



# VP&S REDCAP SERVICE

## BEGINNER GUIDE

MAY 01, 2025

 COLUMBIA | VAGELOS COLLEGE OF  
PHYSICIANS AND SURGEONS  
OFFICE FOR RESEARCH



# VP&S REDCap Beginner Guide

This REDCap instance supports research activities across the VP&S community through a secure, centralized platform. Please note: The CUMC IT help desk does not support this REDCap instance. For technical assistance, contact the VP&S REDCap Support: [redcap-support@cumc.columbia.edu](mailto:redcap-support@cumc.columbia.edu)

The **VP&S REDCap** instance is unique in that the two main functions of creating projects and user rights management are accessed on a separate website, the **VP&S REDCap Admin Center** website <https://admin.columbia.edu>. This portal allows Project Owners to create new REDCap projects, add or remove users, update user roles and permissions, and view or update chart string information used for billing through iLab.

**REDCap Application** website <https://redcap.columbia.edu>

Used to build forms and surveys, enter or import data, distribute surveys, and export datasets.

If you are new to REDCap, tutorial information is widely available on the web by Google searching “REDCap *topic here*” for example *REDCap Surveys*. There are a host of available documents to download as well as great YouTube videos that discuss popular REDCap topics. Training for REDCap is the user’s responsibility as help from the administrator is limited to technical assistance and minimal assistance at the project level.

# Beginner Guide Topics

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# VP&S REDCap Admin Center

The VP&S REDCap Admin Center Website:

<https://admin.redcap.columbia.edu>

- Create new projects
- Add/Edit/Remove Users
- Enter CU chart strings (*owners & payers only*)
- Payment information (*owners only*)
- Create User Roles
- Create Data Access Groups (DAG's)

The VP&S REDCap Admin Center User Guide is available at

<https://www.vagelos.columbia.edu/redcap>

## Welcome to REDCap Admin Center!

The REDCap Admin Center facilitates projects, users, and billing information for the VP&S REDCap instance.

To find more information about VP&S REDCap, please visit our [VP&S REDCap SharePoint](#).

We offer a guide on the [REDCap Admin Center](#) along with other training materials and information.

✉ For general questions regarding our REDCap service, please contact us at [VPS-REDCap@cumc.columbia.edu](mailto:VPS-REDCap@cumc.columbia.edu).

✉ For technical support, please contact us at [redcap-support@cumc.columbia.edu](mailto:redcap-support@cumc.columbia.edu).





# VP&S REDCAP APPLICATION

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# VP&S REDCap Application

The VP&S REDCap Website: <https://redcap.columbia.edu>

This REDCap instance supports both Columbia University users and external collaborators.

- Columbia University users log in with their UNI credentials.
- External users log in with a REDCap username and password created during user creation.

Use the VP&S REDCap Application to:

- Design projects, forms, and surveys
- Add, edit, and delete records
- Perform data entry
- Distribute surveys
- Export data
- Use REDCap Mobile App for offline data collection

# VP&S REDCap Login – Columbia University Users

When your project is created and users have been added, log in to the REDCap Application here

<https://redcap.columbia.edu>

Columbia University and Columbia University Irving Medical Center users log in with your Columbia University UNI



Log In



To learn more about this instance, please visit our VP&S REDCap Research Page.  
To manage projects, users, and billing information, please visit the REDCap Admin Center.

Non-Columbia University Users | Columbia University Users

Please click on the logo below to login with your Columbia University UNI. If you are having trouble logging in, please use the self-service password reset or contact CUIT Service Desk for login assistance.



# VP&S REDCap Login – Non-Columbia University Users



Log In



To learn more about this instance, please visit our VP&S REDCap Research Page.  
To manage projects, users, and billing information, please visit the REDCap Admin Center.

Non-Columbia University Users | Columbia University Users

Please log in with your user name and password. If you are having trouble logging in, try clicking the "Forgot your password" link below.

Username:

Password:

[Forgot your password?](#)

When your project is created and users have been added, log in to the REDCap Application here <https://redcap.columbia.edu>

Non-Columbia University log in with the username and password you received by email.

# VP&S REDCap – My Projects

Click the “My Projects” link and then click on the project link.

REDCap® Home My Projects Help & FAQ Training Videos Send-It Messenger Logged in as lh2023 My Profile Log out

GO TO THE REDCAP ADMINISTRATION WEBSITE [HERE](#) TO CREATE PROJECTS, ENTER CHART STRINGS, PAYMENT INFORMATION, MANAGE USER RIGHTS, CREATE DATA ACCESS GROUPS (DAG's), AND SET UP USER ROLES.

