REDCap USER GUIDE

REDCap Administrative Guide

Advanced Functionalities

PolicyWise
for Children & Families

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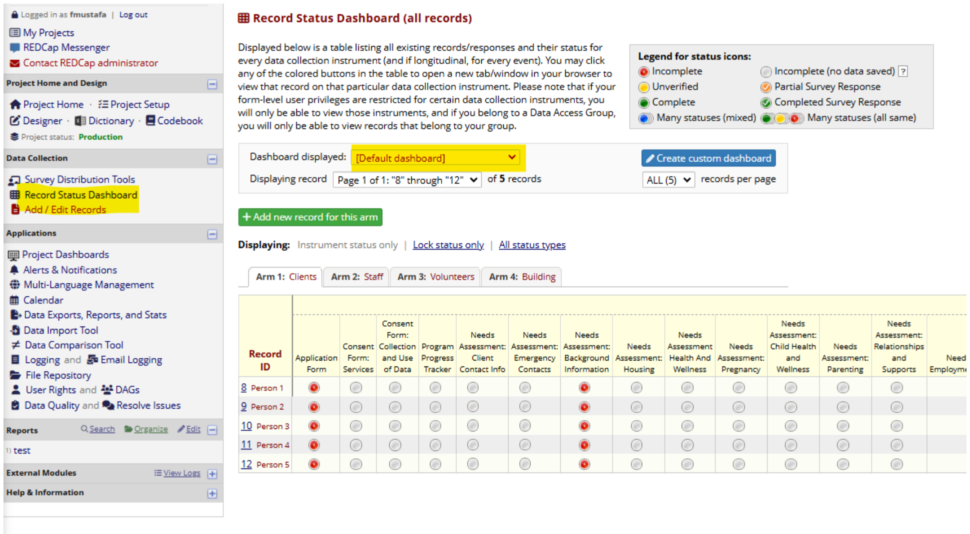
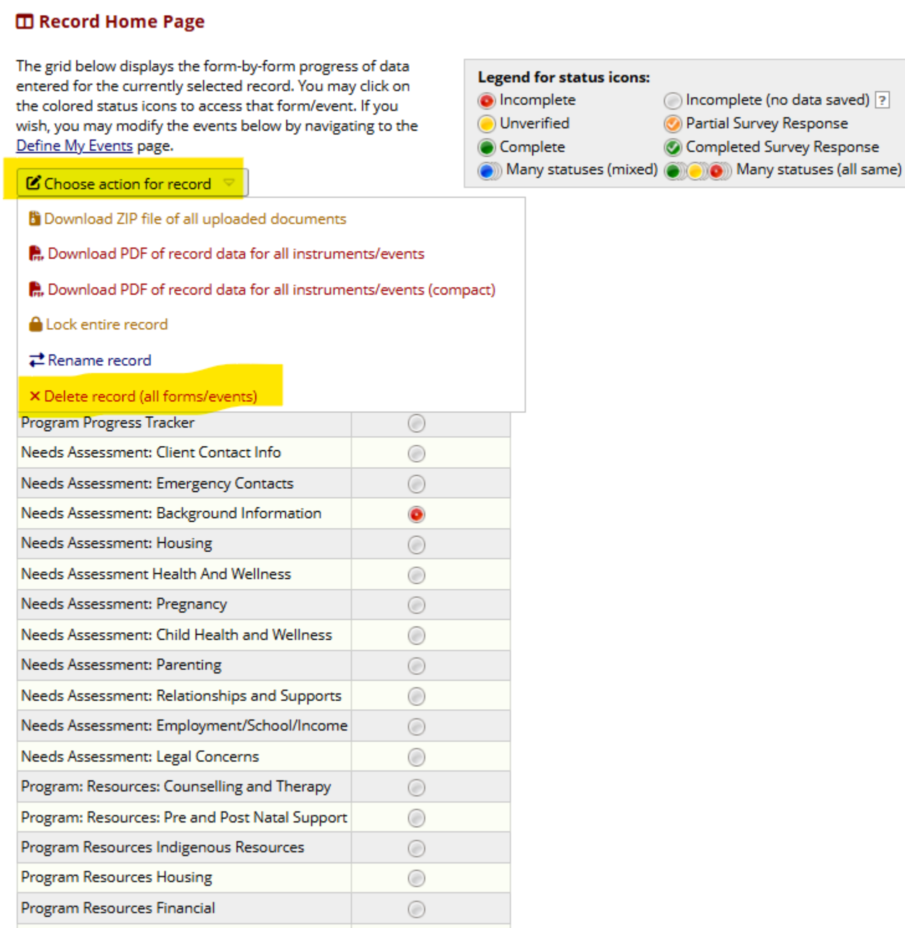
Delete Client Files

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

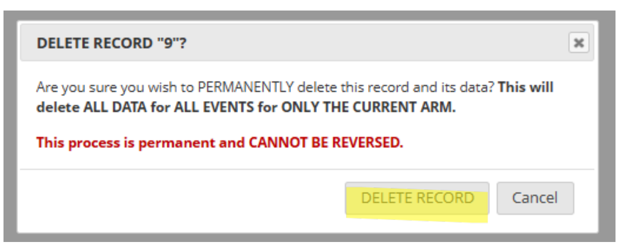


Select the Record ID for the client you want to delete. This will open a list of all of the forms completed for this person.

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



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

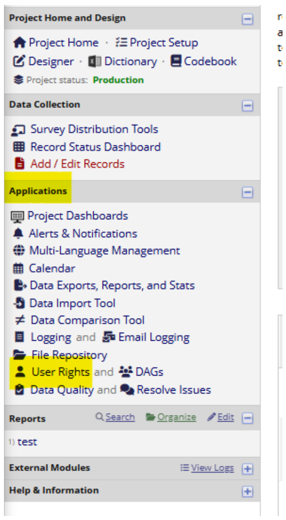


Manage REDCAP User Access Rights

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.

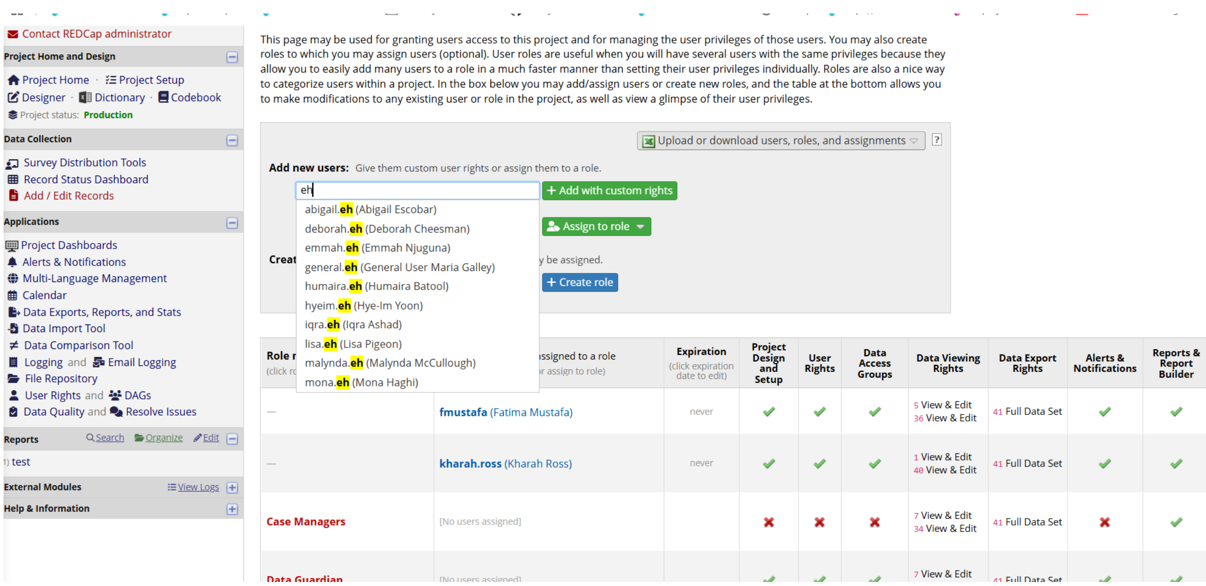
To add users to your REDCap, open the User Rights panel of the Applications menu on the left sidebar.



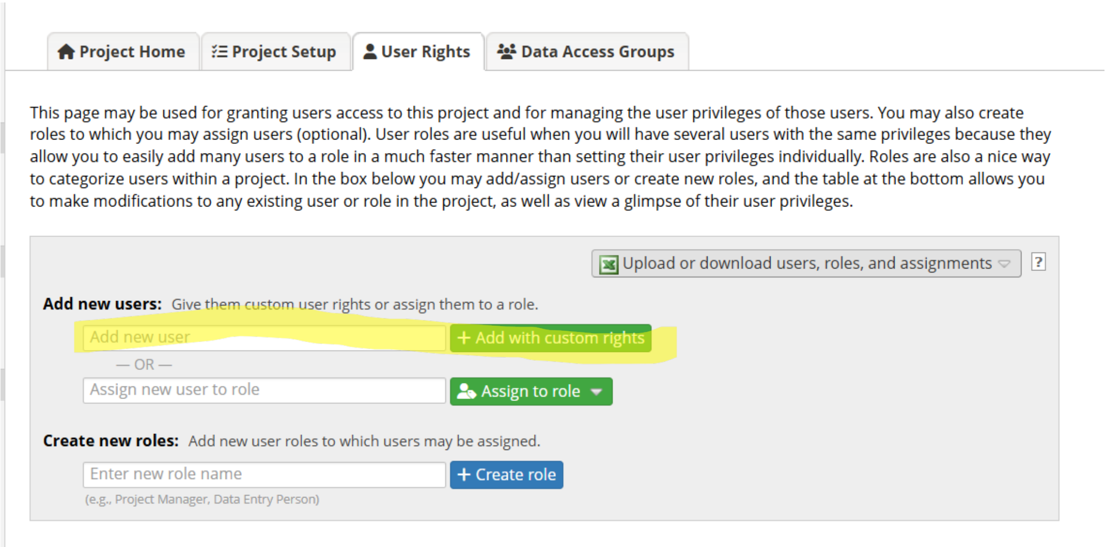
Use the "Add new users" section at the top and enter the user's REDCap username in either the "+Add with custom rights" box or the "Assign to role" box.

