



REDCap Administrative Guide

Advanced Functionalities



PolicyWise
for Children & Families

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Delete Client Files

To delete all data related to a client, open the Default dashboard from the Record Status Dashboard page.

Logged in as fmmustafa | Log out

My Projects

REDCap Messenger

Contact REDCap administrator

Project Home and Design

Project Home · Project Setup

Designer · Dictionary · Codebook

Project status: Production

Data Collection

Survey Distribution Tools

Record Status Dashboard

Add / Edit Records

Applications

Project Dashboards

Alerts & Notifications

Multi-Language Management

Calendar

Data Exports, Reports, and Stats

Data Import Tool

Data Comparison Tool

Logging and Email Logging

File Repository

User Rights and DAGs

Data Quality and Resolve Issues

Reports

test

External Modules

Help & Information

Record Status Dashboard (all records)

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

Dashboard displayed: [Default dashboard]

Displaying record Page 1 of 1: 8" through "12" of 5 records

ALL (5) records per page

+ Add new record for this arm

Displaying: Instrument status only | Lock status only | All status types

Arm 1: Clients | Arm 2: Staff | Arm 3: Volunteers | Arm 4: Building

Record ID	Application Form	Consent Form: Services	Form: Collection and Use of Data	Program Progress Tracker	Needs Assessment: Client Contact Info	Needs Assessment: Emergency Contacts	Needs Assessment: Background Information	Needs Assessment: Housing	Needs Assessment: Health And Wellness	Needs Assessment: Pregnancy	Needs Assessment: Child Health and Wellness	Needs Assessment: Parenting	Needs Assessment: Relationships and Supports	Need Employment
8 Person 1														
9 Person 2														
10 Person 3														
11 Person 4														
12 Person 5														

Select the Record ID for the client you want to delete. This will open a list of all of the forms completed for this person.

Click the drop down box titled “Choose action for record” and then select Delete Record.

Record Home Page

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

Choose action for record

Download ZIP file of all uploaded documents

Download PDF of record data for all instruments/events

Download PDF of record data for all instruments/events (compact)

Lock entire record

Rename record

Delete record (all forms/events)

Program Progress Tracker	
Needs Assessment: Client Contact Info	
Needs Assessment: Emergency Contacts	
Needs Assessment: Background Information	
Needs Assessment: Housing	
Needs Assessment Health And Wellness	
Needs Assessment: Pregnancy	
Needs Assessment: Child Health and Wellness	
Needs Assessment: Parenting	
Needs Assessment: Relationships and Supports	
Needs Assessment: Employment/School/Income	
Needs Assessment: Legal Concerns	
Program: Resources: Counselling and Therapy	
Program: Resources: Pre and Post Natal Support	
Program Resources Indigenous Resources	
Program Resources Housing	
Program Resources Financial	

Legend for status icons:

- Incomplete
- Unverified
- Complete
- Many statuses (mixed)
- Incomplete (no data saved) ?
- Partial Survey Response
- Completed Survey Response
- Many statuses (all same)

Review the pop-up message and click Delete Record to confirm.

DELETE RECORD "9"?

Are you sure you wish to PERMANENTLY delete this record and its data? **This will delete ALL DATA for ALL EVENTS for ONLY THE CURRENT ARM.**

This process is permanent and CANNOT BE REVERSED.

DELETE RECORD

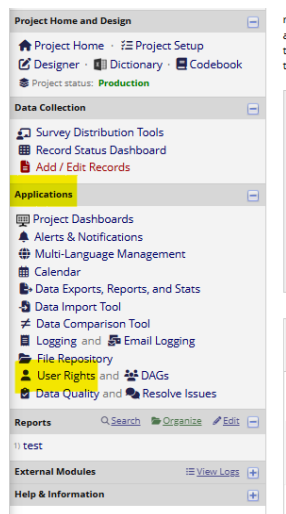
Cancel

Manage REDCAP User Access Rights

Add a New User

Before you can provide access to a new user, they must already have a REDCap account set up with Athabasca University.

To add users to your REDCap, open the User Rights panel of the Applications menu on the left sidebar.



Use the “Add new users” section at the top and enter the user’s REDCap username in either the “+Add with custom rights” box or the “Assign to role” box.

Add new users with custom rights

The first thing to note is that, for these projects, usernames in REDCap are organized by agency initials. For example, all Elizabeth House users have a username that ends in “.eh” and all Highbanks staff have usernames that end with “.hbs”. That makes it easier to find users from your organization and add them to your project or assign them user rights.

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

Upload or download users, roles, and assignments ?

Add new users: Give them custom user rights or assign them to a role.

+ Add with custom rights

Assign to role

▼

+ Create role

▼

Role name (click to edit)	Assigned to a role (click operation to assign to role)	Expiration (click expiration date to edit)	Project Design and Setup	User Rights	Data Access Groups	Data Viewing Rights	Data Export Rights	Alerts & Notifications	Reports & Report Builder
—	fmustafa (Fatima Mustafa)	never	✓	✓	✓	5 View & Edit 36 View & Edit	41 Full Data Set	✓	✓
—	kharah.ross (Kharah Ross)	never	✓	✓	✓	1 View & Edit 48 View & Edit	41 Full Data Set	✓	✓
Case Managers	[No users assigned]		✗	✗	✗	7 View & Edit 34 View & Edit	41 Full Data Set	✗	✓
Data Guardian	[No users assigned]		✓	✓	✓	7 View & Edit	41 Full Data Set	✓	✓

To assign custom user rights, enter in the username in front of the “+ Add with custom rights” button and then click on the “+ Add with custom rights”.

Project Home
Project Setup
User Rights
Data Access Groups

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

Upload or download users, roles, and assignments
?

Add new users: Give them custom user rights or assign them to a role.

Add new user
+ Add with custom rights

— OR —

Assign to role

Create new roles: Add new user roles to which users may be assigned.

+ Create role

(e.g., Project Manager, Data Entry Person)

Once you do that, a new screen will pop up, as shown below. Here you can select what kinds of user access you want to provide that username. You can control access to basic privileges – such as setting up alerts and notifications or distributing surveys – and you can also control privileges for viewing and exporting data form by form. These options allow you to implement fine-grained access control.