For details on how to use the REDCap Administration site, download the [policy and procedures document here](#).

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. [Read more](#) To review which users still have access to your projects, visit the [User Access Dashboard](#).

**My Projects** [Organize](#) Filter projects by title

Project Title	Records	Fields	Instrument	Type	Status
<a href="#">Enter Project Title Here</a>	0	2	1 form	■	✎

REDCap 9.9.7 - © 2020 Vanderbilt University

*If you are new to REDCap you can watch the training videos for a brief overview. Other tutorials are available on YouTube and various informational documents on the web. Training for REDCap is the user's responsibility and only limited support is available from the administrator.*





# VP&S REDCAP – SURVEYS

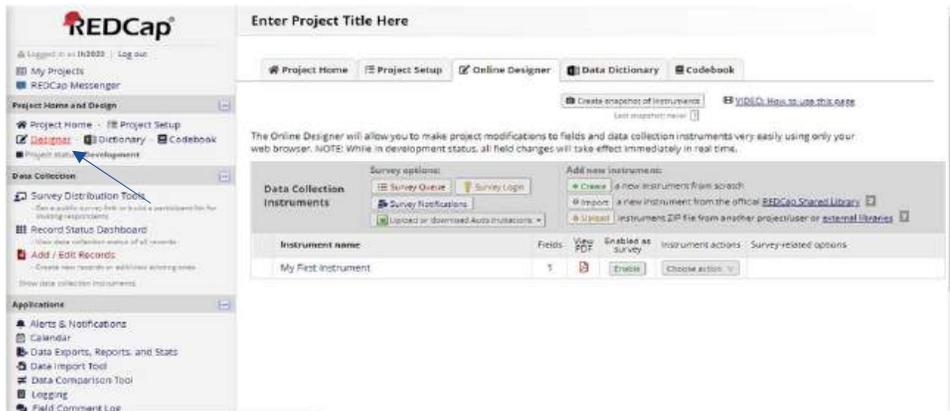
# VP&S REDCap - Surveys

To create a new survey, first enable the project to use surveys.

The image displays two screenshots of the REDCap 'Enter Project Title Here' page, illustrating the process of enabling surveys for a project. The top screenshot shows the 'Main project settings' section with the 'Use surveys in this project?' checkbox disabled. A yellow callout box with a blue arrow points to the 'Enable' button next to this checkbox, with the text: '<- Click "Enable" to use surveys and longitudinal studies if necessary'. The bottom screenshot shows the same page after the checkbox has been enabled, with a blue arrow pointing from the disabled state to the enabled state. The 'Enable' button is now greyed out, and the 'Disable' button is active. The 'Use longitudinal data collection with defined events?' checkbox is also disabled in both screenshots.

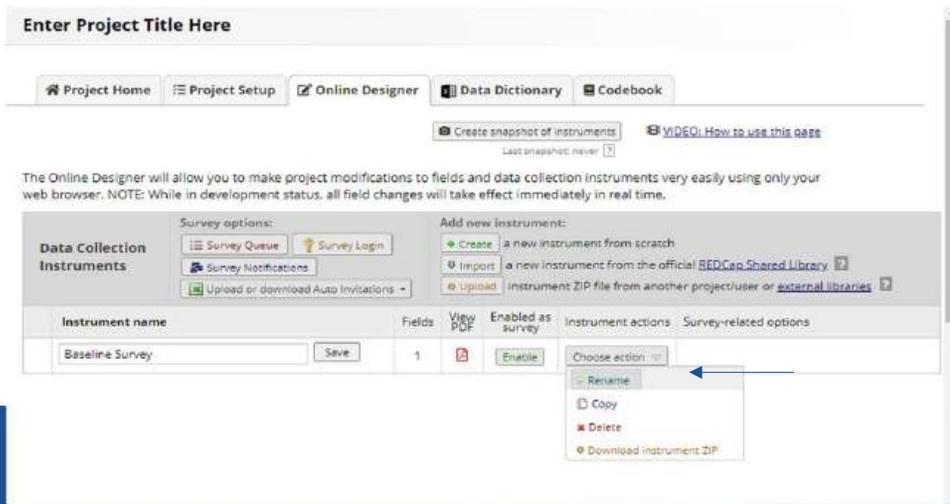
# VP&S REDCap - Surveys

Next, click the “Designer” link to see the instrument queue.



The difference between a form and a survey is how data is entered. For a form, data is entered via the REDCap application and only REDCap users can access it.

The Survey is sent out or delivered for data entry for users without REDCap access.



Change the instrument name by clicking “Choose action” and “Rename”. Enter “Baseline Survey” and click “Save” (for example purposes).