Add new users with custom rights

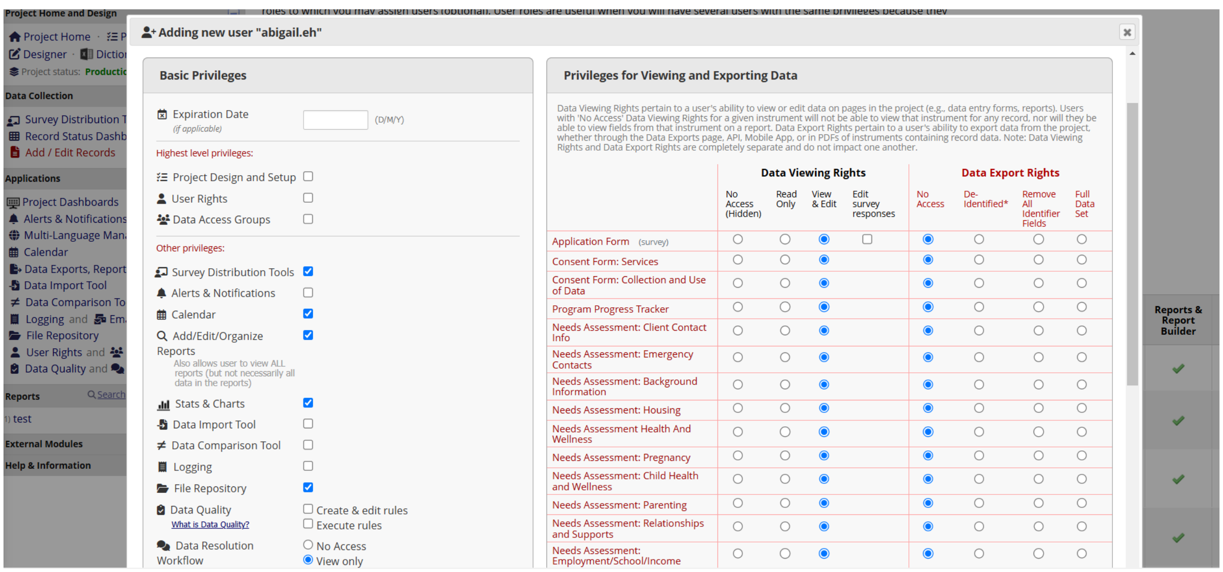
The first thing to note is that, for these projects, usernames in REDCap are organized by agency initials. For example, all Elizabeth House users have a username that ends in ".eh" and all Highbanks staff have usernames that end with ".hbs". That makes it easier to find users from your organization and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



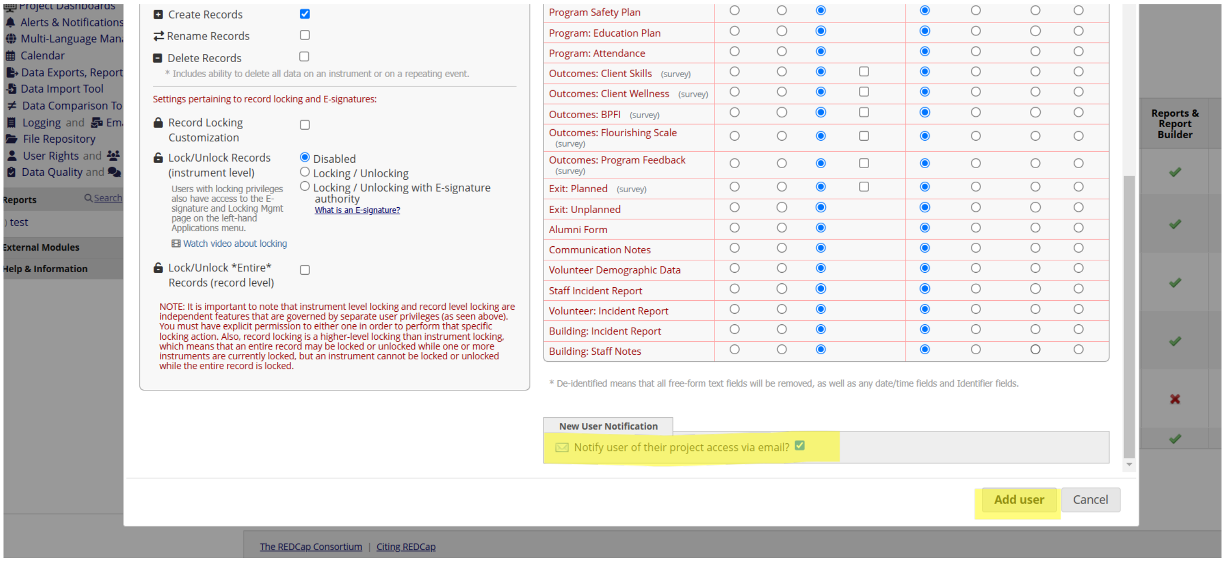
To assign custom user rights, enter in the username in front of the "+ Add with custom rights" button and then click on the "+ Add with custom rights".



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.

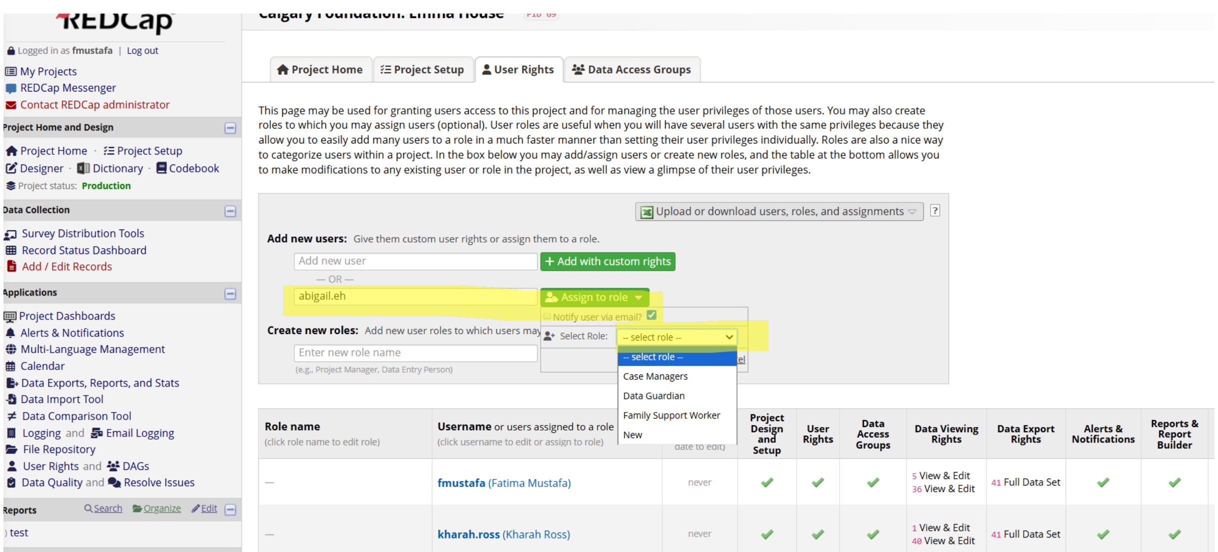


Once you are done, you can then click “Add user” at the bottom and also select whether user will be notified through email about their project access.



Add new users and assign to existing roles

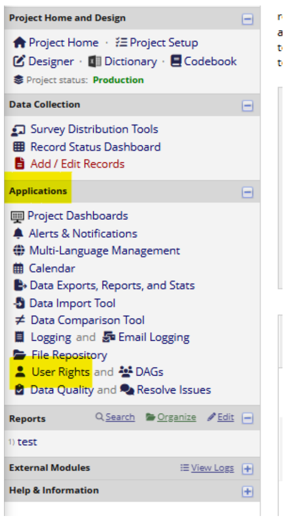
Use the second option (i.e., assign a new user to an existing role) if you want to add them to the system with a pre-created set of user rights (for example, Case Managers, Data Guardians, Family Support Worker, etc.) Most often, the new users you add to your REDCap project will be assigned to existing 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".



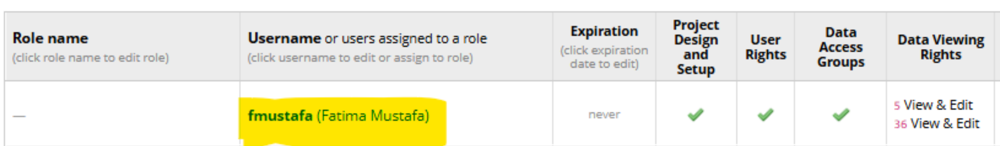
Remove an Existing User

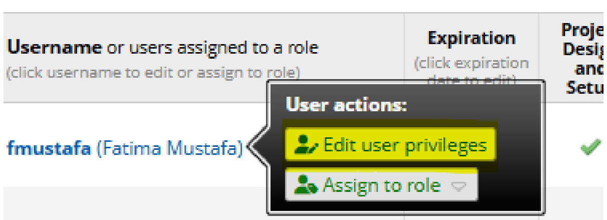
You can manage who has access to the REDCap and remove users who should no longer have access to the data.

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

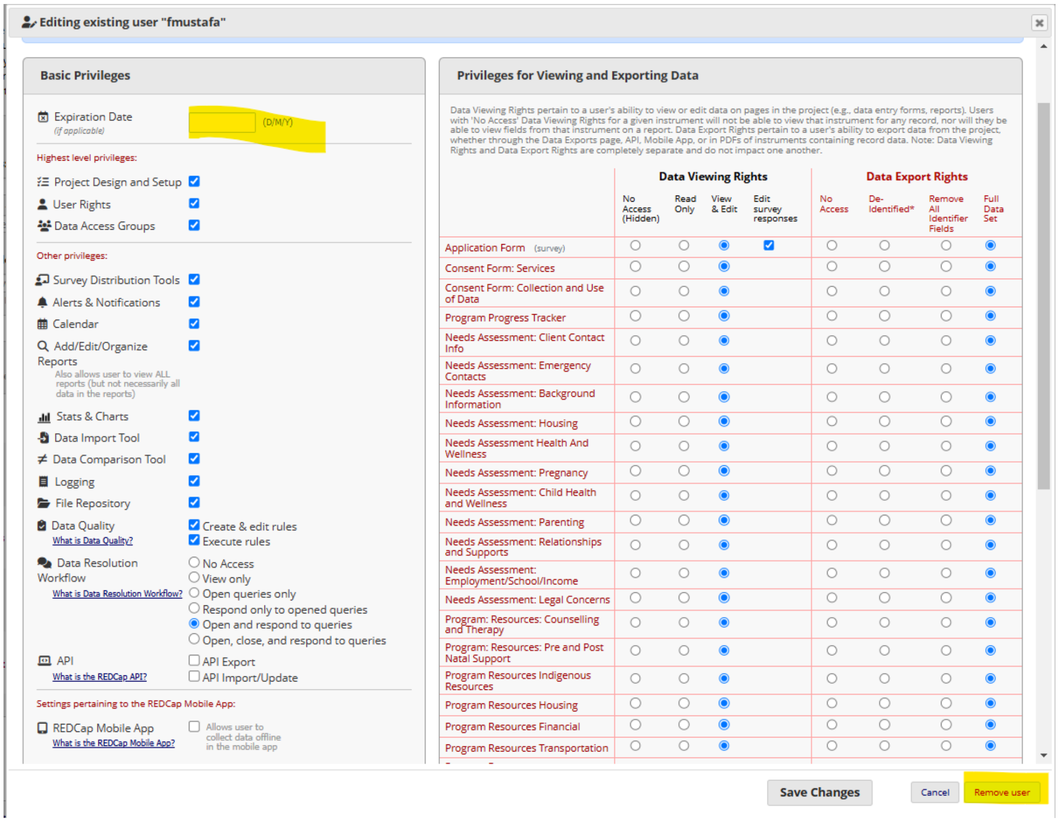


Click on the username of the user whose access you wish to modify. Select Edit User Privileges