Project Home and Design
Designer
Project status: **Production**

Survey Distribution Tools
Record Status Dashboard
Add / Edit Records

Applications
Project Dashboards
Alerts & Notifications
Multi-Language Manager
Calendar
Data Exports, Reports
Data Import Tool
Data Comparison Tool
Logging and Email
File Repository
User Rights and Roles
Data Quality and Workflow

Reports
test

External Modules
Help & Information

Adding new user "abigail.leh"

Basic Privileges

Expiration Date

(if applicable)

(D/M/Y)

Highest level privileges:

Project Design and Setup
User Rights
Data Access Groups

Other privileges:

Survey Distribution Tools
Alerts & Notifications
Calendar
Add/Edit/Organize Reports
Stats & Charts
Data Import Tool
Data Comparison Tool
Logging
File Repository
Data Quality
Data Resolution Workflow

Privileges for Viewing and Exporting Data

Data Viewing Rights
Data Export Rights

	No Access (Hidden)	Read Only	View & Edit	Edit survey responses	No Access	De-identified*	Remove All Identifier Fields	Full Data Set
Application Form (survey)	☐	☐	☒	☐	☒	☐	☐	☐
Consent Form: Services	☐	☐	☒	☐	☒	☐	☐	☐
Consent Form: Collection and Use of Data	☐	☐	☒	☐	☒	☐	☐	☐
Program Progress Tracker	☐	☐	☒	☐	☒	☐	☐	☐
Needs Assessment: Client Contact Info	☐	☐	☒	☐	☒	☐	☐	☐
Needs Assessment: Emergency Contacts	☐	☐	☒	☐	☒	☐	☐	☐
Needs Assessment: Background Information	☐	☐	☒	☐	☒	☐	☐	☐
Needs Assessment: Housing	☐	☐	☒	☐	☒	☐	☐	☐
Needs Assessment: Health And Wellness	☐	☐	☒	☐	☒	☐	☐	☐
Needs Assessment: Pregnancy	☐	☐	☒	☐	☒	☐	☐	☐
Needs Assessment: Child Health and Wellness	☐	☐	☒	☐	☒	☐	☐	☐
Needs Assessment: Parenting	☐	☐	☒	☐	☒	☐	☐	☐
Needs Assessment: Relationships and Supports	☐	☐	☒	☐	☒	☐	☐	☐
Needs Assessment: Employment/School/Income	☐	☐	☒	☐	☒	☐	☐	☐

Once you are done, you can then click “Add user” at the bottom and also select whether user will be notified through email about their project access.

Project Dashboards

- Alerts & Notifications
- Multi-Language Man.
- Calendar
- Data Exports, Report
- Data Import Tool
- Data Comparison To
- Logging and Em
- File Repository
- User Rights and
- Data Quality and

Reports 🔍 Search

test

External Modules

Help & Information

Create Records ☒

Rename Records ☐

Delete Records ☐

* Includes ability to delete all data on an instrument or on a repeating event.

Settings pertaining to record locking and E-signatures:

Record Locking Customization ☐

Lock/Unlock Records (instrument level) ☒ Disabled
☐ Locking / Unlocking
☐ Locking / Unlocking with E-signature authority
[What is an E-signature?](#)

Users with locking privileges also have access to the E-signature and Locking Mgmt page on the left-hand Applications menu.
[Watch video about locking](#)

Lock/Unlock *Entire* Records (record level) ☐

NOTE: It is important to note that instrument level locking and record level locking are independent features that are governed by separate user privileges (as seen above). You must have explicit permission to either one in order to perform that specific locking action. Also, record locking is a higher-level locking than instrument locking, which means that an entire record may be locked or unlocked while one or more instruments are currently locked, but an instrument cannot be locked or unlocked while the entire record is locked.

Program Safety Plan	☐	☐	☒	☒	☐	☐	☐	☐
Program: Education Plan	☐	☐	☒	☒	☐	☐	☐	☐
Program: Attendance	☐	☐	☒	☒	☐	☐	☐	☐
Outcomes: Client Skills (survey)	☐	☐	☒	☐	☒	☐	☐	☐
Outcomes: Client Wellness (survey)	☐	☐	☒	☐	☒	☐	☐	☐
Outcomes: BPPI (survey)	☐	☐	☒	☐	☒	☐	☐	☐
Outcomes: Flourishing Scale (survey)	☐	☐	☒	☐	☒	☐	☐	☐
Outcomes: Program Feedback (survey)	☐	☐	☒	☐	☒	☐	☐	☐
Exit: Planned (survey)	☐	☐	☒	☐	☒	☐	☐	☐
Exit: Unplanned (survey)	☐	☐	☒	☐	☒	☐	☐	☐
Alumni Form	☐	☐	☒	☐	☒	☐	☐	☐
Communication Notes	☐	☐	☒	☐	☒	☐	☐	☐
Volunteer Demographic Data	☐	☐	☒	☐	☒	☐	☐	☐
Staff Incident Report	☐	☐	☒	☐	☒	☐	☐	☐
Volunteer: Incident Report	☐	☐	☒	☐	☒	☐	☐	☐
Building: Incident Report	☐	☐	☒	☐	☒	☐	☐	☐
Building: Staff Notes	☐	☐	☒	☐	☒	☐	☐	☐

* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.

New User Notification

☒ Notify user of their project access via email? ☒

Add user Cancel

Add new users and assign to existing roles

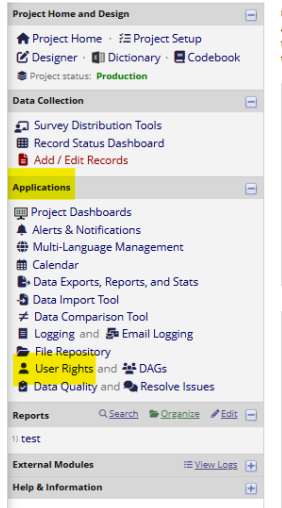
Use the second option (i.e., assign a new user to an existing role) if you want to add them to the system with a pre-created set of user rights (for example, Case Managers, Data Guardians, Family Support Worker, etc.) Most often, the new users you add to your REDCap project will be assigned to existing roles. To do this, add username next to the “Assign to role” button and then click on the “Assign to role” button which will show a pull-down menu. Select the role that you want to assign that user to and then click “Assign”.

