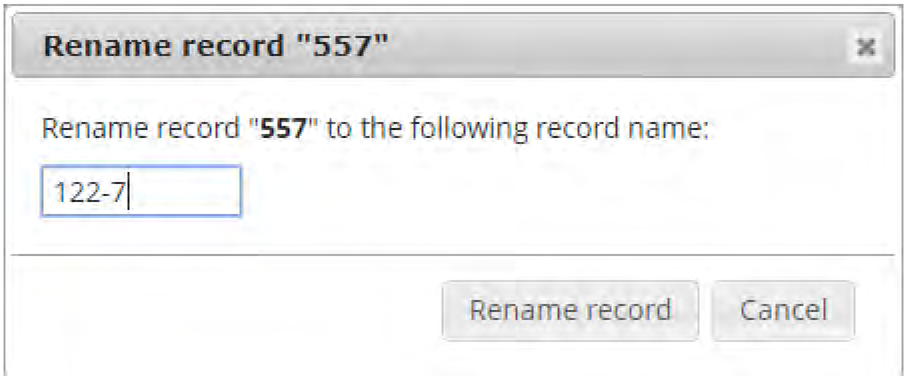
- Record creation:
  If the project has record auto-numbering enabled, then when a DAG member creates a record, a unique DAG ID is prepended to the record number.
  - In the example below, records 1-6 were created by a Global Access User.
  - A DAG member of Test Group A created the bottom two records. 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.



- 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.

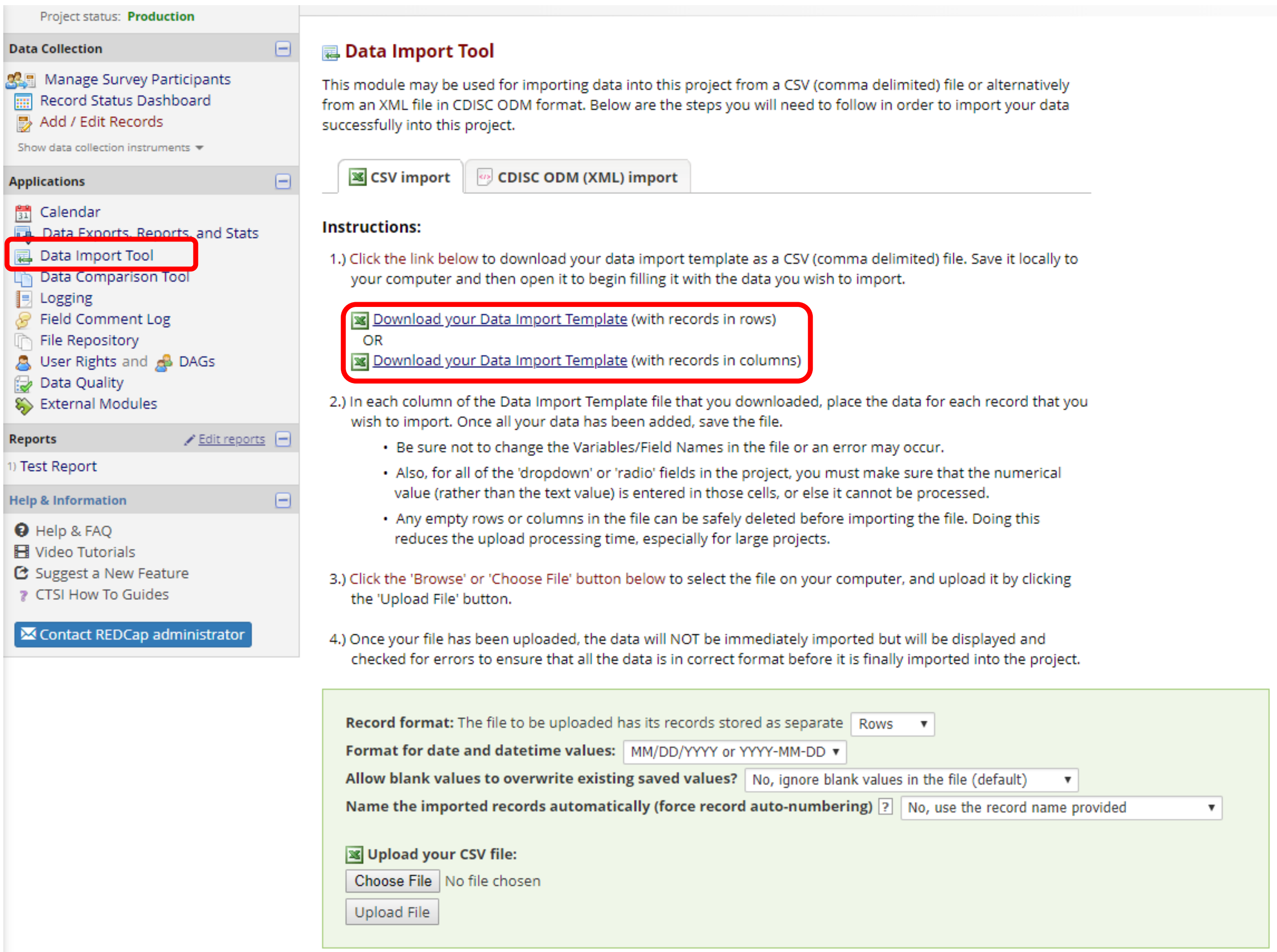



Rename record "557"
Rename record "557" to the following record name:
122-7
Rename record
Cancel

REDCap – How to import data from an Excel file

- Create the project and fields/questions within REDCap.
  - o 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.



- Download the Data Import Template.
- Save the Data Import Template locally to your computer. Begin completing the template with the data to be imported.
  - o 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:

	A	B	C	D	E	F	G	H	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 instructions 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 reviewing 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	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.

<u>REDCap – Creating a report</u>

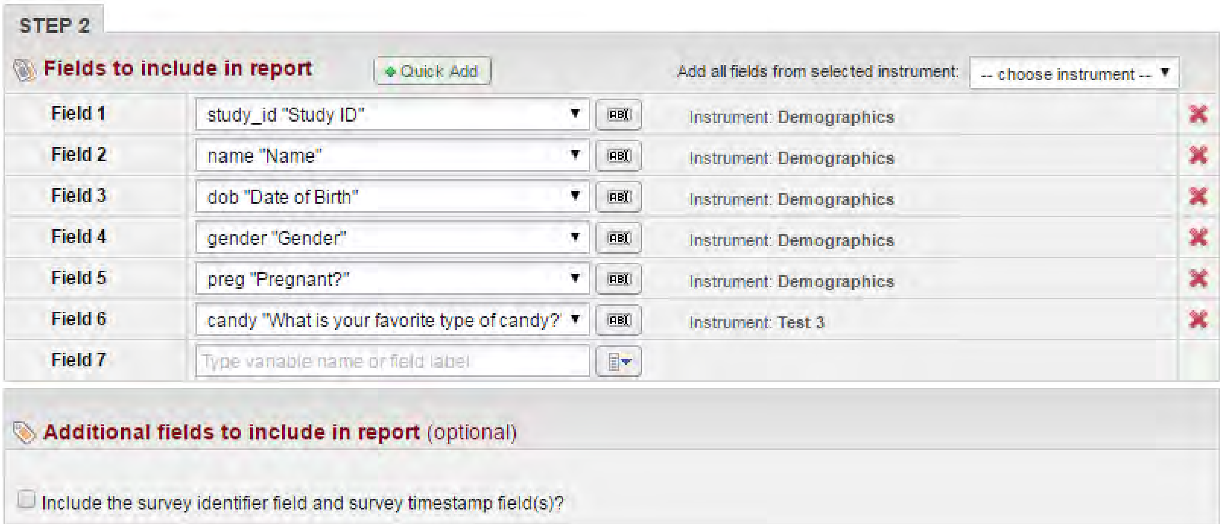
The Report Builder allows a user to create customized reports that are queried in real time.

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.
    - 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.

- 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



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

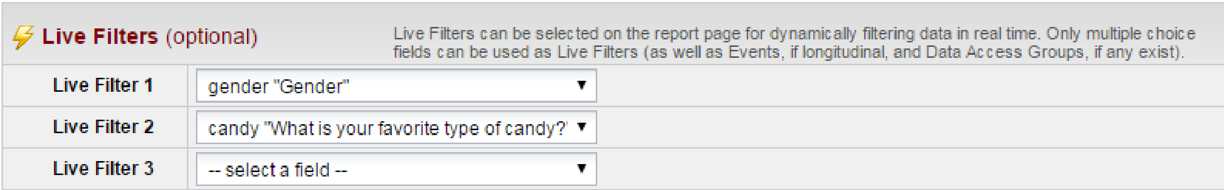
Filters:

Results:

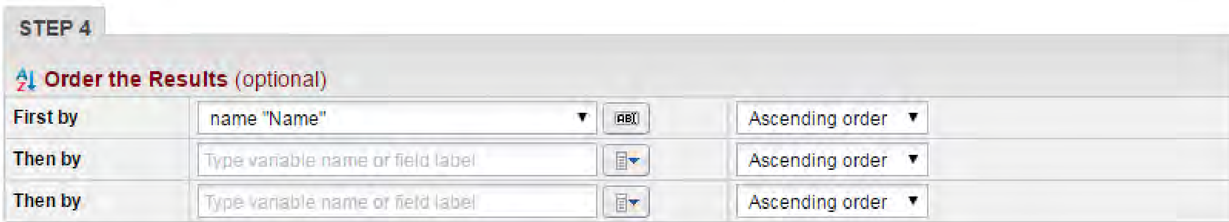
Demographics

Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
9 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)
7 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)	

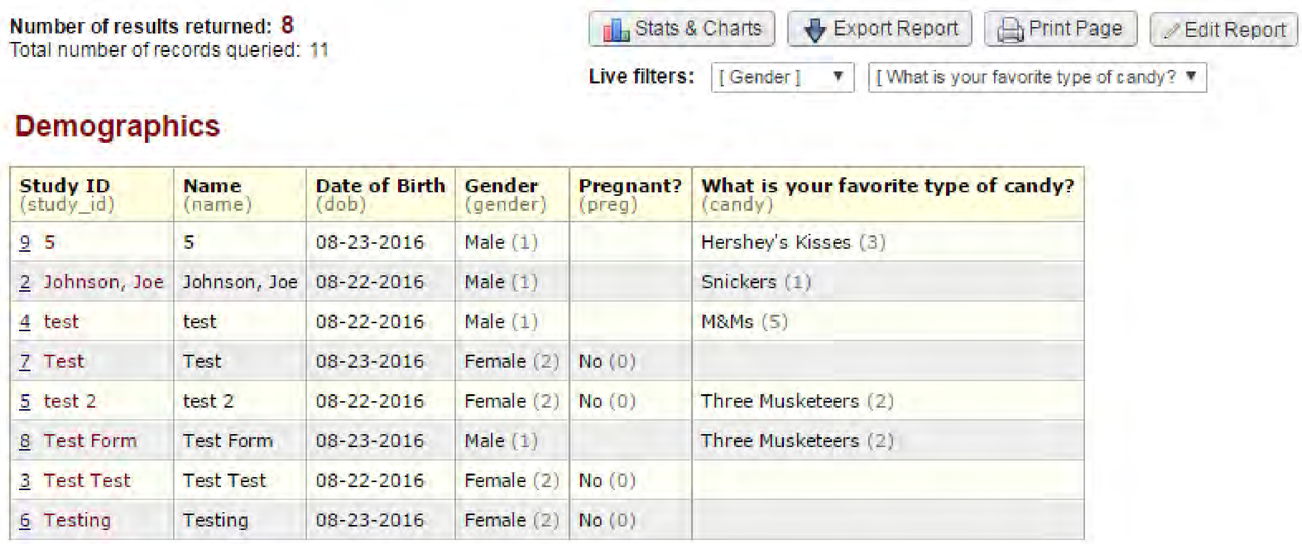
- Live Filters (optional): Live filters can be used on the report page for filtering data in real time. Only multiple choice fields can be used with these filters. Up to three (3) live filters can be assigned.
  - In this example, we have assigned ‘Gender’ and ‘What is your favorite candy?’



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



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



Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
9 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)
7 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)	

  - 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 | Export Report | Print Page | Edit Report

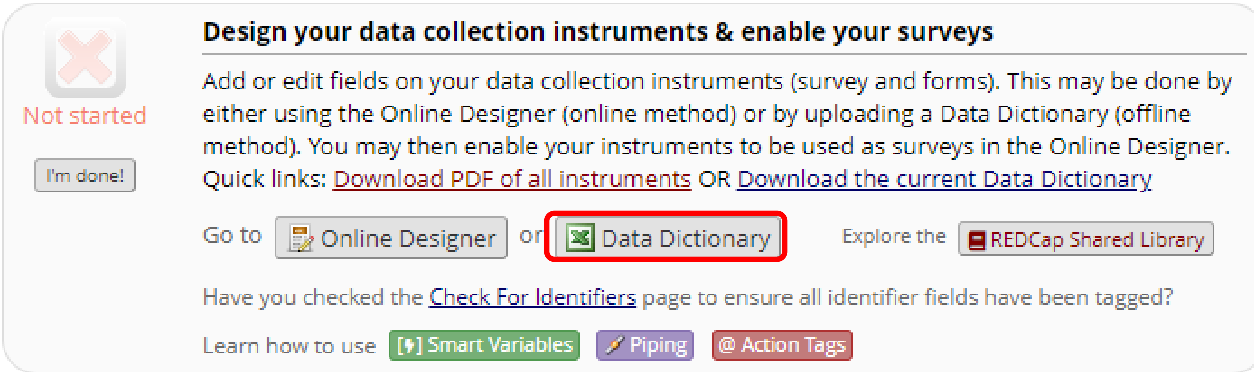
Live filters: [Gender] | Three Musketeers | Reset

Demographics

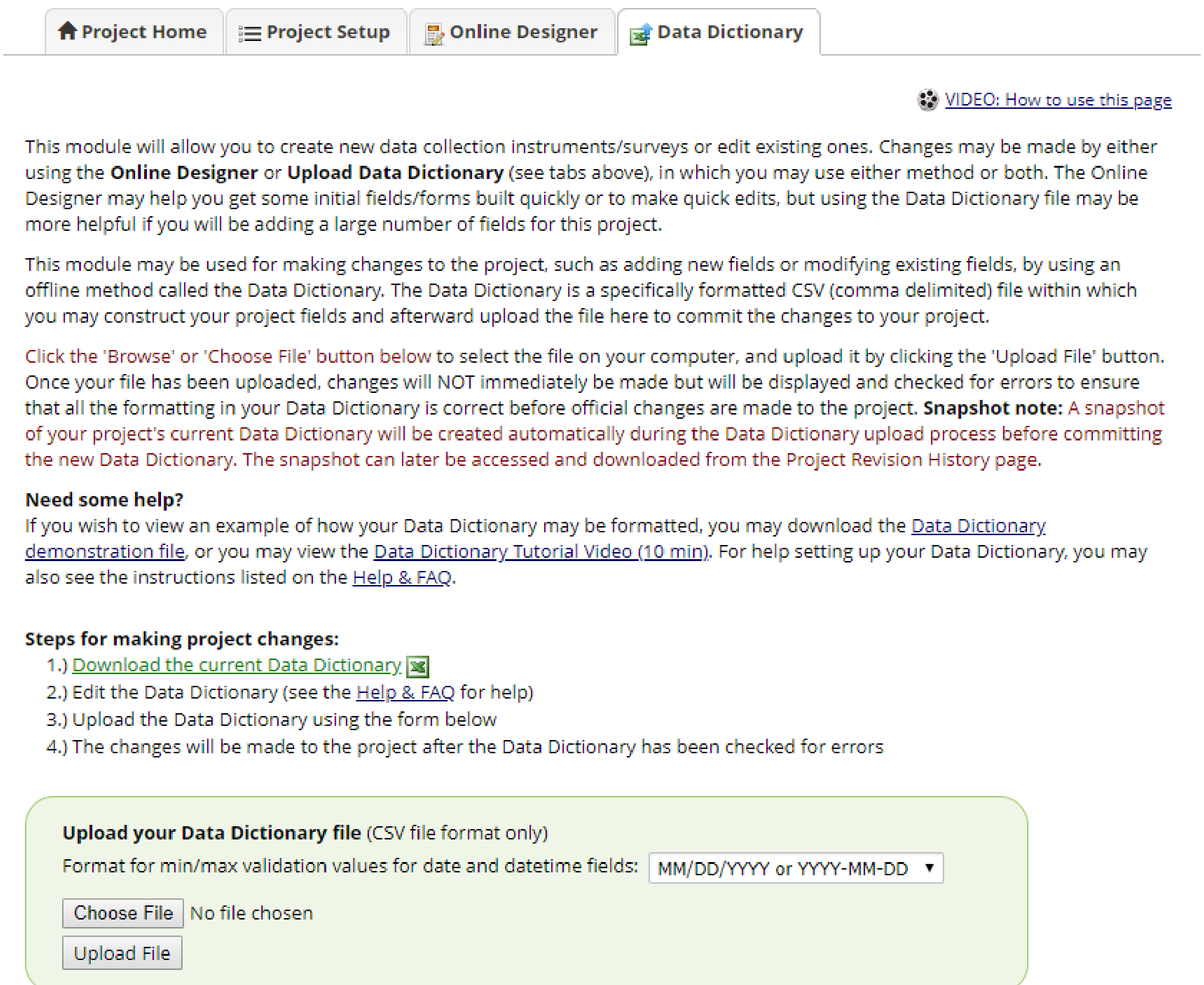
Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
5 test 2	test 2	08-22-2016	Female (2)	No (0)	Three Musketeers (2)
8 Test Form	Test Form	08-23-2016	Male (1)		Three Musketeers (2)

REDCap – How to Download the Data Dictionary

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



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



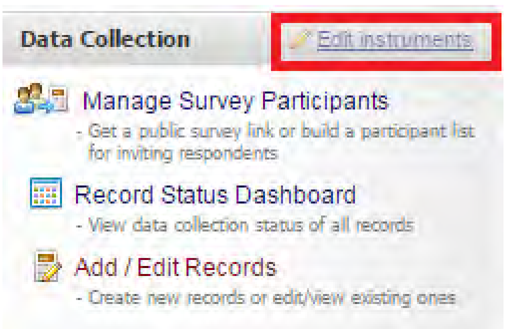
- The file will download in a .csv format.

REDCap – Edit a field

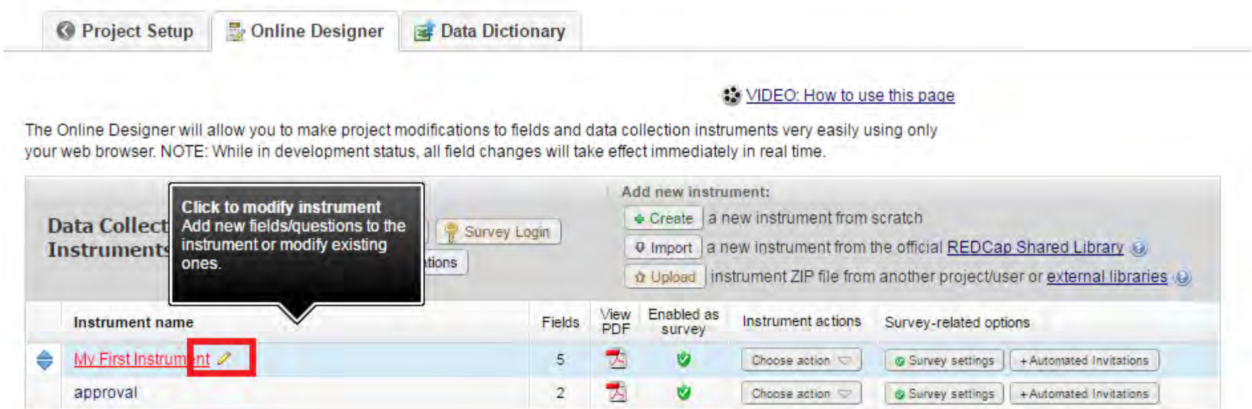
- If the project is in development mode, please follow the steps below.
- If the project is in production mode, please refer to the the *Making Changes while in Production* Guide.

Step 1:

- Click on Edit Instruments

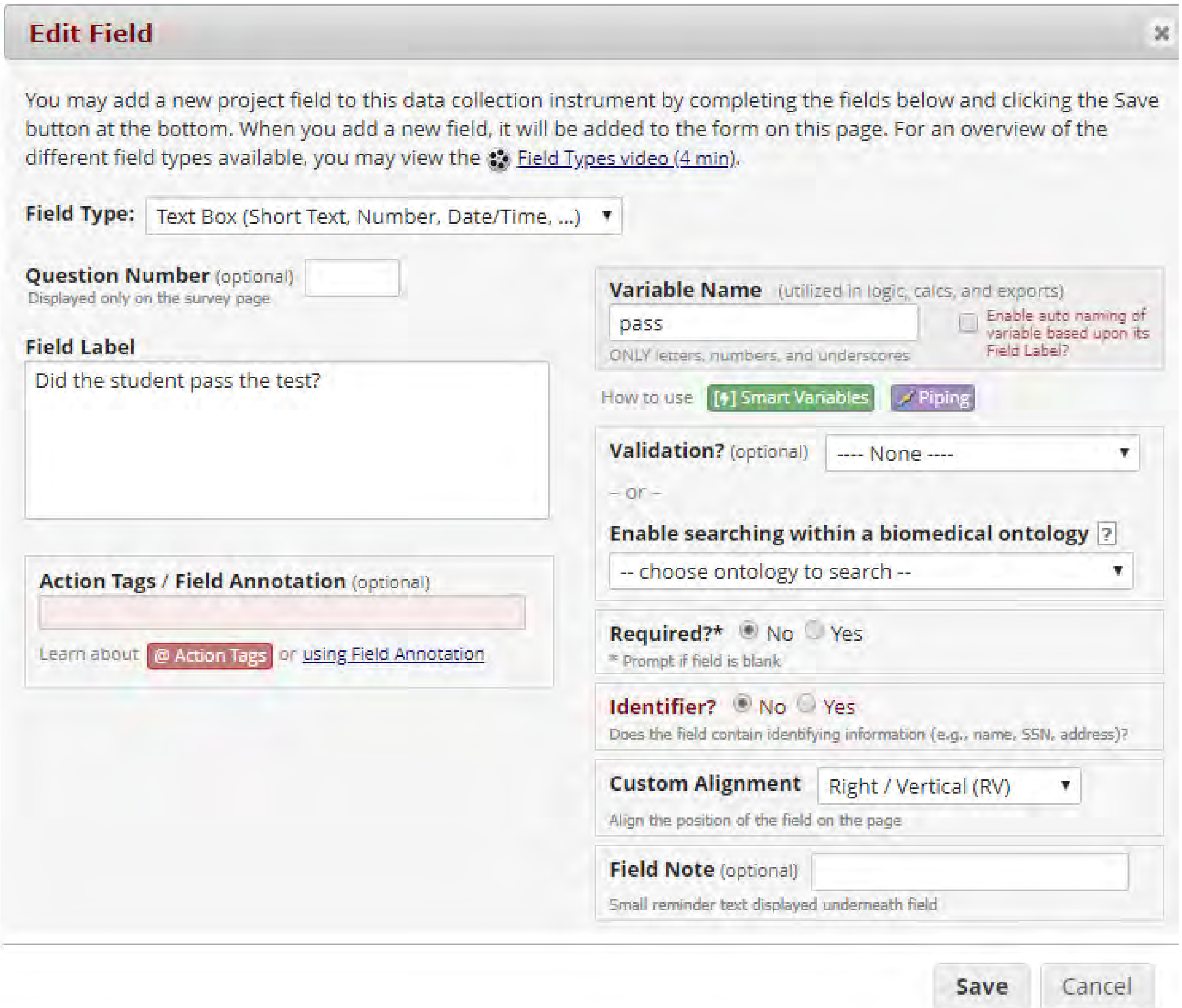


- Select the instrument to edit and then click on the pencil icon

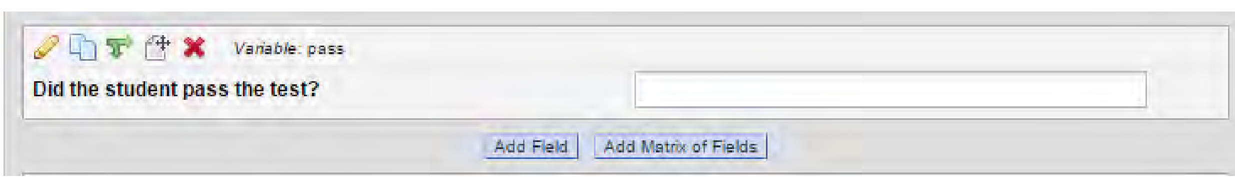


- Select the pencil icon on the field you would like to edit.

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

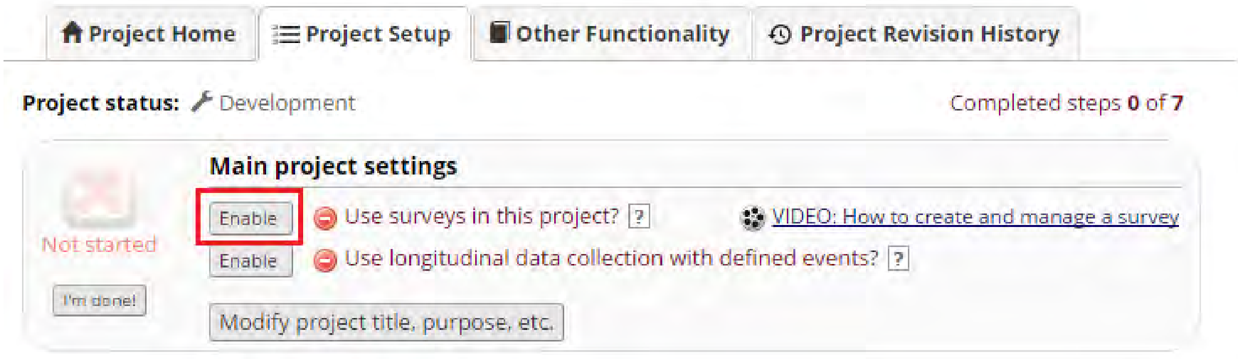


- The pop-up box will close and return to the list of fields for the instrument.

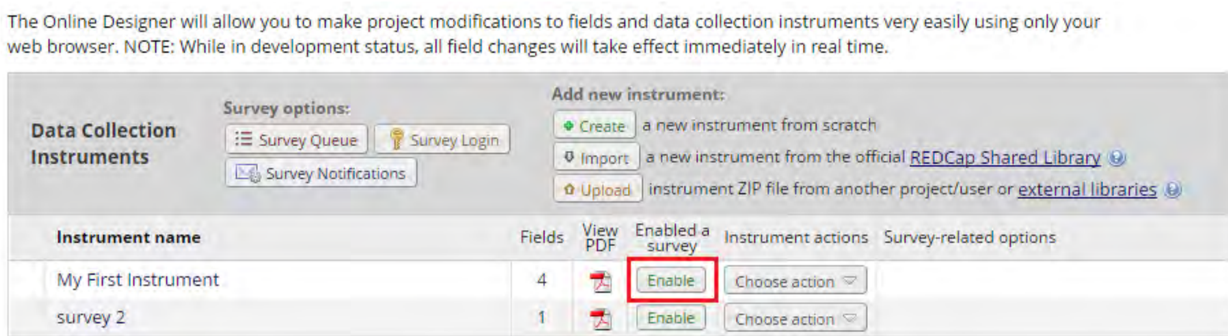


REDCap – Enable an Instrument as a Survey

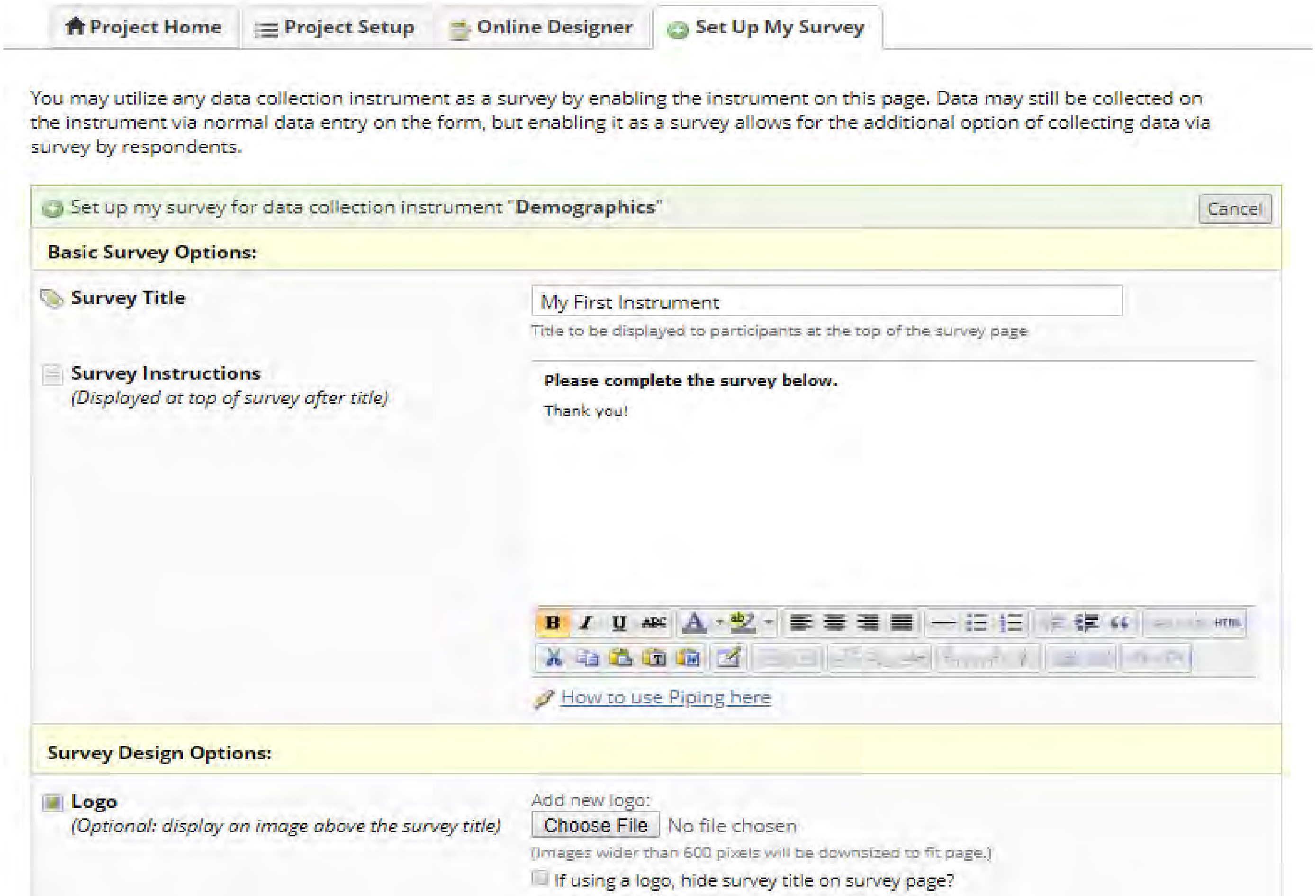
- Step 1: On the Project Setup page and under "Main project settings," select the Enable button next to "Use surveys in this project?"