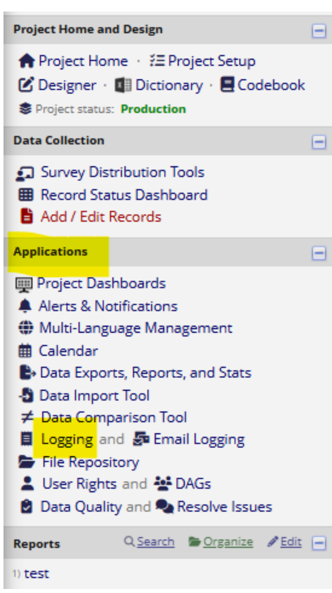


You can edit which functions and areas the user has access to, change the expiration date of their access, or remove the user entirely, which will remove their access to the data system.



Review Audit Logs

You can review which users made changes to data, as well as who exported data and added or deleted users. To open the logged events, select Logging from the Applications section of the left sidebar.



You can view the logged events from the past week in the table that loads.

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)

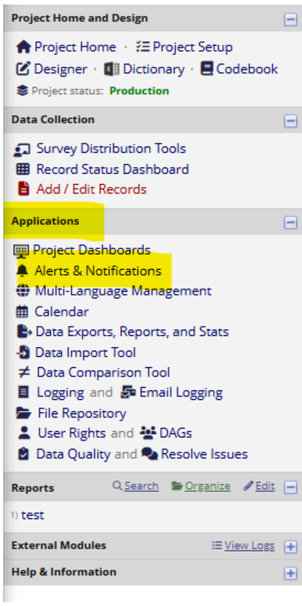
Time / Date	Username	Action	List of Data Changes OR Fields Exported
06/11/2024 9:22pm	fmustafa	Update record 10 (Data_Entry_Clients (Arm 1: Clients))	cinfo_ethnicity(3) = checked, needs_assessment_background_information_complete = '0'
06/11/2024 9:22pm	fmustafa	Update record 10 (Data_Entry_Clients (Arm 1: Clients))	appform_gender = '2', appform_imm = '6', appform_rel = '1'
06/11/2024 9:21pm	fmustafa	Create record 10 (Data_Entry_Clients (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

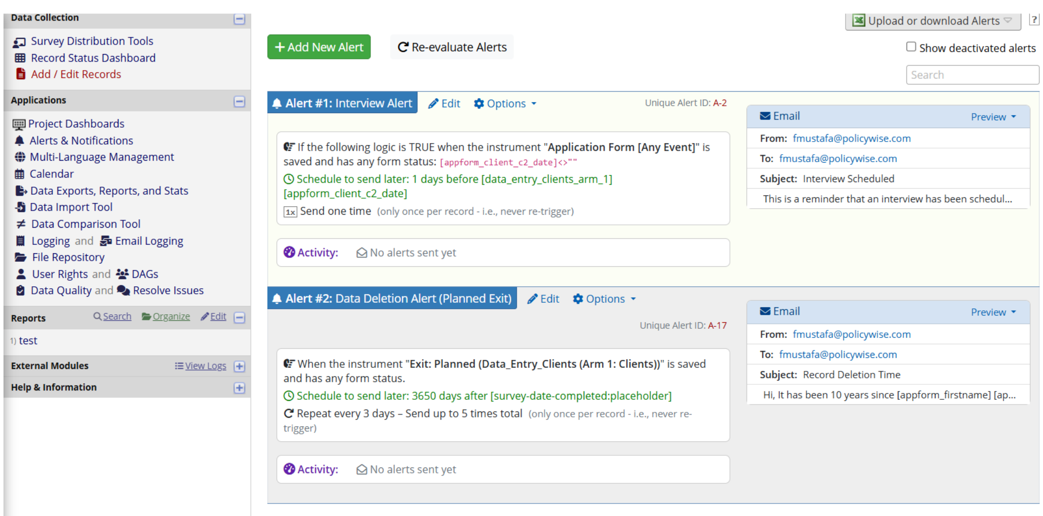
You can create email alerts and notifications based on various criteria.

**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.

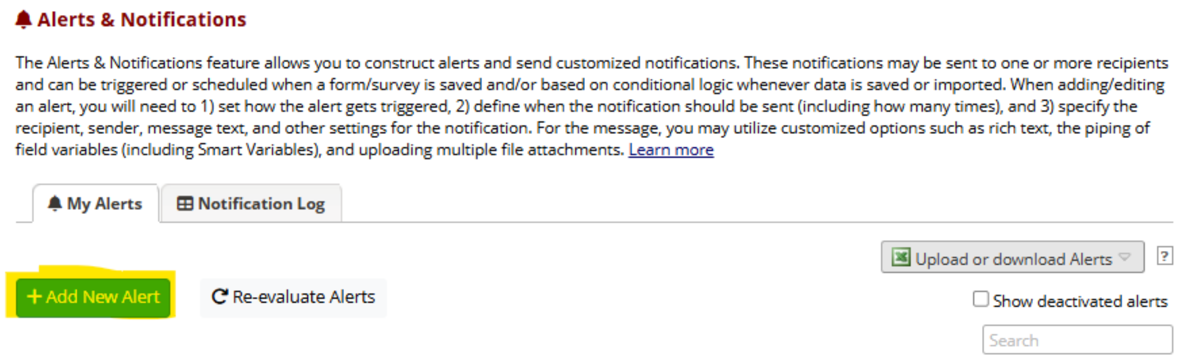
Open Alerts and Notifications from the Applications section of the left sidebar.



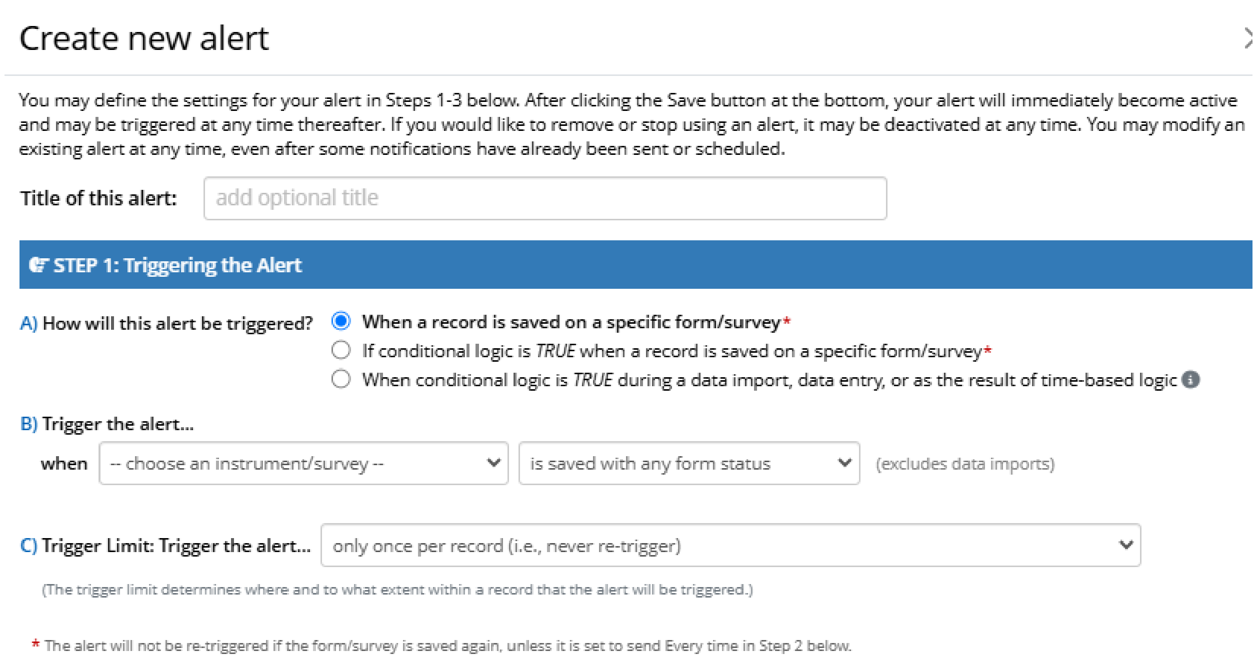
You will see any existing alerts and notifications that have been created. Below are two example alerts. The first is to be notified 1 day before an Interview date set on the Application Form for a client. The second is to be notified when it is time to delete data for a client who has left the program,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



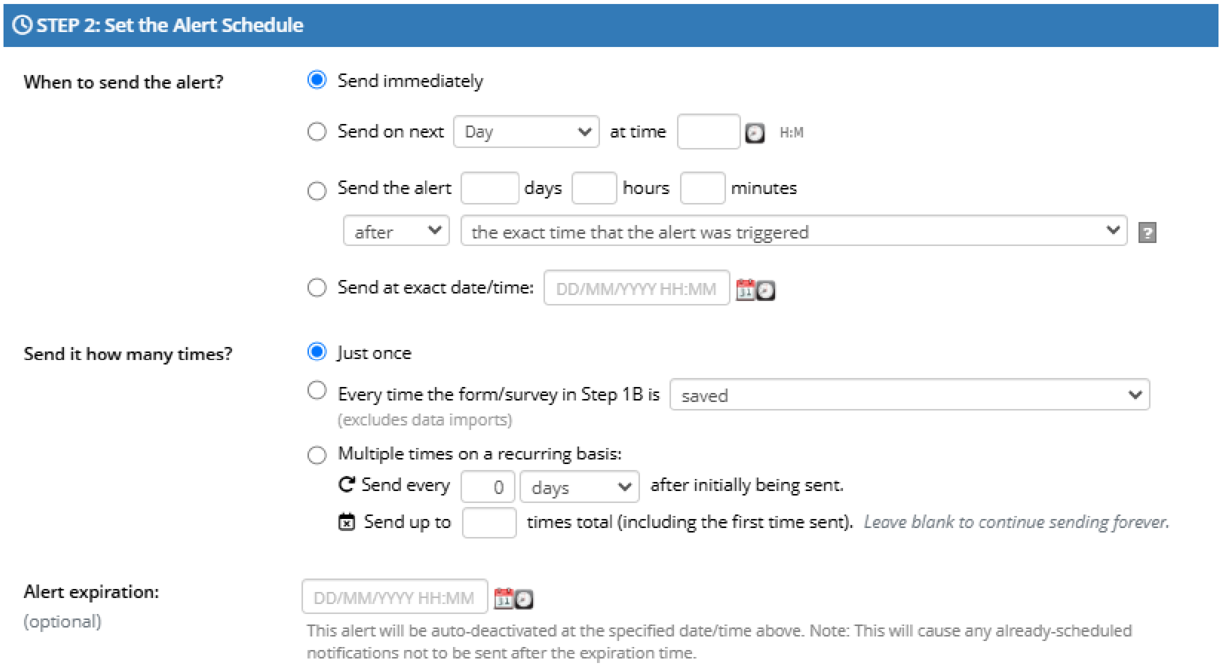
To create a new email alert or notification, select "+Add New Alert".