# VP&S REDCap - Surveys

Next, click on the newly named instrument to add new fields by clicking “Add Field”.

**Ready to add fields**

You may now begin adding fields to your data collection instrument below using the Online Designer. Alternatively, you may build your fields in the Data Dictionary (offline method) by clicking its tab above.

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

*<- Take a moment to read through the information*

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the Add Field buttons. You can begin editing an existing field by clicking on the **Edit** icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the **X Delete** icon. To reorder the fields, simply **drag and drop** a field to a different position within the form below. NOTE: While in development status, all field changes will take effect immediately in real time. Are you using Action Tags yet? if not, [learn about Action Tags here](#)

[Return to list of instruments](#)

Current instrument: **Baseline Survey**

[Preview instrument](#)

Formable: record\_id

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

[Add](#) [Add Matrix of Fields](#)

*<- ! The Record ID is a default field and always must be the first field on the first instrument in the project.*

**Add New Field**

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4.0 min\)](#).

Field Type:

# VP&S REDCap - Surveys

Select the field type, in this case a text box to capture the first name.

**Add New Field**

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types](#) (colorful link).

Field Type: Text Box (Short Text, Number, Date/Time, ...)

Field Label:  Use the Rich Text Editor  
First name

Action Tags / Field Annotation (optional)

Learn about [Action Tags](#) or [Using Field Annotations](#)

Variable Name (optional; numeric, alphanumeric, and underscore)

Frame  Enable auto-formatting of variable based upon its field type?

How to Use: [Add Custom Variables](#) [Help](#)

Validation? (optional) --- None ---  
-or-  
--select ontology/service--

Required?  Yes  No  
\* Please if field is blank

Identified?  No  Yes  
Enter the form content identifying information (e.g., name, title, address)

Custom Alignment: Right / Vertical (RV)

Align the position of the field on the page

Field Note (optional)  
Small, variable text displayed underneath field

Save Cancel

This step allows multiple settings on the field.  
Click "Save" when completed.

[Return to list of instruments](#)

Current instrument: **Baseline Survey**

[Preview instrument](#)

Variable: record\_id

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

[Add Field](#) [Add Matrix of Fields](#)

Variable: frame

**First name**

\* must provide value

[Add Field](#) [Add Matrix of Fields](#)

Click "Add Field" to continue adding fields.  
Click "Save" when completed.

# VP&S REDCap - Surveys

When all the fields are created, return to the list and click on the “Project Setup” tab.

[Return to list of instruments](#) ←

Current instrument: **Baseline Survey** [Preview instrument](#)

Variable: record\_id  
**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

[Add Field](#) [Add Matrix of Fields](#)

Variable: fname  
**First name**

\* must provide value

[Add Field](#) [Add Matrix of Fields](#)

Variable: lname  
**Last Name**

\* must provide value

[Add Field](#) [Add Matrix of Fields](#)

Enter Project Title Here

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

[Create snapshot of instruments](#) [VIDEO: How to use this page](#)

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. NOTE: While in development status, all field changes will take effect immediately in real time.

**Data Collection Instruments**

Survey options:  
[Survey Queue](#) [Survey Login](#)  
[Survey Notifications](#)  
[Upload or download Auto Invitations](#)

Add new instrument:  
[Create](#) a new instrument from scratch  
[Import](#) a new instrument from the official REDCap Shared Library  
[Upload](#) instrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Baseline Survey	3		<a href="#">Enable</a>	<a href="#">Choose action</a>	

# VP&S REDCap - Surveys

Click “Online Designer” and “Enable” the form under “Enabled as Survey”. **! Troubleshoot this first if survey settings are missing**

Enter Project Title Here

Project Home Project Setup Other Functionality Project Revision History

Project status: Development Completed steps 0 of 7

**Main project settings**

Not started

Disable Use surveys in this project? [?] VIDEO: How to create and manage a survey

Enable Use longitudinal data collection with defined events? [?]

I'm done

Modify project title, purpose, etc.

**Design your data collection instruments & enable your surveys**

Not started

I'm done

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to [Online Designer](#) or [Data Dictionary](#) Explore the [REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use: [Smart Variables](#) [Piping](#) [Action Tags](#)



Enter Project Title Here

Project Home Project Setup **Online Designer** Data Dictionary Codebook

Create snapshot of instruments VIDEO: How to use this page

Based on 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. NOTE: While in development status, all field changes will take effect immediately in real time.