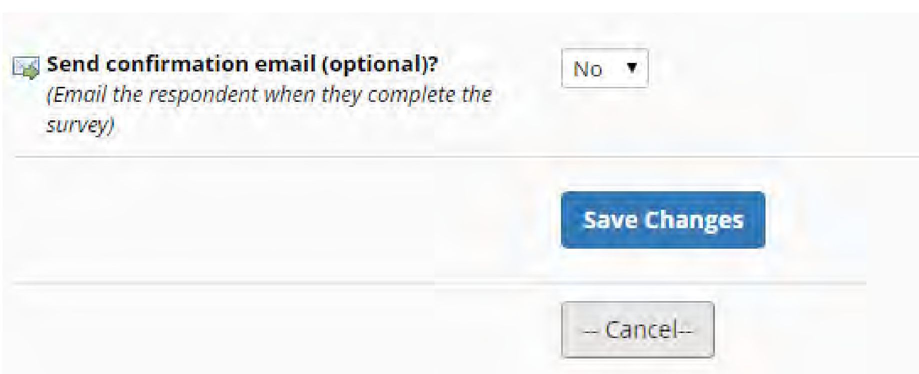
- Step 2: Create your data collection instrument. Once you have created your instrument, go to the Online Designer and select the Enable button next to your instrument name, under the "Enabled a survey" column header.



- 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.

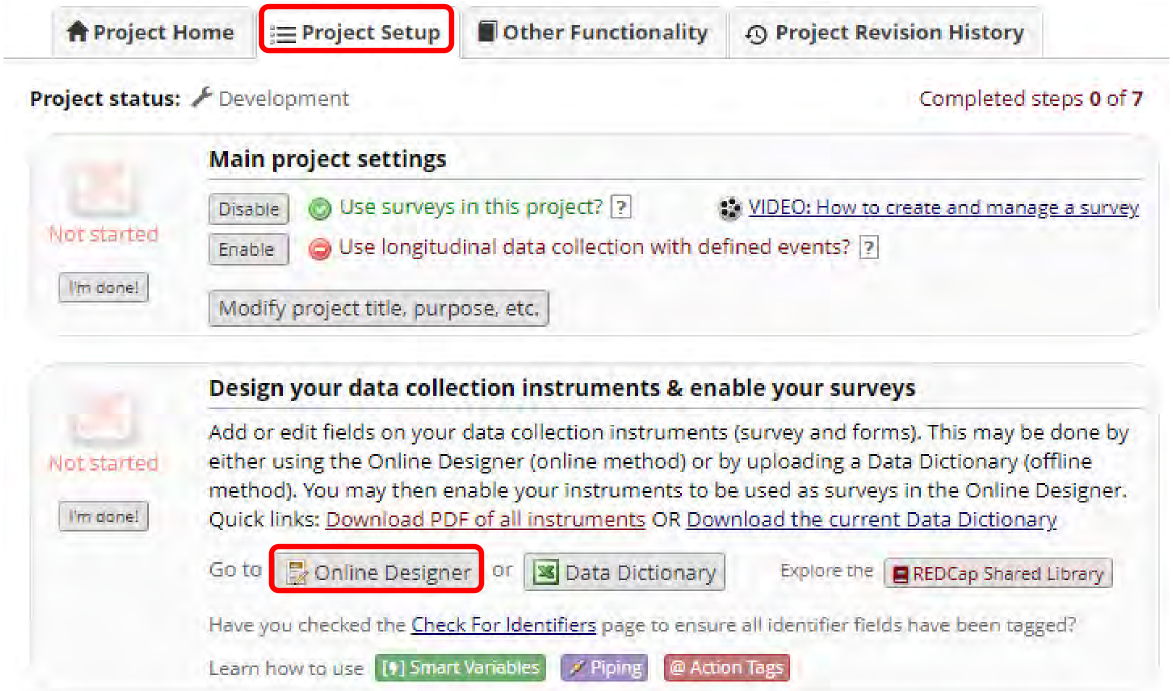


- When you are finished editing your survey settings, scroll down to the bottom of the page and select “Save Changes.” Your instrument is now enabled as a survey.

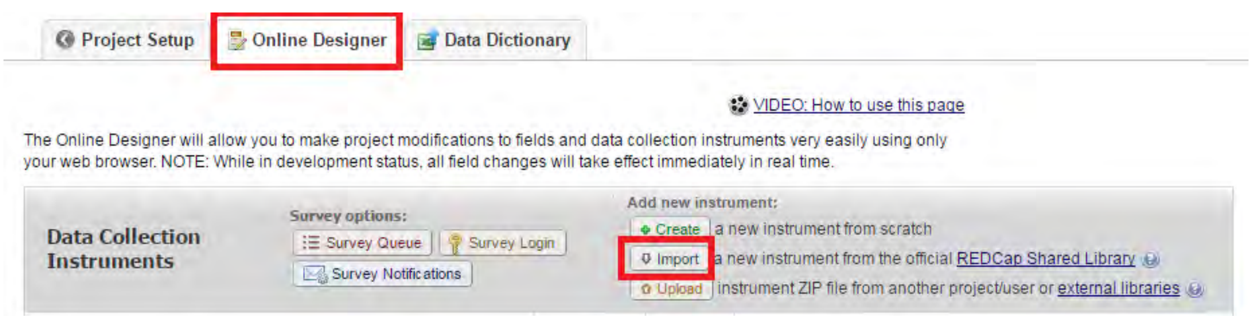


REDCap – How to import documents from the REDCap Shared Library (Adaptive Instruments)

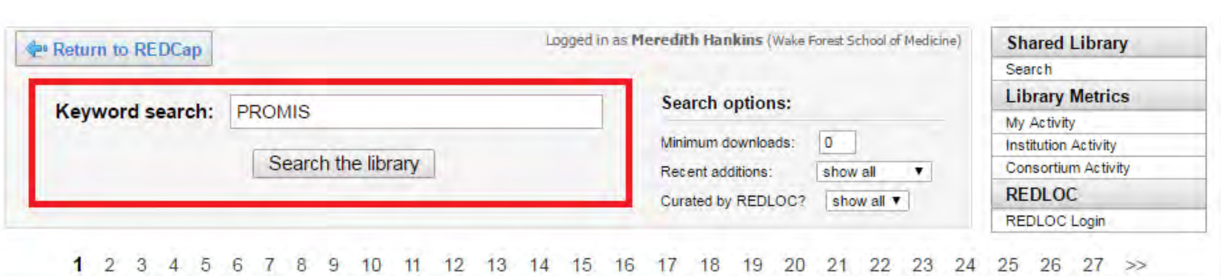
- Click on the Project Setup tab and select 'Online Designer.'



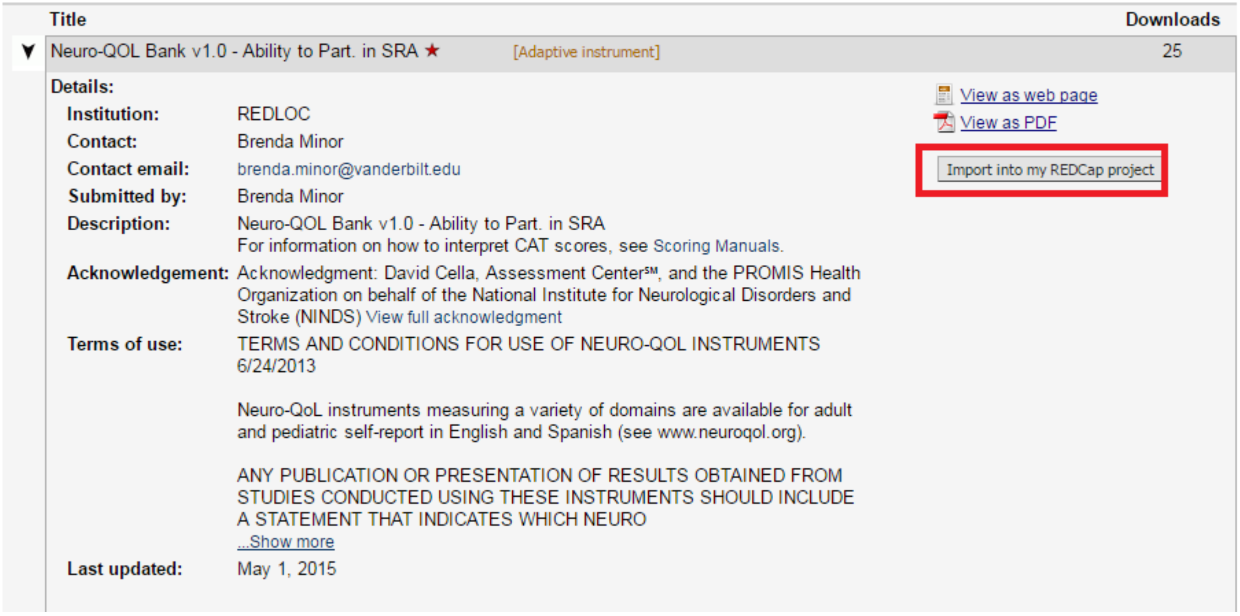
- Select 'Import' under 'Add new instrument.'



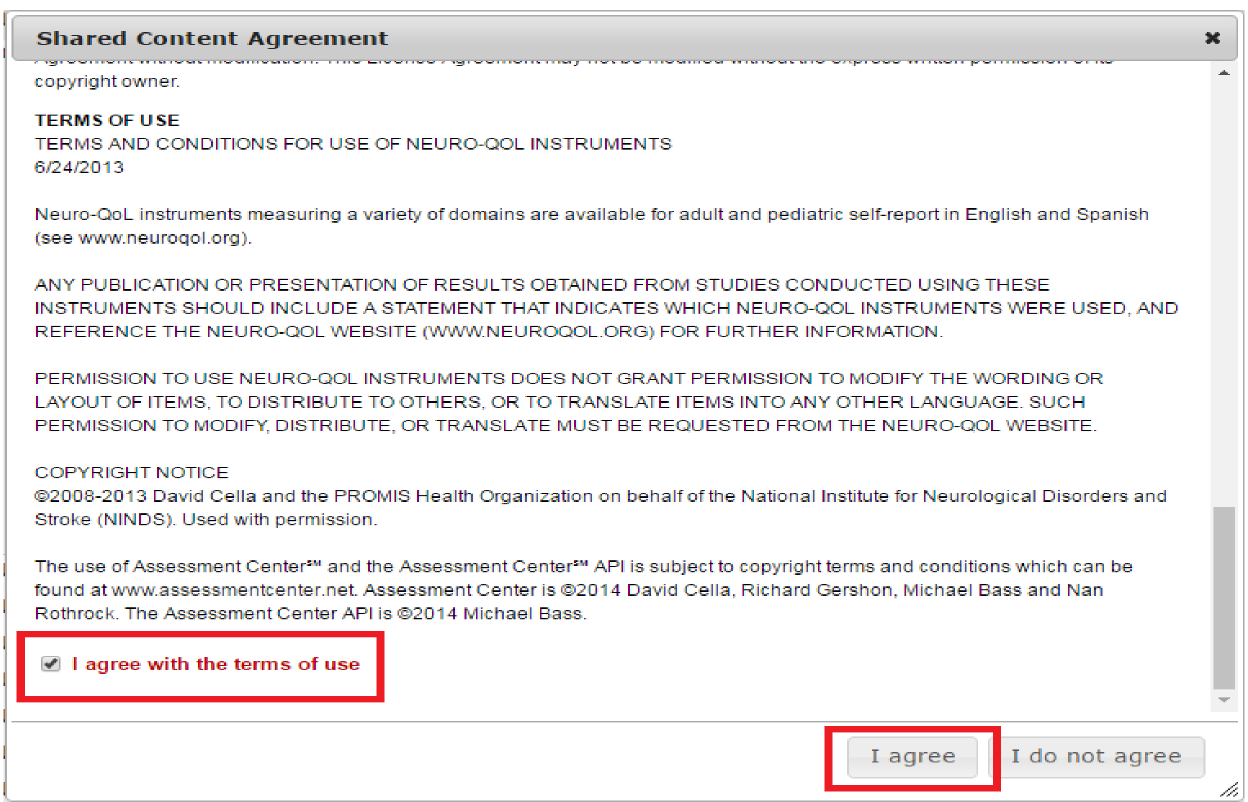
- Enter keywords into the search box then click on 'Search the library.'



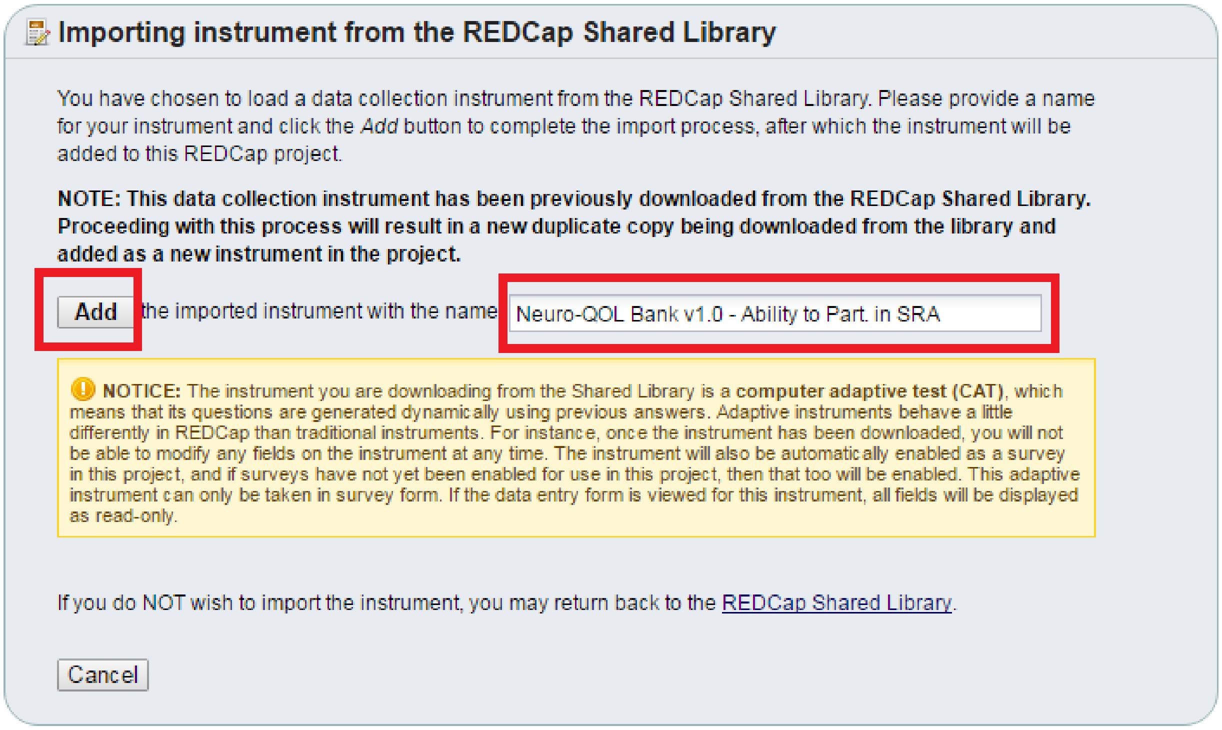
- Select the correct form from the list then click on 'Import into my REDCap project.'



- Read the Shared Content Agreement then at the bottom, click on the 'I agree with the terms of use' and click 'I Agree.'

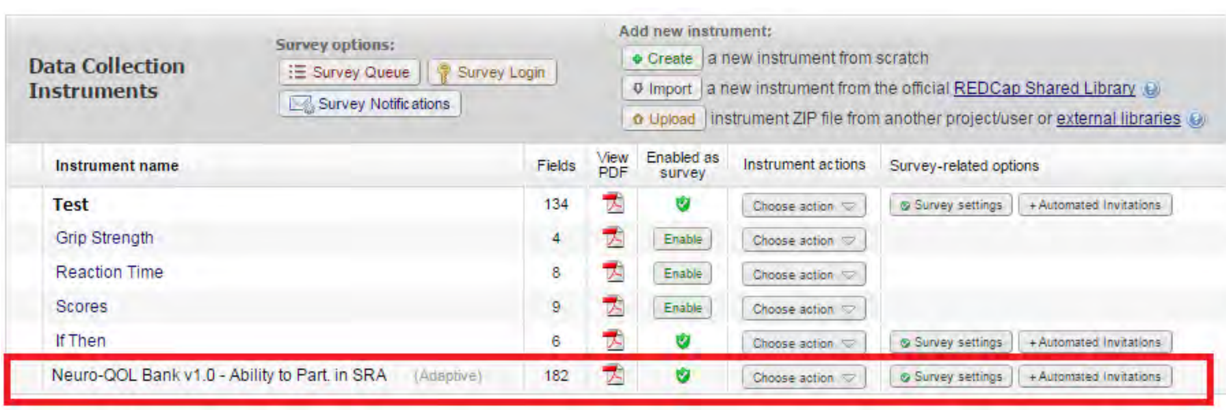


- Review the REDCap Notice that no changes can be made to the document. You can adjust the name of the document for your project. Click on 'Add.'

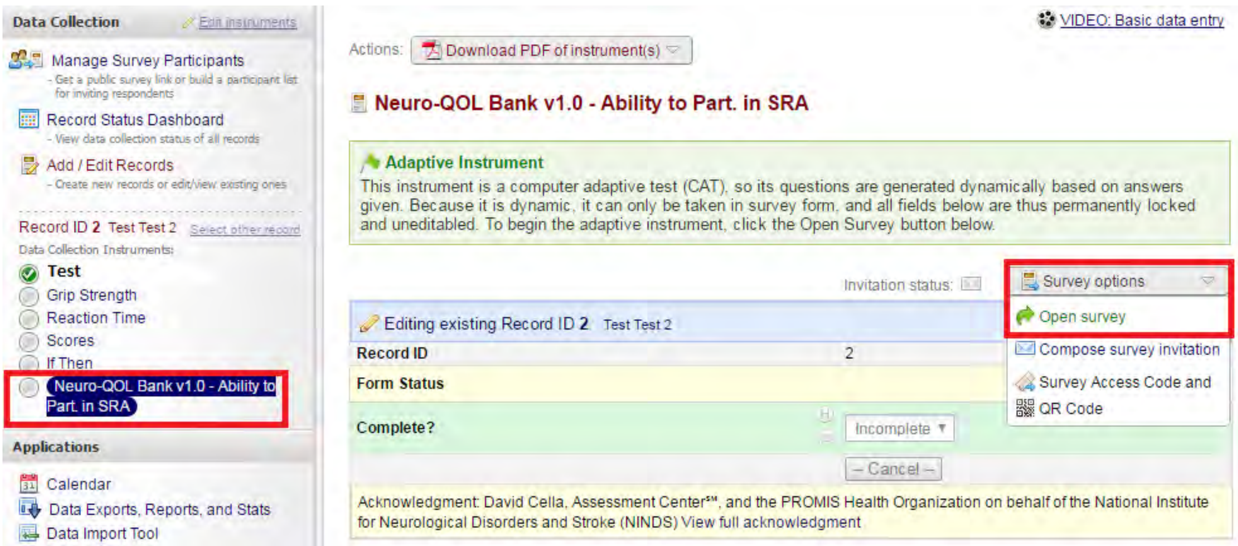


- You should receive an import successful notice. Click on 'Return to Previous Page' to return to the Online Designer.

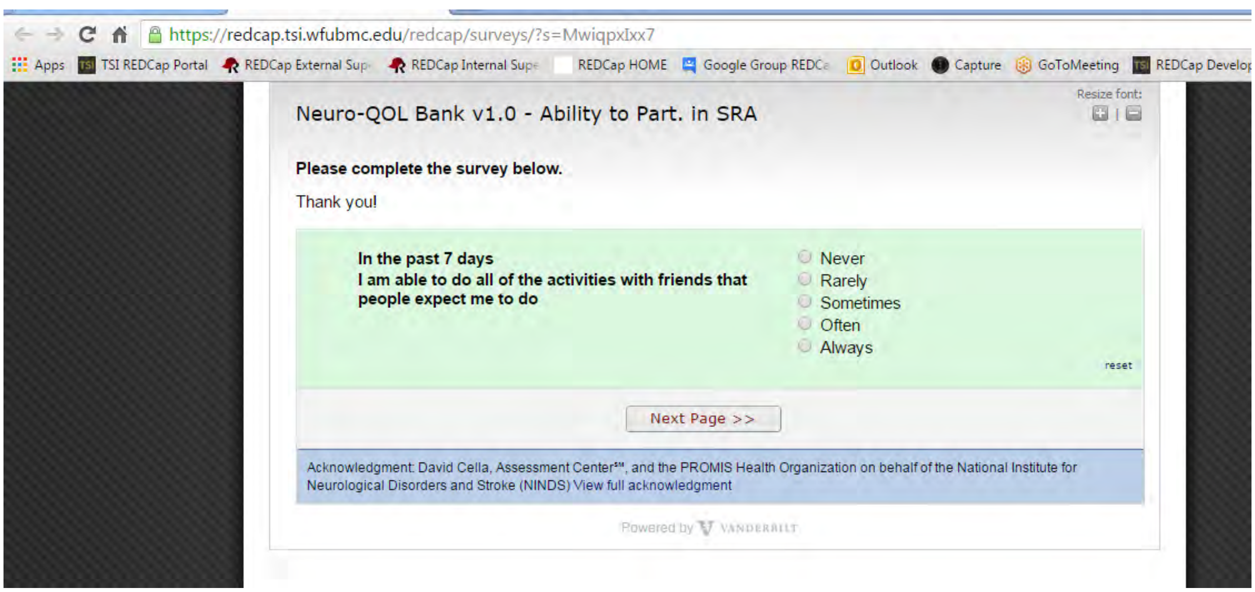
- Once you have returned to the Online Designer, you should see the imported instrument in the list.



- 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.



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



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.

Study ID 1 Hall, Timothy

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

The questions on the "Monthly Clinical Data" instrument needed to be collected during all four visits/events

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.

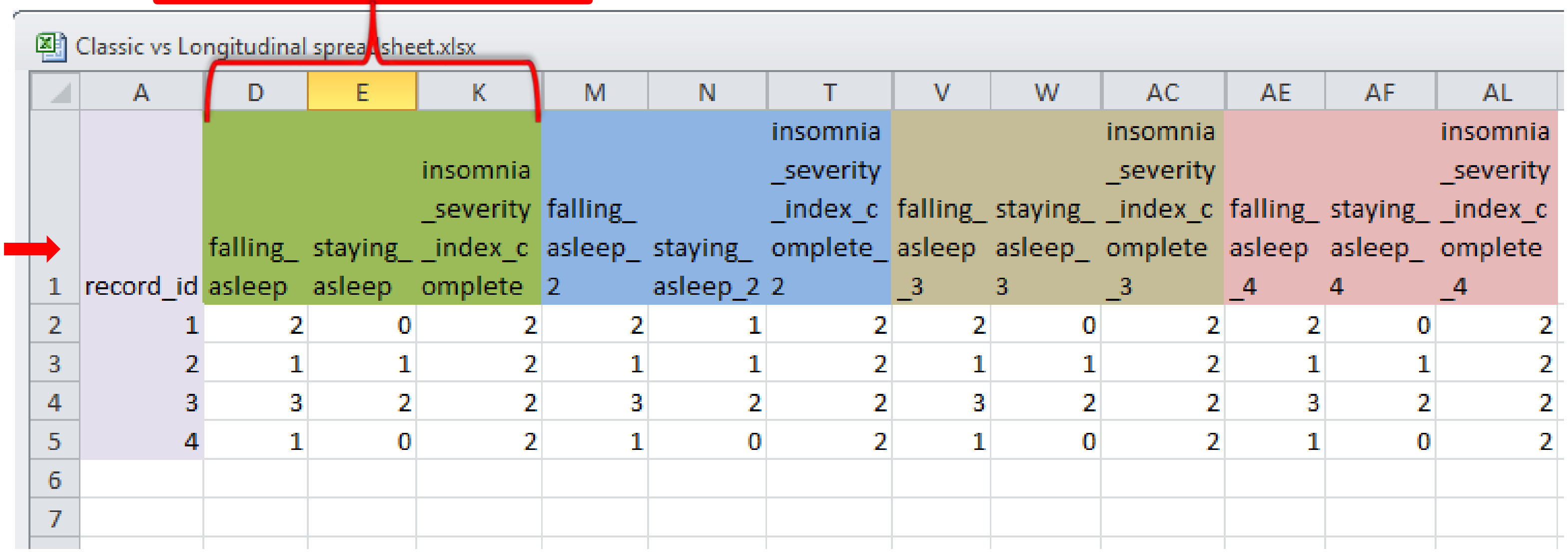
Question #3: How do you want your data to look when you export them?

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.

Notice that the same sleep variables were repeated four times for each event

Notice that there is one row for each record



	A	D	E	K	M	N	T	V	W	AC	AE	AF	AL
1	record_id	falling_asleep	staying_asleep	insomnia_severity_index_complete	falling_asleep_2	staying_asleep_2	insomnia_severity_index_complete_2	falling_asleep_3	staying_asleep_3	insomnia_severity_index_complete_3	falling_asleep_4	staying_asleep_4	insomnia_severity_index_complete_4
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.

Notice that the same sleep variables are only displayed once in the spreadsheet

Notice that there are multiple rows for each record

Classic vs Longitudinal spreadsheet.xlsx

	A	B	E	F	L
1	record_id	redcap_event_name	falling_asleep	staying_asleep	insomnia_severity_index_complete
2	1	basline_arm_1	2	0	2
3	2	basline_arm_1	1	1	2
4	3	basline_arm_1	3	2	2
5	4	basline_arm_1	1	0	2
6	1	visit_1_arm_1	2	1	2
7	2	visit_1_arm_1	1	1	2
8	3	visit_1_arm_1	3	2	2
9	4	visit_1_arm_1	1	0	2
10	1	visit_2_arm_1	2	0	2
11	2	visit_2_arm_1	1	1	2
12	3	visit_2_arm_1	3	2	2
13	4	visit_2_arm_1	1	0	2
14	1	final_arm_1	2	0	2
15	2	final_arm_1	1	1	2
16	3	final_arm_1	3	2	2
17	4	final_arm_1	1	0	2
18					

This column indicates the unique event name

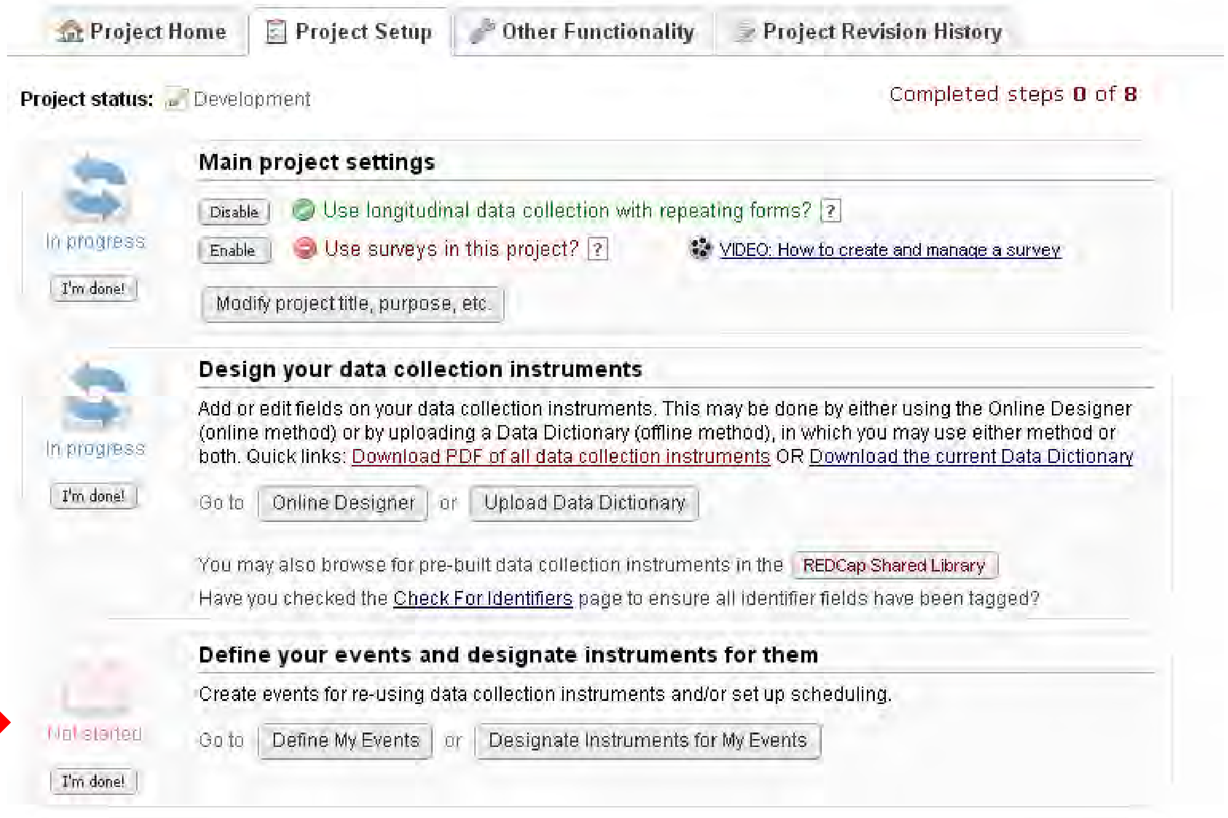
Longitudinal Setup

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.