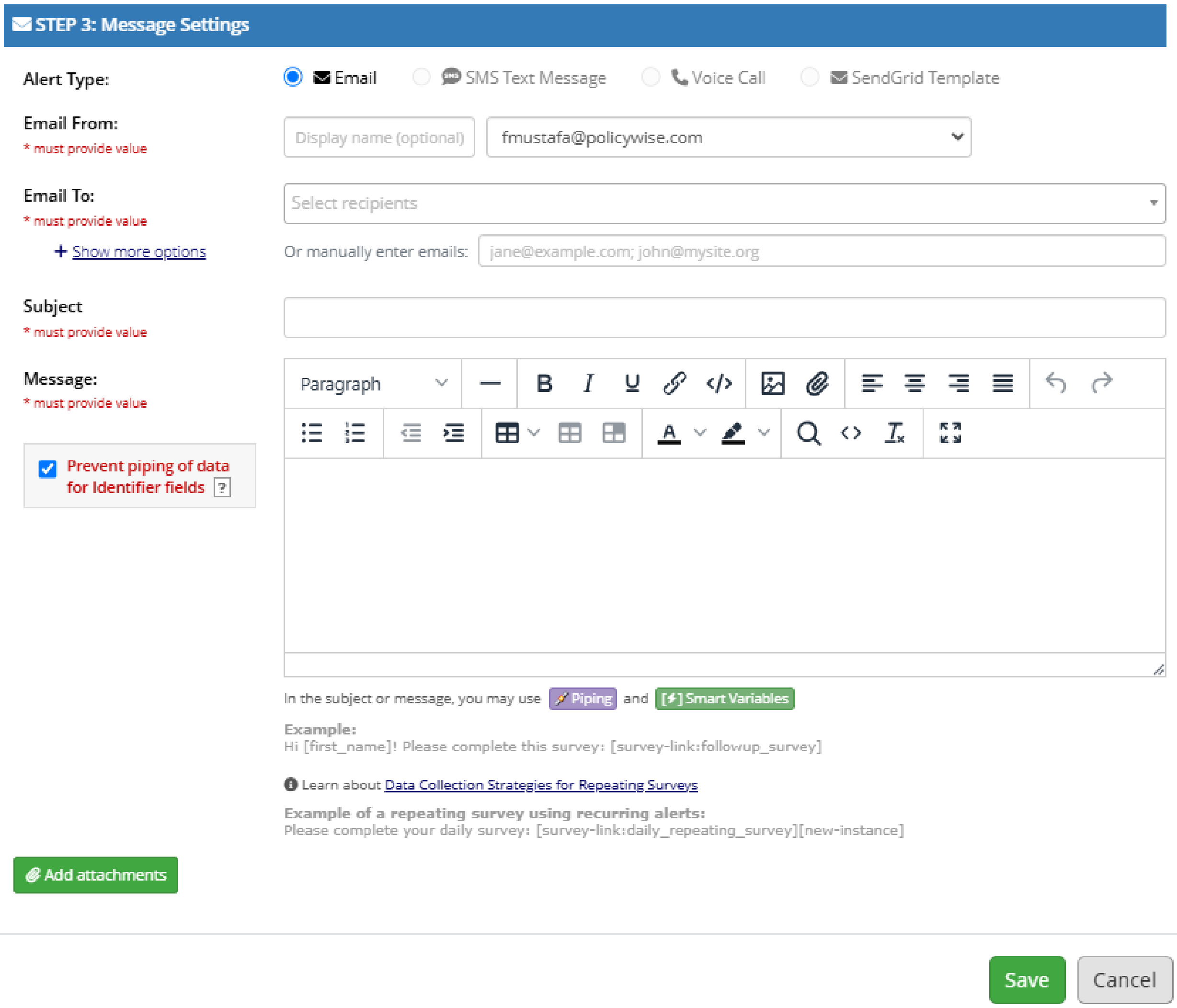
The screenshot below shows the pop-up that appears when you click “+Add New Alert”. Complete the required fields to select when the alert should be triggered, and where it should be sent. The first step is to define what will trigger the alert. You could set the alert to be triggered if a record is saved 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.



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.



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’.



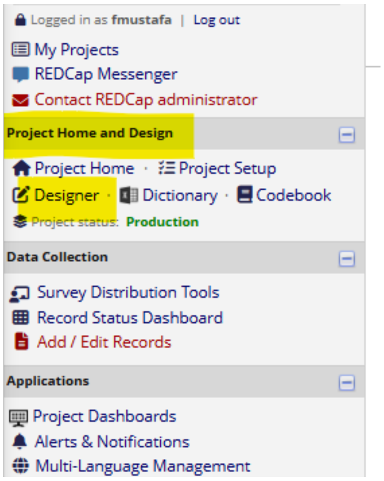
Click Save to save the alert settings and close the setup box.

Sending Surveys by Email

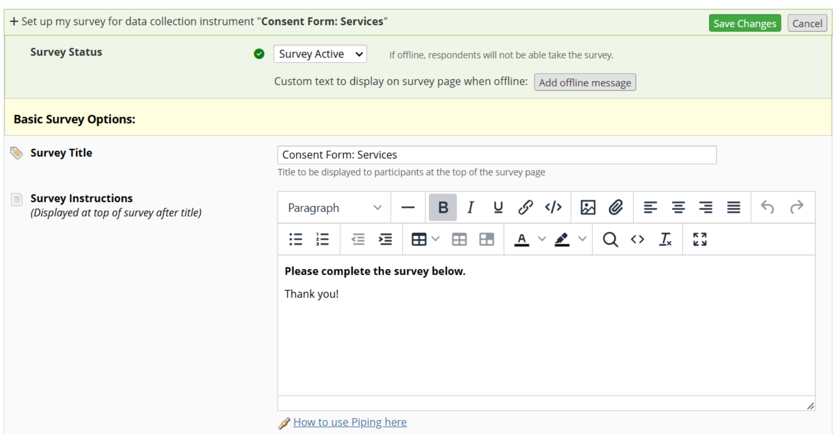
If you would like to send a client an email invitation to complete a form, you can follow these steps.

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.



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:
Choose File 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 Customize

Survey design preview (sample survey): Expand

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.

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:
10 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: English - United States (Female)
* 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).

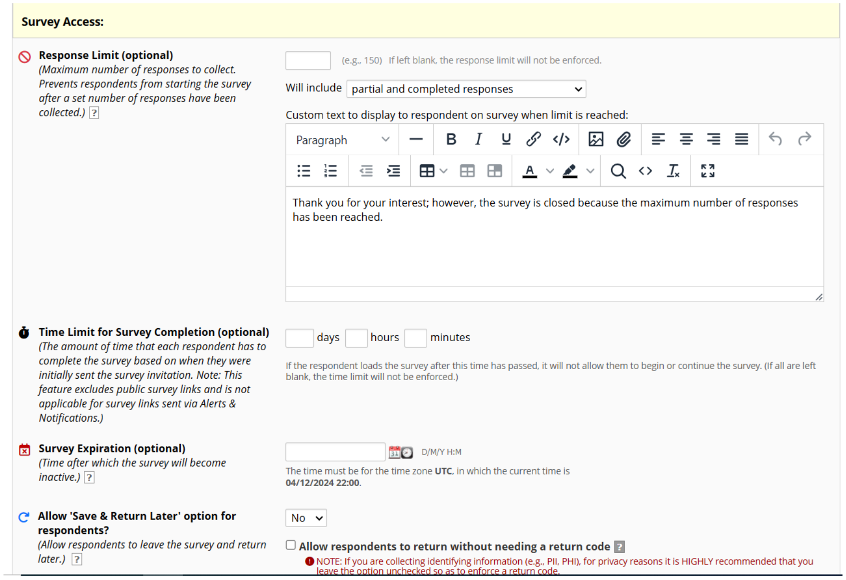
Always display the Submit buttons

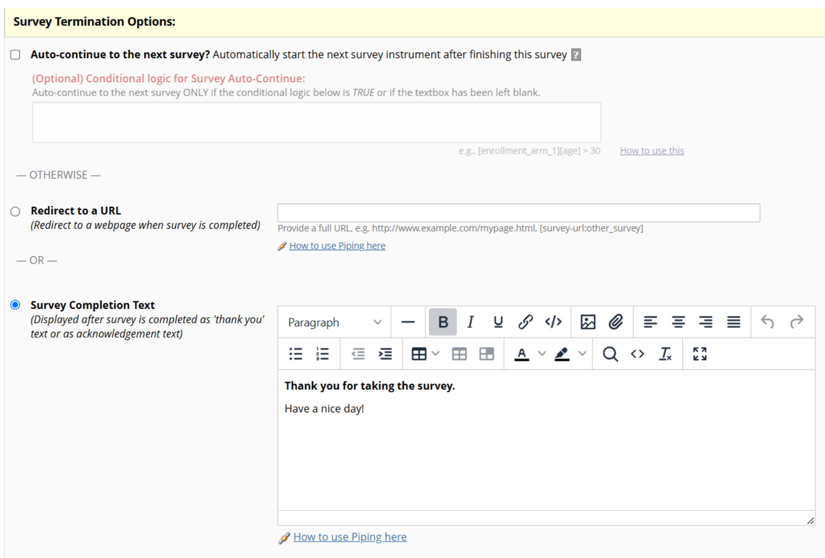
Hiding the Submit buttons can be useful if you are not using the survey for data collection but for instructional purposes or other similar use cases.