[illegible]

Remove an Existing User

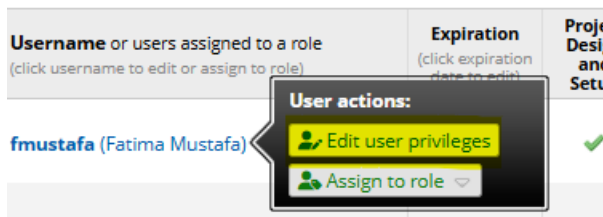
You can manage who has access to the REDCap and remove users who should no longer have access to the data.

Click on User Rights under the Applications menu on the left sidebar.



Click on the username of the user whose access you wish to modify. Select Edit User Privileges

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 date to edit)	Project Design and Setup	User Rights	Data Access Groups	Data Viewing Rights
—	fmustafa (Fatima Mustafa)	never	✓	✓	✓	5 View & Edit 36 View & Edit



You can edit which functions and areas the user has access to, change the expiration date of their access, or remove the user entirely, which will remove their access to the data system.

Time / Date	Username	Action	List of Data Changes OR Fields Exported
19/11/2024 8:45pm	fmustafa	Manage/Design	Modify custom record dashboard
19/11/2024 8:44pm	fmustafa	Manage/Design	Modify custom record dashboard
19/11/2024 8:43pm	fmustafa	Manage/Design	Modify custom record dashboard
19/11/2024 8:42pm	fmustafa	Manage/Design	Modify custom record dashboard

To view a different date range and filter the records further, use the functions at the top of the table.

This module lists all changes made to this project, including data exports, data changes, and the creation or deletion of users.

Filter by event: All event types (excluding page views) ▼
Filter by user name: All users ▼
Filter by record: All records ▼
Filter by time range from: 12/11/2024 21:16  to 
Custom range Past Day Past Week Past Month Past Year No limit
Displaying events (by most recent): 1 - 4 (Page 1 of 1) ▼

❗ By default, only the logged events from the past week are displayed below, but you may change the time range filter above.

For example, if we change the date range to the past month and select only records for Person 3, we see different logs:

This module lists all changes made to this project, including data exports, data changes, and the creation or deletion of users.

Filter by event: All event types (excluding page views) ▼
Filter by user name: All users ▼
Filter by record: 10 Person 3 ▼
Filter by time range from: 19/10/2024 21:16  to 
Custom range Past Day Past Week Past Month Past Year No limit
Displaying events (by most recent): 1 - 3 (Page 1 of 1) ▼

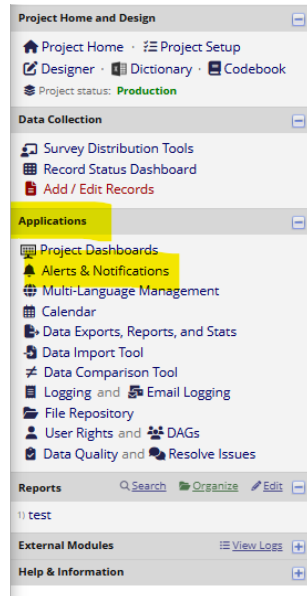
Time / Date	Username	Action	List of Data Changes OR Fields Exported
06/11/2024 9:22pm	fmustafa	Update record 10 (Data_Entry_Client s (Arm 1: Clients))	cinfo_ethnicity(3) = checked, needs_assessment_background_information_complete = '0'
06/11/2024 9:22pm	fmustafa	Update record 10 (Data_Entry_Client s (Arm 1: Clients))	appform_gender = '2', appform_imm = '6', appform_rel = '1'
06/11/2024 9:21pm	fmustafa	Create record 10 (Data_Entry_Client s (Arm 1: Clients))	appform_todaysdate = '2024-11-06', appform_firstname = 'Person 3', appform_dob = '2000-11-06', appform_currentage = '24', application_form_complete = '0', record_id = '10'

Alerts and Notifications

You can create email alerts and notifications based on various criteria.

****Remember that when you create an alert, it will be set to go to a specific email address. If that email address is deleted, the alert or notification will not be able to be sent. If there is staff turnover or email address changes, be sure to check that any alerts have been modified as needed.**

Open Alerts and Notifications from the Applications section of the left sidebar.



You will see any existing alerts and notifications that have been created. Below are two example alerts. The first is to be notified 1 day before an Interview date set on the Application Form for a client. The second is to be notified when it is time to delete data for a client who has left the program, set to send 10 years after the client's exit date from the program.

+ Add New Alert ☒ Re-evaluate Alerts

Alert #1: Interview Alert Unique Alert ID: **A-2**

If the following logic is TRUE when the instrument "Application Form [Any Event]" is saved and has any form status: `[appform_client_c2_date]<=""`

Schedule to send later: 1 days before `[data_entry_clients_arm_1]` `[appform_client_c2_date]`

Send one time (only once per record - i.e., never re-trigger)

Activity: No alerts sent yet

Email Preview:

From: fmustafa@policywise.com
To: fmustafa@policywise.com
Subject: Interview Scheduled
This is a reminder that an interview has been schedu...

Alert #2: Data Deletion Alert (Planned Exit) Unique Alert ID: **A-17**

When the Instrument "Exit: Planned (Data_Entry_Clients (Arm 1: Clients))" is saved and has any form status.

Schedule to send later: 3650 days after `[survey-date-completed;placeholder]`

Repeat every 3 days - Send up to 5 times total (only once per record - i.e., never re-trigger)

Activity: No alerts sent yet

Email Preview:

From: fmustafa@policywise.com
To: fmustafa@policywise.com
Subject: Record Deletion Time
Hi, It has been 10 years since `[appform_firstname]` [ap...

To create a new email alert or notification, select "+Add New Alert".