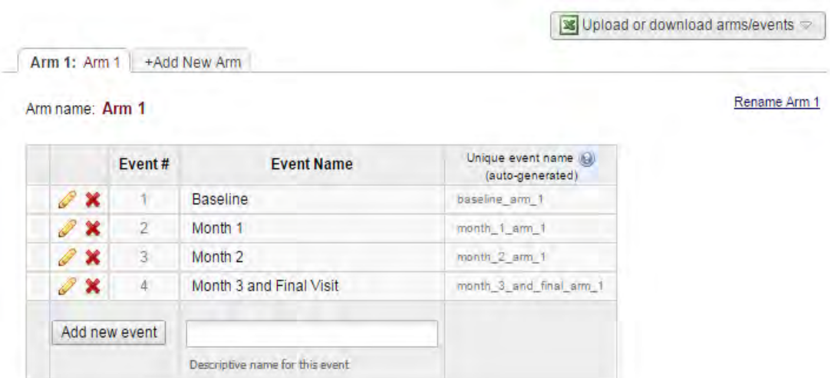
Click enable if you want a longitudinal database

When enabling longitudinal data collection, you will see this as an option. You must define your events and then designate the instruments 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.


Upload or download arms/events

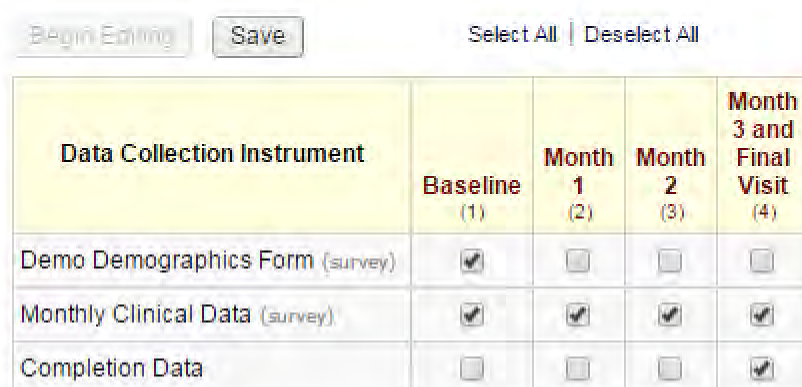
Arm 1: Arm 1 | +Add New Arm

Arm name: **Arm 1** Rename Arm 1

	Event #	Event Name	Unique event name (auto-generated)
	1	Baseline	baseline_arm_1
	2	Month 1	month_1_arm_1
	3	Month 2	month_2_arm_1
	4	Month 3 and Final Visit	month_3_and_final_arm_1
Add new event		Descriptive name for this event	

Define your Events:
- Title the Event
- Create multiple arms if your project requires this

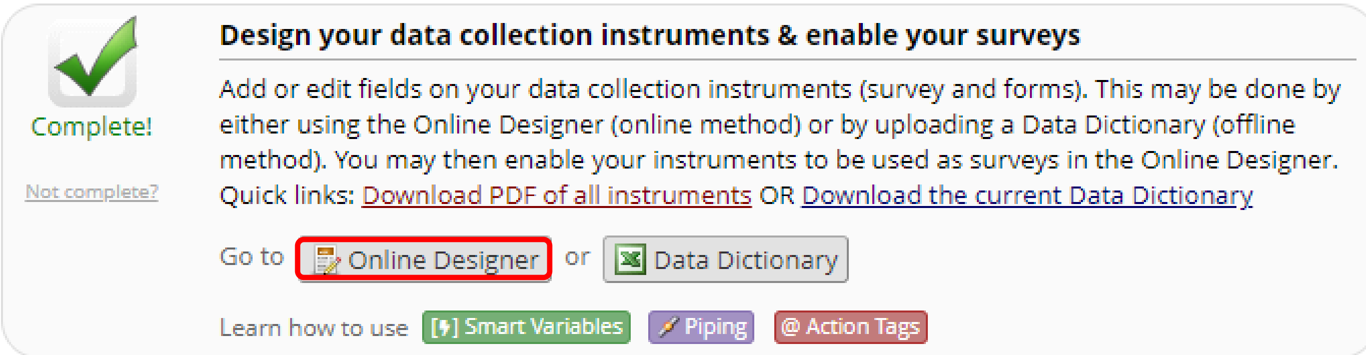
Designate Instruments for Events:
Select which Data Collection Instrument is used at each Event


Begin Editing | Save | Select All | Deselect All

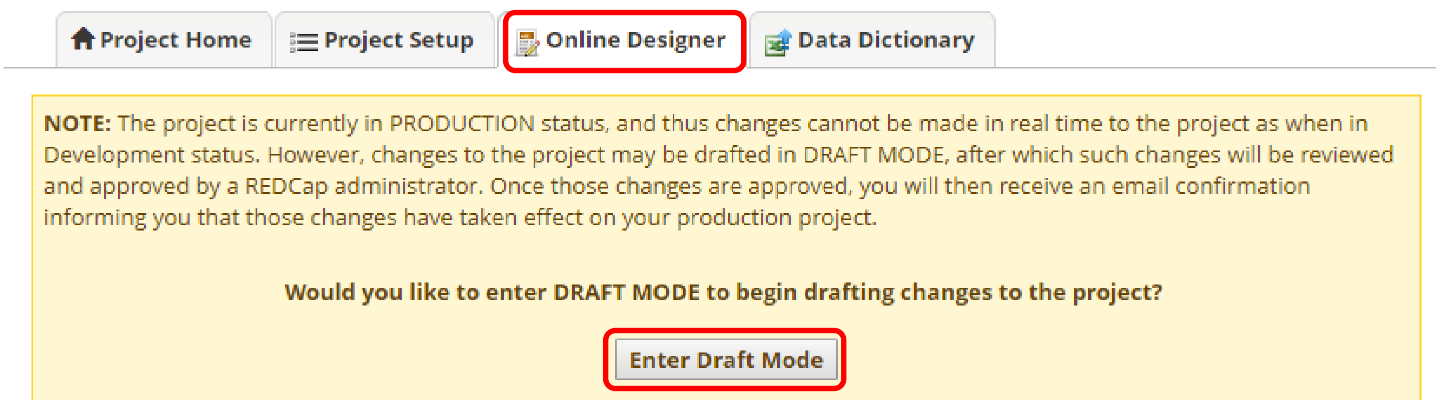
Data Collection Instrument	Baseline (1)	Month 1 (2)	Month 2 (3)	Month 3 and Final Visit (4)
Demo Demographics Form (survey)	✔			
Monthly Clinical Data (survey)	✔	✔	✔	✔
Completion Data				✔

REDCap – How to Make Changes in Production

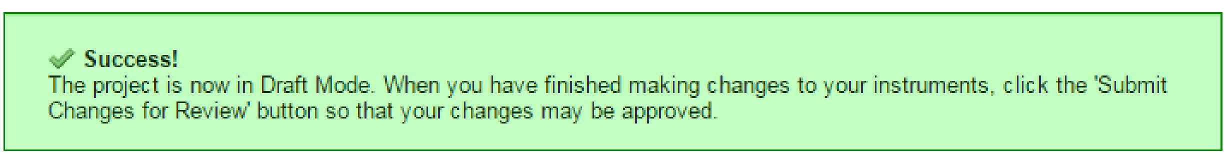
- Step 1
  - Navigate to the Project Setup tab for the project.
  - Click on 'Online Designer' under 'Design your data collection instruments & enable your surveys.'



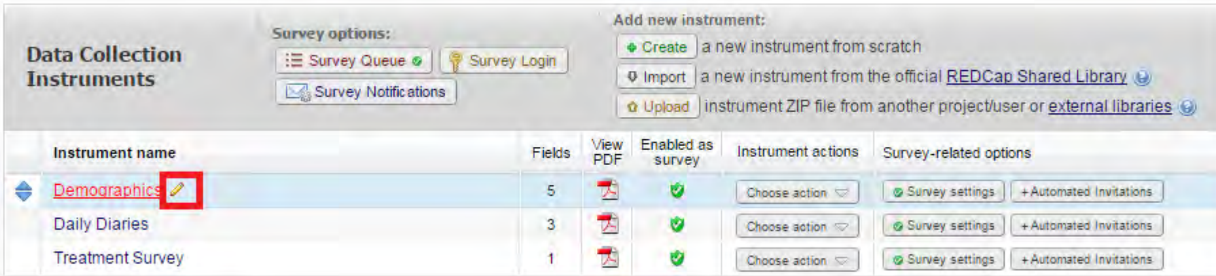
- Step 2
  - The system will navigate the user to the Online Designer tab.
  - Click on 'Enter Draft Mode.'



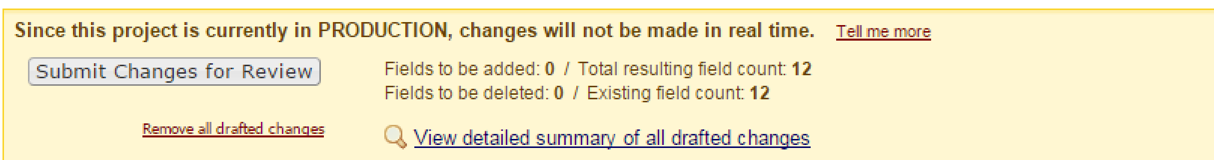
The system will provide a green Success notification that you have entered the Draft Mode.



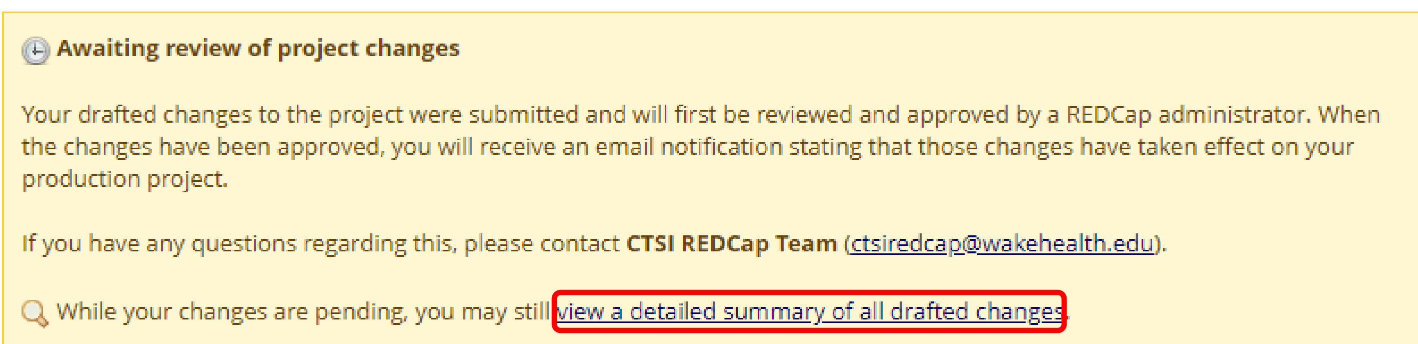
- Step 4
  - Begin making any changes to the Forms/Instruments by hovering over the Form/Instrument and clicking on the pencil icon.



- 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
  - 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.'

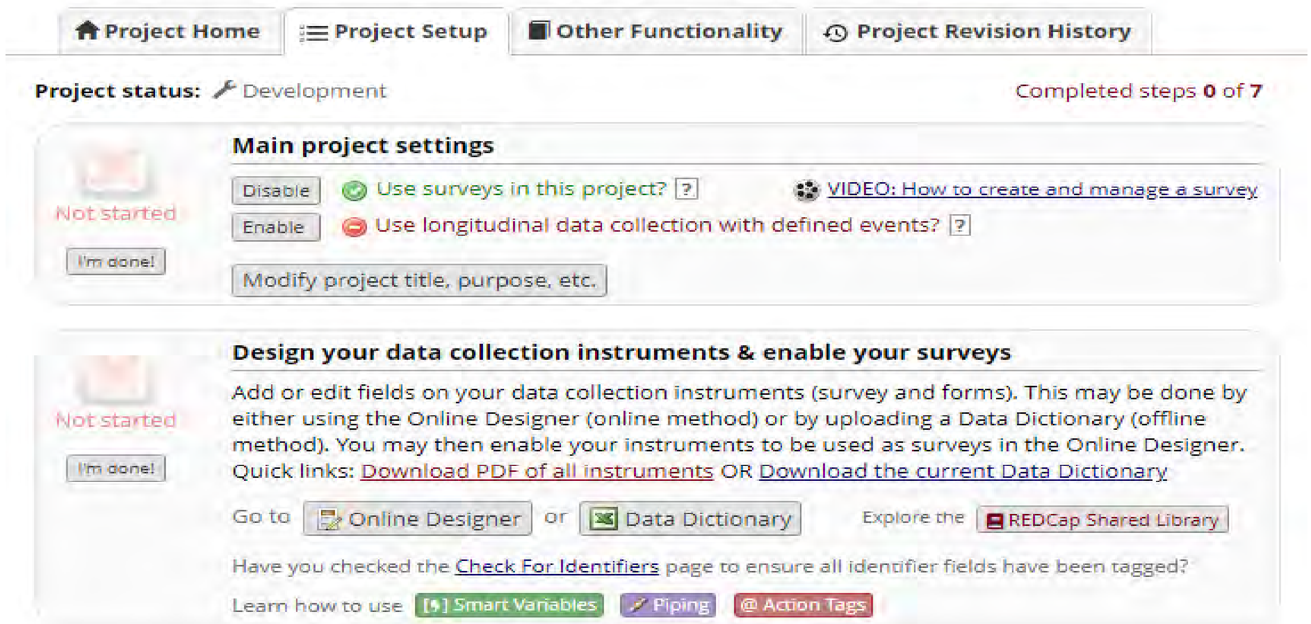


- Step 7
  - If the CTSI REDCap Administrator has any questions regarding the changes, they will reach out to the submitter via email.
  - Once the CTSI REDCap Administrator has committed the changes, the user will be notified via email.

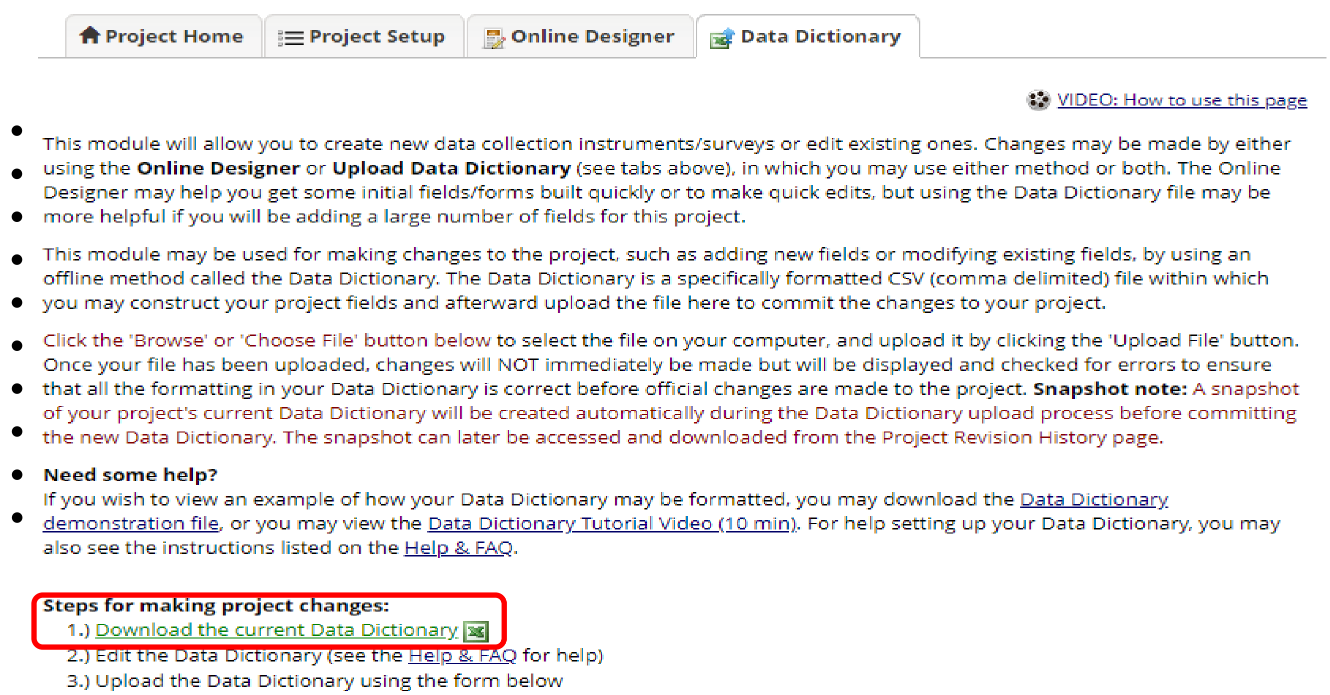
REDCap – How to Use the Data Dictionary (within a project)

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.'



- Step 2
  - Download the Data Dictionary and save it to your computer as a .csv file.



- Step 3
  - In the "Form Name" column, the current list reflects the names of the different forms.

- 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

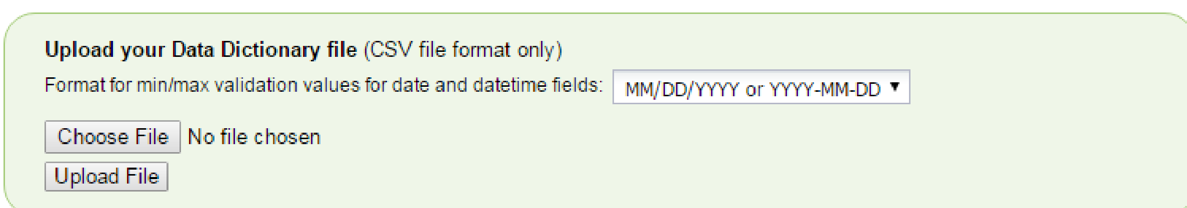
Variable /	Form Name	Section H	Field Type	Field Labe	Choices, C	Field Note	Text Valid	Text Valid	Text Valid	Identifier	Branching	Required	Custom Al	Question	Matrix Gr	Matrix Ra	Field Annotation
record_id	my_first_instrument		text	Record ID													
name	my_first_instrument		text	Name of participant:													
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, Maybe | 99, Retake												
where	my_first_instrument		radio	Where?	1, Classroom | 2, Gym						[pass] <> '1'						
group	my_first_instrument		radio	randomiz	1, group a | 2, group b												
approved	approval		yesno	approved?													
calendar2	approval		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, Maybe												
active2	test2		descriptiv	Active Project? [august_arm_1][active]													
active3	test2		descriptiv	If yes, date? [august_arm_1][date]													

After

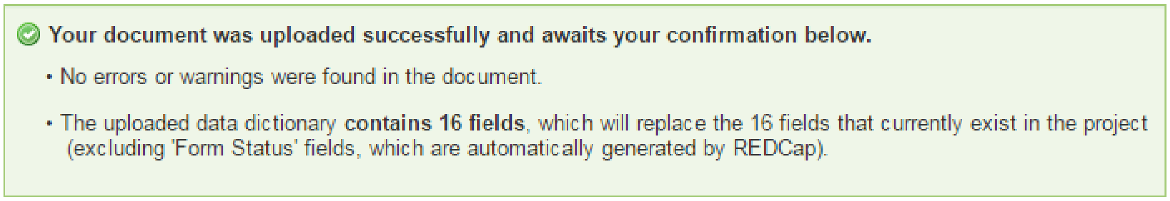
Variable /	Form Name	Section H	Field Type	Field Labe	Choices, C	Field Note	Text Valid	Text Valid	Text Valid	Identifier	Branching	Required	Custom Al	Question	Matrix Gr	Matrix Ra	Field Annotation
record_id	test		text	Record ID													
name	test		text	Name of participant:													
mrn	test		text	MRN#													
gender	test		radio	gender	0, male | 1, female												
email	test		text	Email			email										
pass	test		radio	Did the st	1, Yes | 2, No | 3, Maybe | 99, Retake												
where	test		radio	Where?	1, Classroom | 2, Gym						[pass] <> '1'						
group	test		radio	randomiz	1, group 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, Maybe												
active2	test		descriptiv	Active Project? [august_arm_1][active]													
active3	test		descriptiv	If yes, date? [august_arm_1][date]													

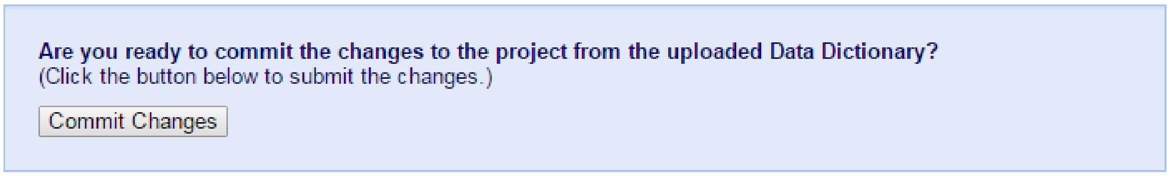
- Save the changes to your computer as a .csv file.

- Step 4
    - Return to the Data Dictionary tab and select "Choose File." Select the revised .csv file and then click on "Upload File."



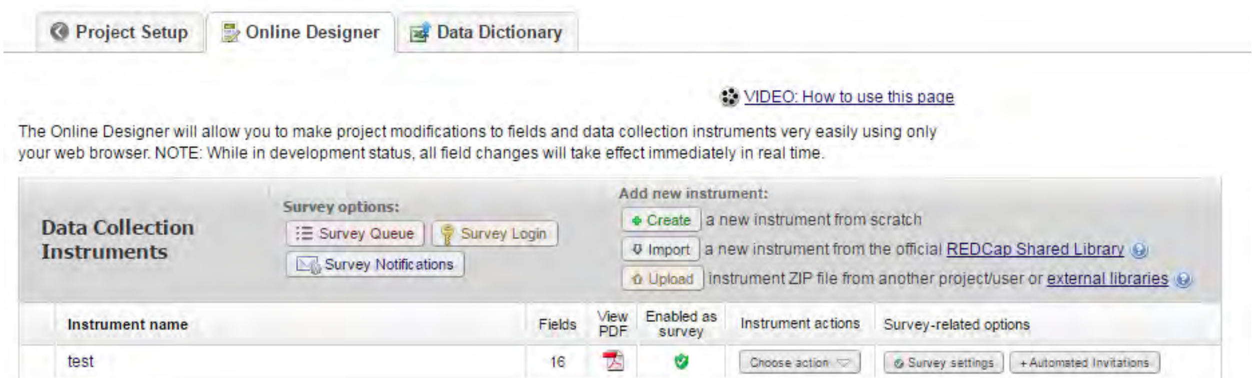
- Step 5
    - The system will return a notification of your changes. If the changes are acceptable, click on "Commit Changes."





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

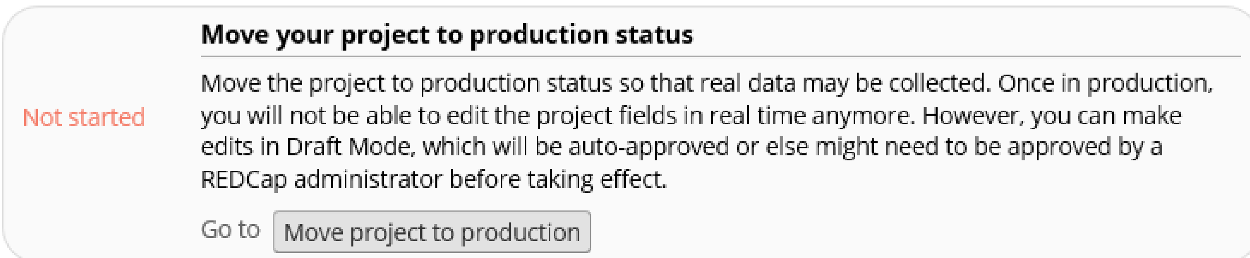
- Step 6
  - Navigate to the Online Designer. Review and confirm the variables moved to the appropriate instrument.



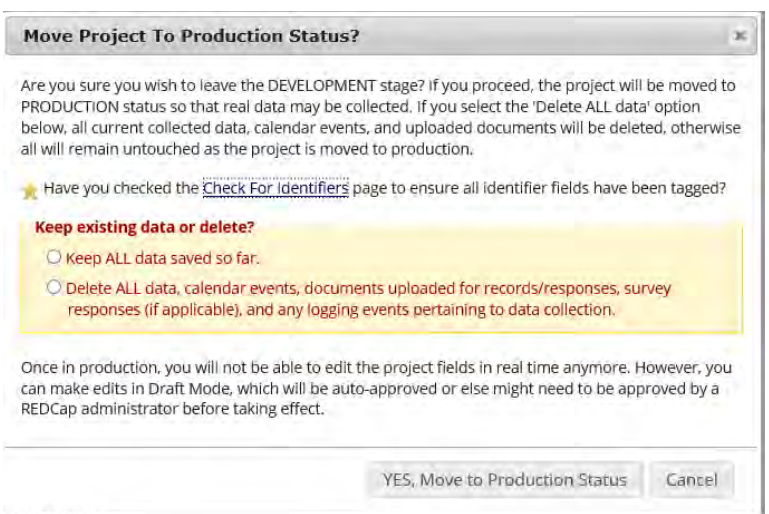
REDCap – How to Move a Project to Production

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.

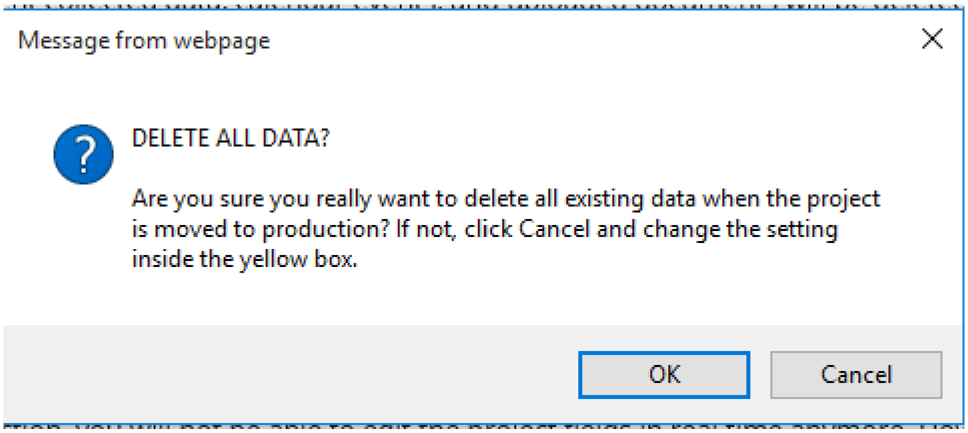
- Step 1
  - Navigate to the Project Setup tab for the project. The last checklist item is “Move your project to production status.” Click on ‘Move project to production.’
- Step 2



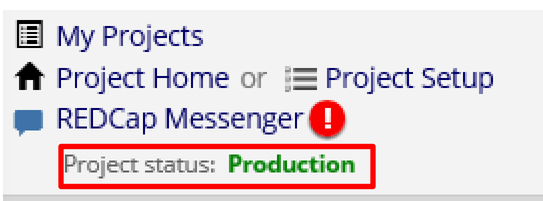
  - A pop-up notice will appear with the red box pre-checked to ‘Delete ALL data, calendar events, documents uploaded for records/responses, and (if applicable) survey responses’. If you have entered test data that needs to be deleted prior to moving to production, please leave this box checked. *Real 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.’*
  - Click on ‘Yes, Move to Production Status.’