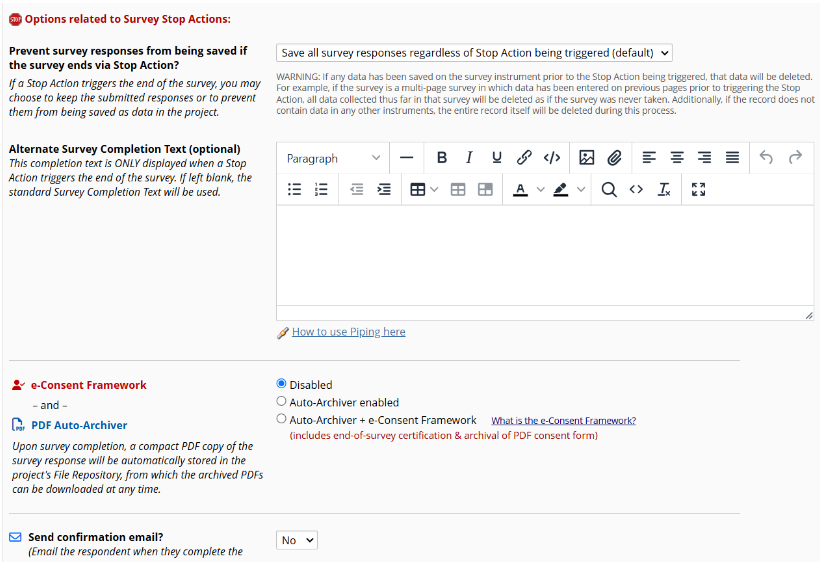
Customize the text of the Submit buttons
Provide alternative text for the 'Submit', 'Next Page', and 'Previous Page' buttons displayed at the bottom of every survey page.

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

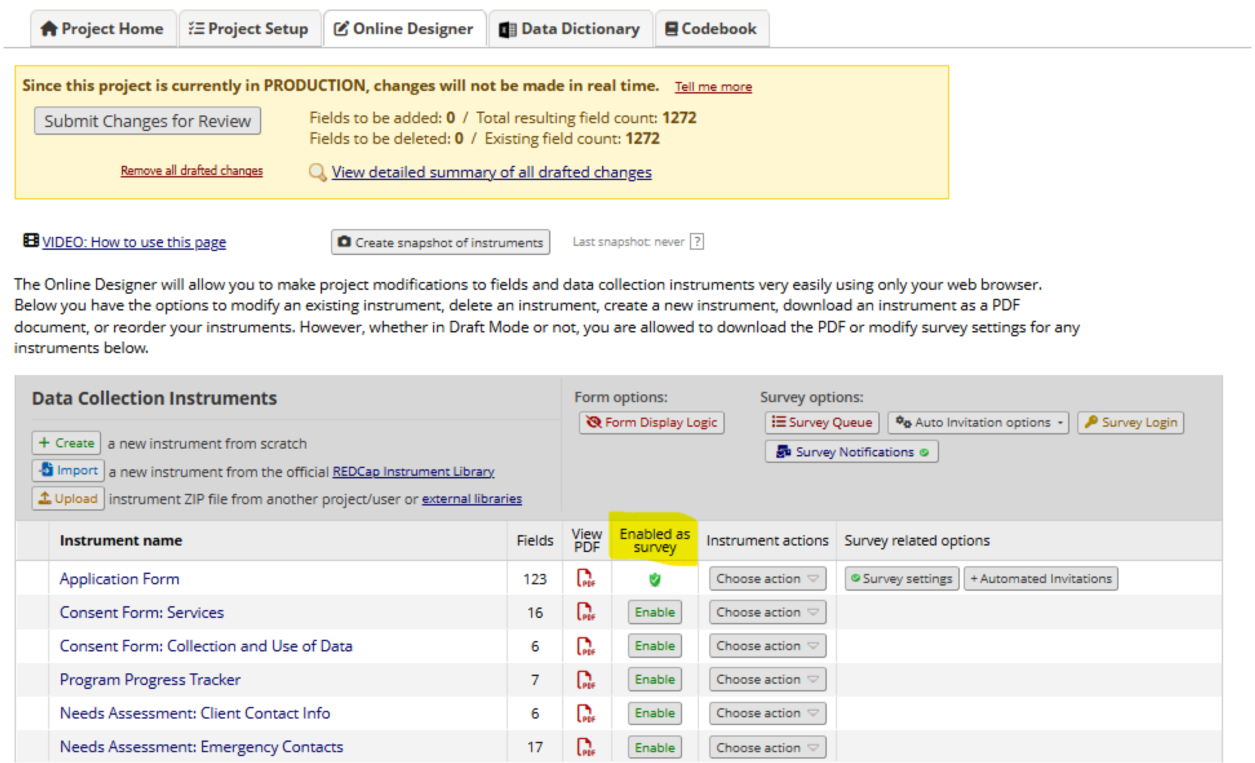
`<< Previous Page`: << Previous Page
`Next Page >>`: Next Page >>
`Submit`: Submit


Survey Access:
Response Limit (optional)
(Maximum number of responses to collect. Prevents respondents from starting the survey after a set number of responses have been collected.) ?
(e.g., 150) If left blank, the response limit will not be enforced.
Will include partial and completed responses
Custom text to display to respondent on survey when limit is reached:
Paragraph
Thank you for your interest; however, the survey is closed because the maximum number of responses has been reached.
Time Limit for Survey Completion (optional)
(The amount of time that each respondent has to complete the survey based on when they were initially sent the survey invitation. Note: This feature excludes public survey links and is not applicable for survey links sent via Alerts & Notifications.)
days hours minutes
If the respondent loads the survey after this time has passed, it will not allow them to begin or continue the survey. (If all are left blank, the time limit will not be enforced.)
Survey Expiration (optional)
(Time after which the survey will become inactive.) ?
D/M/Y H:M
The time must be for the time zone UTC, in which the current time is 04/12/2024 22:00.
Allow 'Save & Return Later' option for respondents?
(Allow respondents to leave the survey and return later.) ?
No
Allow respondents to return without needing a return code ?
NOTE: If you are collecting identifying information (e.g., PII, PHI), for privacy reasons it is HIGHLY recommended that you leave the option unchecked so as to enforce a return code.


Survey Termination Options:
Auto-continue to the next survey? Automatically start the next survey instrument after finishing this survey ?
(Optional) Conditional logic for Survey Auto-Continue:
Auto-continue to the next survey ONLY if the conditional logic below is TRUE or if the textbox has been left blank.
e.g., [enrollment_arm_1][age] > 30
How to use this
— OTHERWISE —
Redirect to a URL
(Redirect to a webpage when survey is completed)
Provide a full URL, e.g. http://www.example.com/mypage.html, [survey-url:other_survey]
How to use Piping here
— OR —
Survey Completion Text
(Displayed after survey is completed as 'thank you' text or as acknowledgement text)
Paragraph
Thank you for taking the survey.
Have a nice day!
How to use Piping here

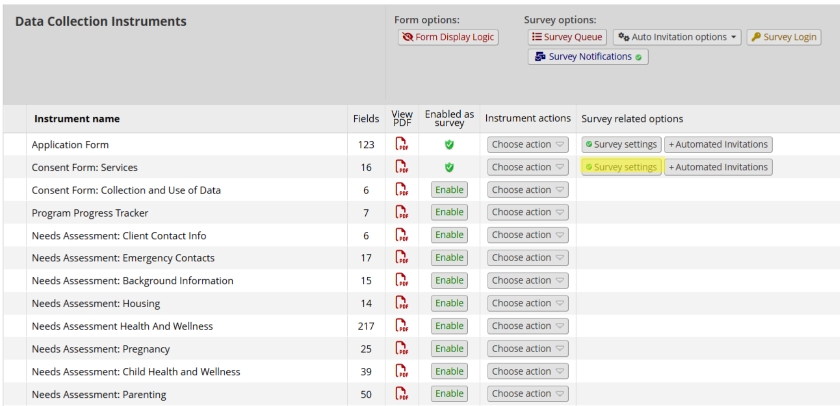


You only need to do this step the first time. After that, it will stay enabled as a survey unless you disable that feature. In this example, you can see that the Application Form is already enabled to send as a survey.

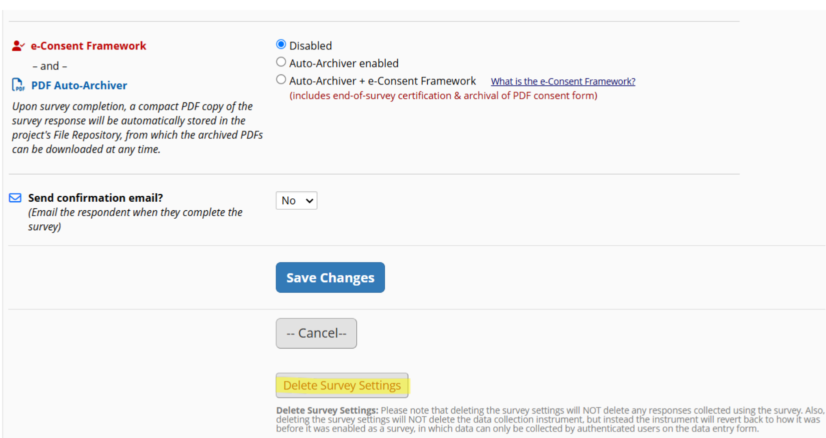


Disable a Form as a Survey

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.