🔔 Alerts & Notifications

The Alerts & Notifications feature allows you to construct alerts and send customized notifications. These notifications may be sent to one or more recipients and can be triggered or scheduled when a form/survey is saved and/or based on conditional logic whenever data is saved or imported. When adding/editing an alert, you will need to 1) set how the alert gets triggered, 2) define when the notification should be sent (including how many times), and 3) specify the recipient, sender, message text, and other settings for the notification. For the message, you may utilize customized options such as rich text, the piping of field variables (including Smart Variables), and uploading multiple file attachments. [Learn more](#)

🔔 My Alerts

📋 Notification Log

+ Add New Alert

🔄 Re-evaluate Alerts

📁 Upload or download Alerts ?

☐ Show deactivated alerts

Search

The screenshot below shows the pop-up that appears when you click “+Add New Alert”. Complete the required fields to select when the alert should be triggered, and where it should be sent. The first step is to define what will trigger the alert. You could set the alert to be triggered if a record is saved on a form/survey. The alert can also be set to be triggered if conditional logic is true either when a record is saved or when data is imported or entered or other time-based logic. You can also pick the specific forms or surveys that will trigger the alert as well as how often the alert is triggered.

Create new alert

You may define the settings for your alert in Steps 1-3 below. After clicking the Save button at the bottom, your alert will immediately become active and may be triggered at any time thereafter. If you would like to remove or stop using an alert, it may be deactivated at any time. You may modify an existing alert at any time, even after some notifications have already been sent or scheduled.

Title of this alert:

🔧 STEP 1: Triggering the Alert

- A) How will this alert be triggered? ☒ When a record is saved on a specific form/survey*
☐ If conditional logic is *TRUE* when a record is saved on a specific form/survey*
☐ When conditional logic is *TRUE* during a data import, data entry, or as the result of time-based logic ⓘ

B) Trigger the alert...

when is saved with any form status

C) Trigger Limit: Trigger the alert...

(The trigger limit determines where and to what extent within a record that the alert will be triggered.)

* The alert will not be re-triggered if the form/survey is saved again, unless it is set to send Every time in Step 2 below.

Once you determine what action will trigger the alert, the second step is to set the alert schedule, as shown below. You can decide if the alert notification will be sent immediately after the action that you picked in step 1, or on some future date. You can also pick if the alert will be sent once or more than once. You can set an alert expiration date if needed.

STEP 2: Set the Alert Schedule

When to send the alert?

- ☒ Send immediately
- ☐ Send on next at time H:M
- ☐ Send the alert days hours minutes
 the exact time that the alert was triggered
- ☐ Send at exact date/time:

Send it how many times?

- ☒ Just once
- ☐ Every time the form/survey in Step 1B is saved
(excludes data imports)
- ☐ Multiple times on a recurring basis:
☒ Send every days after initially being sent.
☒ Send up to times total (including the first time sent). *Leave blank to continue sending forever.*

Alert expiration:
(optional)

This alert will be auto-deactivated at the specified date/time above. Note: This will cause any already-scheduled notifications not to be sent after the expiration time.

The third step in this process is to determine who will get an email notification about the alert and what to write in that email, as the screenshot below shows. You can decide who the alert email comes from, who it is sent to and what it says. You will see a checkbox next to “Prevent piping of data for identifier fields”. Note that piping refers to using data entered onto a form within the text of the notification. For example you could pipe in the client’s name so your alert would say “[client_name] is due to complete her annual review in 3 days”. Here client_name is the variable with client name information. In order for any identifying data to be display in this way, you must uncheck the box that says ‘Prevent piping of data for identifier fields’.

STEP 3: Message Settings

Alert Type:

Email From: * must provide value

Email To: * must provide value

+ [Show more options](#)

Subject

* must provide value

Message:

* must provide value

☒ Prevent piping of data for Identifier fields ?

In the subject or message, you may use [Piping](#) and [Smart Variables](#).

Example:

Hi [first_name]! Please complete this survey: [survey-link:followup_survey]

Learn about Data Collection Strategies for Repeating Surveys

Example of a repeating survey using recurring alerts:

Please complete your daily survey: [survey-link:daily_repeating_survey][new-instance]

[Add attachments](#)

Save Cancel

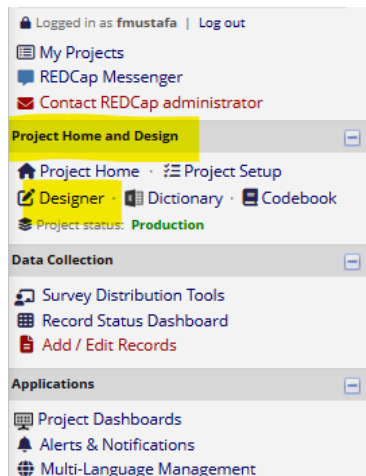
Click Save to save the alert settings and close the setup box.

Sending Surveys by Email

If you would like to send a client an email invitation to complete a form, you can follow these steps.

Enable a Form as a Survey

First, you must enable the form to be sent as a survey. To do this, open the Designer in the Project Home and Design section of the left menu bar.



This will show you a list of all of the forms in your data system. To enable a form to be sent as a survey, click “Enable” in the “Enabled as survey” column beside the form you want to send and it will open a list of options for surveys, as shown below. Using these options, you can customize a range of things – e.g., the way your survey appears, whether it has an expiration date, whether respondents can download a pdf of their responses, how a survey is terminated and other customizations.

A screenshot of the 'Consent Form: Services' survey configuration page. The page has a green header bar with the title '+ Set up my survey for data collection instrument "Consent Form: Services"' and buttons for 'Save Changes' and 'Cancel'. The main content area is divided into sections. The 'Survey Status' section shows a green checkmark and a dropdown menu set to 'Survey Active', with a note 'If offline, respondents will not be able take the survey.' and a link to 'Add offline message'. The 'Basic Survey Options' section is highlighted in yellow. It contains a 'Survey Title' field with the text 'Consent Form: Services' and a description 'Title to be displayed to participants at the top of the survey page'. Below this is a 'Survey Instructions' section with a description '(Displayed at top of survey after title)'. The instructions text area contains the text 'Please complete the survey below.' and 'Thank you!'. At the bottom, there is a link 'How to use Piping here'.