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



- 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:



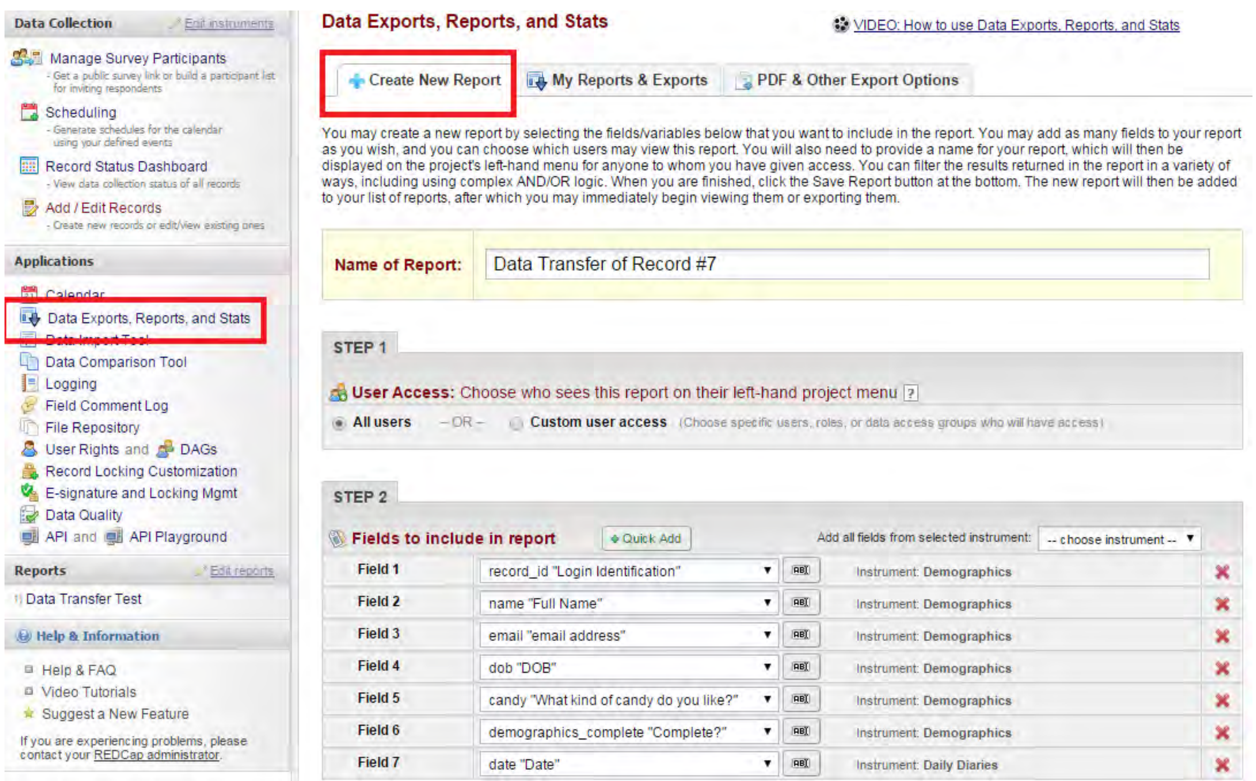
REDCap - Steps to move a record from one project to another project

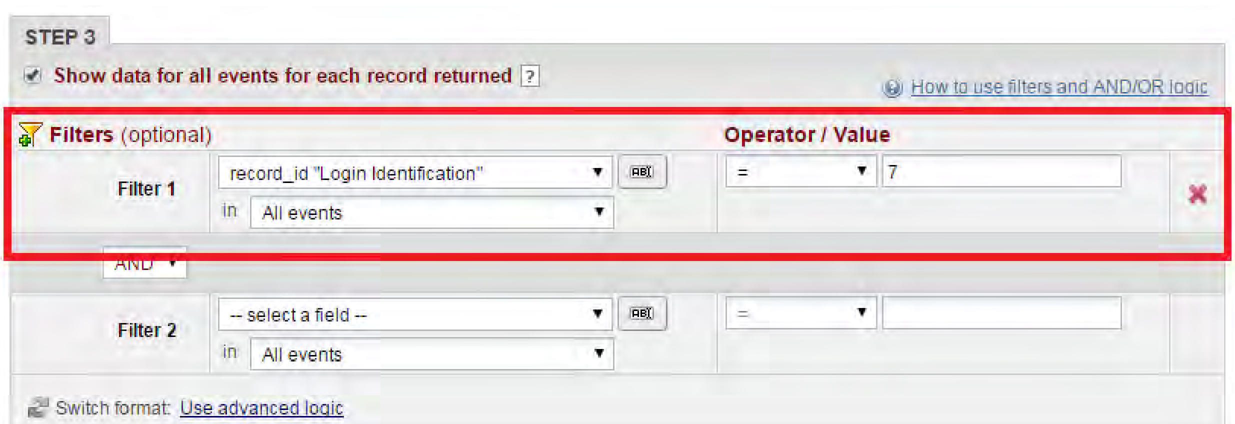
For the process detailed below, the variable names and form names must be identical

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

Step 1

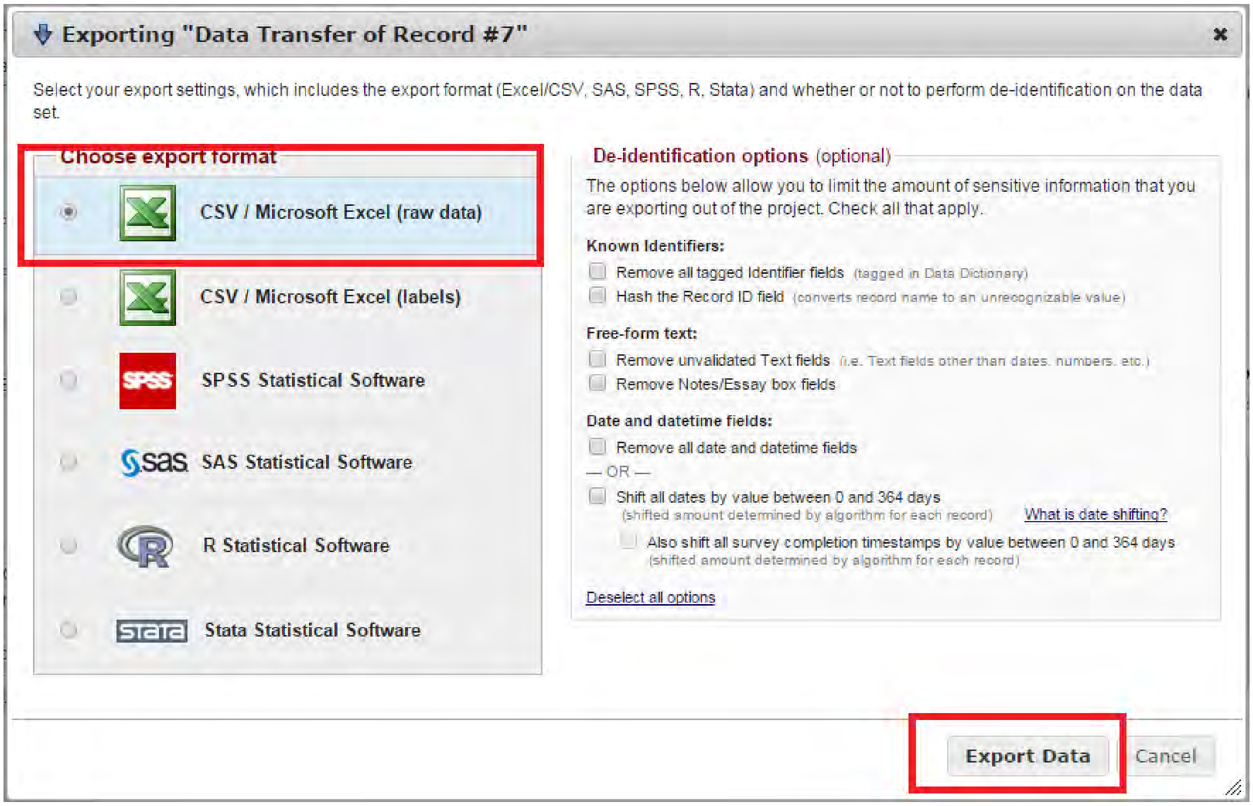
- Within the project containing the record currently, create a report for the specific record (to include all the fields to be transferred with the record). Add a filter to the report to only pull in the information for the record to be transferred. Once the report is created, click Save.





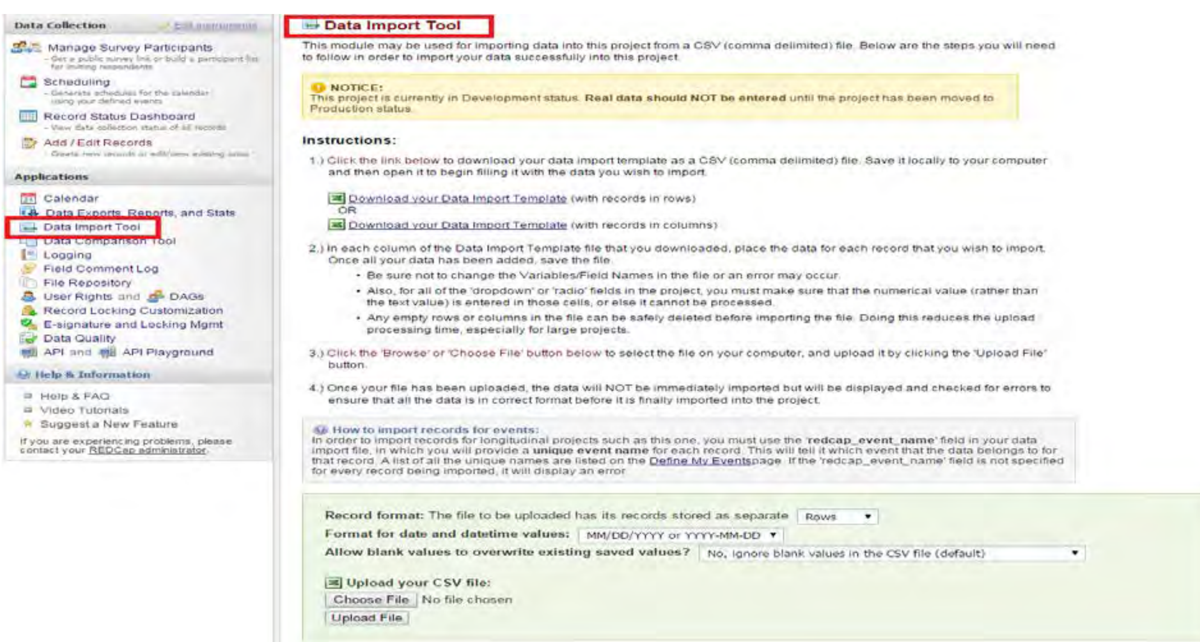
Step 2

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



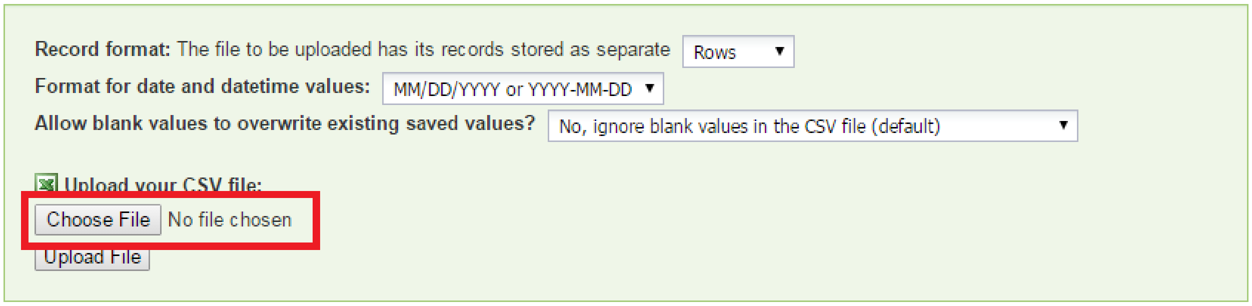
Step 3

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



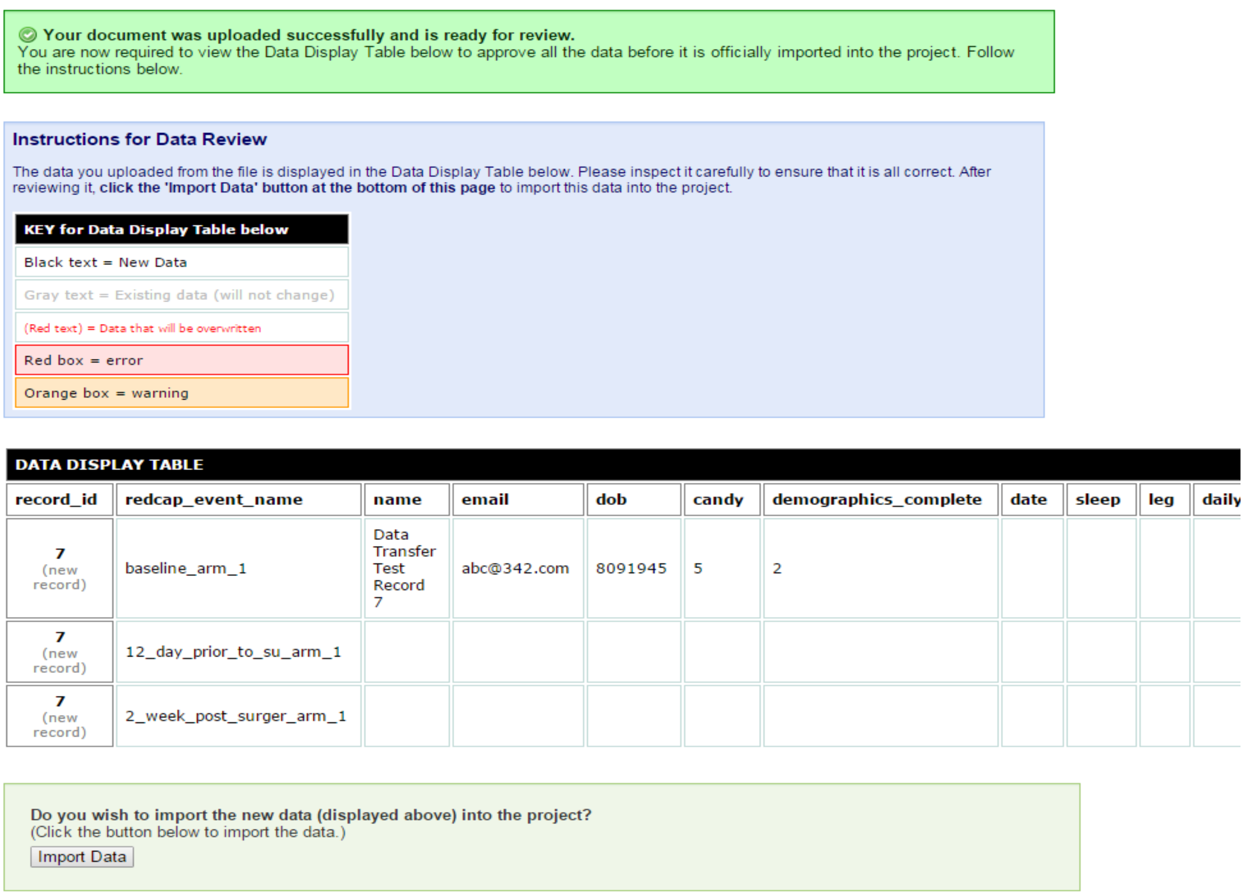
Step 4

- 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*.



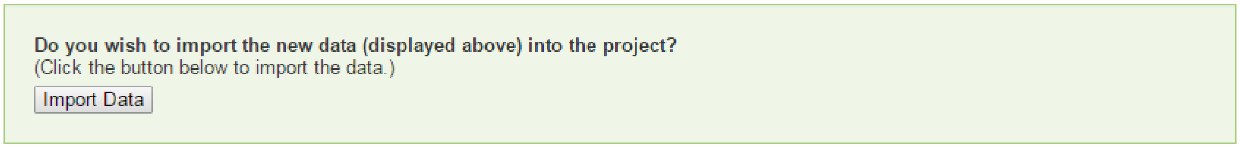
Step 5

- 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.

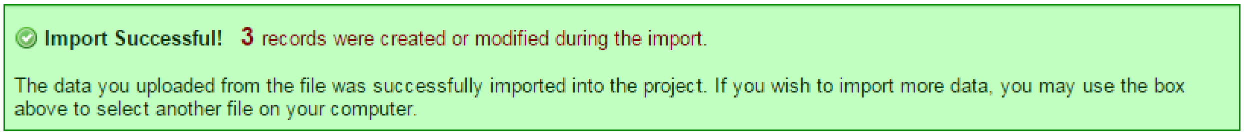


Step 6

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

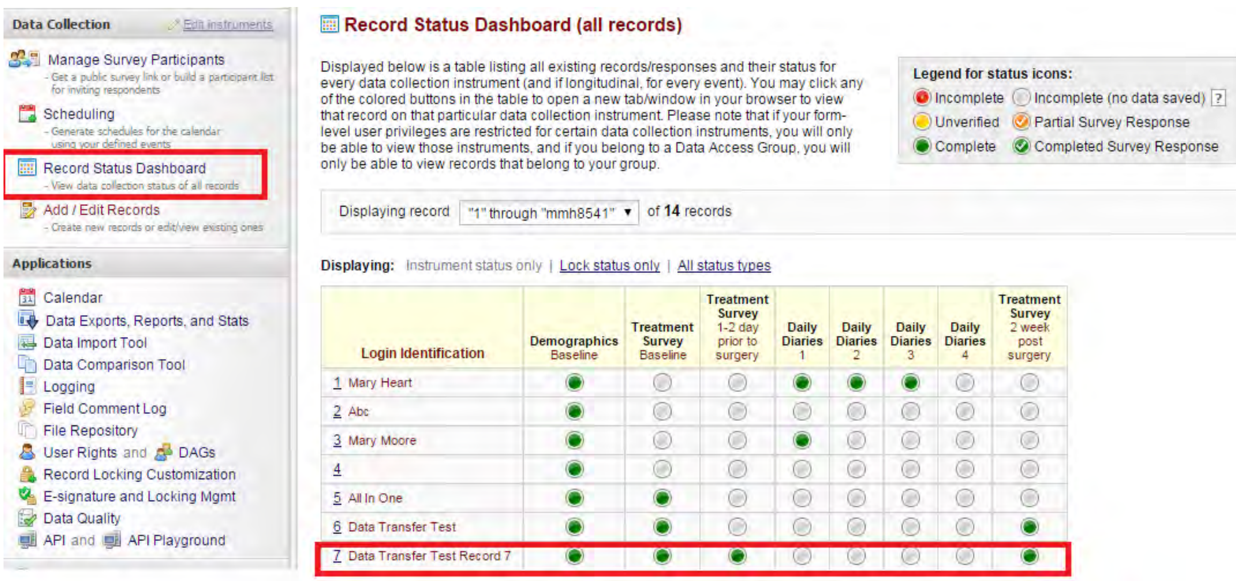


If the import was successful, you will receive a successful notice.



Step 7

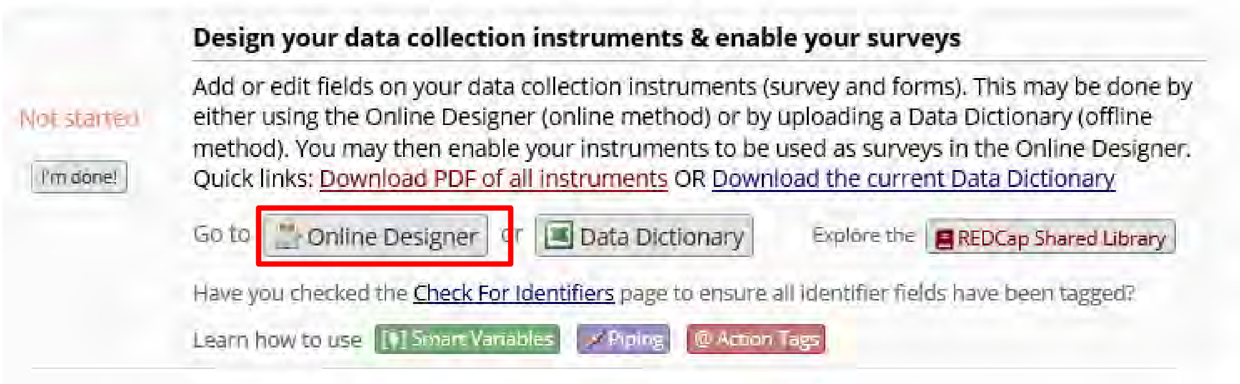
- Navigate to the Record Status Dashboard and locate the imported record. Verify the information was imported to the correct variable names and forms.



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

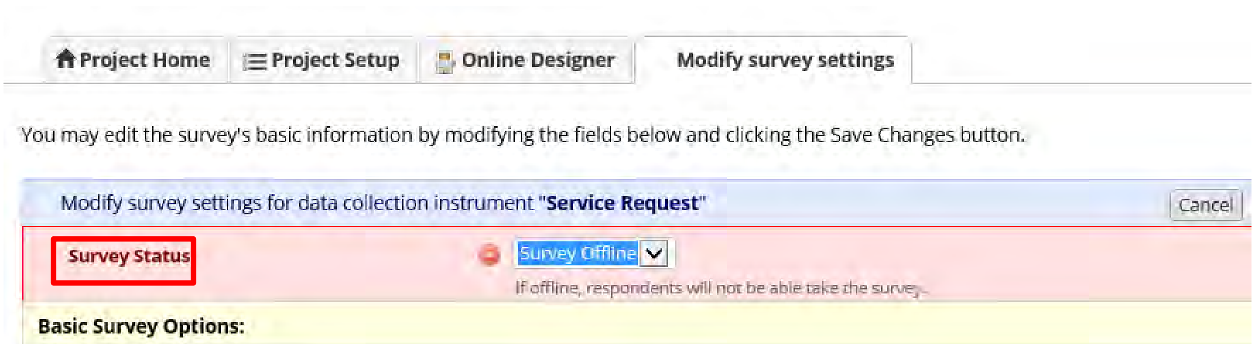
REDCap - How To Make a Survey Inactive

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



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

- 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.

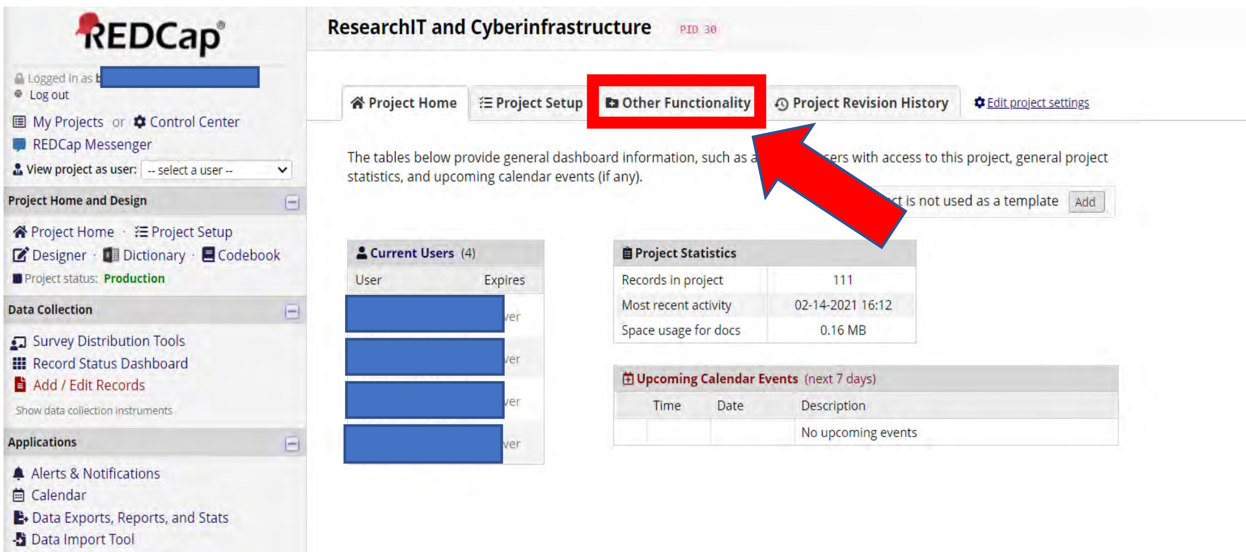


REDCap: How to migrate project from CTSI to GWU

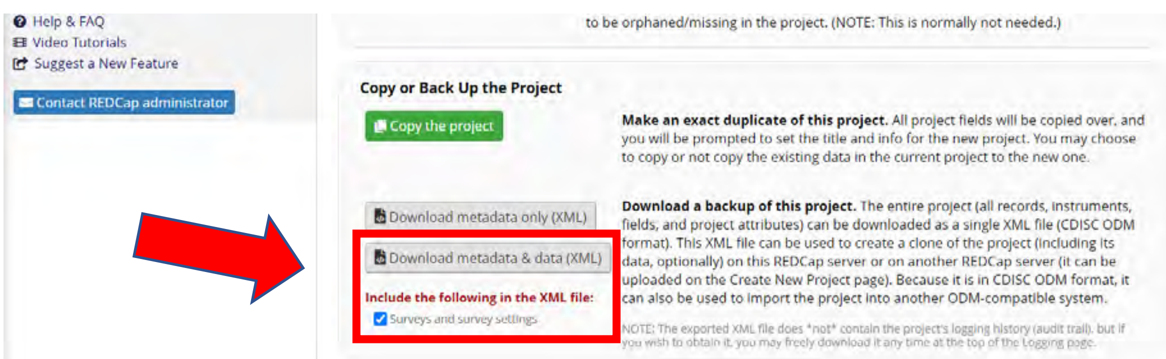
- Login to CTSI (or any REDCap system where the project you want to move is located).

- Choose the project you want to migrate/move from the project list.

- Once you are at the project home page, click "Other Functionality"

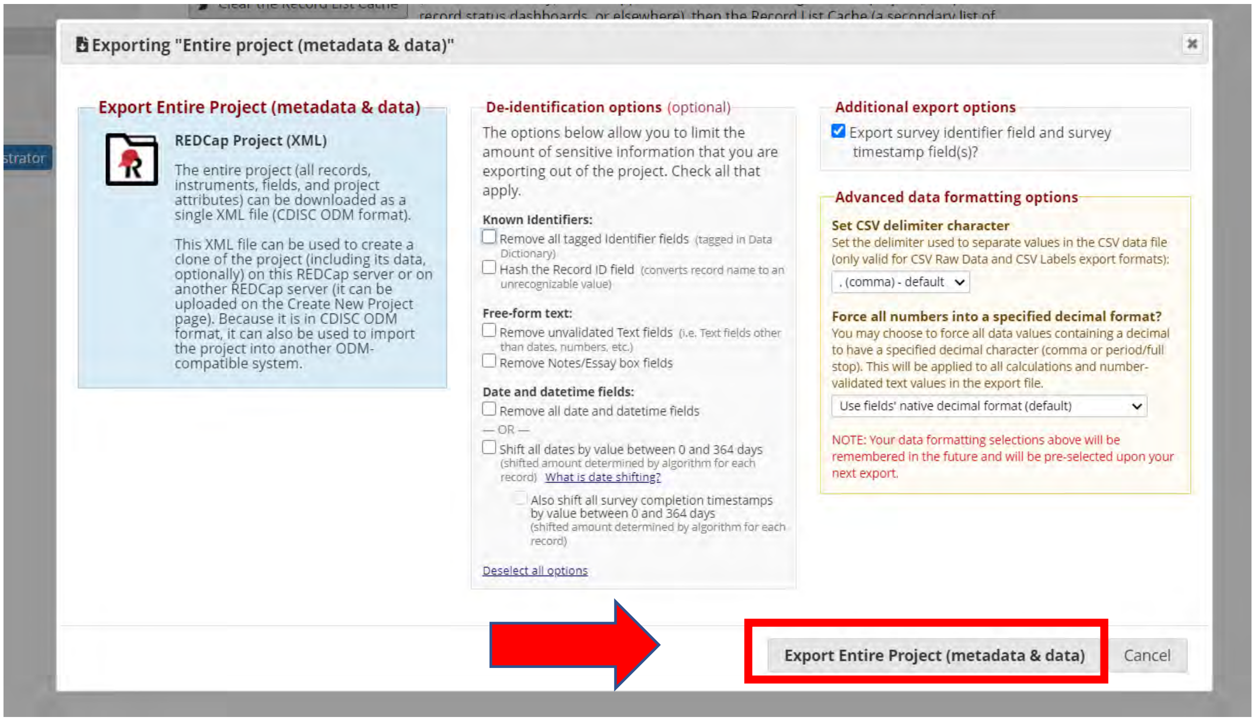


- On the "other functionality" page, scroll down to "Copy or Backup Project" section.



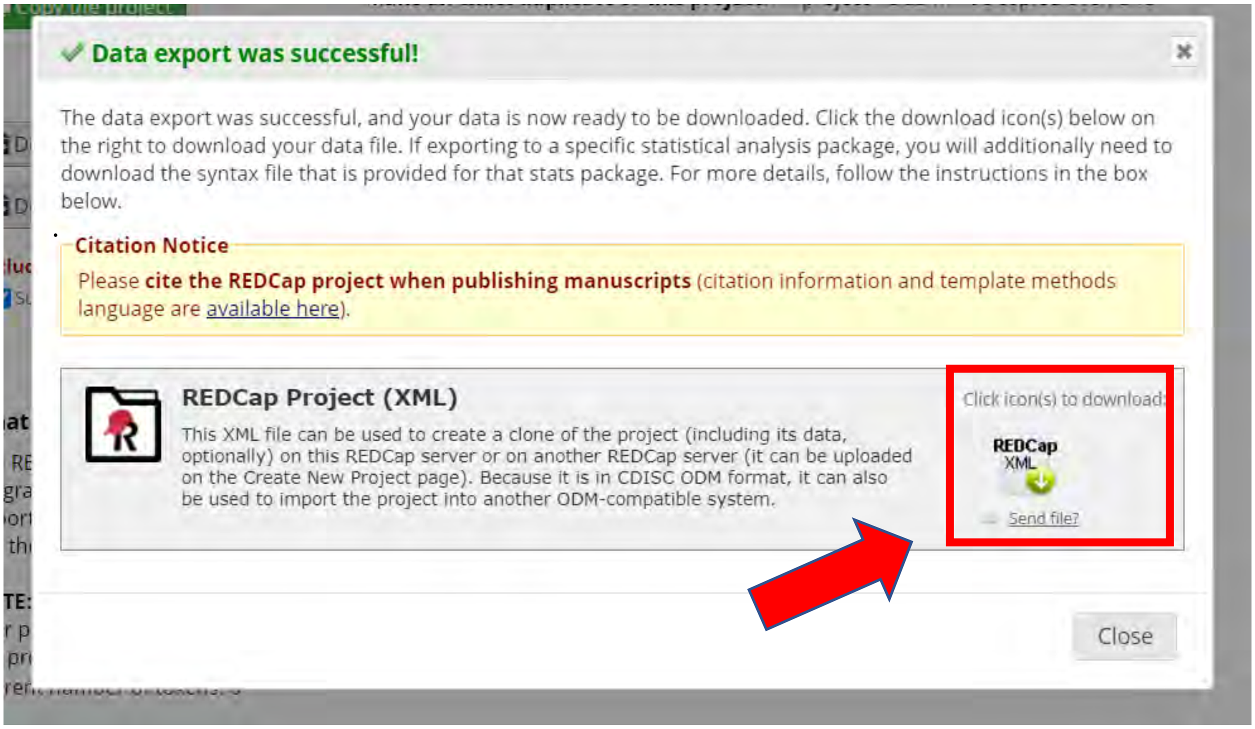
NOTE: There are many options here for exporting your project. We recommend selecting "Download metadata & data" and also selecting "Survey and survey settings" if your project has a survey(s).