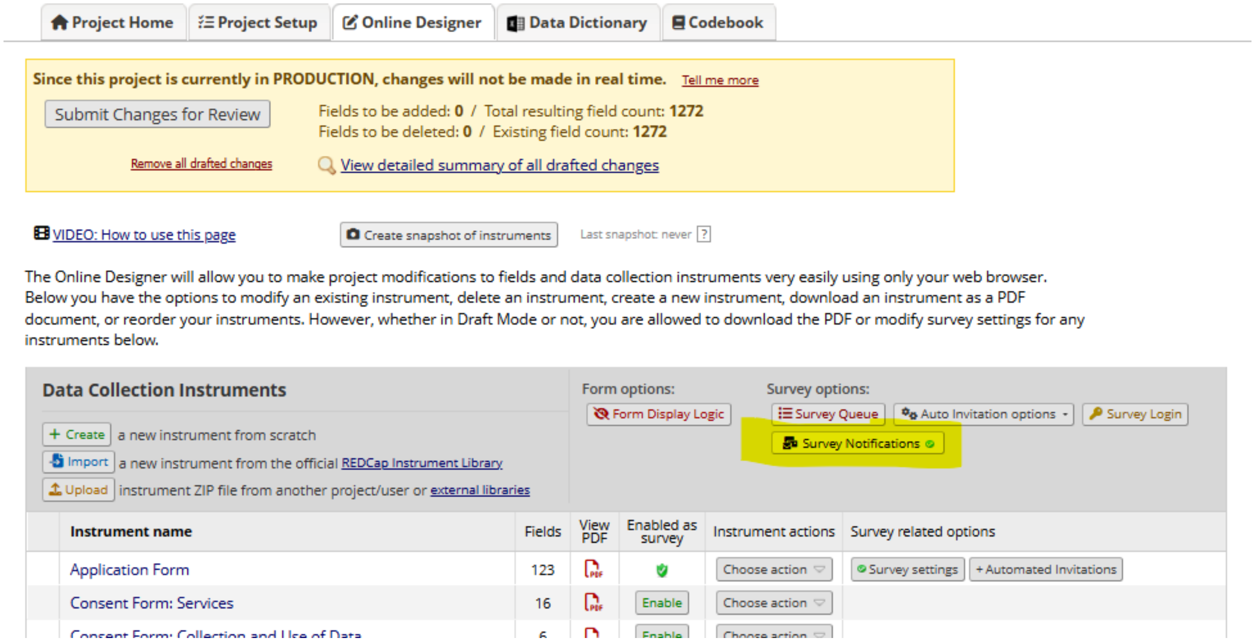


Once you click the survey settings button, you will get the survey settings page with all the survey options that you saw previously. You will now need to go to the end of this page and click on the “Delete survey settings” button at the bottom, as shown below. There will be a pop-up asking you to confirm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

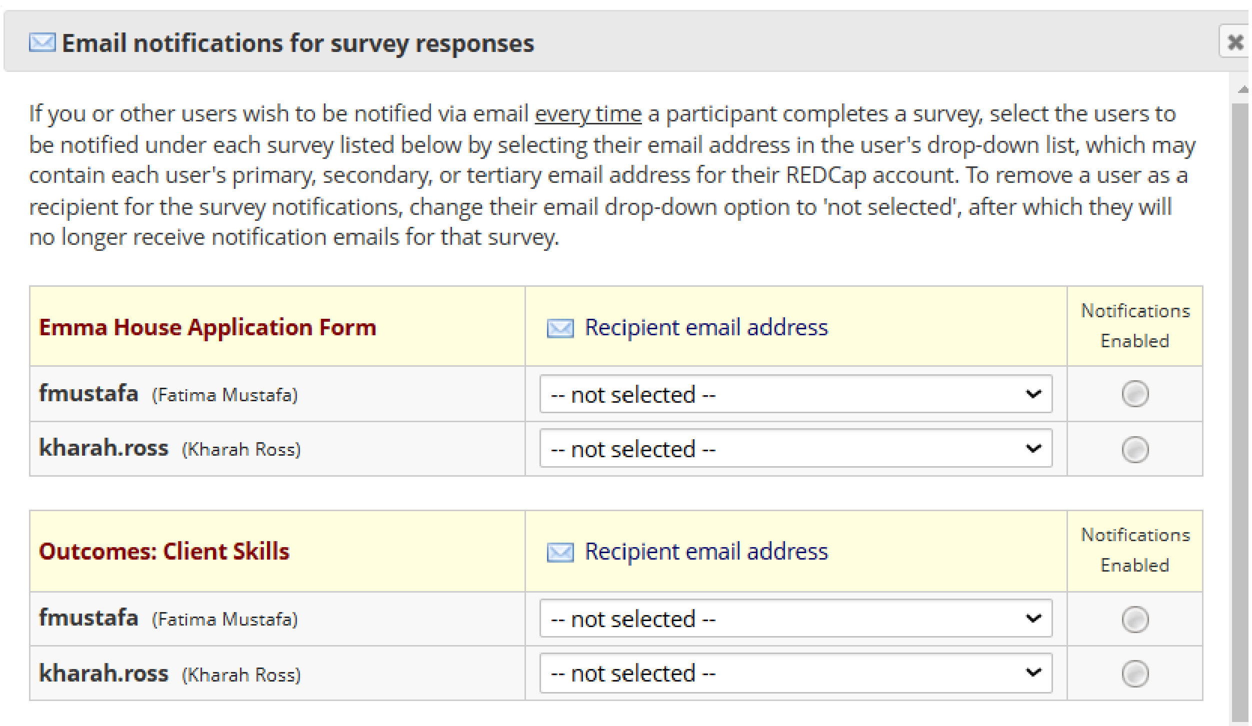


Setting Survey Notifications

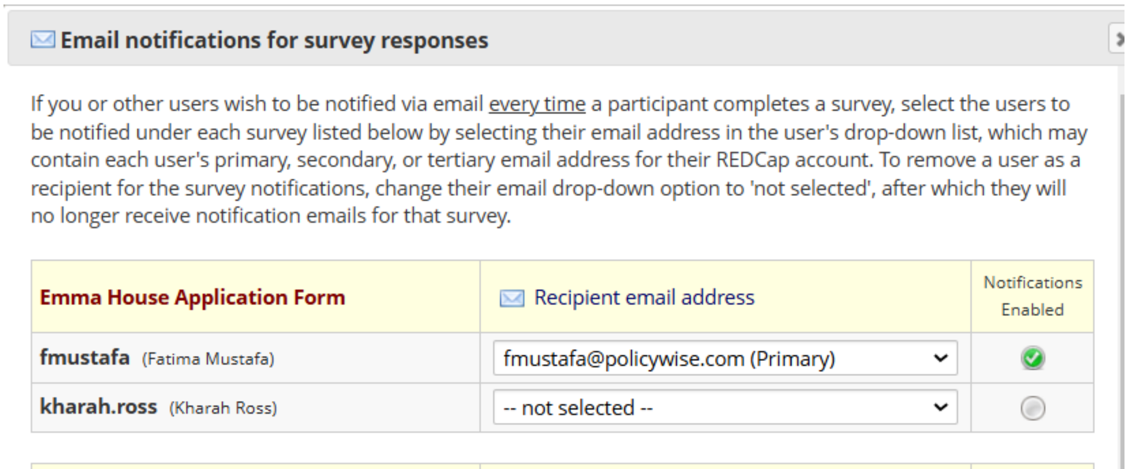
On the main designer page, you can also enable notifications so you will know when someone has completed a survey sent by email. Click on Survey Notifications at the top.



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.



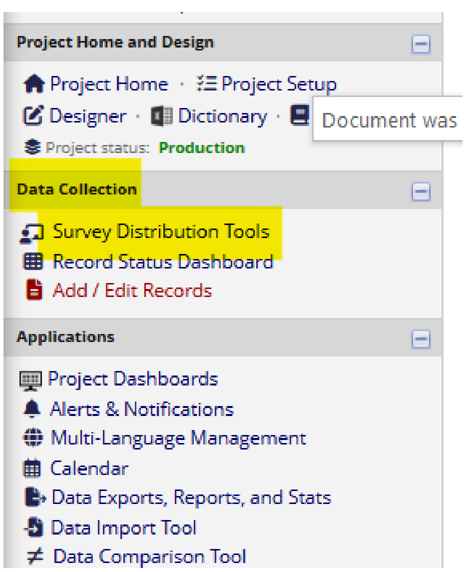
Select the email address in the drop-down beside the person who will need to receive the notification. The Notifications Enabled button will turn green to indicate your settings have been saved.



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

Sending Surveys

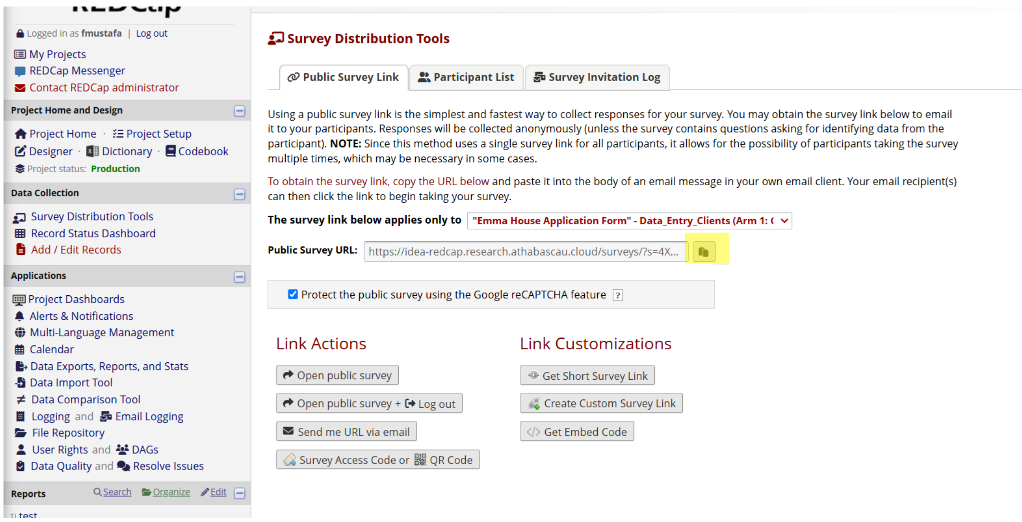
Once your survey has been enabled and you have set up notifications, you can begin distributing the link to the survey as needed. To do this, open Survey Distribution Tools in the Data Collection section of the left sidebar.



