Creating and Distributing a Single Survey in REDCap – How-To Guide

Any data collection form in REDCap can be enabled as a survey, allowing participants to enter data for themselves, without having access to the REDCap project and its data. Survey participants do not need to have GatorLink access to complete surveys, only those who need to see the data and create the surveys need access to the REDCap project.

This guide describes how to create and distribute a single survey (the project contains only one data collection instrument that is enabled as a survey), methods for collecting anonymous and non-anonymous survey data, how to set up longitudinal survey collection (the one survey is distributed multiple times to participants) and how to get notified when a participant submits a survey.

REDCap has an online Help & FAQs page detailing survey design, the different distribution methods (Public Link vs. Participant List), and the advantages/limitations of each of these methods. It is recommended that you read the relevant sections below before sending out your survey to participants.

Survey Design: Help & FAQs:
https://redcap.ctsi.ufl.edu/redcap/index.php?action=help#ss41

Surveys: Anonymous Surveys: Help & FAQs:
https://redcap.ctsi.ufl.edu/redcap/index.php?action=help#ss56

Surveys: Invite Participants: Help & FAQs:
https://redcap.ctsi.ufl.edu/redcap/index.php?action=help#ss57

Surveys: Automated Survey Invitations (longitudinal survey data): Help & FAQs:
https://redcap.ctsi.ufl.edu/redcap/index.php?action=help#ss58

Enabling a Data Collection Form as a Survey:

Once you have built the data collection form that is intended to be a survey, the first step is to enable the form to be a survey.

On the Project Setup page, click on ‘Enable’ next to ‘Use surveys in this project’ (Figure 1). Once enabled, the text will become green (Figure 2).

Figure 1:
After surveys have been enabled, go to the Online Designer page to enable the form itself as a survey.

Click on ‘Enable’ under ‘Enabled a survey’ (Figure 3).

Now that the form is enabled as a survey, click on ‘Survey Settings’ (Figure 4) to design your survey.

This will take you to the Survey Settings page (Figures 5-8). The Survey Settings page is where you design your survey, such as choosing the font, text size and the survey’s color theme, and configure its settings, such as the question display format (all on one page or multiple pages),
setting up an expiration date, enabling Text-to-Speech functionality, entering the survey completion text, and setting up confirmation emails for respondents.

Figure 5:

Question Display Format (Figure 6) – The survey can be one page or multiple pages. To break the survey into sections for multiple pages, use the **Begin New Section (with optional text)** field type. Each section will be its own page of the survey.

Figure 6:

Allow ‘Save & Return Later’ option for respondents? (Figure 7) – If you’re survey is long or you want to allow respondents to save the survey and return to it later, you can enable that here:

Figure 7:
**Survey Completion text:** This is the text that will appear when the respondent submits the survey. It is not emailed to them, it merely appears on the screen when they click *Submit*.

Figure 8:

Now that the survey settings are done, the survey needs to be distributed. There are two methods of distributing the survey: via the *Public Survey Link* and via the *Participant List*.

**Public Survey Link:**
Using the *Public Survey Link* is the simplest and fastest way to collect responses for your survey. Responses will be collected **anonymously** (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases, and REDCap does not keep track of which respondents have taken the survey and which have not since the respondent’s emails are not captured within the
system. The *Public Survey Link* can be used for longitudinal data collection as long as the ‘Designated an email field to use for invitations to survey participants’ has been enabled on the *Project Setup* page under ‘Enable optional modules and customizations,’ and the initial survey collects the respondent’s email address.

**Participant List:**
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 by providing an 'identifier' for each participant (this feature must first be enabled on the *Participant List* page). **Note:** All survey responses collected are considered *anonymous* unless you 1) are using *Participant Identifiers* or 2) have enabled the *Designated an email field to use for invitations to survey participants* (longitudinal data collection only) on the *Project Setup* page under *Enable optional modules and customizations.* If the *Participant Identifier* is not enabled, REDCap will track who has responded and who hasn’t on the *Participant List* page, but you will not know which individual survey belongs to which respondent.

**How can I send multiple surveys to participants and link their responses?**
If the responses need to be anonymous, please see the section *Surveys: Anonymous* below. If responses **do not need to be anonymous**, you must at some point collect individual email addresses to send participants multiple surveys and have the data linked. This can be done in two ways:

1. **Project’s first instrument is a Survey & Use of Public URL & Designate an email field:** If you want to utilize the *Public Survey URL* to distribute an initial survey and invite participants for future surveys, the survey MUST contain a text field with *validation = email* to collect the participant’s email address.