- Once you select “Download metadata & data” this screen will appear.



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

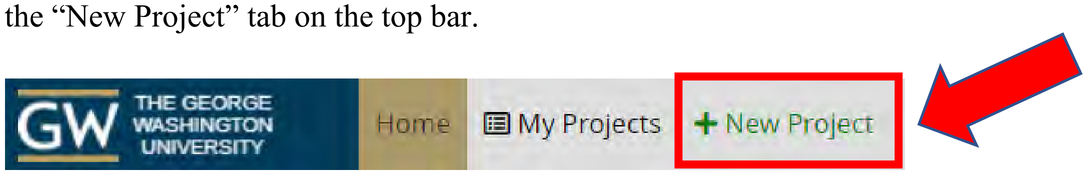
- When everything looks acceptable, select “Export Entire Project (metadata & data)” in the bottom right



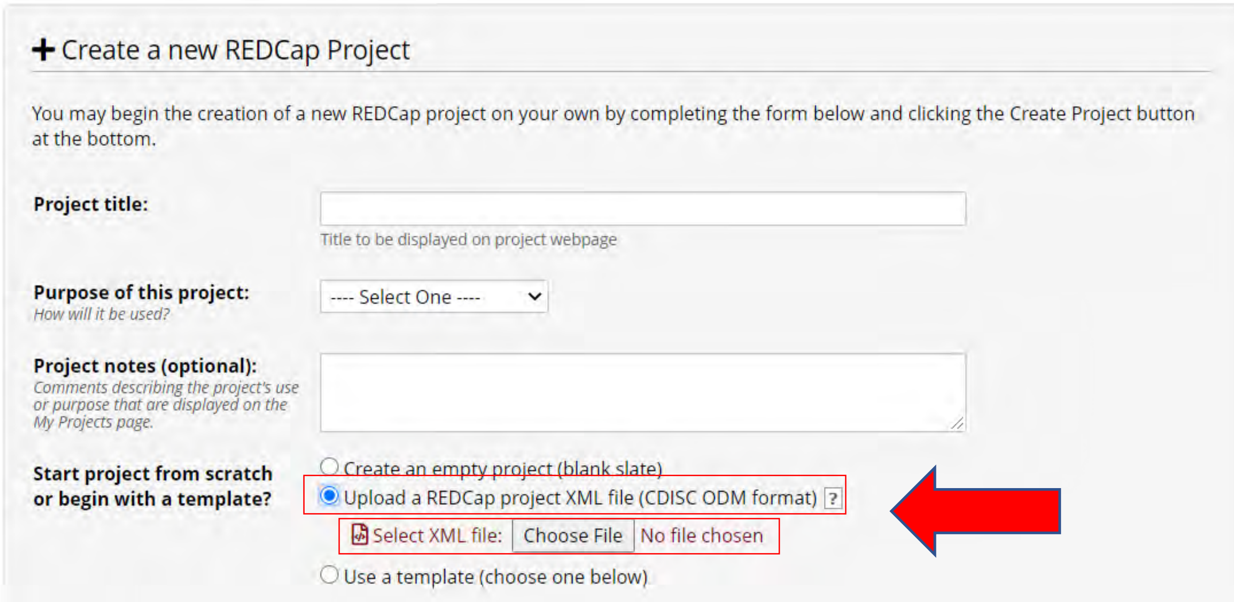
- This will be the next screen alerting that your file is ready for download. Select the icon to the right to download the file.
    - Keep this file in a safe place, we will need it again.

- 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.



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

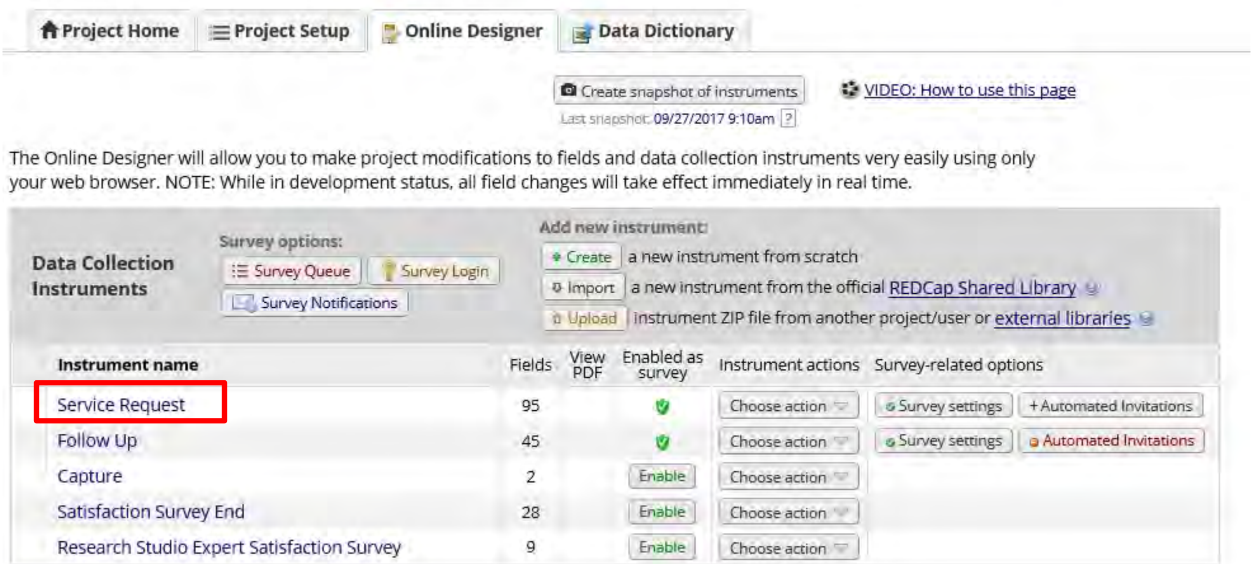
Your project should now be available in the new REDCap instance.

TIPS:

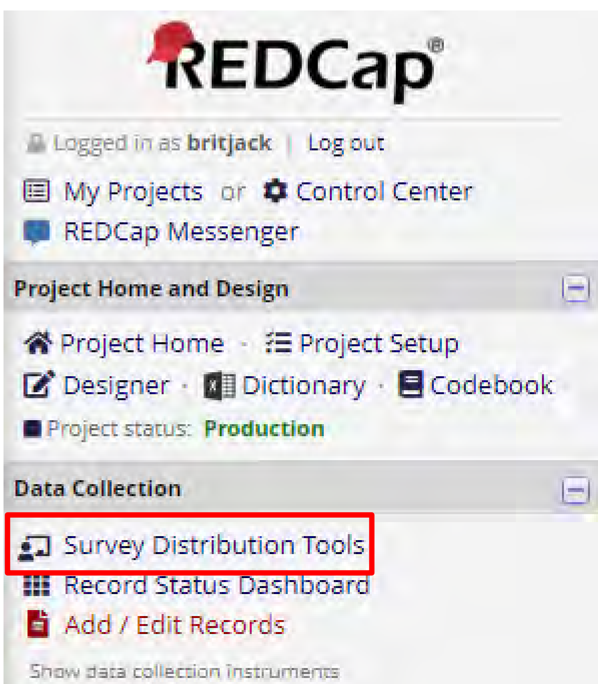
- Review your project to make sure everything migrated safely.
- If you used or use any external modules in the CTSI REDCap instance that you would also want available in the GWU instance, please reach out to an administrator at REDCap@gwu.edu.

REDCap – Obtain the Public Survey Link to a Survey

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.

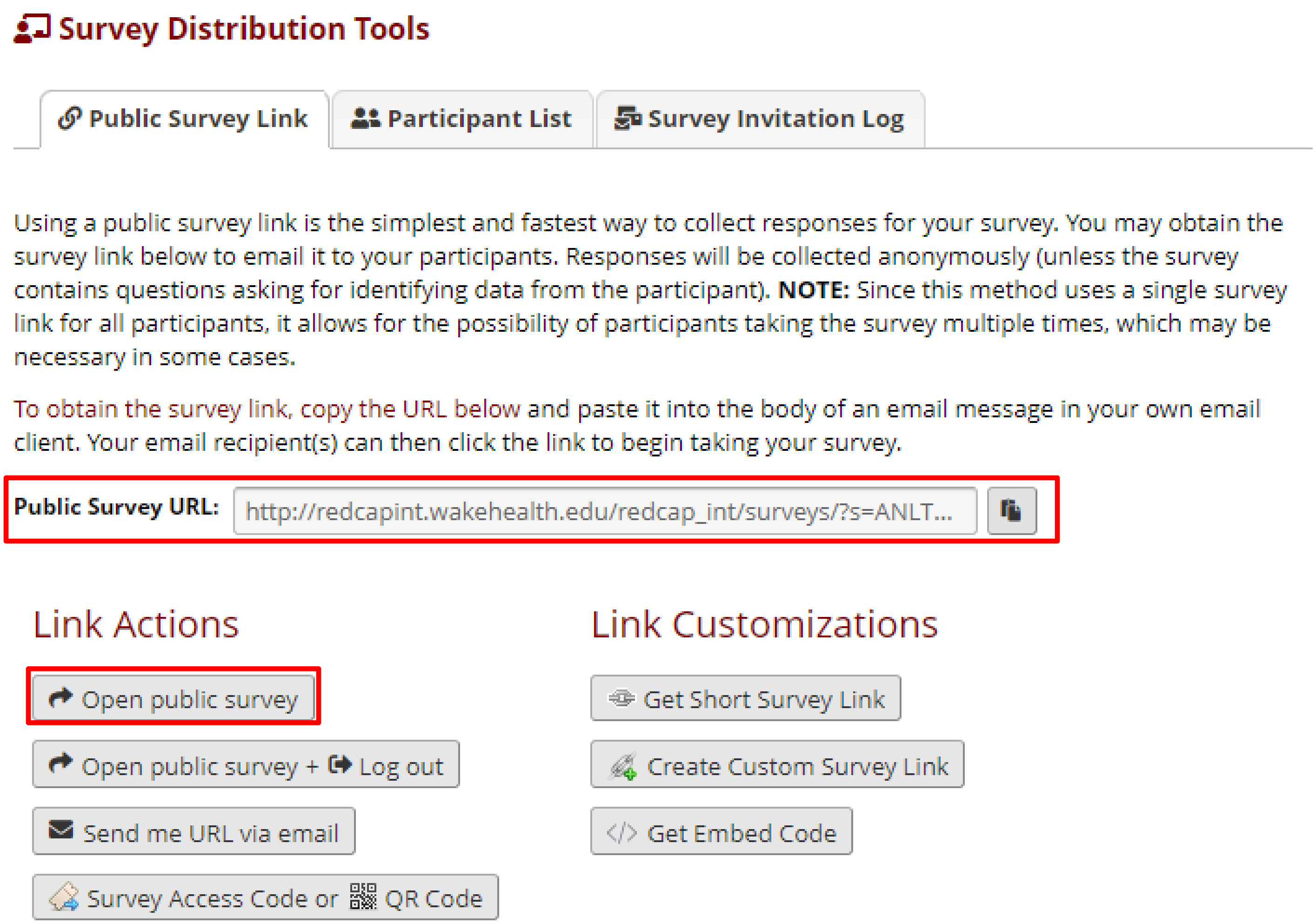


- Step 1
    - To obtain the public link to the first instrument/form/survey, click on 'Survey Distribution Tools.'



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

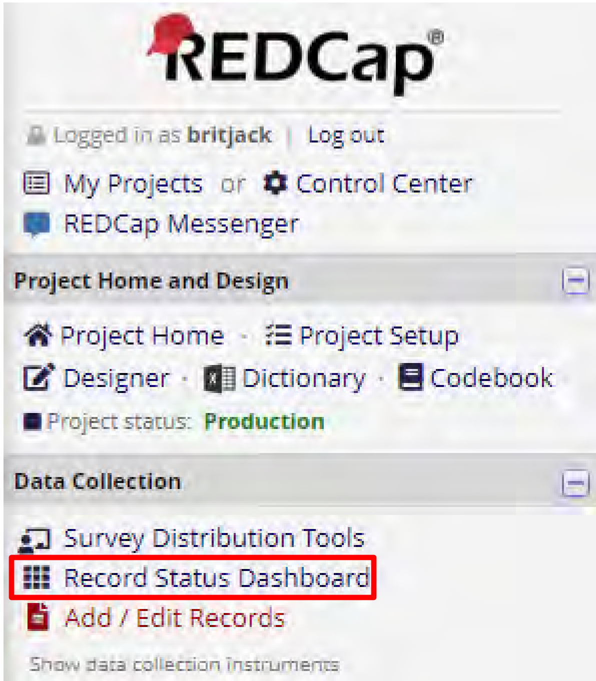
- To obtain the general link to the survey, highlight and copy the link located in the Public Survey URL box. You can alternatively select "Send me URL via email" to have REDCap email you the public survey link.
- To open the survey, click on "Open Public Survey." This will open the survey in a format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

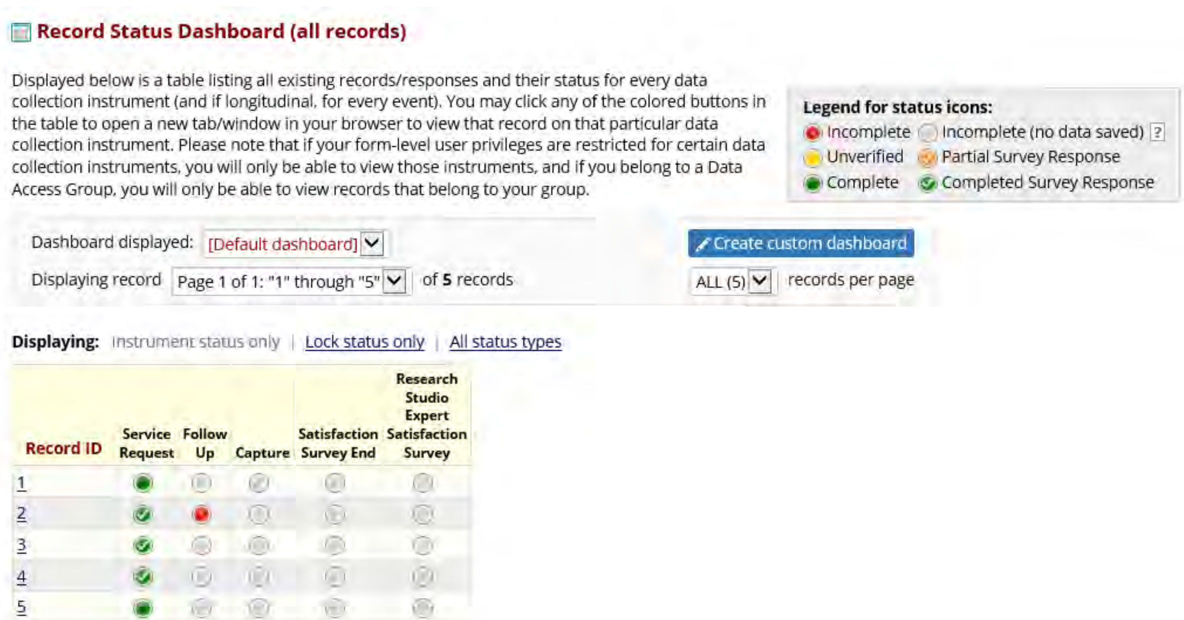


REDCap – How to Open a Follow-Up Survey

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.

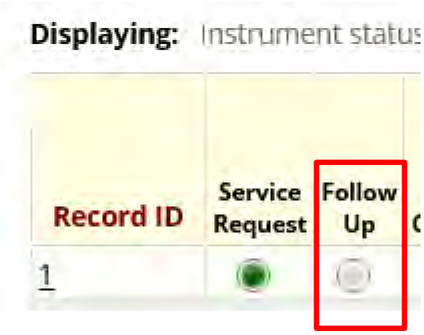
- Step 1
  - To open a follow-up survey for a participant, navigate to the Record Status Dashboard

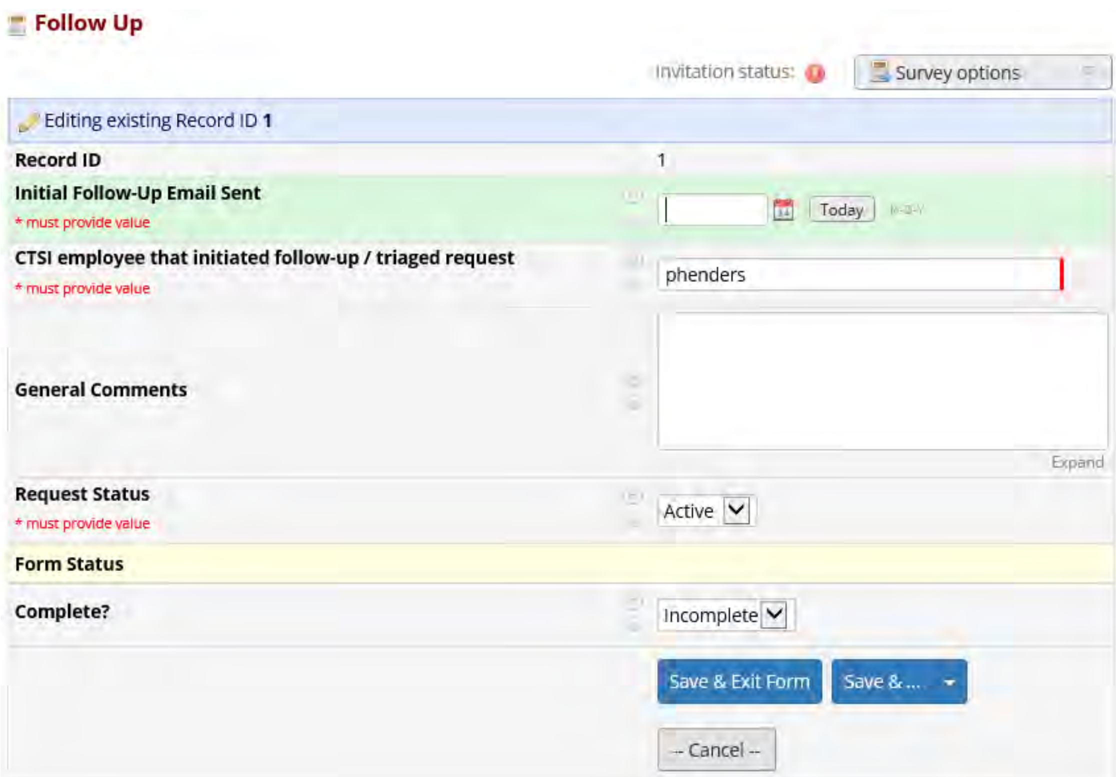




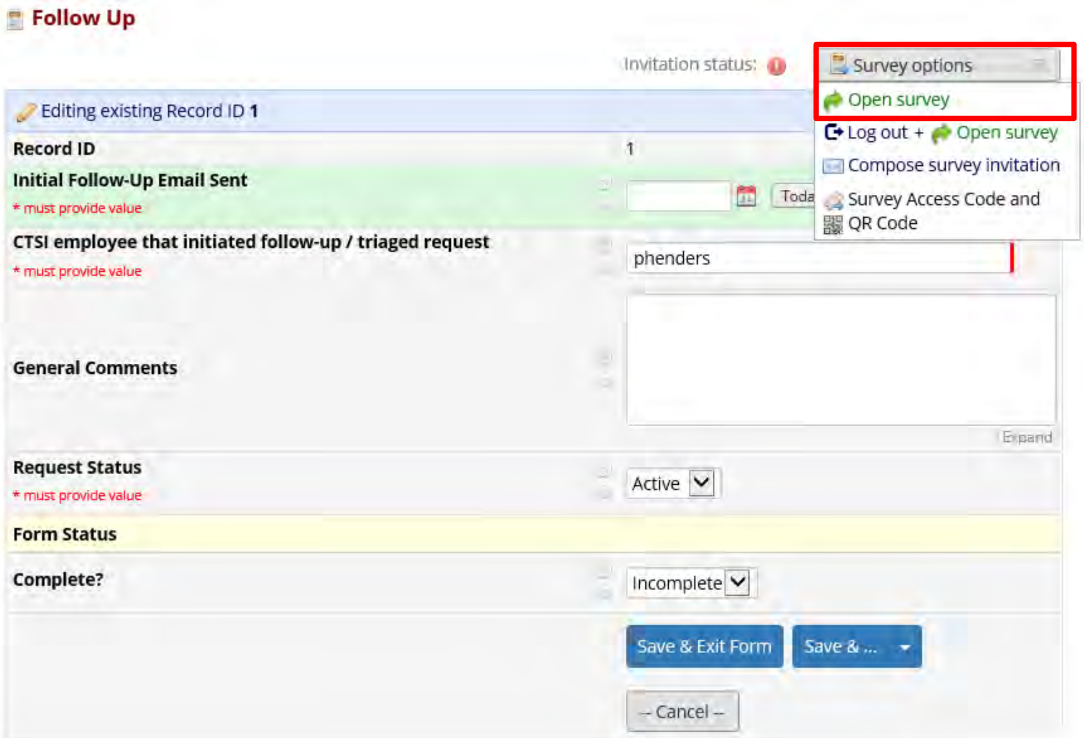
- Step 2
  - Locate the Record for which the next survey needs to be completed.

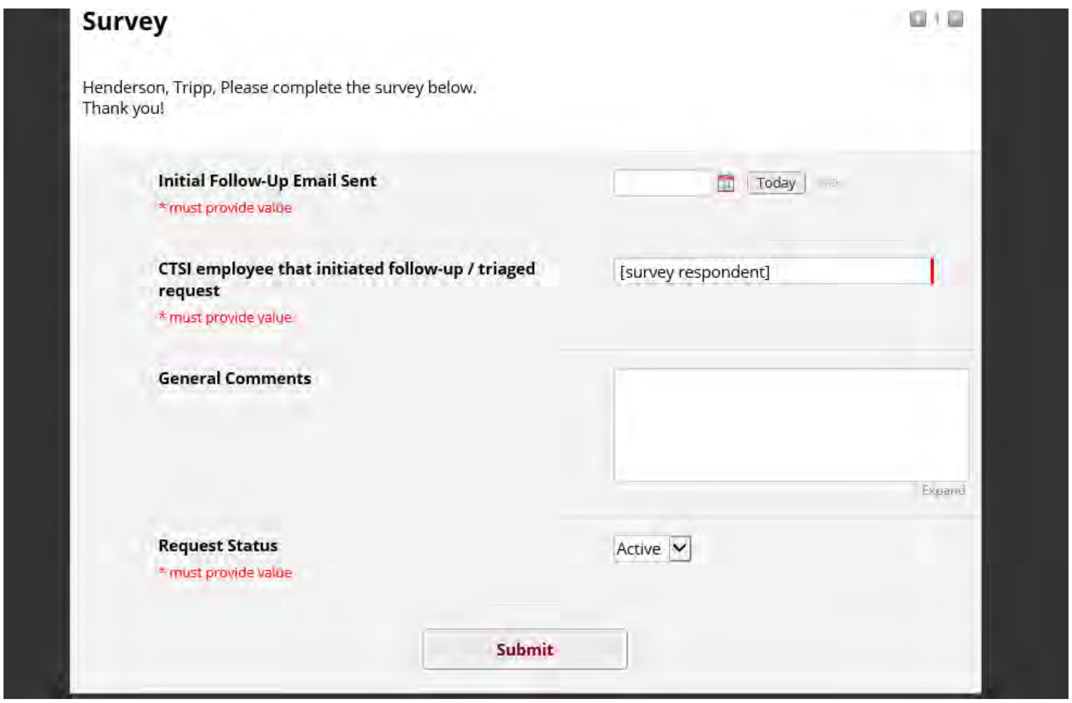
- Click on the grey bubble under the appropriate Survey header.
- This will open the Data Entry Form for that record's survey.





- 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
Open survey
Log out + Open survey
Compose survey invitation
Survey Access Code and
QR Code
Editing existing Record ID 1
Record ID
1
Initial Follow-Up Email Sent
* must provide value
CTSI employee that initiated follow-up / triaged request
* must provide value
phenders
General Comments
Expand
Request Status
* must provide value
Active
Form Status
Complete?
Incomplete
Save & Exit Form
Save & ...
-- Cancel --


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

REDCap – Piping

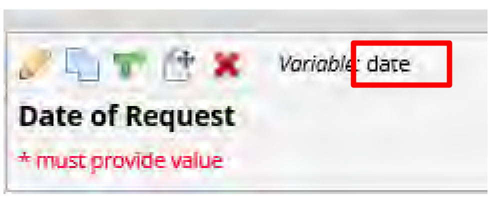
Piping allows a user to insert previously collected data into a form or survey within the same REDCap project.

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

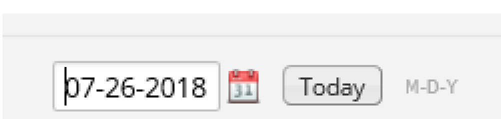
To pipe in previously collected data, insert the variable name in brackets where you want the collected data to appear.

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:

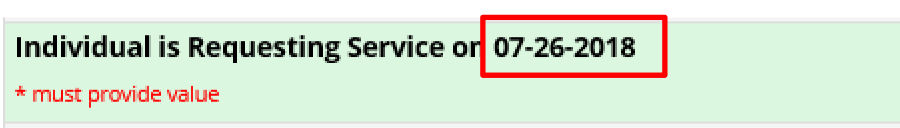


Collected Data Variable

Variable inserted into a question



Response to question

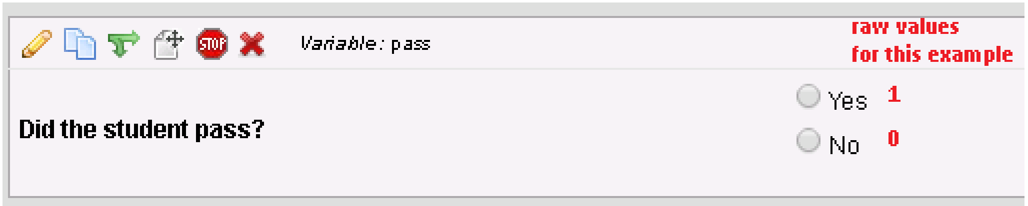


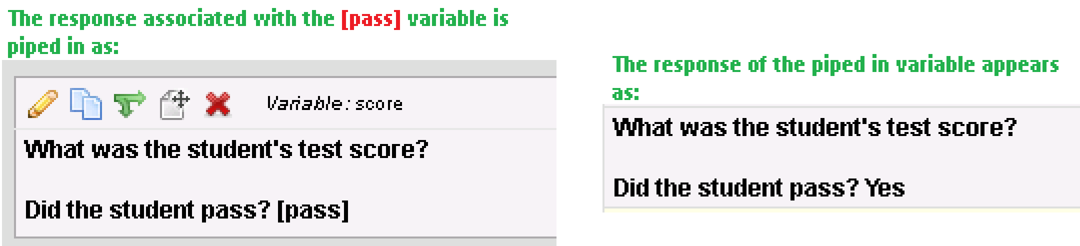
The response to the question is piped into another question

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.

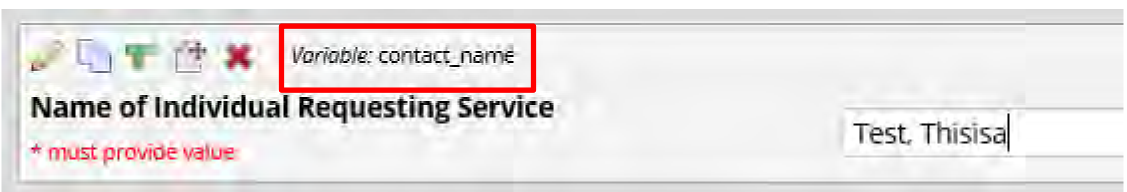
In this example, we are piping in the data associated with the question, “Did the student pass?” (variable name=*pass*). The piped field will appear as:

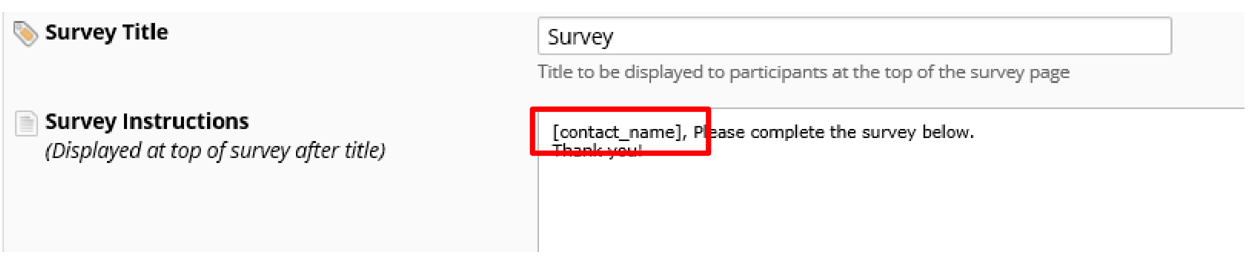


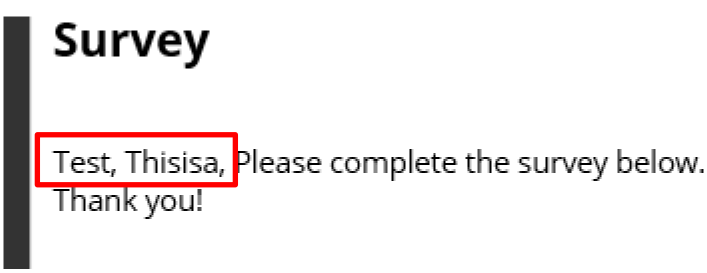


If you are piping data **from** a non-multiple choice field type (i.e. notes field or text field), the response will appear as the literal value.