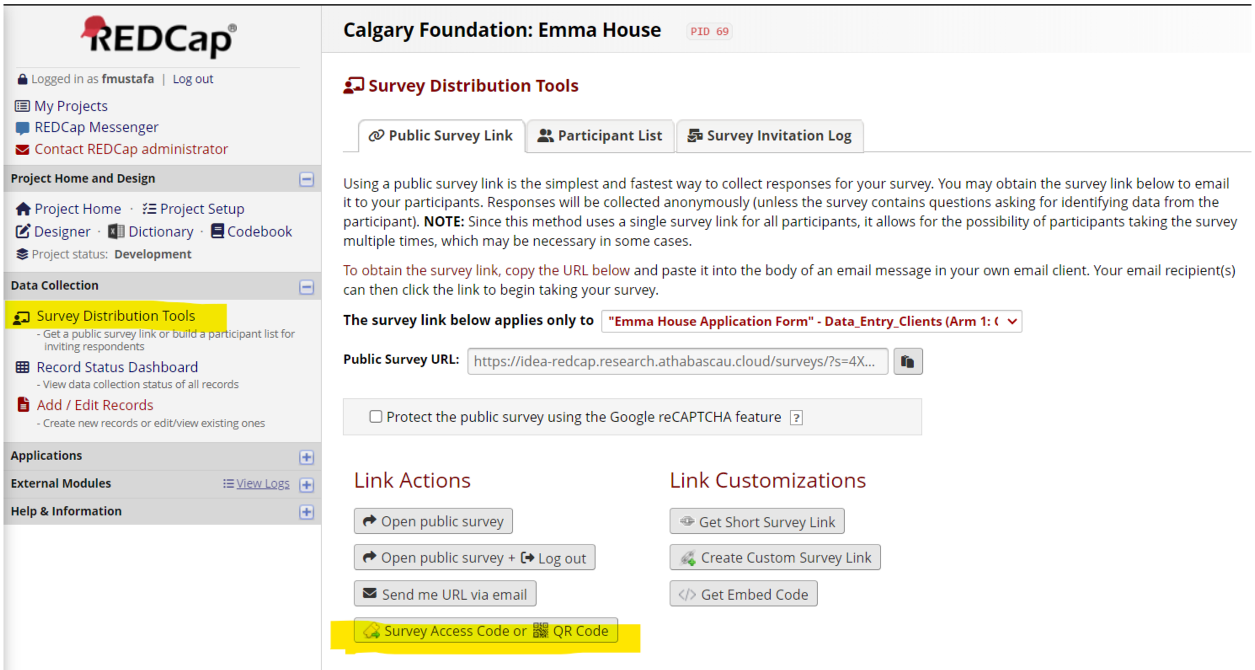
Once you open Survey Distribution Tools, you can send a survey in one of two ways – either by using the public survey link or by sending an email to the participant list.

Using the Public Survey Link

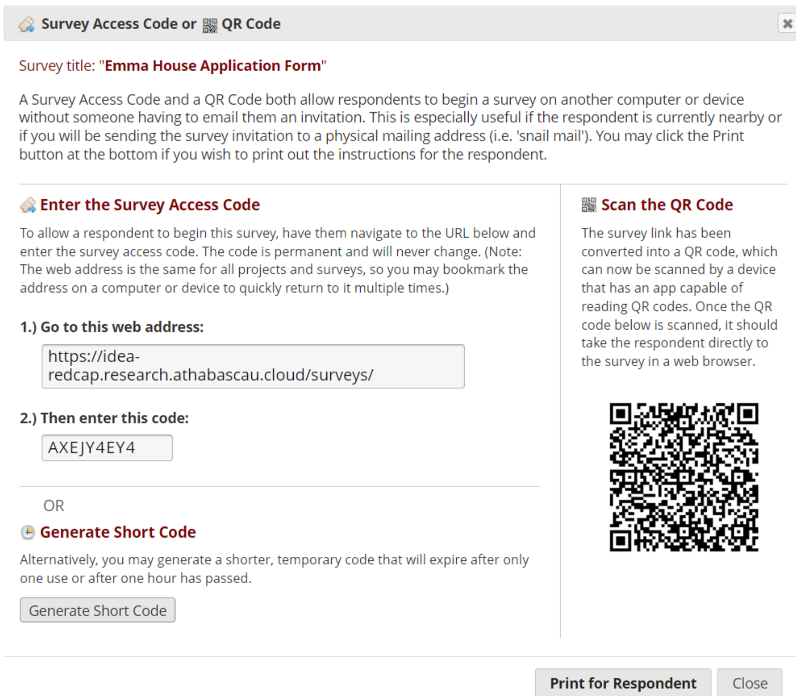
REDCap generates a public survey link for the first form in your data collection instruments that is enabled as a survey. In your REDCap, this would be the application form. To get to the survey link for the application form, you would go to Survey Distribution Tools and then look at the first tab titled 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.



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

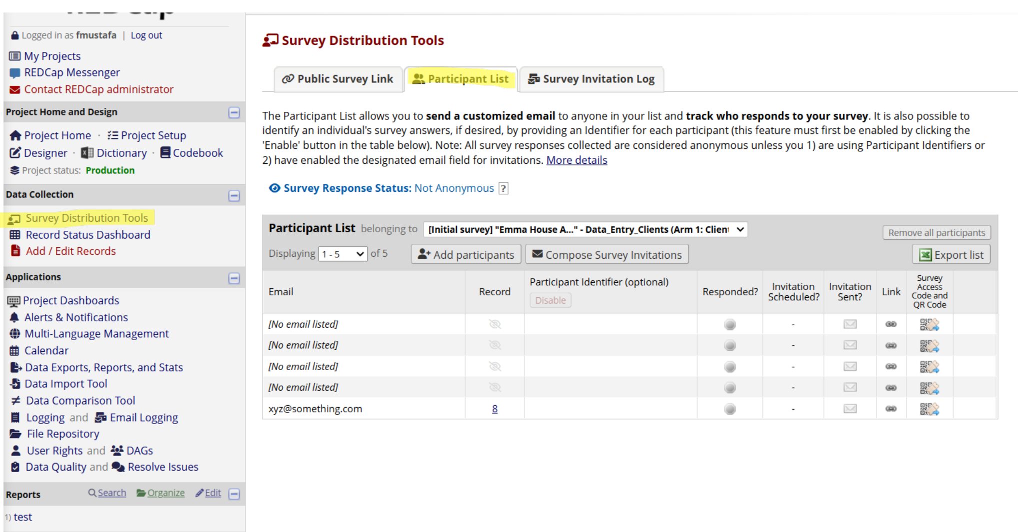


You can have the client scan the QR code on the screen, or you can use the Print for Respondent button to print this page. It gives them the option to use the QR code or to visit the website listed and enter the Survey Access Code. This QR code and Survey Access Code can be used for every client and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

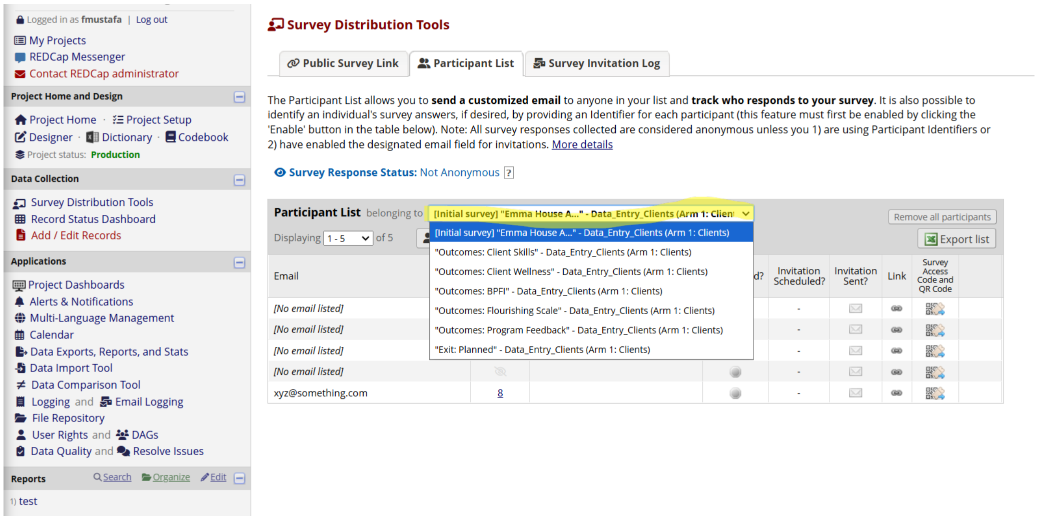


Send a Survey Using the Participant List

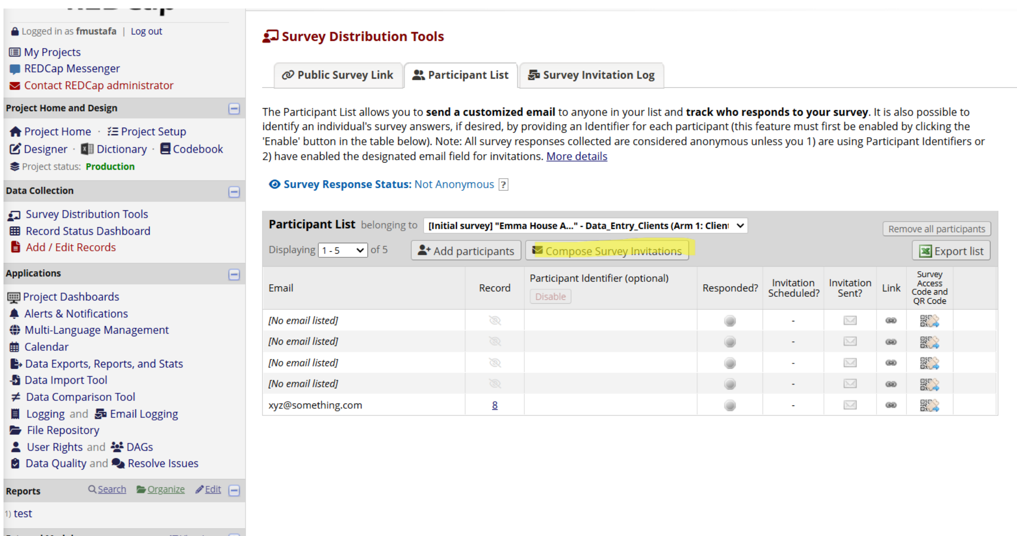
If you want to send clients any of the other forms that have been enabled as surveys, you will need to use the participant list. You will open Survey Distribution Tools and then click on the second tab "Participant List" as highlighted below.



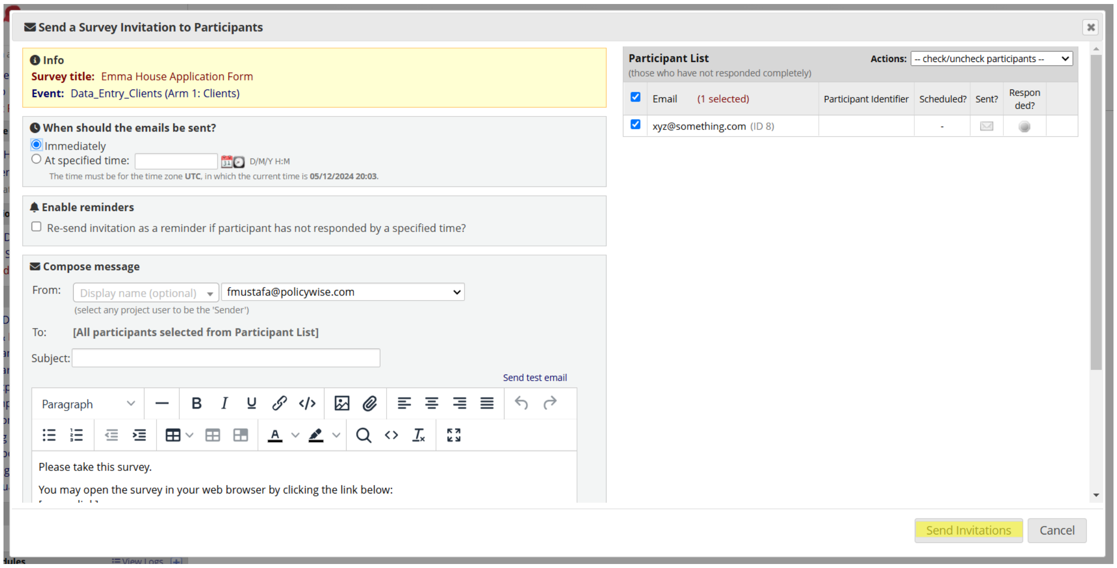
Once you are in the participant list tab, you will select the survey that you want to send.