Survey Design Options:

 Copy design to other surveys

↔ Width of survey on page

Set a custom width as a percentage of the webpage that the survey will take up.

Fixed width (default) ▾

Note: The percentage page width settings are fully dependent on the participant's screen size. This setting will not be applied when viewing the survey on mobile devices.



Logo

(Optional: display an image above the survey title)

Add new logo:

No file chosen

(Images wider than 600 pixels will be downsized to fit page.)

☐ Hide survey title on survey page when display logo



Use enhanced radio buttons and checkboxes?

Includes Yes/No and True/False fields

Standard radios and checkboxes ▾

[Show example](#)



Size of survey text

Large ▾



Font of survey text

Open Sans ▾



Survey theme

Default ▾

Survey design preview (sample survey):

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the survey, as well as what to expect once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

This is a section header to divide the survey page into sections.

[Expand](#)

Survey Customizations:

☰ Question Numbering

For custom numbering, each question's number will be blank by default until manually added via the Online Designer or Data Dictionary.

Auto numbered ▾



Pagination

One page or multiple pages? Section headers, which begin new sections on the instrument, will serve as the page break in a multi-page survey, in which each page will begin with a section header.

Single page ▾

☐ Display page numbers at top of survey page

☐ Hide the 'Previous Page' button (i.e., Back button) on the survey page (prevents respondents from going back to previous pages)



Allow participants to download a PDF of their responses at end of survey?

Display a button for the participant to download a PDF file of their responses for the survey they just completed.

No ▾

This option will not be available if the Survey Auto-continue or Survey Queue auto-start option is enabled. Also, if a field utilizes the @HIDDEN action tag, it will not be displayed in the PDF.



Save a PDF of completed survey response to a File Upload field

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

Current event ▾

Disabled ▾

☐ Store the translated version of the PDF (if using Multi-language Management)

Choose a File Upload field from the drop-down above to enable this feature. Tip: If desired, the field may exist on the survey instrument that is triggering it, in which the field can be hidden on the survey page using the action tag @HIDDEN-SURVEY. [Learn more](#)



Survey-specific email invitation field

Designate an email field for sending survey invitations for this survey only. [?](#)

-- select a field -- ▾

⚠ It appears that the project-level email invitation field has been enabled already. Please note that it is not required to select a survey-specific email field here if a project-level email field has already been defined. This is an optional setting only.

Note: This option will override the project-level email invitation field (if enabled on the Project Setup page) and will also override any email address originally entered into the Participant List. Also, if this field has no value and the project-level email field is enabled, then the project-level email field's value will be used instead.



For 'Required' fields, display the red 'must provide value' text on the survey page?

Yes ▾

If 'No', then it will NOT display the following text beneath all 'Required' fields: *** must provide value**



Display the font resize options at the top of the survey page

Yes ▾



Allow survey respondents to view aggregate survey results after completing the survey?

After completing the survey, participants can view ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent's answers will be highlighted in the results.

Disabled ▾

Additional settings:

Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).

☐ Do not show plots for questions lacking diversity in response values? (What does this mean?)



Text-To-Speech functionality

(Allows text on survey page to be read audibly to participants.)

When enabled, icons will be displayed next to all text on the survey page, and when clicked, the text will be read out loud to the participant (must have computer speakers turned on).

Disabled ▾

[Learn more](#)

Language of text to be spoken:

* Does not perform translation but only reads text in the language specified here.



Show or hide the Submit buttons

Show or hide the Submit buttons displayed at the bottom of every survey page (including the 'Next Page' and 'Previous Page' buttons).

Always display the Submit buttons ▾

Hiding the Submit buttons can be useful if you are not using the survey for data collection but for instructional purposes or other similar use cases.



Customize the text of the Submit buttons

Provide alternative text for the 'Submit', 'Next Page', and 'Previous Page' buttons displayed at the bottom of every survey page.

Any alternative text provided for the submit buttons will override their default text below:

<< Previous Page :	<< Previous Page
Next Page >> :	Next Page >>
Submit :	Submit

Options related to Survey Stop Actions:

Prevent survey responses from being saved if the survey ends via Stop Action?
If a Stop Action triggers the end of the survey, you may choose to keep the submitted responses or to prevent them from being saved as data in the project.

Save all survey responses regardless of Stop Action being triggered (default) ▼

WARNING: If any data has been saved on the survey instrument prior to the Stop Action being triggered, that data will be deleted. For example, if the survey is a multi-page survey in which data has been entered on previous pages prior to triggering the Stop Action, all data collected thus far in that survey will be deleted as if the survey was never taken. Additionally, if the record does not contain data in any other instruments, the entire record itself will be deleted during this process.

Alternate Survey Completion Text (optional)
This completion text is ONLY displayed when a Stop Action triggers the end of the survey. If left blank, the standard Survey Completion Text will be used.

Paragraph ▼ **B** *I* U

[How to use Piping here](#)

e-Consent Framework
 – and –

PDF Auto-Archiver
Upon survey completion, a compact PDF copy of the survey response will be automatically stored in the project's File Repository, from which the archived PDFs can be downloaded at any time.

☒ Disabled
☐ Auto-Archiver enabled
☐ Auto-Archiver + e-Consent Framework [What is the e-Consent Framework?](#)
(includes end-of-survey certification & archival of PDF consent form)

☒ **Send confirmation email?**
(Email the respondent when they complete the

No ▼

You only need to do this step the first time. After that, it will stay enabled as a survey unless you disable that feature. In this example, you can see that the Application Form is already enabled to send as a survey.

[Project Home](#)
[Project Setup](#)
[Online Designer](#)
[Data Dictionary](#)
[Codebook](#)

Since this project is currently in **PRODUCTION**, changes will not be made in real time. [Tell me more](#)

[Submit Changes for Review](#)

Fields to be added: **0** / Total resulting field count: **1272**
 Fields to be deleted: **0** / Existing field count: **1272**

[Remove all drafted changes](#) [View detailed summary of all drafted changes](#)

[VIDEO: How to use this page](#)
[Create snapshot of instruments](#)
 Last snapshot: never ?