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:







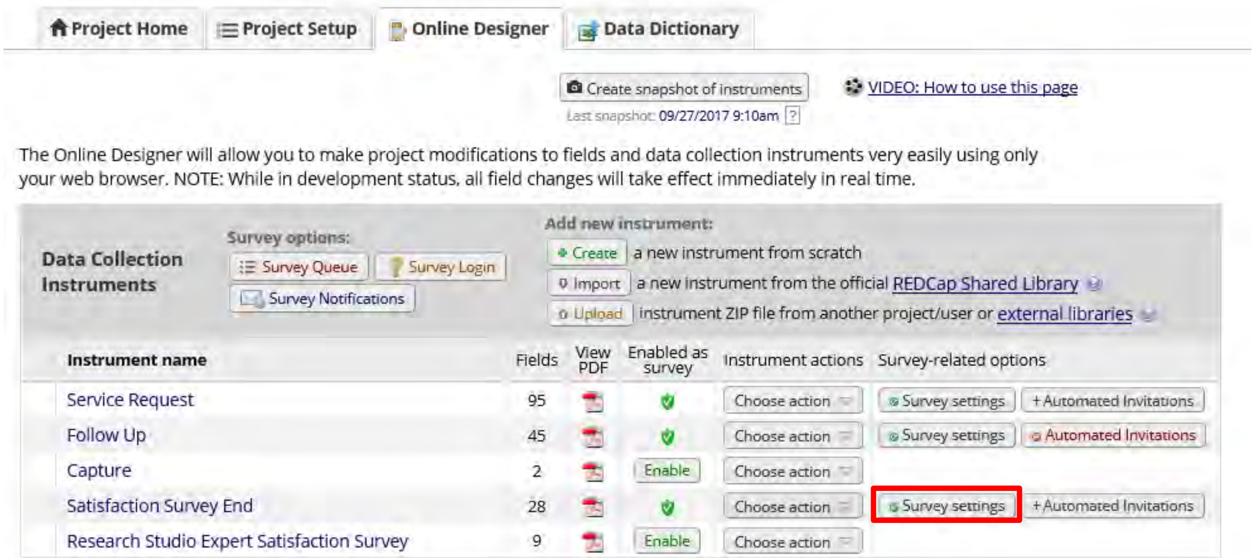
To cross-event pipe in longitudinal projects, include the event name in brackets before the variable name in brackets. The event name is located on the ‘Define My Events’ page.

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]

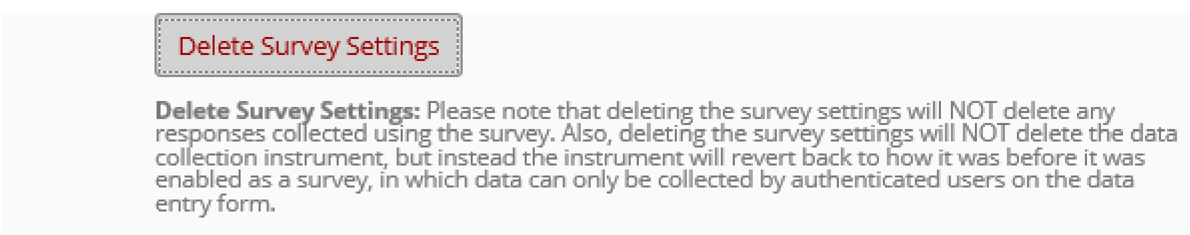
REDCap – How to remove the Survey functionality and return the instrument back to basic data entry

To remove the survey functionality, complete the following steps:

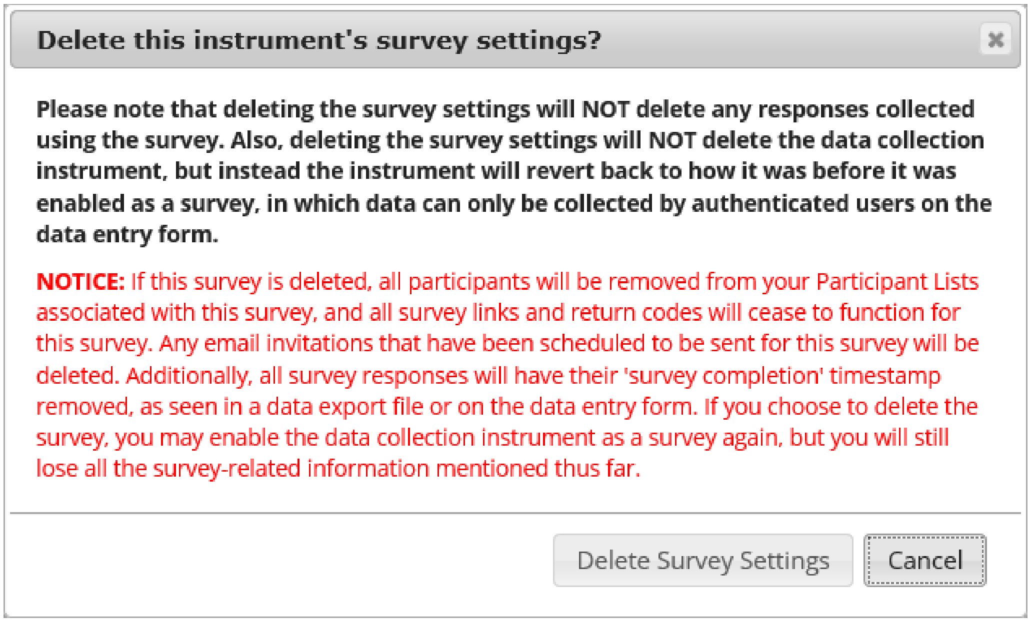
- Navigate to the Online Designer tab. Click on “Survey Settings” next to the instrument that you no longer want to be a survey.



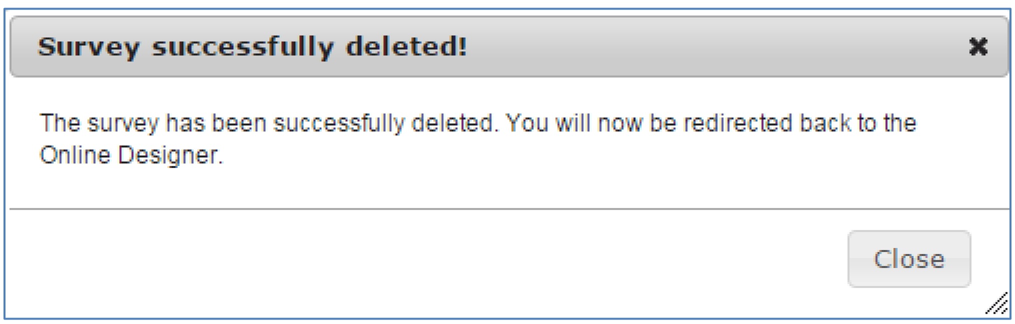
- This will open the Modify Survey Settings page. Navigate to the bottom of the page and locate the “Delete Survey Settings” button. Notice the disclaimer underneath the button.



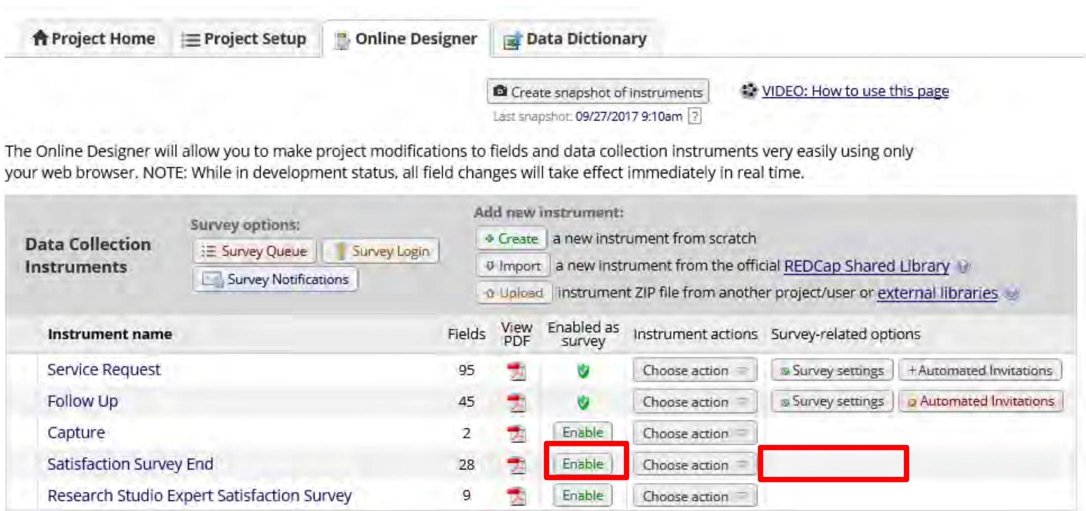
- Click on the “Delete Survey Settings” button. A second disclaimer will appear. If you are certain you want to remove the survey functionality, click on Delete Survey.
- Note: This will not delete the instrument. It will only remove the survey functionality.



- The user will receive a successful deletion notice.

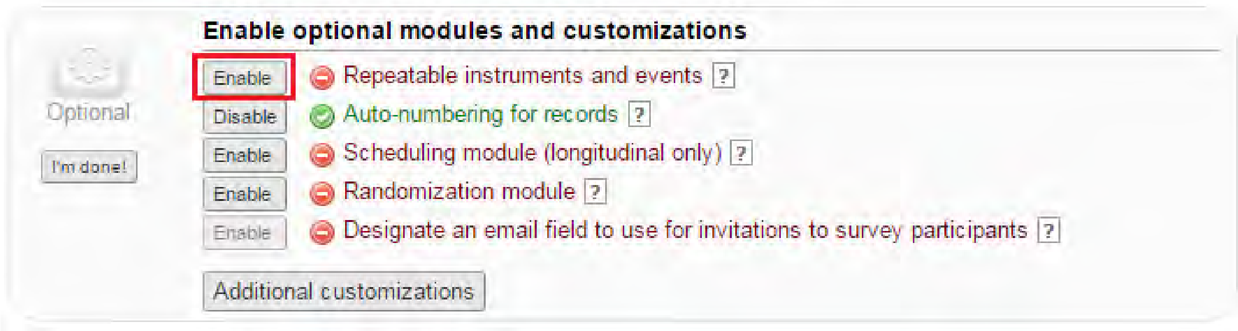


- Once the user clicks on "Close," the system will return the user to the Online Designer tab. Notice the survey functionality is no longer enabled.

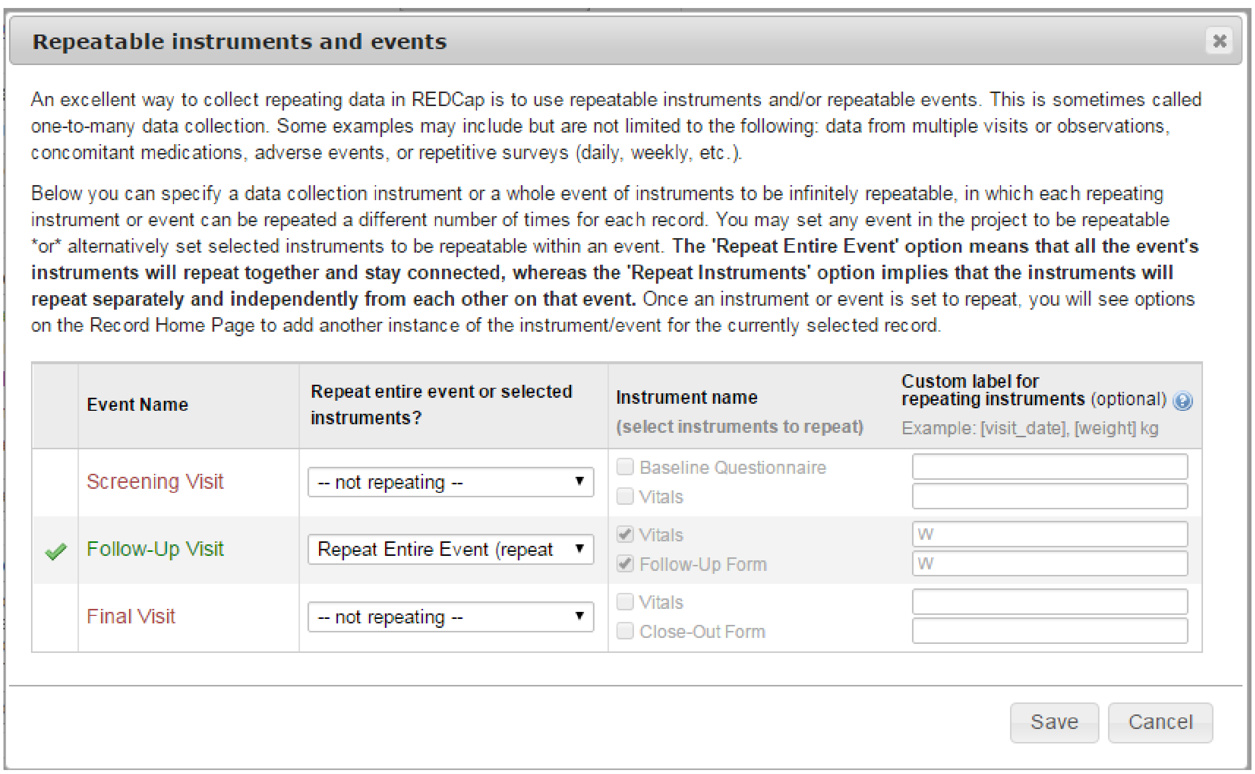


REDCap – Repeating Events

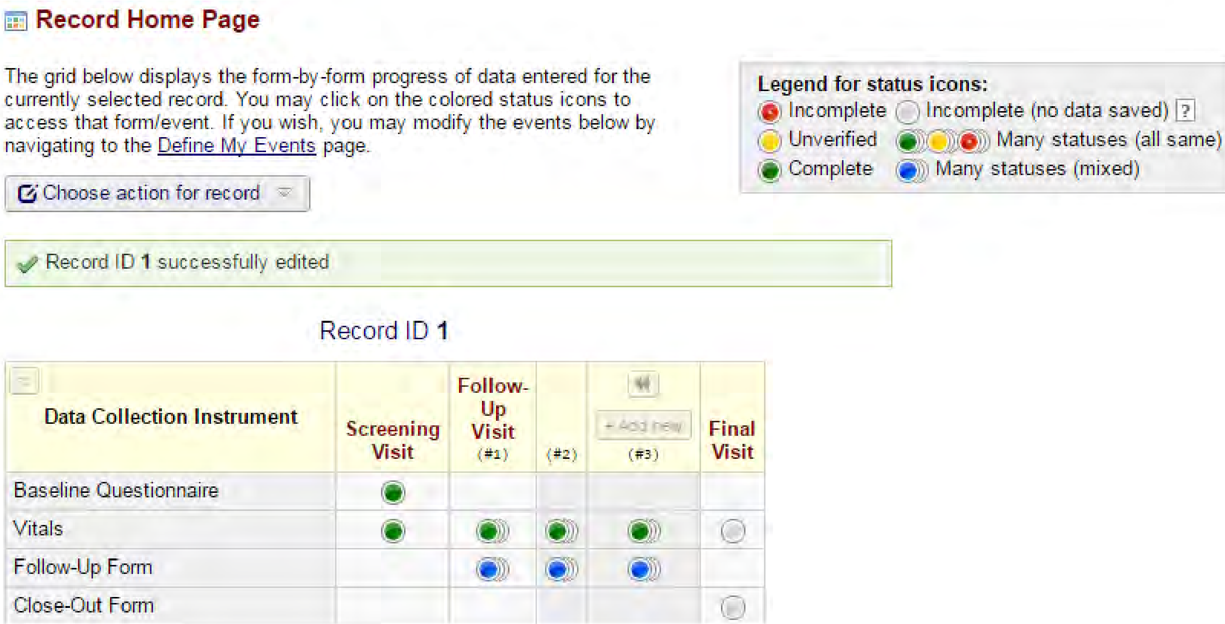
- Before enabling the repeating event functionality, first build all of your forms in either the Online Designer or Data Dictionary and then create your events and designate your forms to your events.
- Once all forms have been built and designated to the appropriate events, navigate to the Project Setup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



- 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."



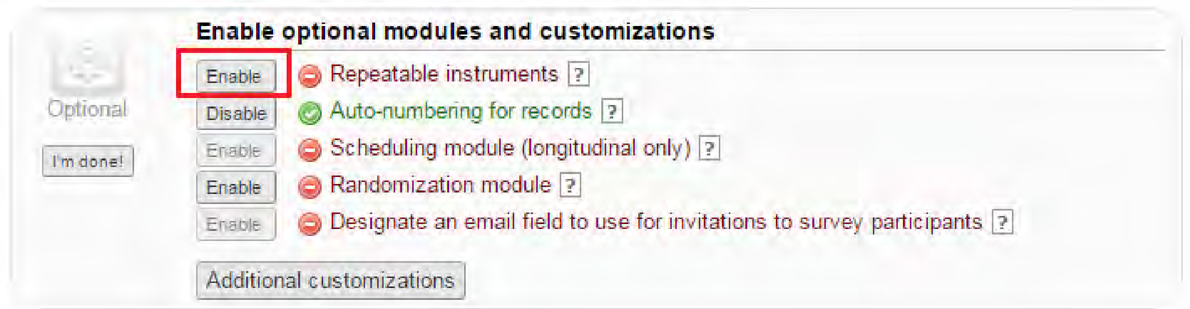
- You have now successfully enabled the repeating event functionality. The Record Home Page will display the repeating events as shown in the table on the next page.



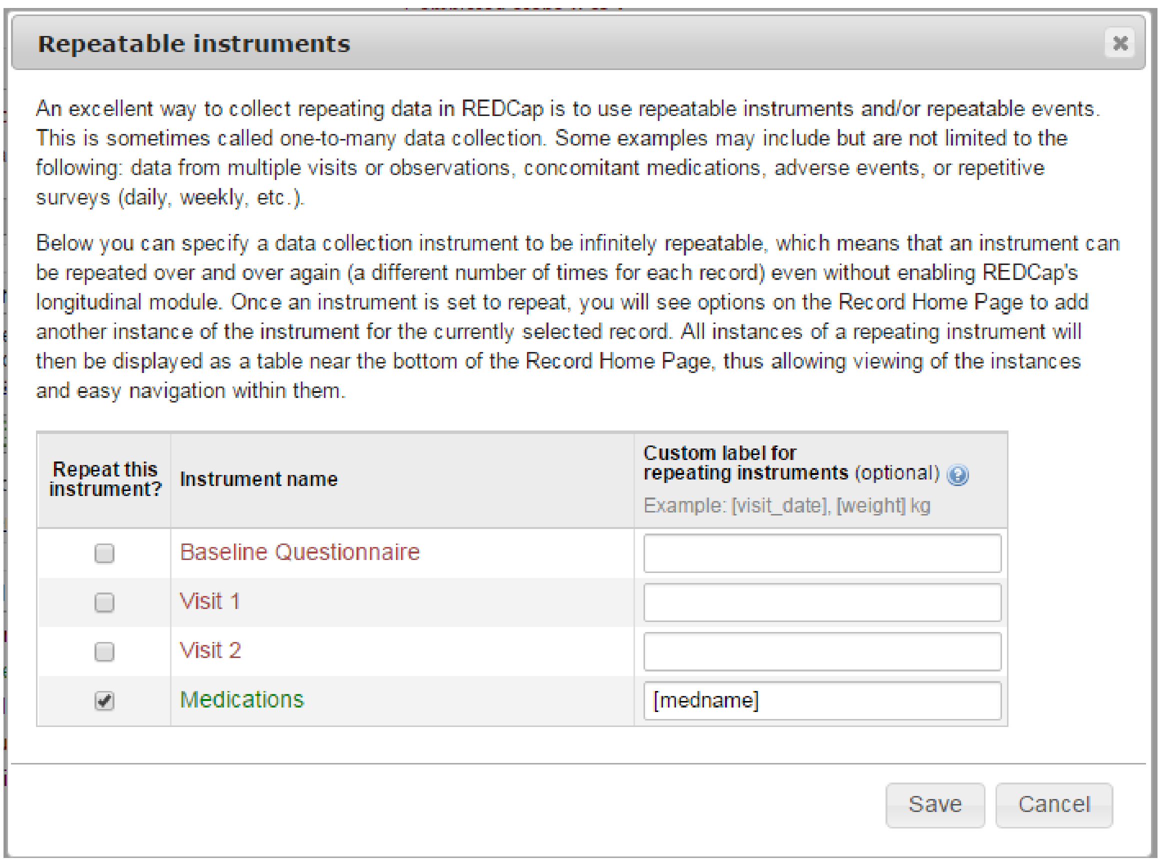
- In order to add a new instance of your repeating event, you can click the “Add new” button above the final instance (in this example, #3).

REDCap – Repeating Instruments

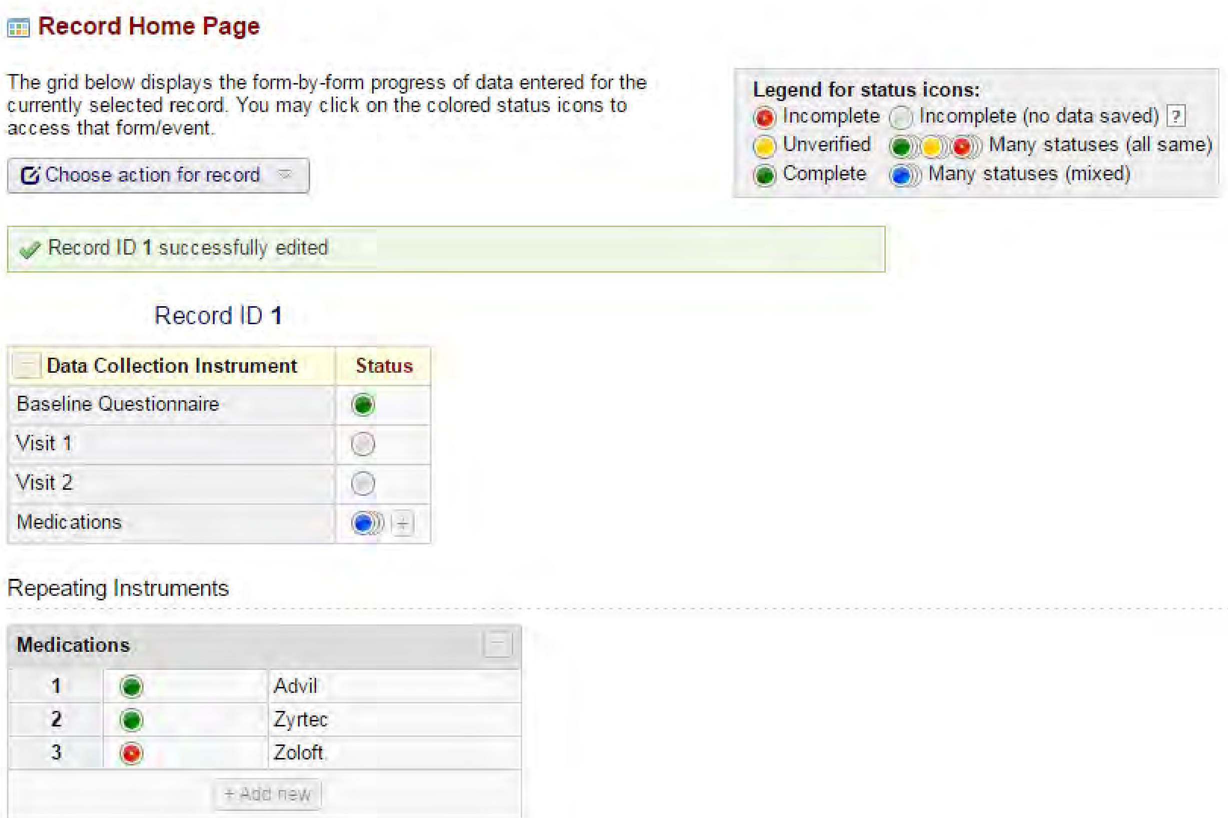
- Before enabling the repeating instrument functionality, first build all of your forms in either the Online Designer or Data Dictionary.
- Once all forms have been built, navigate to the Project Setup page. Under “Enable optional modules and customizations,” select the Enable button next to “Repeatable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



- 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.”



- 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).



- 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.

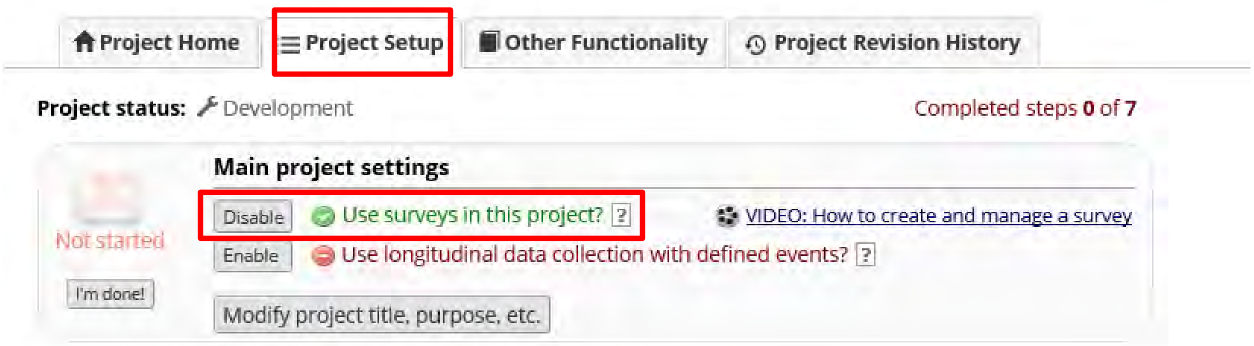
REDCap – Survey Participant List

If responses do not 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.

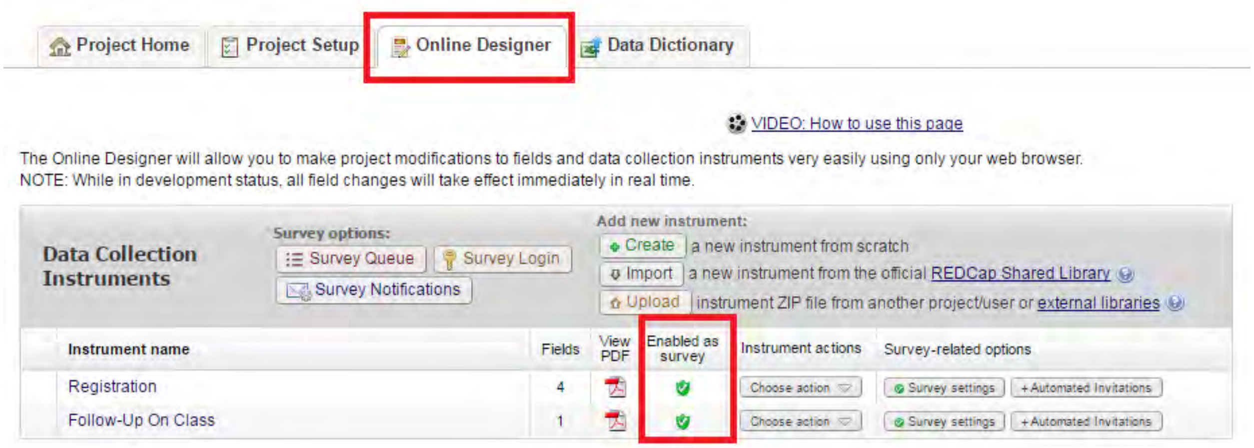
Option 1: The project's first instrument is a survey and you want to use the public URL to capture email addresses for follow-up surveys

Step 1: Ensure the survey functionality is enabled:

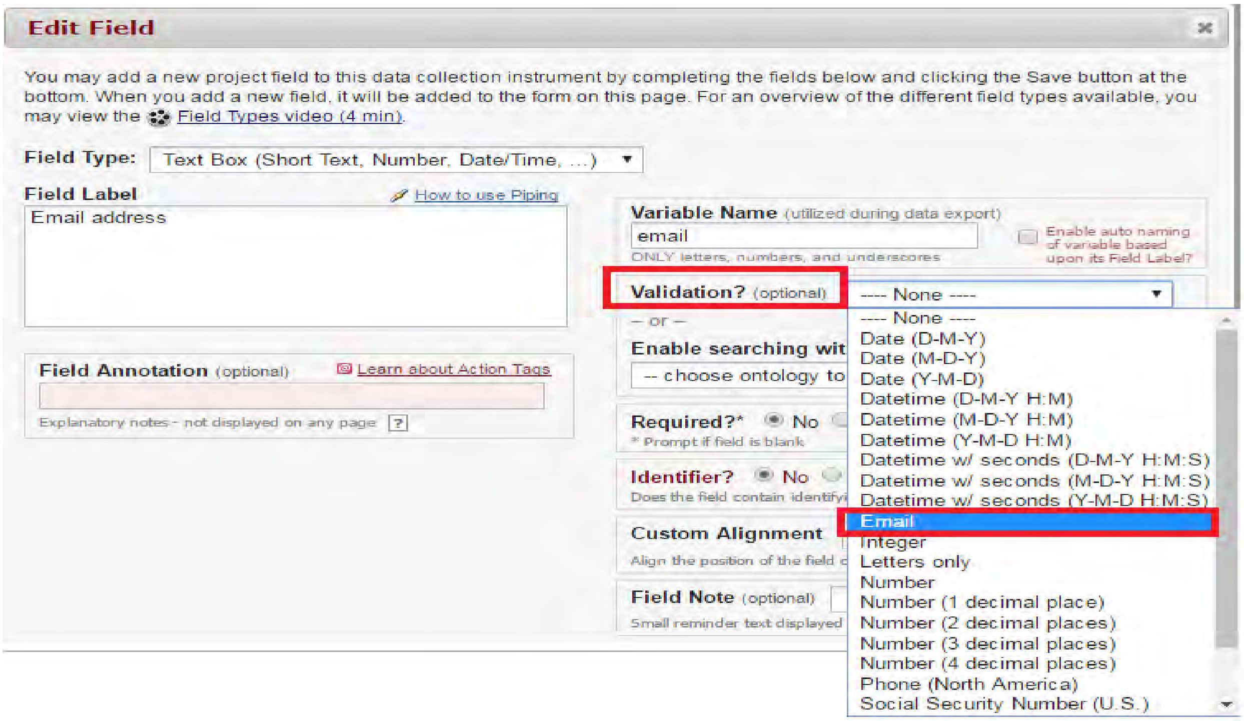
#1) On the Project Setup tab



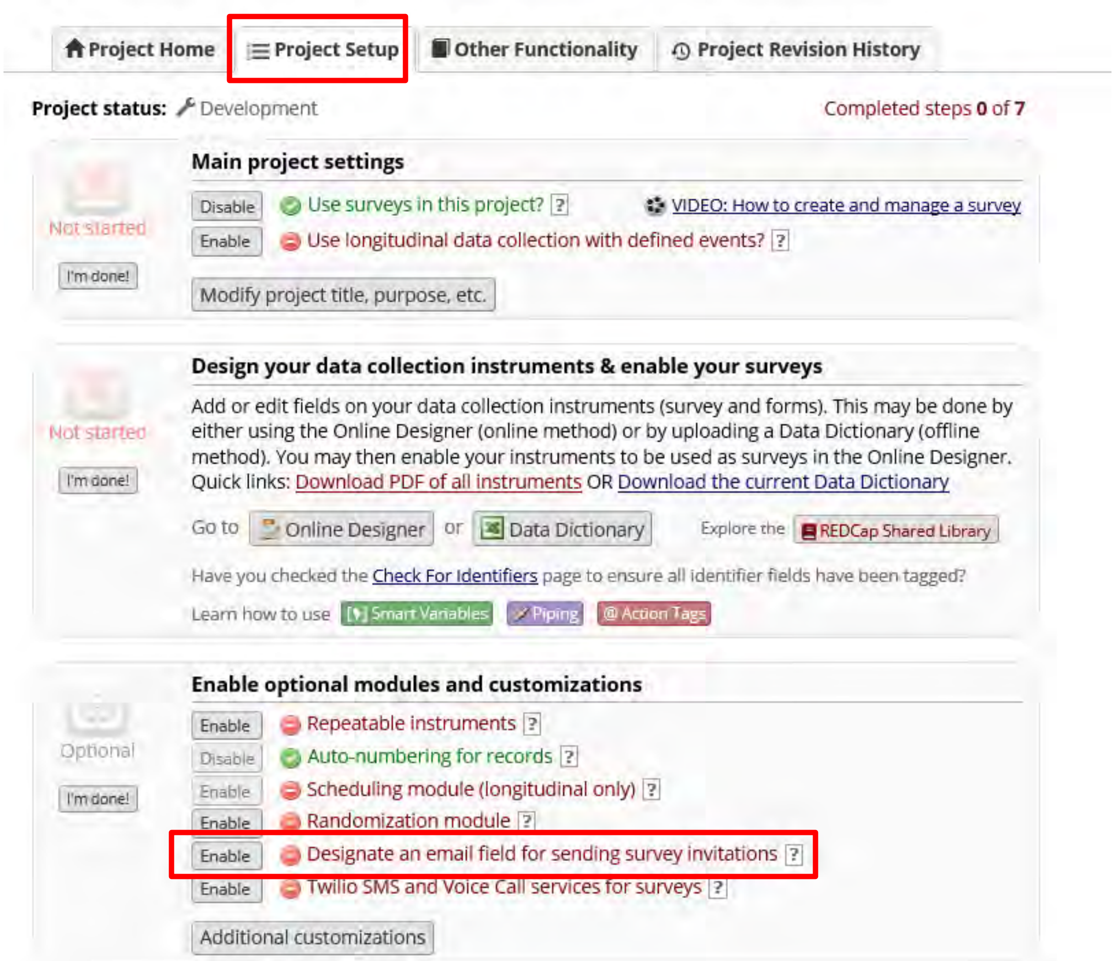
#2) Each individual form that will be a survey is also enabled on the Online Designer tab



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.'