Once you have selected the survey you want to send, click “Compose Survey Invitations”



The following screen will pop up:

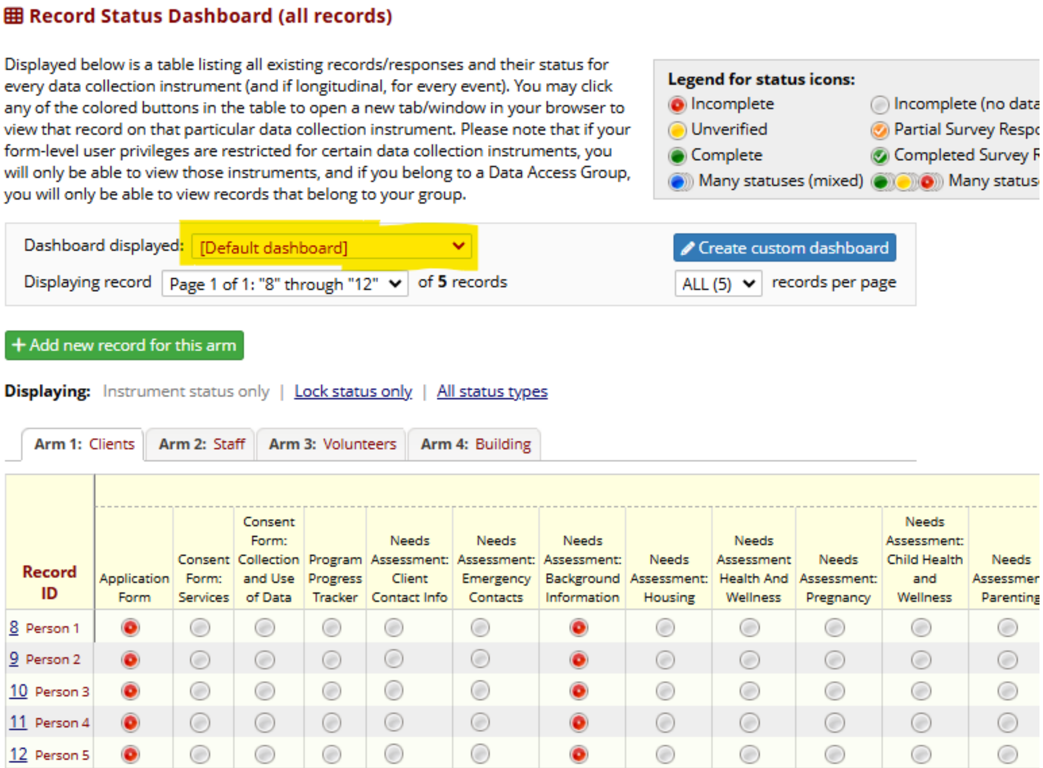


Now you can select the participants you want to send the survey to on the right-hand side and on the left-hand side, you can select when the survey email will be sent, and what that email will include. Once you have filled in all these options, you can then click "Send Invitations" and it will send an email to respondents with the survey.

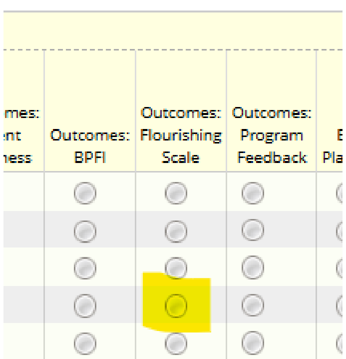
Sending a Specific Client a Survey

You can also send a specific client a survey from their record. In this case, we are sending the Flourishing Scale to an existing client.

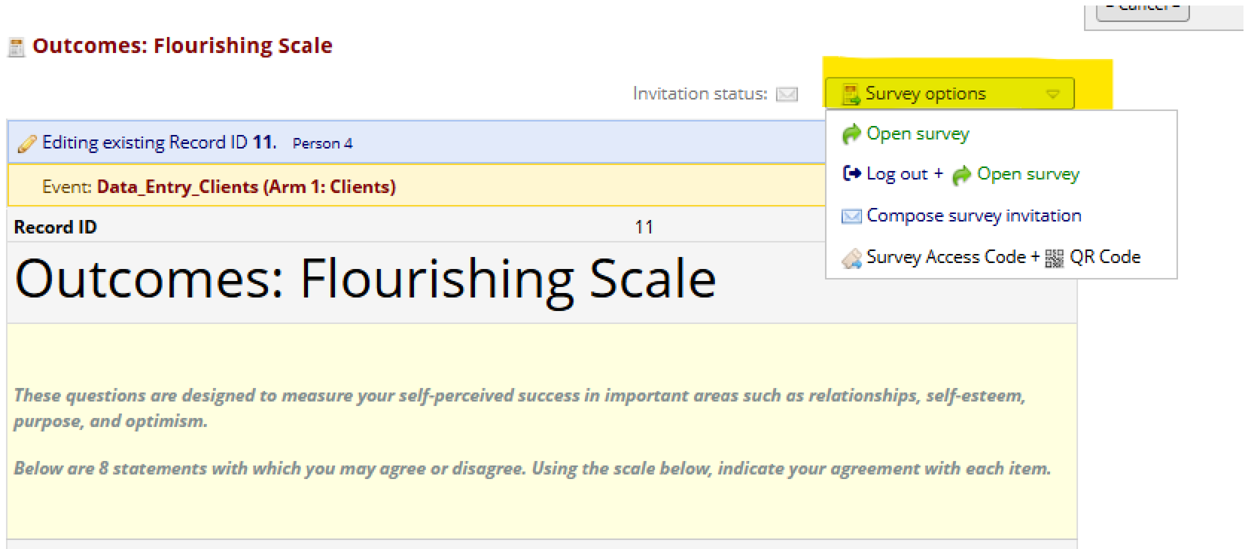
First, open the Record Status Dashboard so it displays the form/survey you wish to send. You may need to change the dashboard view to see the correct form and client.



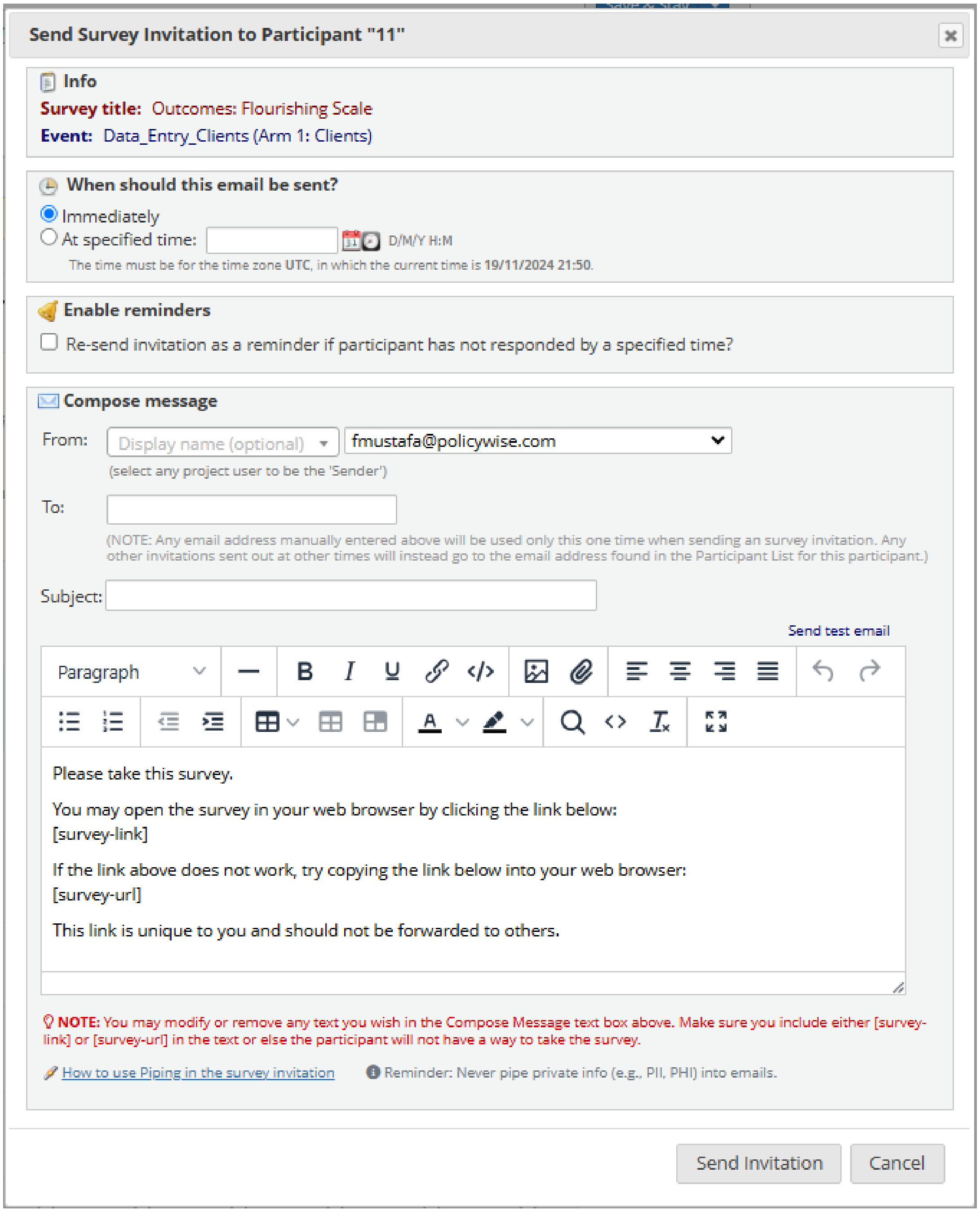
For the appropriate client, scroll right until you find the correct instrument, and click on the circle icon where the client and form intersect.



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’.



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".



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