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. Below you have the options to modify an existing instrument, delete an instrument, create a new instrument, download an instrument as a PDF document, or reorder your instruments. However, whether in Draft Mode or not, you are allowed to download the PDF or modify survey settings for any instruments below.

Data Collection Instruments			Form options:	Survey options:	
+ Create	a new instrument from scratch		Form Display Logic	Survey Queue	Auto Invitation options - Survey Login
Import	a new instrument from the official REDCap Instrument Library			Survey Notifications	
Upload	instrument ZIP file from another project/user or external libraries				
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Application Form	123			Choose action ▼	Survey settings + Automated Invitations
Consent Form: Services	16		Enable	Choose action ▼	
Consent Form: Collection and Use of Data	6		Enable	Choose action ▼	
Program Progress Tracker	7		Enable	Choose action ▼	
Needs Assessment: Client Contact Info	6		Enable	Choose action ▼	
Needs Assessment: Emergency Contacts	17		Enable	Choose action ▼	

Disable a Form as a Survey

To disable the survey function on a form, you will need to click the “survey settings” button for the form that you are interested in disabling as a survey, as shown below.

Data Collection Instruments			Form options:	Survey options:	
			Form Display Logic	Survey Queue	Auto Invitation options ▾
				Survey Notifications	Survey Login
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Application Form	123			Choose action ▾	Survey settings + Automated Invitations
Consent Form: Services	16			Choose action ▾	Survey settings + Automated Invitations
Consent Form: Collection and Use of Data	6			Choose action ▾	
Program Progress Tracker	7			Choose action ▾	
Needs Assessment: Client Contact Info	6			Choose action ▾	
Needs Assessment: Emergency Contacts	17			Choose action ▾	
Needs Assessment: Background Information	15			Choose action ▾	
Needs Assessment: Housing	14			Choose action ▾	
Needs Assessment Health And Wellness	217			Choose action ▾	
Needs Assessment: Pregnancy	25			Choose action ▾	
Needs Assessment: Child Health and Wellness	39			Choose action ▾	
Needs Assessment: Parenting	50			Choose action ▾	

Once you click the survey settings button, you will get the survey settings page with all the survey options that you saw previously. You will now need to go to the end of this page and click on the “Delete survey settings” button at the bottom, as shown below. There will be a pop-up asking you to confirm that survey settings should be deleted and once you confirm, this will disable the survey function for that form.

e-Consent Framework
- and -
 PDF Auto-Archiver
Upon survey completion, a compact PDF copy of the survey response will be automatically stored in the project's File Repository, from which the archived PDFs can be downloaded at any time.

☒ Disabled
☐ Auto-Archiver enabled
☐ Auto-Archiver + e-Consent Framework [What is the e-Consent Framework?](#)
(includes end-of-survey certification & archival of PDF consent form)

☒ **Send confirmation email?**
(Email the respondent when they complete the survey)

No ▾

Save Changes

-- Cancel--

Delete Survey Settings

Delete Survey Settings: Please note that deleting the survey settings will NOT delete any responses collected using the survey. Also, deleting the survey settings will NOT delete the data collection instrument, but instead the instrument will revert back to how it was before it was enabled as a survey, in which data can only be collected by authenticated users on the data entry form.

Setting Survey Notifications

On the main designer page, you can also enable notifications so you will know when someone has completed a survey sent by email. Click on Survey Notifications at the top.

Since this project is currently in PRODUCTION, changes will not be made in real time. [Tell me more](#)

[Submit Changes for Review](#)

Fields to be added: 0 / Total resulting field count: 1272
Fields to be deleted: 0 / Existing field count: 1272

[Remove all drafted changes](#)

[View detailed summary of all drafted changes](#)

[VIDEO: How to use this page](#)

[Create snapshot of instruments](#)

Last snapshot: never ?

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. Below you have the options to modify an existing instrument, delete an instrument, create a new instrument, download an instrument as a PDF document, or reorder your instruments. However, whether in Draft Mode or not, you are allowed to download the PDF or modify survey settings for any instruments below.

Data Collection Instruments

[+ Create](#) a new instrument from scratch

[Import](#) a new instrument from the official REDCap Instrument Library

[Upload](#) instrument ZIP file from another project/user or external libraries

Form options:

[Form Display Logic](#)

Survey options:

[Survey Queue](#)

[Auto Invitation options](#)

[Survey Login](#)

[Survey Notifications](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Application Form	123			Choose action	Survey settings + Automated Invitations
Consent Form: Services	16		Enable	Choose action	
Consent Form: Collection and Use of Data	6		Enable	Choose action	

In here you can set email notifications for any form that is enabled as a survey, and notifications can be sent to any existing user in the system. Once you open the Survey Notifications window you will see a list of all of the forms that have been enabled as surveys. Here you can set which system users are notified of the completion of which surveys.

Email notifications for survey responses

If you or other users wish to be notified via email every time a participant completes a survey, select the users to be notified under each survey listed below by selecting their email address in the user's drop-down list, which may contain each user's primary, secondary, or tertiary email address for their REDCap account. To remove a user as a recipient for the survey notifications, change their email drop-down option to 'not selected', after which they will no longer receive notification emails for that survey.

Emma House Application Form	☒ Recipient email address	Notifications Enabled
fmustafa (Fatima Mustafa)	-- not selected --	☐
kharah.ross (Kharah Ross)	-- not selected --	☐

Outcomes: Client Skills	☒ Recipient email address	Notifications Enabled
fmustafa (Fatima Mustafa)	-- not selected --	☐
kharah.ross (Kharah Ross)	-- not selected --	☐

Select the email address in the drop-down beside the person who will need to receive the notification. The Notifications Enabled button will turn green to indicate your settings have been saved.