   On the *Project Setup* page → *Enable optional modules and customizations* → Enable: ‘Designate an email field to use for invitations to survey participants.’ Designate the email address field you are collecting on the first survey.
When participants complete the first survey, their email addresses will pre-populate the Participant List and will allow you to send additional surveys for the same record. Surveys will be automatically linked by Record ID. The ‘Participant Identifier’ on the Participant List will not be editable after the survey has been sent.

**LIMITATION:** Only participants that answer the first survey with an email address will be able to respond to the follow-up surveys.

2. **Project’s first instrument is a Survey & Use of Participant List:**
If you have individual email addresses, you can create a project with multiple surveys. You would add individual emails to the Participant List with or without a Participant Identifier. Then you can send the survey invites through “Compose Survey Invitations.”

**LIMITATION:** Only participants that answer the first survey will be able to respond to the follow-up surveys. If you wish to collect additional surveys for the non-responders, you will need to create additional REDCap projects with the follow-up surveys.

**Surveys: Anonymous**

Can I use the Participant List to collect anonymous survey data from participants?

Technically, no. Data is not anonymous when collected using the Participant List; but it can be "coded" and "unidentifiable" to the project admins.

REDCap’s user interface has two separate modules for (1) sending emails and tracking responders/non-responders (Participant List) and (2) viewing data/responses. Through the REDCap interface, there is no link between the modules and no connection between the email address entered and the responses collected unless you enter unique values into the "Participant Identifier (optional)" field. The ‘Participant Identifier’ field links the email address to the survey responses.

To ensure confidentiality of the data, REDCap tracks responses by attributing it to an email address. If the Participant List → ‘Participant Identifier’ field is not used, the project administrators are not privy to this information.

** If you truly need anonymous data, use the Public Survey Link. **
Public Survey Link (non-longitudinal data collection)

Public Survey Link: Click on ‘Manage Survey Participants’ under Data Collection (left-hand menu) on the Project Setup page. This will take you directly to the Public Survey Link page.

To view what the survey will look like to respondents, click on ‘Open public survey.’

The ‘Public Survey URL’ is the link that you would provide to all the desired respondents. This can be emailed to the participants, posted on a website or recruitment letter, saved to a desktop/device, or opened while the respondent is present.

Participant List (non-longitudinal data collection)

Participant List: Click on ‘Manage Survey Participants’ under Data Collection (left-hand menu) on the Project Setup page. Then click on ‘Participant List.’
**Participant Identifier:** If you need to be able to identify which survey response belongs to which respondent, click on ‘Enable’ next to **Participant Identifier.** Note: Once you send out the surveys you cannot enable this option for the invites that have already been sent out so the responses will be anonymous.

To add people to the **Participant List,** click on ‘Add participants.’

If not using the ‘Participant Identifier,’ add the email addresses of the respondents, one per line (Figure 1). If using the ‘Participant Identifier,’ add the email addresses of the respondents, one per line, as well as the participant’s identifier (Figure 2). Click on ‘Add participants’ when all emails have been entered.

Figure 1:

![Figure 1: Add Email to Participant List](image1)

Type or copy and paste the email addresses that you want to send the survey to. Each participant starting on a new line.

Figure 2:

![Figure 2: Add Email to Participant List](image2)

Type or copy and paste the email addresses you want to send the survey to. Then provide the identifier for each email address.

To send the survey to those on the Participant List, click on ‘Compose Survey Invitations.’

![Compose Survey Invitations](image3)
The **Compose Survey Invitations** page is where you set up when the survey should be sent (immediately vs. a specific date and time), reminder emails if the participant has not responded by a specified time and the email that will go out with the survey invitation. **Note:** Reminder emails must be set up before the survey is sent out and cannot be set up retroactively. If you forget to set up reminders, you’ll have to re-send the survey to the participant if they do not respond.

The email addresses with a **blue** checkmark under the ‘Participant List’ heading are the email addresses that will be sent the invitation to the survey. You can uncheck an email address if you do not want an invitation to be sent to this address.

![Compose Survey Invitations](image)

Click on ‘Send Invitations’ when finished. The survey invites have now been sent!