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.'



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 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).

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.

Save Cancel

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.

Manage Survey Participants

Public Survey Link | Participant List | Survey Invitation Log

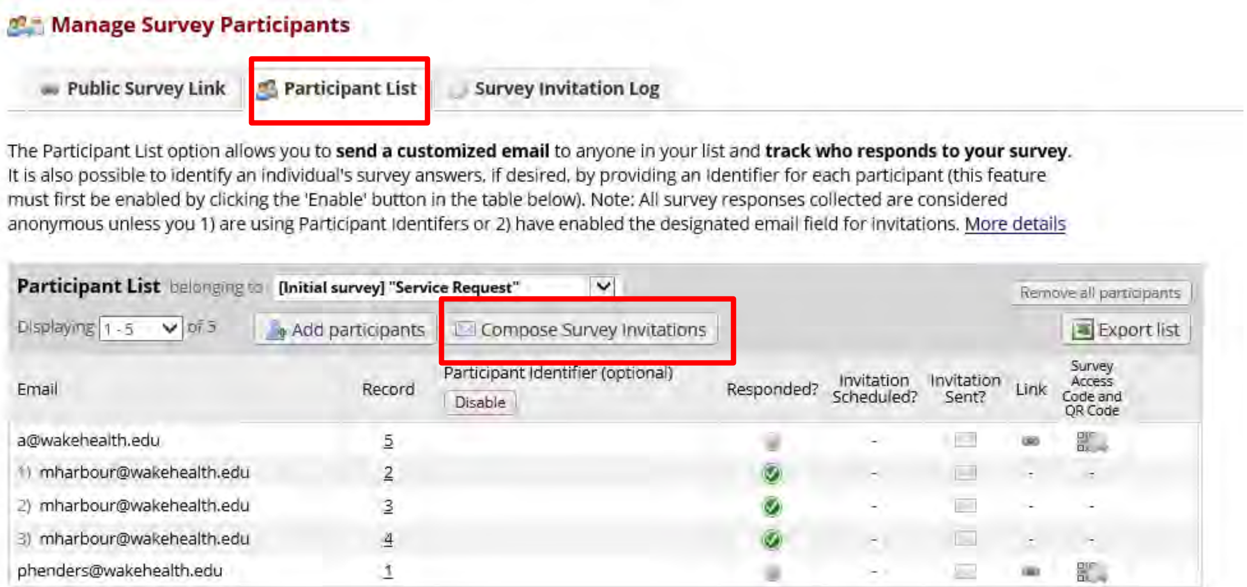
The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifers or 2) have enabled the designated email field for invitations. More details

Participant List belonging to [Initial survey] "Service Request"   Remove all participants

Displaying 1 - 5 of 5   Add participants   Compose Survey Invitations   Export list

Email	Record	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5			-			
1) mharbour@wakehealth.edu	2			-		-	-
2) mharbour@wakehealth.edu	3			-		-	-
3) mharbour@wakehealth.edu	4			-		-	-
phenders@wakehealth.edu	1			-			

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.’



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.

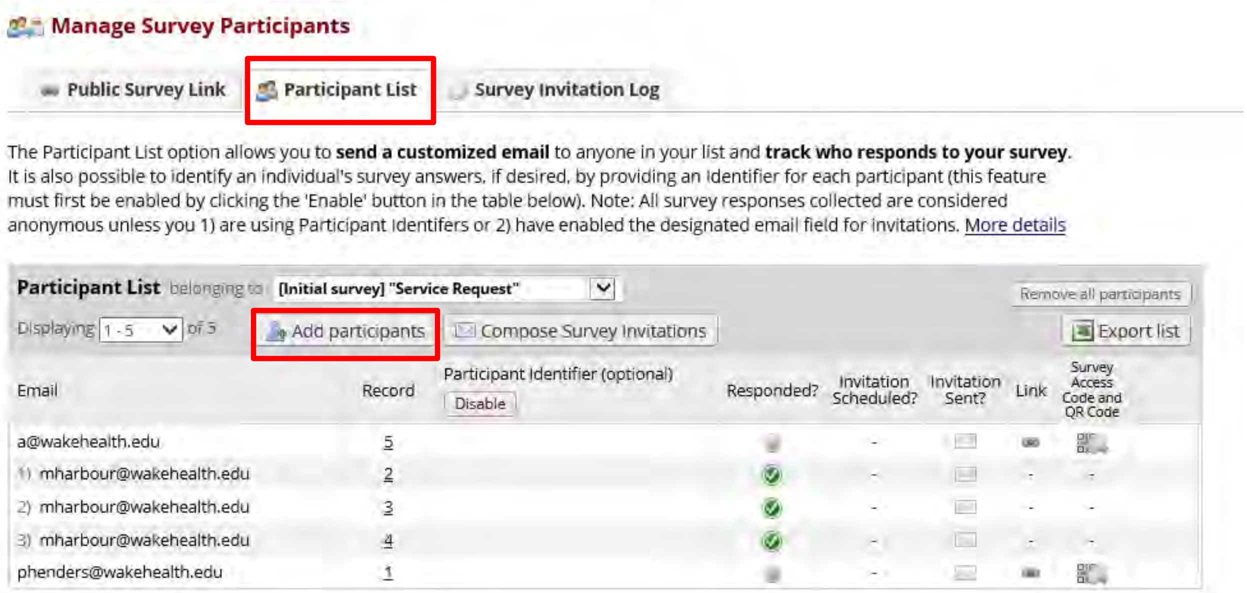
Only the names of individuals who completed the prior survey will be in this list. The system will pre-check the names of the individuals. If you decide against sending a follow-up survey to an individual, you can uncheck their name manually.

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.

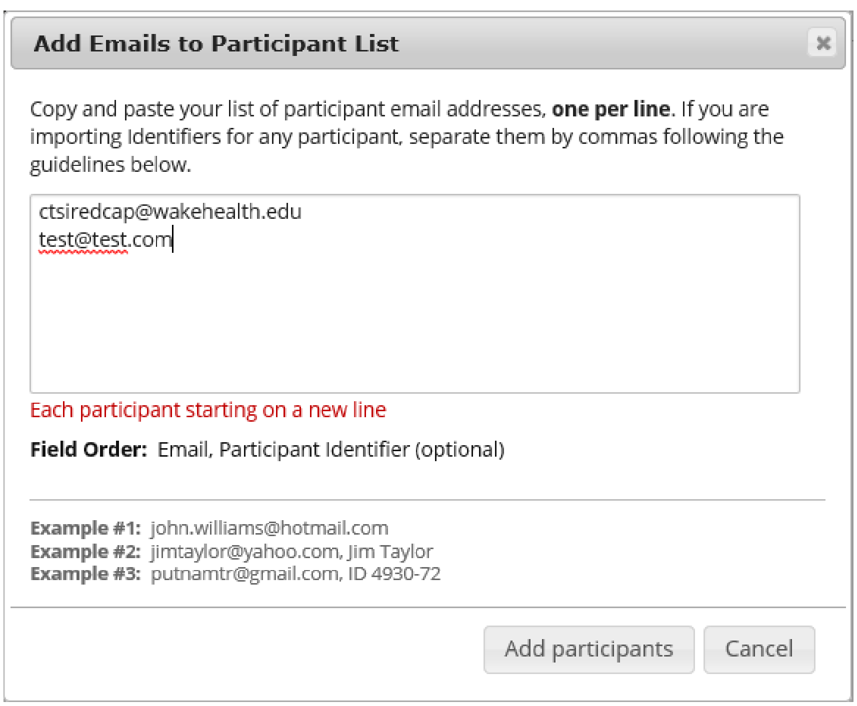
Step 1: The first form must be enabled as a survey. Refer to Option 1, Step 1 above to ensure the forms have been enabled as surveys.

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



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

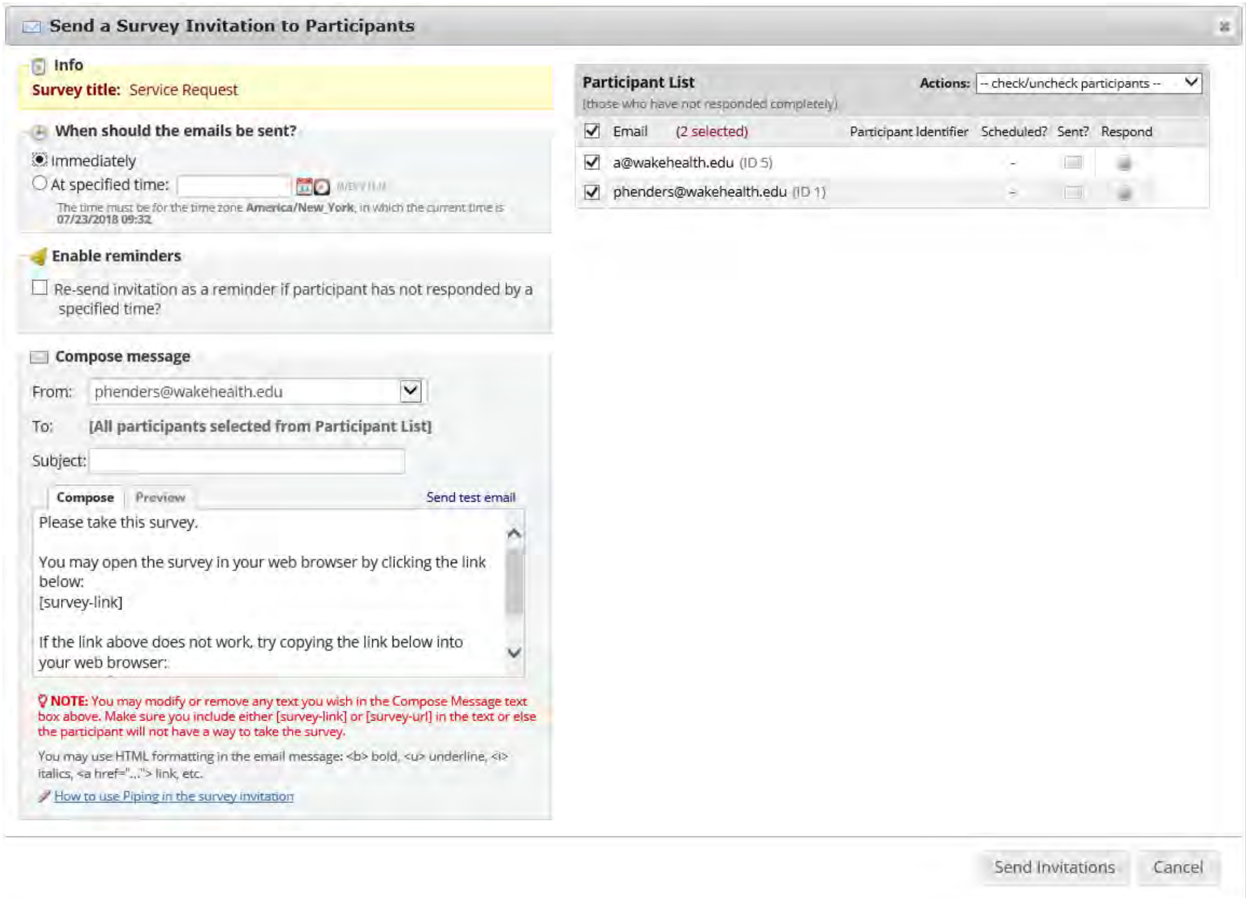
Note: If you want to enable the Participant Identifier option, click on 'enable' before entering the email addresses. As you are entering emails, you can add an identifier behind the email address using a comma as the separator. For example, REDCap@gwu.edu, REDCap Admin. **If you do not enable the Participant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



The names will then appear in the Participant List chart.

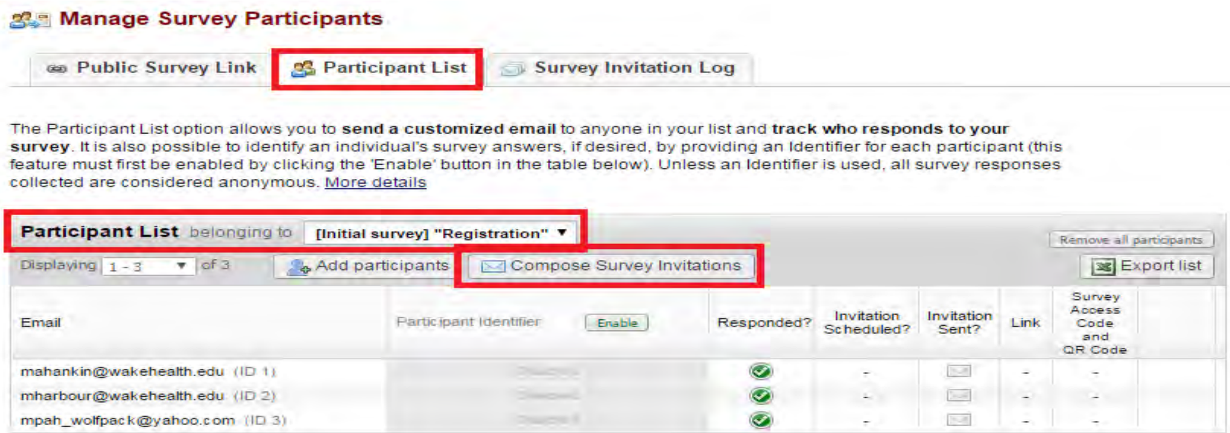
Step 4: Click on 'Compose Survey Invitations.' This will open a pop-up box where you can complete the invitation information.

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.



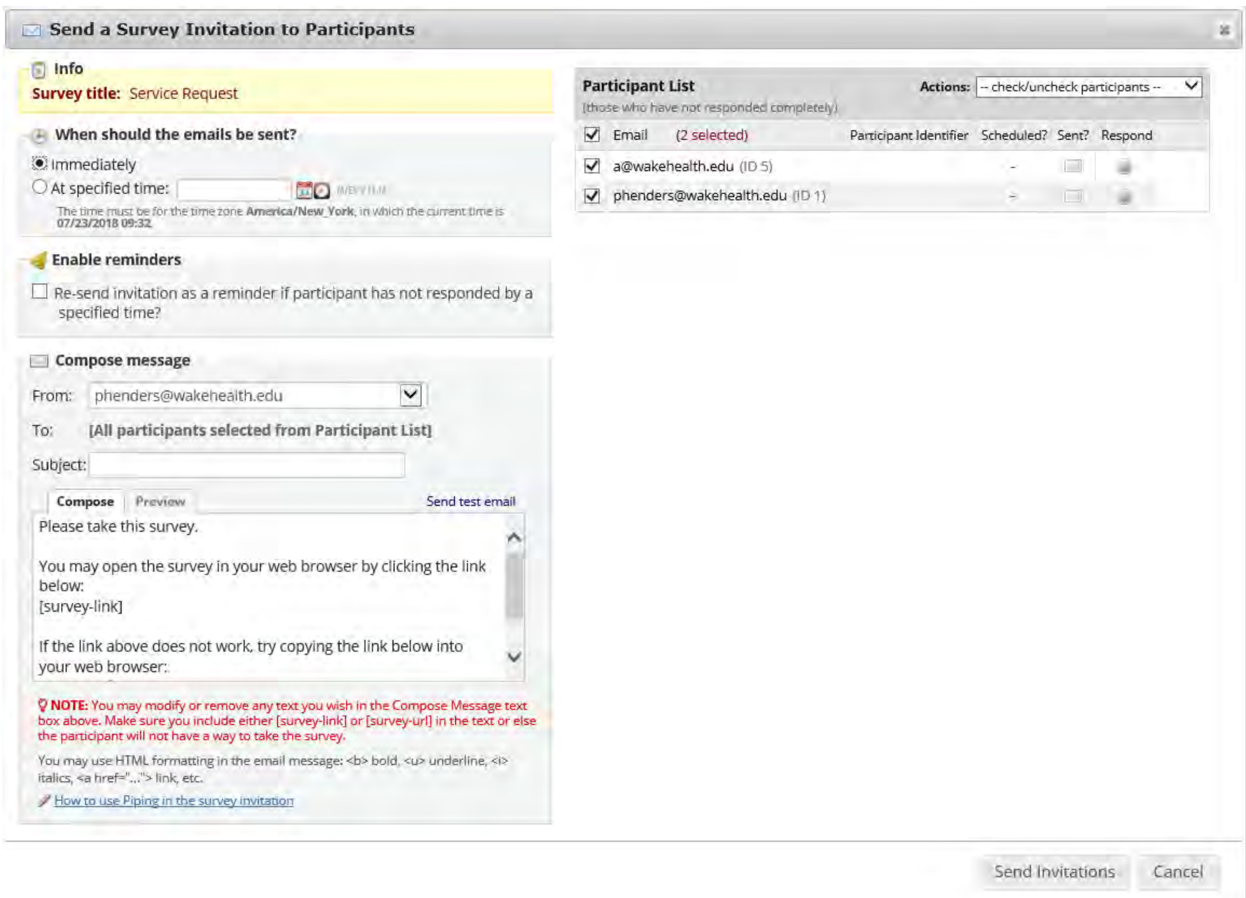
If a period of time has passed and participants have not completed the survey, you can use the 'Compose Survey Invitations' button to re-send the request.

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.'



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 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.



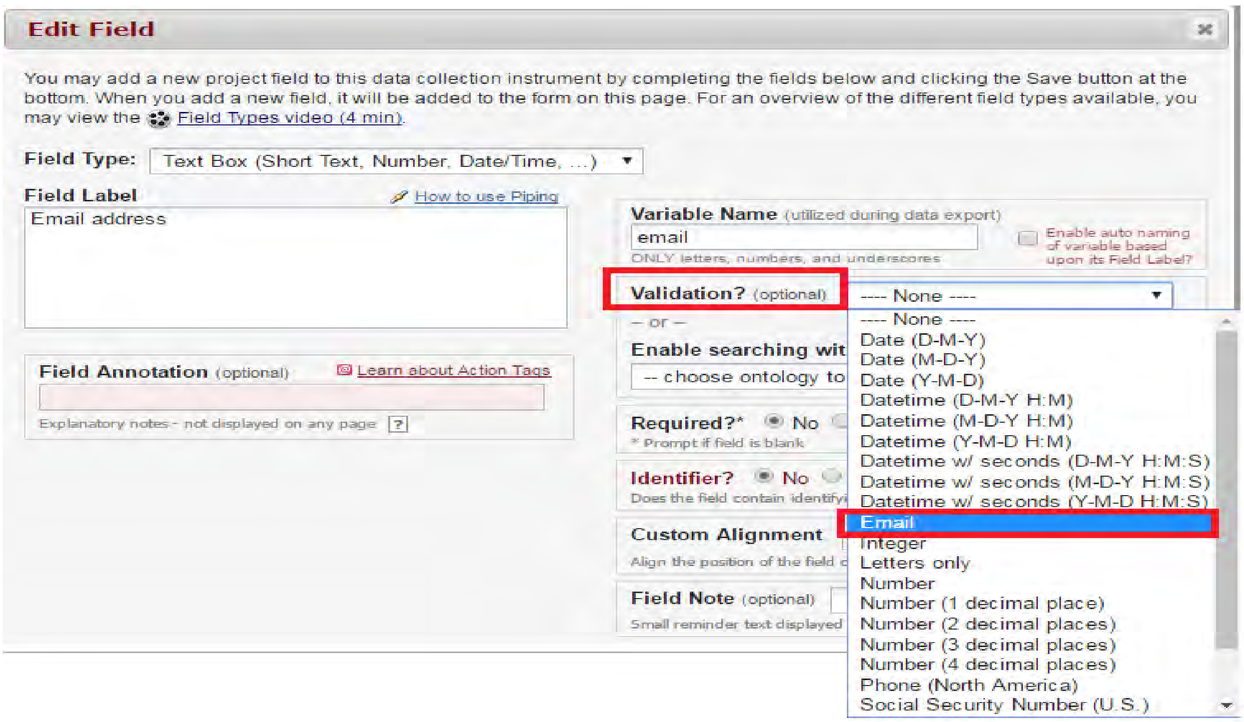
If you want to send the follow-up survey to participants even though they did not complete the initial survey, then you will need to create a separate REDCap project.

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

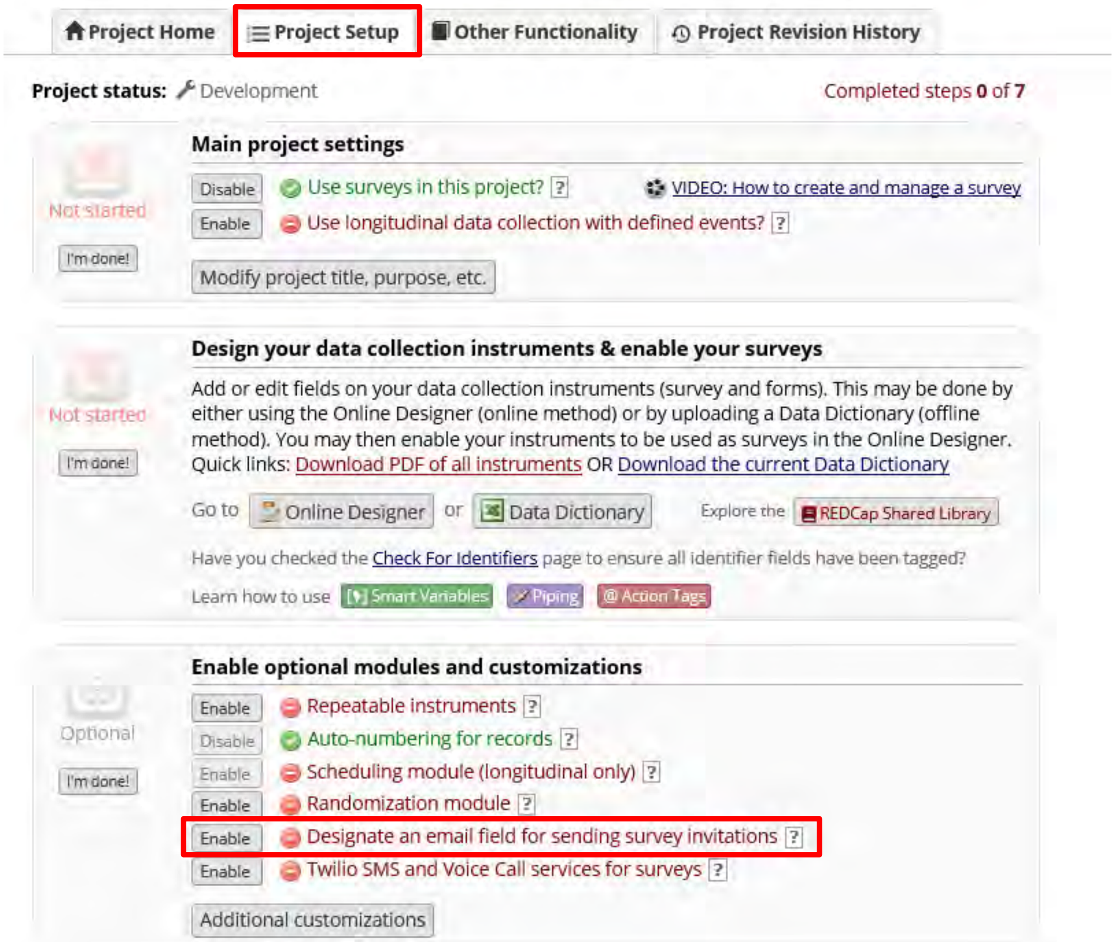
If you know the participant email addresses and want the participants to complete a survey at some point within the project, then you can complete the following steps to upload the email addresses to the Participant List for a future survey within the project.

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.

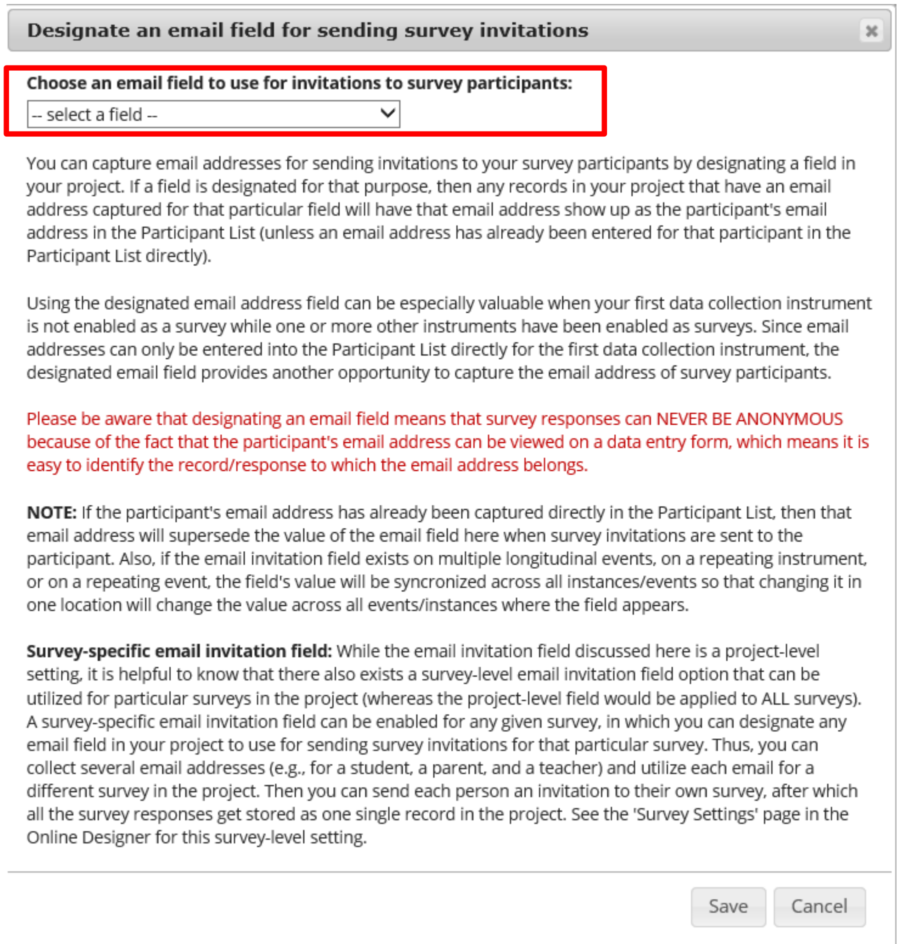
Step 2: Create a field on the data collection form for email addresses. Ensure the validation for that field is set for 'Email.'