 **Email notifications for survey responses**

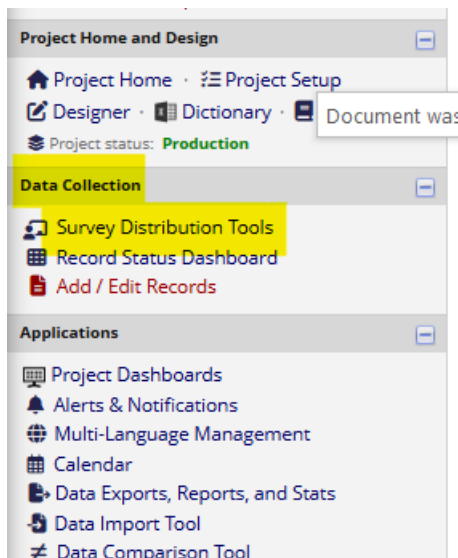
If you or other users wish to be notified via email every time a participant completes a survey, select the users to be notified under each survey listed below by selecting their email address in the user's drop-down list, which may contain each user's primary, secondary, or tertiary email address for their REDCap account. To remove a user as a recipient for the survey notifications, change their email drop-down option to 'not selected', after which they will no longer receive notification emails for that survey.

Emma House Application Form	 Recipient email address	Notifications Enabled
fmustafa (Fatima Mustafa)	fmustafa@policywise.com (Primary) ▼	
kharah.ross (Kharah Ross)	-- not selected -- ▼	

Once you are done, you can click “close” and your settings will be saved.

Sending Surveys

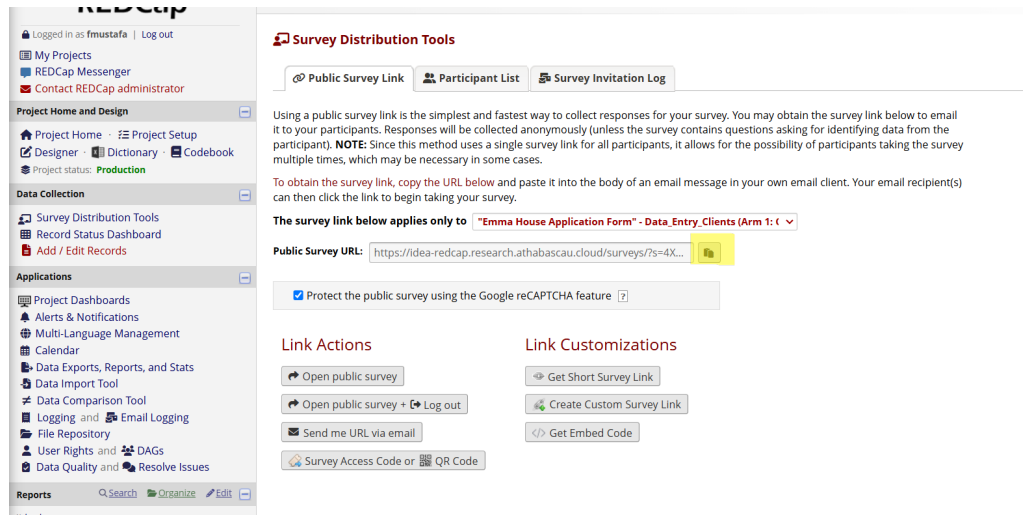
Once your survey has been enabled and you have set up notifications, you can begin distributing the link to the survey as needed. To do this, open Survey Distribution Tools in the Data Collection section of the left sidebar.



Once you open Survey Distribution Tools, you can send a survey in one of two ways – either by using the public survey link or by sending an email to the participant list.

Using the Public Survey Link

REDCap generates a public survey link for the first form in your data collection instruments that is enabled as a survey. In your REDCap, this would be the application form. To get to the survey link for the application form, you would go to Survey Distribution Tools and then look at the first tab titled Public Survey Link. In this tab, you will see a link to the application form that you can copy using the button highlighted in yellow below. Once you have the link you can share it or embed it on your website to allow clients to access the application form.



The screenshot shows the REDCap interface. On the left is a sidebar with navigation menus: 'My Projects', 'Project Home and Design', 'Data Collection', 'Applications', and 'Reports'. The 'Data Collection' menu is expanded, showing 'Survey Distribution Tools' as the selected option. The main content area is titled 'Survey Distribution Tools' and has three tabs: 'Public Survey Link' (selected), 'Participant List', and 'Survey Invitation Log'. Below the tabs, there is explanatory text about using a public survey link, a note about anonymity, and instructions on how to obtain the link. A section titled 'The survey link below applies only to' shows a dropdown menu with 'Emma House Application Form' - Data Entry Clients (Arm 1) selected. Below this, the 'Public Survey URL' is displayed as a long URL, with a yellow button next to it for copying the link. A checkbox option 'Protect the public survey using the Google reCAPTCHA feature' is checked. At the bottom, there are two columns of buttons: 'Link Actions' (Open public survey, Open public survey + Log out, Send me URL via email, Survey Access Code or QR Code) and 'Link Customizations' (Get Short Survey Link, Create Custom Survey Link, Get Embed Code).

You can also get a QR code for the application form. Click the button for “Survey Access Code or QR Code”, as shown below.

Logged in as **fmustafa** | [Log out](#)

[My Projects](#)

[REDCap Messenger](#)

[Contact REDCap administrator](#)

Project Home and Design

[Project Home](#) · [Project Setup](#)

[Designer](#) · [Dictionary](#) · [Codebook](#)

[Project status: Development](#)

Data Collection

Survey Distribution Tools

[Get a public survey link or build a participant list for inviting respondents](#)

[Record Status Dashboard](#)

[View data collection status of all records](#)

[Add / Edit Records](#)

[Create new records or edit/view existing ones](#)

Applications

[External Modules](#)

[View Logs](#)

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Calgary Foundation: Emma House PID 69

Survey Distribution Tools

[Public Survey Link](#) [Participant List](#) [Survey Invitation Log](#)

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

The survey link below applies only to **"Emma House Application Form" - Data_Entry_Clients (Arm 1: C** ▼

Public Survey URL: <https://idea-redcap.research.athabascau.cloud/surveys/?s=4X...>

☐ Protect the public survey using the Google reCAPTCHA feature ?

Link Actions

[Open public survey](#)

[Open public survey + Log out](#)

[Send me URL via email](#)

[Survey Access Code or QR Code](#)

Link Customizations

[Get Short Survey Link](#)

[Create Custom Survey Link](#)

[Get Embed Code](#)

You can have the client scan the QR code on the screen, or you can use the Print for Respondent button to print this page. It gives them the option to use the QR code or to visit the website listed and enter the Survey Access Code. This QR code and Survey Access Code can be used for every client and do not expire.