You can go back to the **Participant List** page to see who has responded to the survey, if an invitation has already been sent and the unique survey link for that participant. The grey bubble under ‘Responded’ will turn **green** when the survey has been submitted. If there is an envelope icon with a green arrow under ‘Invitation Sent’ then the invitation has already been sent to the individual. To view the unique survey link for the individual, click on the icon under the ‘Link’ column. To remove an individual from the Participant List, click on ‘remove’ in the far-right column.
Public Survey Link (longitudinal data collection)

You can use the Public Survey Link for collecting longitudinal data, and have all the surveys linked to the individual, but only if you are collecting the email addresses of the respondents in the initial survey and enable the ‘Designate an email field’ under Optional Modules and Customizations. The project must also be set up longitudinally, with at least 2 events (see below).

On the Project Setup page → Enable optional modules and customizations → Enable: ‘Designate an email field to use for invitations to survey participants.’ Designate the email address field you are collecting on the first instance of the survey.

The next step is to set up ‘Automated Invitations’ for the surveys that will be sent out after the ‘first’ survey is sent out. The ‘first’ instance of the survey (i.e., Event 1) will still be sent out using the Public Survey URL method. Click on ‘Automated Invitations’ to set up the following surveys (i.e., Events 2 and 3).
Automated Survey Invitations set up page:

Step 1: Compose your survey email message.
Step 2: Specify the conditions for sending the invitations. For the second survey, you would specify ‘When the following survey is completed: “Survey” – Event 1.’ For the third survey, you would specify ‘When the following survey is completed: “Survey” – Event 2.’
Step 3: Specify when the next survey should be sent out once the person completes the previous survey.
Step 4: Active your surveys by clicking on ‘Active.’ The automated survey invitations will not be sent until they are activated.

Click on ‘Save’ once finished. To send the initial survey, go to the Public Survey Link page to obtain the survey’s URL.
Participant List (longitudinal data collection)

You can use the Participant List for collecting longitudinal data, and have all the surveys linked to the individual, by entering the email addresses of the respondents into the Participant List and by enabling the ‘Designate an email field’ under Optional Modules and Customizations. The project must also be set up longitudinally, with at least 2 events (see below).

On the Project Setup page → Enable optional modules and customizations → Enable: ‘Designate an email field to use for invitations to survey participants.’ Designate the email address field you are collecting on the first instance of the survey.

The next step is to set up ‘Automated Invitations’ for the surveys that will be sent out after the ‘first’ survey is sent out. The ‘first’ instance of the survey (i.e., Event 1) will still be sent out using the Participant List/Compose Survey Invitations method. Click on ‘Automated Invitations’ to set up the following surveys (i.e., Events 2 and 3).
**Automated Survey Invitations set up page:**

Step 1: Compose your survey email message.

Step 2: Specify the conditions for sending the invitations. For the second survey, you would specify ‘When the following survey is completed: “Survey” – Event 1.’ For the third survey, you would specify ‘When the following survey is completed: “Survey” – Event 2.’

Step 3: Specify when the next survey should be sent out once the person completes the previous survey.

Step 4: Active your surveys by clicking on ‘Active.’ The automated survey invitations will not be sent until they are activated.

Click on ‘Save’ once finished.

To send the initial survey, go to the Participant List page to enter the email addresses and compose the initial survey invitation.
It is recommended that you DO NOT enable the Participant Identifier if collecting data longitudinally using the Participant List. Because you are using the Designate email field option, REDCap knows which record the email belongs to and will notate the subject’s Record ID when the survey is completed (see below).

If you do enable the ‘Participant Identifier’ field, the identifier you give them will appear next to their email address instead of their Record ID, making their Record ID number harder to find if you needed to pull up this respondent’s survey results.

How to get notified when a survey has been submitted:

Go to the Online Designer page and click on ‘Survey Notifications.’

A list of all project users and their email addresses will be listed here. To select who gets the survey notification emails, select their email address under the Recipient email address column. Once enabled, there will be a green checkmark under Notifications Enabled column.

Example email from a survey notification:

This message was automatically generated by REDCap.

A respondent completed your survey titled “Example Survey” on 04/06/2017 4:28pm. You may view their responses here.

If you no longer wish to receive email confirmations triggered by survey responses, simply uncheck the checkbox for your user name for this survey in the Notifications pop-up on the Online Designer page, if you have privileges to access that page.