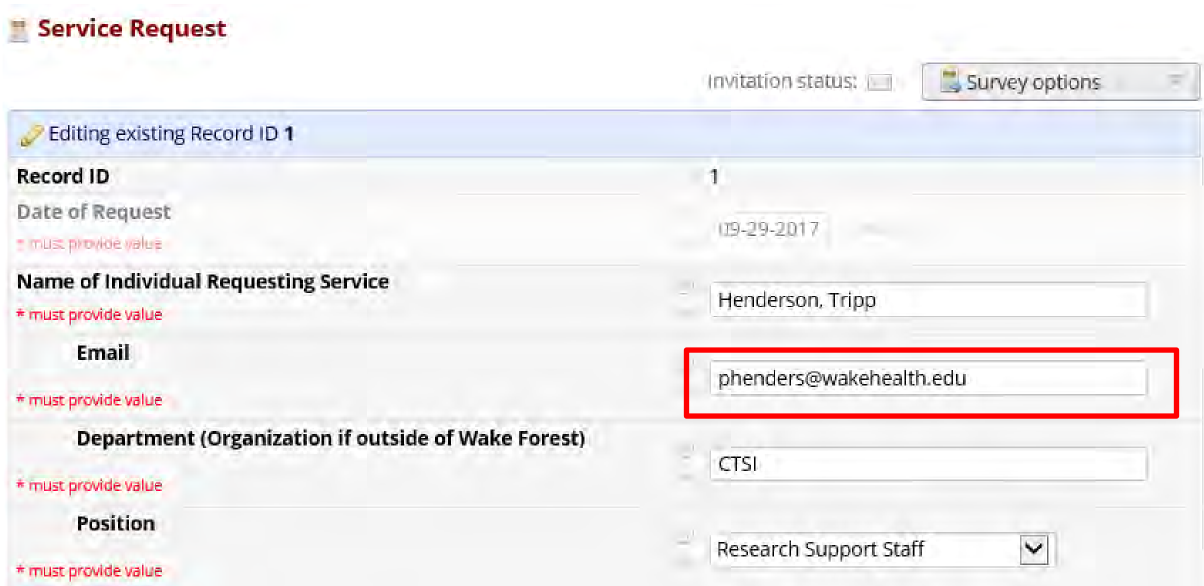
Step 3: Navigate to the Project Setup tab and locate the 'Enable optional modules and Customizations' bubble. Click Enable for the 'Designate an email field to use for invitations to survey participants.'



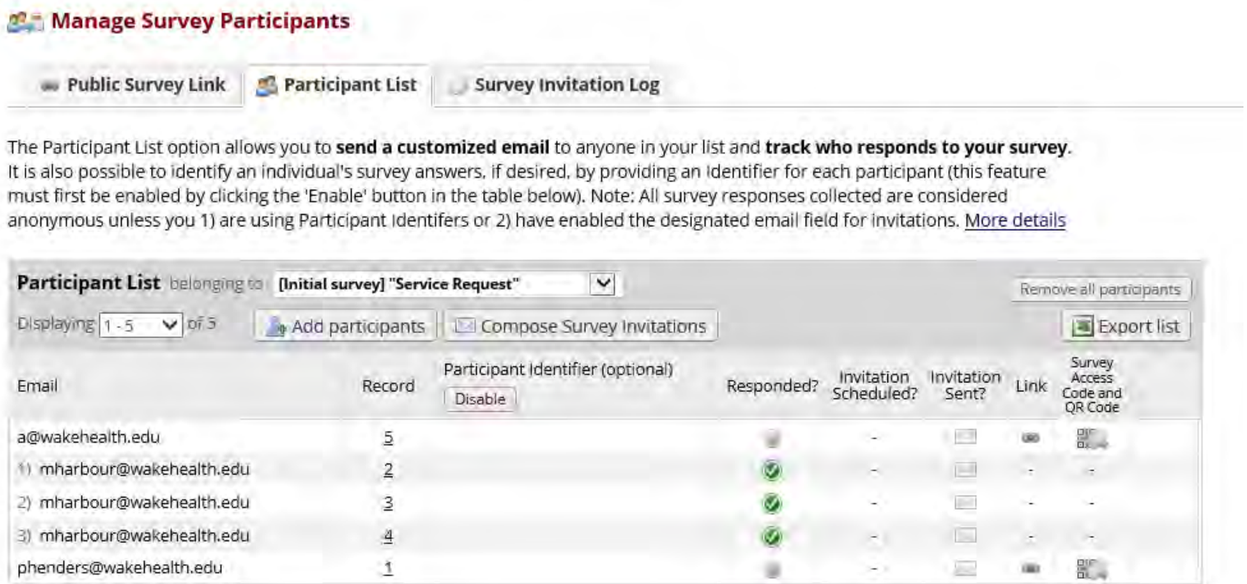
The 'Enable' button will open a pop-up box where you will select the variable named used for the 'Email' field.



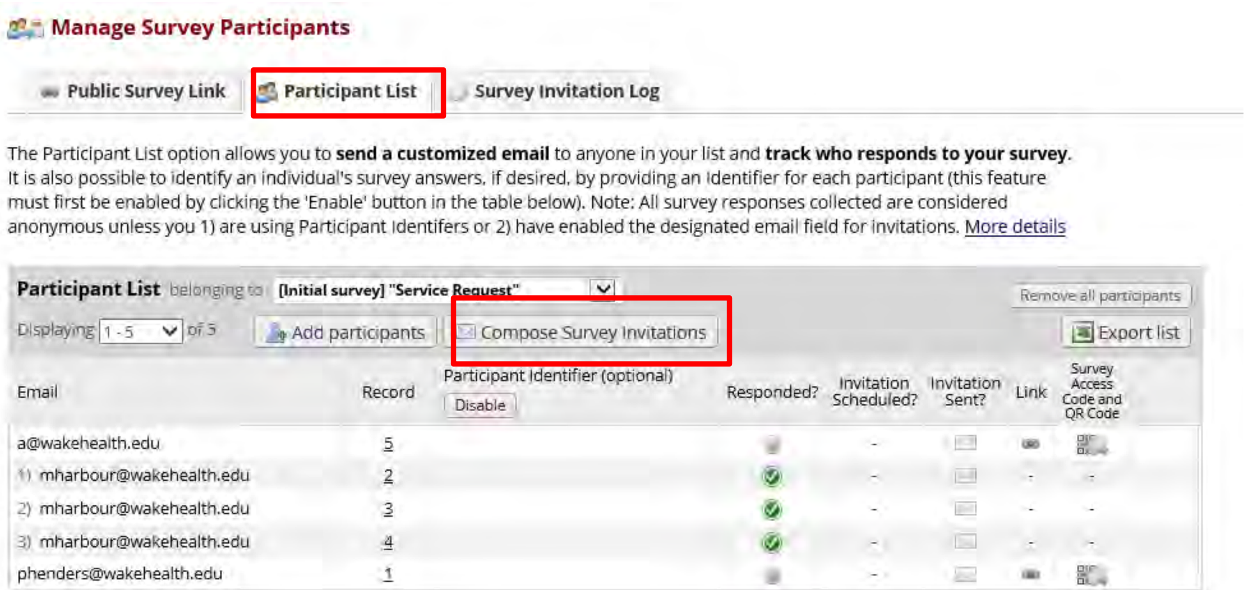
Step 4: When creating a record for the participant, make sure to complete the email address field that was created above in Steps 2 and 3.



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



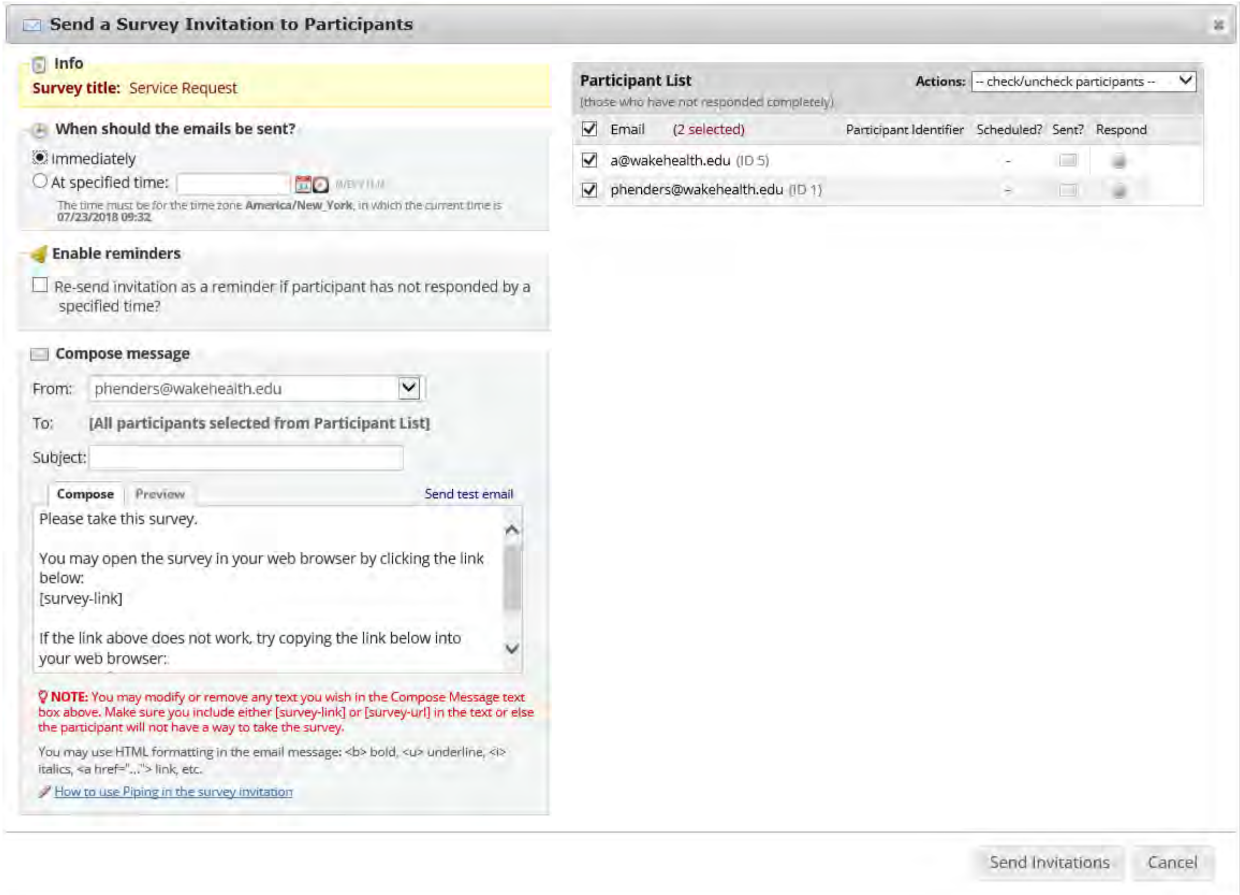
Step 5: When you are ready to send the survey(s) to the participants, navigate to the Participant List and select the ‘Participant List belonging to’ from the drop down then click on ‘Compose Survey Invitations.’



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.



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.

REDCap – Survey Queue

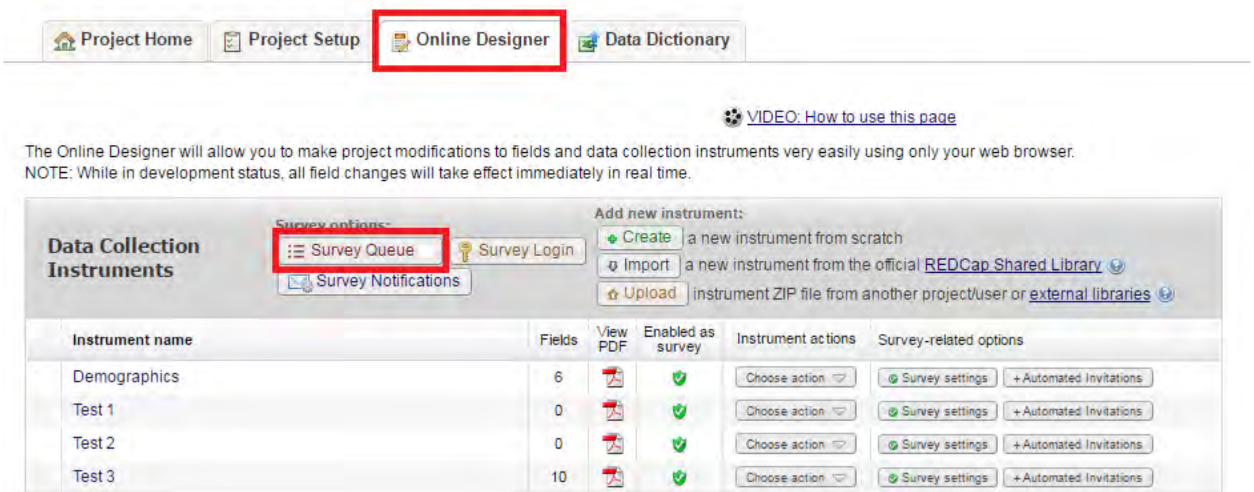
The Survey Queue displays a list of surveys to a participant on a single page. The queue contains the survey's **to be** completed as well as the surveys that have **already been** completed. Surveys are set to appear in the Survey Queue based on conditions set by a user, such as when a particular survey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

Section A: If the project forms are surveys

Step 1:

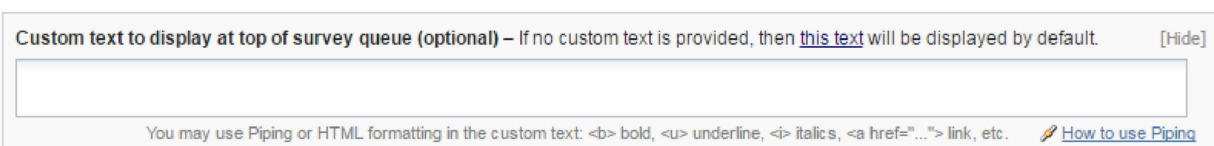
- To create a Survey Queue, first enable the forms to be used as surveys.
- Navigate to the Online Designer and click on Survey Queue.

In this example, all forms are surveys.



Step 2:

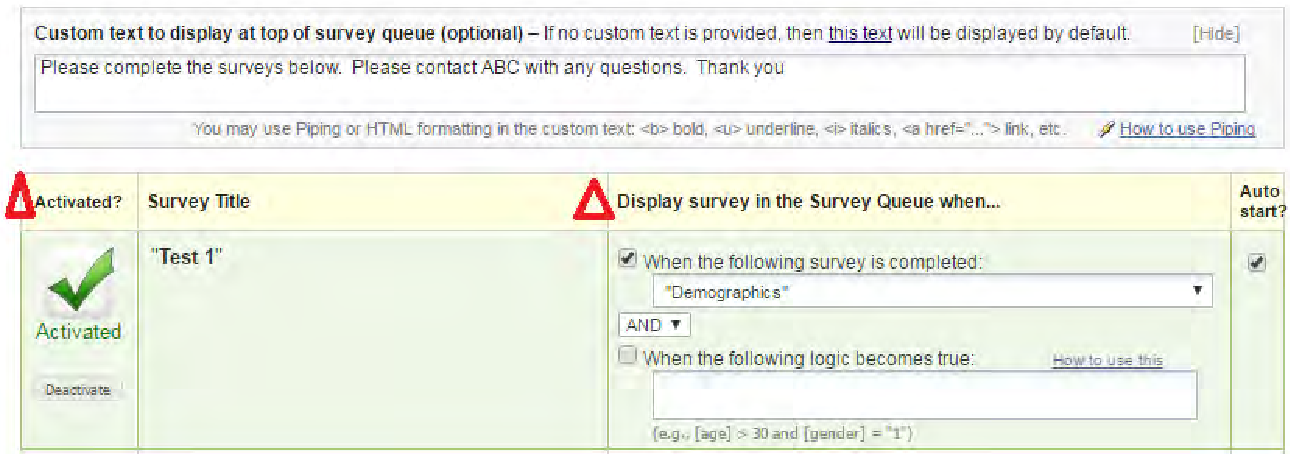
- At the top of the Survey Queue box, a User can click on  to add any custom text to the top of the queue.



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.

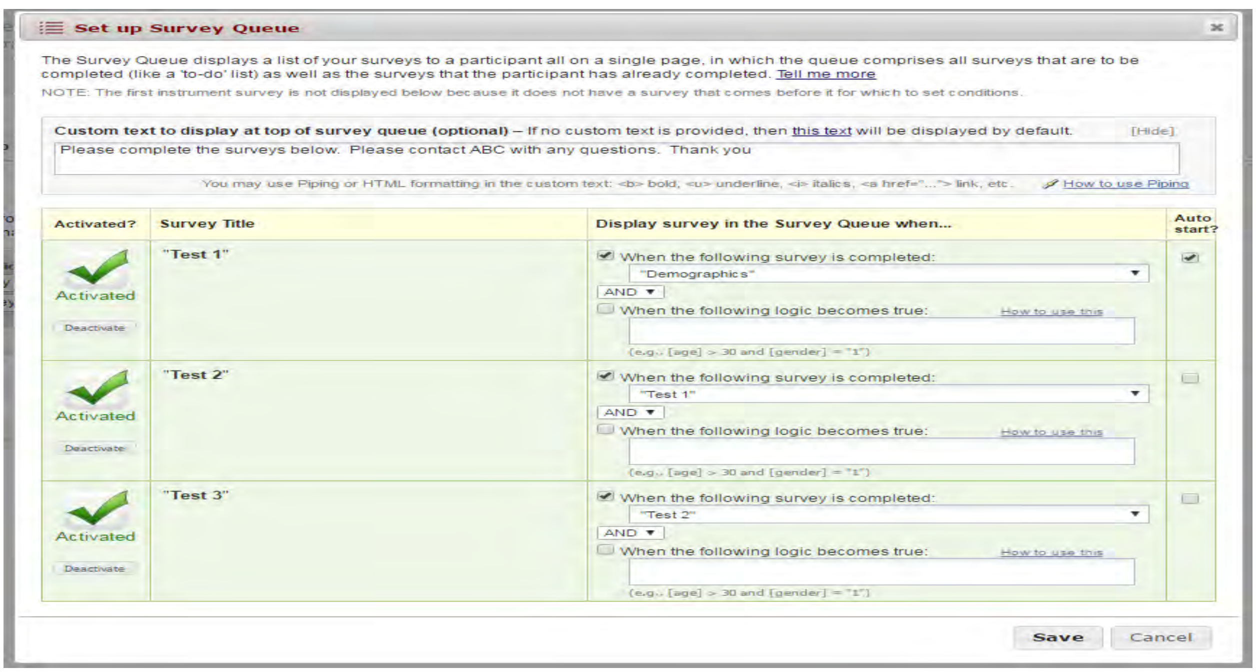
In this example, we want the Test 1 survey to appear in the queue once the Demographics survey has been completed. Additionally, in this example, we want to automatically start the Test 1 survey as soon as the Demographics survey has been completed.



Step 4:

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

To continue with the example, 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.

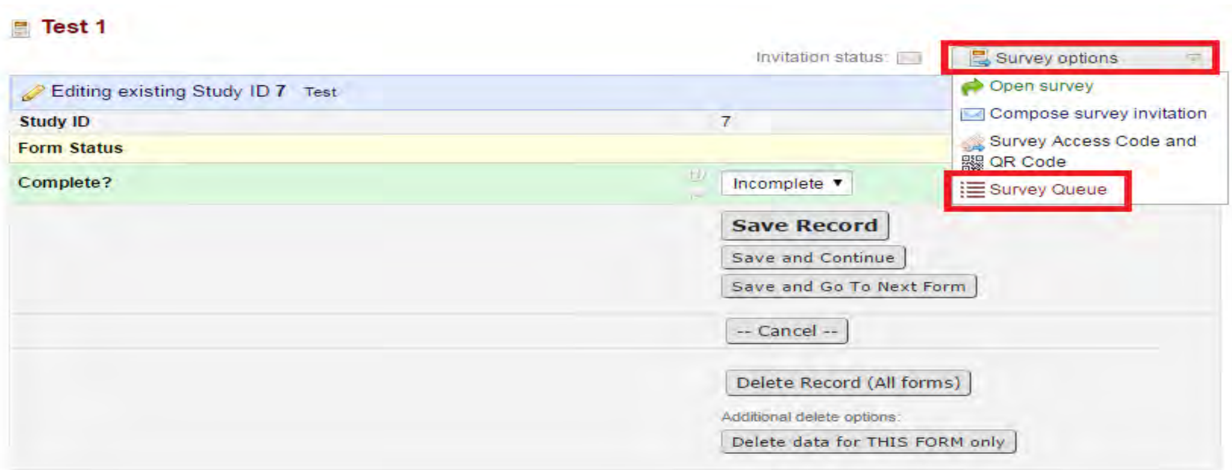


- Once you have the queue created, click on 'Save.'

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.



- 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

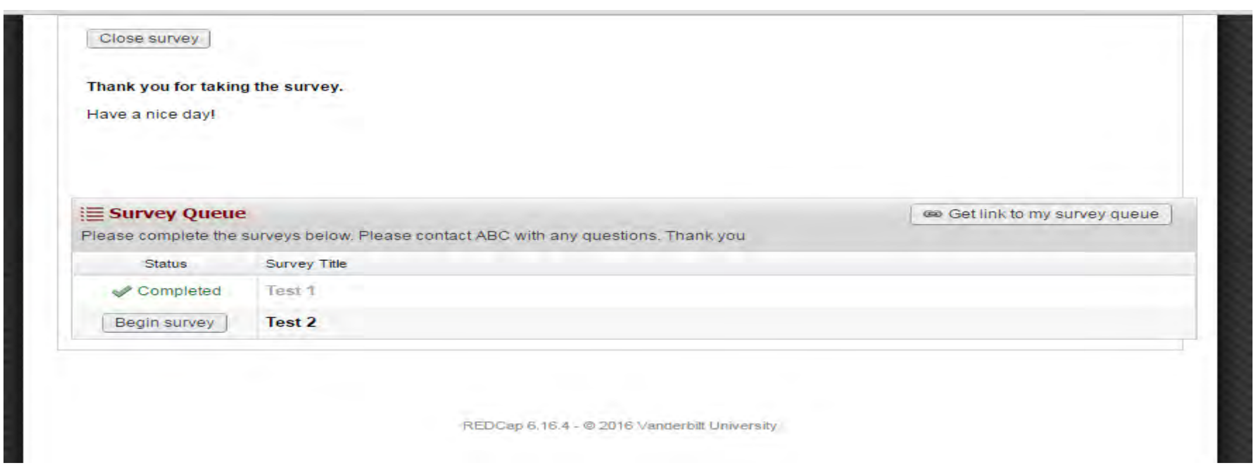
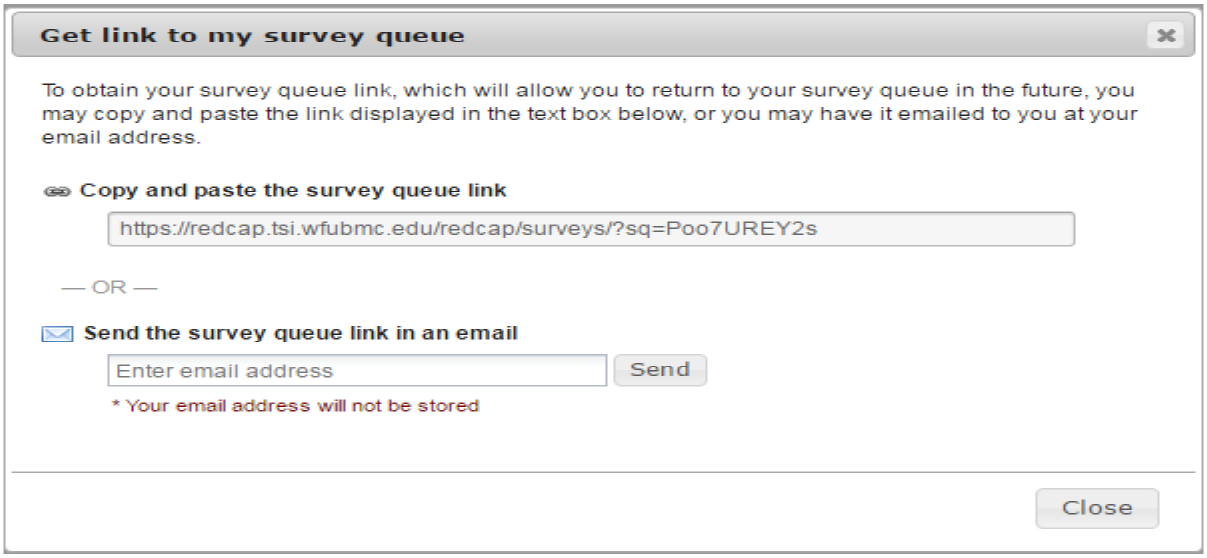


Image 2



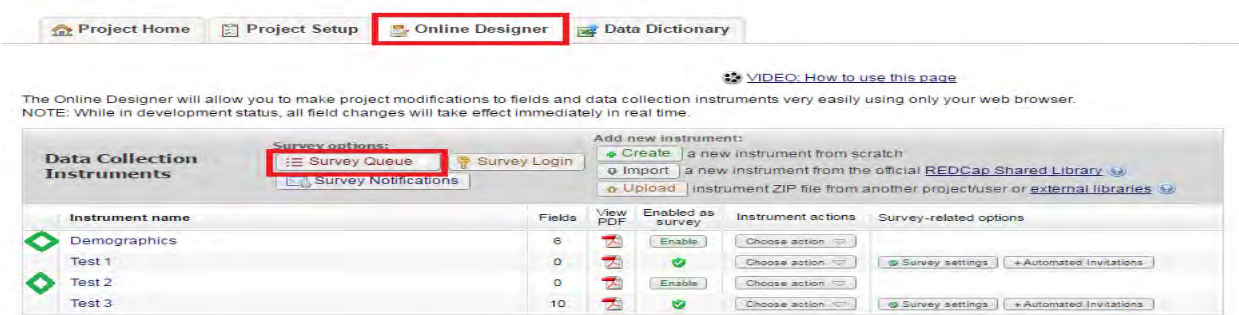
Section B: If the project contains traditional data collection forms and surveys

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:

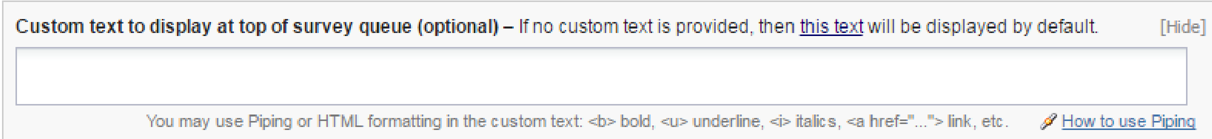
- Enable any forms that will be used as surveys (instead of as data collection instruments).
- If various forms will be traditional data collection instruments instead of surveys, please do not change them to surveys.
- Navigate to the Online Designer and click on Survey Queue.

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



Step 2:

- At the top of the Survey Queue box, a User can click on Add custom text to display at top of survey queue to add any custom text to the top of the queue.



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.

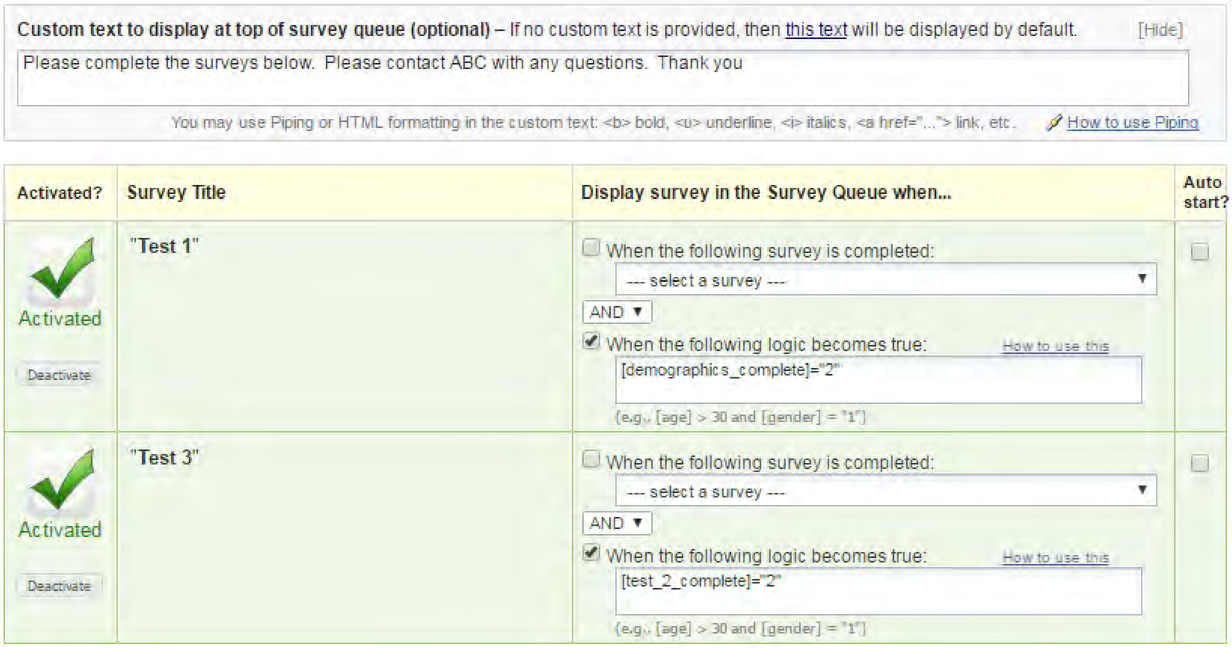
For the purposes of this example, we want the Test 1 survey and the Test 2 survey to appear when the Demographics form and Test 2 form are marked 'Complete.'

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?	dropdown 0 Incomplete 1 Unverified 2 Complete
9	test_2_complete	Section Header: *Form Status* Complete?	dropdown 0 Incomplete 1 Unverified 2 Complete

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



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.