Survey Access Code or
 QR Code

Survey title: **"Emma House Application Form"**

A Survey Access Code and a QR Code both allow respondents to begin a survey on another computer or device without someone having to email them an invitation. This is especially useful if the respondent is currently nearby or if you will be sending the survey invitation to a physical mailing address (i.e. 'snail mail'). You may click the Print button at the bottom if you wish to print out the instructions for the respondent.

Enter the Survey Access Code

To allow a respondent to begin this survey, have them navigate to the URL below and enter the survey access code. The code is permanent and will never change. (Note: The web address is the same for all projects and surveys, so you may bookmark the address on a computer or device to quickly return to it multiple times.)

1.) Go to this web address:

https://idea-redcap.research.athabascau.cloud/surveys/

2.) Then enter this code:

AXEJY4EY4

OR

Generate Short Code

Alternatively, you may generate a shorter, temporary code that will expire after only one use or after one hour has passed.

Generate Short Code

Scan the QR Code

The survey link has been converted into a QR code, which can now be scanned by a device that has an app capable of reading QR codes. Once the QR code below is scanned, it should take the respondent directly to the survey in a web browser.

Print for Respondent

Close

Send a Survey Using the Participant List

If you want to send clients any of the other forms that have been enabled as surveys, you will need to use the participant list. You will open Survey Distribution Tools and then click on the second tab "Participant List" as highlighted below.

Logged in as **fmustafa** | Log out

My Projects

REDCap Messenger

Contact REDCap administrator

Project Home and Design

Project Home | Project Setup

Designer | Dictionary | Codebook

Project status: **Production**

Data Collection

Survey Distribution Tools

Record Status Dashboard

Add / Edit Records

Applications

Project Dashboards

Alerts & Notifications

Multi-Language Management

Calendar

Data Exports, Reports, and Stats

Data Import Tool

Data Comparison Tool

Logging and Email Logging

File Repository

User Rights and DAGs

Data Quality and Resolve Issues

Reports

Search | Organize | Edit

test

External Modules

Survey Distribution Tools

Public Survey Link | **Participant List** | Survey Invitation Log

The Participant List 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 Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Survey Response Status: Not Anonymous ?

Participant List belonging to: [Initial survey] "Emma House A..." - Data_Entry_Clients (Arm 1: Client) Remove all participants

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

Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
[No email listed]		Disable		-			
[No email listed]				-			
[No email listed]				-			
[No email listed]				-			
xyz@something.com				-			

Once you are in the participant list tab, you will select the survey that you want to send.

The following screen will pop up:

Record Status Dashboard (all records)

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

Legend for status icons:

- Incomplete
- Unverified
- Complete
- Many statuses (mixed)
- Incomplete (no data)
- Partial Survey Response
- Completed Survey Form
- Many statuses (mixed)

Dashboard displayed: [Default dashboard] ▼

Create custom dashboard

Displaying record Page 1 of 1: "8" through "12" ▼ of 5 records

ALL (5) ▼ records per page

+ Add new record for this arm

Displaying: Instrument status only | [Lock status only](#) | [All status types](#)

Arm 1: Clients Arm 2: Staff Arm 3: Volunteers Arm 4: Building

Record ID	Application Form	Consent Form: Services	Consent Form: Collection and Use of Data	Program Progress Tracker	Needs Assessment: Client Contact Info	Needs Assessment: Emergency Contacts	Needs Assessment: Background Information	Needs Assessment: Housing	Needs Assessment: Health And Wellness	Needs Assessment: Pregnancy	Needs Assessment: Child Health and Wellness	Needs Assessment: Parenting
8 Person 1												
9 Person 2												
10 Person 3												
11 Person 4												
12 Person 5												

For the appropriate client, scroll right until you find the correct instrument, and click on the circle icon where the client and form intersect.

mes: nt ness	Outcomes: BPFI	Outcomes: Flourishing Scale	Outcomes: Program Feedback	Pla

When the form opens, select the Survey Options dropdown at the top of the survey. Remember, this will only appear if you have previously set the form to 'Enable as survey'.

Outcomes: Flourishing Scale

Invitation status: 

 Editing existing Record ID 11. Person 4

Event: **Data_Entry_Clients (Arm 1: Clients)**

Record ID

11

Outcomes: Flourishing Scale

These questions are designed to measure your self-perceived success in important areas such as relationships, self-esteem, purpose, and optimism.

Below are 8 statements with which you may agree or disagree. Using the scale below, indicate your agreement with each item.

 Survey options

 Open survey

 Log out +  Open survey

 Compose survey invitation

 Survey Access Code +  QR Code

Select the appropriate option, usually “Compose survey invitation”. This will open a form to compose an email to send the survey link. You can specify the “From” address and the Subject line and modify the contents of the email message as appropriate. You can also choose to send the message immediately or at a later date. When you are ready, click “Send Invitation”.

Send Survey Invitation to Participant "11"

Info

Survey title: Outcomes: Flourishing Scale
Event: Data_Entry_Clients (Arm 1: Clients)

When should this email be sent?

☒ Immediately
☐ At specified time: D/M/Y H:M
The time must be for the time zone UTC, in which the current time is 19/11/2024 21:50.

Enable reminders

☐ Re-send invitation as a reminder if participant has not responded by a specified time?

Compose message

From:

(select any project user to be the 'Sender')

To:

(NOTE: Any email address manually entered above will be used only this one time when sending an survey invitation. Any other invitations sent out at other times will instead go to the email address found in the Participant List for this participant.)

Subject:

Send test email

Paragraph

—

B

I

U

Please take this survey.

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

[survey-link]

If the link above does not work, try copying the link below into your web browser:

[survey-url]

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

NOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.

[How to use Piping in the survey invitation](#)

Reminder: Never pipe private info (e.g., PII, PHI) into emails.

Send Invitation

Cancel

If you set up a notification previously, you will receive the notification once the client has submitted the survey.