**Data Collection Instruments**

Survey options: Survey Queue Survey Login Survey Notifications Upload or download Auto Invitations

Add new instrument: Create a new instrument from scratch Import a new instrument from the official REDCap Shared Library Upload instrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Baseline Survey	3		Enable	Choose action	

<- Enable the instrument as a survey

# VP&S REDCap - Surveys

Click “Online Designer” and “Enable” the form under “Enabled as Survey”. **! Troubleshoot this first if survey settings are missing**

Enter Project Title Here

Project Home Project Setup Other Functionality Project Revision History

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Disable Use surveys in this project? [?] VIDEO: How to create and manage a survey

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I'm done Modify project title, purpose, etc.

**Design your data collection instruments & enable your surveys**

Not started

I'm done

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to [Online Designer](#) or [Data Dictionary](#) Explore the [REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

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Enter Project Title Here

Project Home Project Setup **Online Designer** Data Dictionary Codebook

Create snapshot of instruments VIDEO: How to use this page

Based on snapshot: never

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**Data Collection Instruments**

Survey options: Survey Queue Survey Login Survey Notifications Upload or download Auto Initations

Add new instrument: Create a new instrument from scratch Import a new instrument from the official REDCap Shared Library Upload instrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Baseline Survey	3		Enable	Choose action [?]	

<- Enable the instrument as a survey

# VP&S REDCap - Surveys

Click “Save Changes” to set the survey, then click “Survey Settings” to edit the survey

The screenshot shows the REDCap Online Designer interface. At the top, there are navigation tabs: Project Home, Project Setup, Online Designer, and Modify survey settings. Below this, a message states: "You may edit the survey's basic information by modifying the fields below and clicking the Save Changes button." A blue arrow points to the "Save Changes" button in the "Modify survey settings for data collection Instrument 'Baseline Survey'" window. This window includes a "Survey Status" dropdown set to "Survey Active", a "Basic Survey Options" section with a "Survey Title" field containing "Baseline Survey", and a "Survey Instructions" text area containing "Please complete the survey below." and "Thank you!". Below the main window, there are more navigation tabs: Project Home, Project Setup, Online Designer, Data Dictionary, and Codebook. A blue arrow points from the "Save Changes" button in the top window to the "Data Dictionary" tab. Below the tabs, there are options to "Create snapshot of instruments" and "VIDEO: How to use this page". A message states: "The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time." At the bottom, there is a "Data Collection Instruments" table with columns for Instrument name, Fields, View PDF, Enabled as survey, Instrument actions, and Survey-related options. The table lists "Baseline Survey" with 3 fields, a PDF icon, a green checkmark, a "Choose action" dropdown, a "Survey settings" link, and an "Automated invitations" link. A blue arrow points from the "Survey settings" link in the table back to the "Modify survey settings" window.

## Survey Status:

- Active or Offline

## Survey Design Options:

- Logo
- Survey instructions
- Can use “piping”

## Survey Customizations include:

- Question numbering
- All on one page / one section per page using “Section Headers”
- Required Fields – option to display *\*must provide value*
- Aggregate Results
- Text-to-speech
- Limit survey responses

## Survey Access:

- Expiration date and time
- Save and Return Later
  - Also, ability to return and modify a completed response

## Survey Termination Options:

- Auto-continue on to next survey – link surveys together
- Redirect to URL or Survey completion text
- Confirmation email

# VP&S REDCap - Surveys

Click “Save Changes” to save the survey.

**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 RichText 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 (optional)**  
*(Email the respondent when they complete the survey)*

No

**Save Changes**

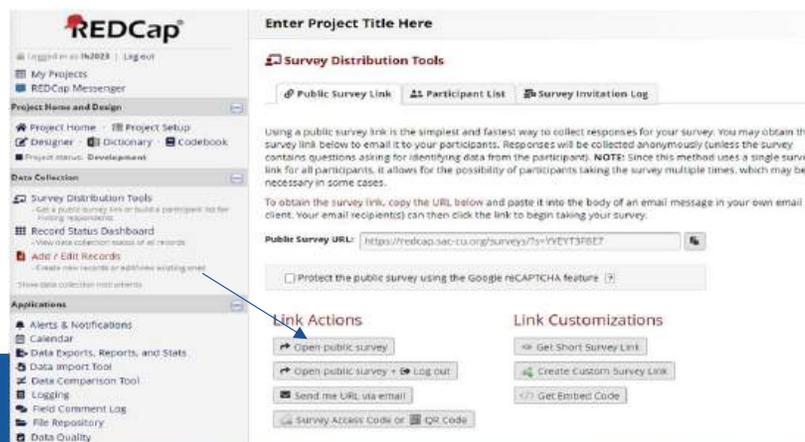
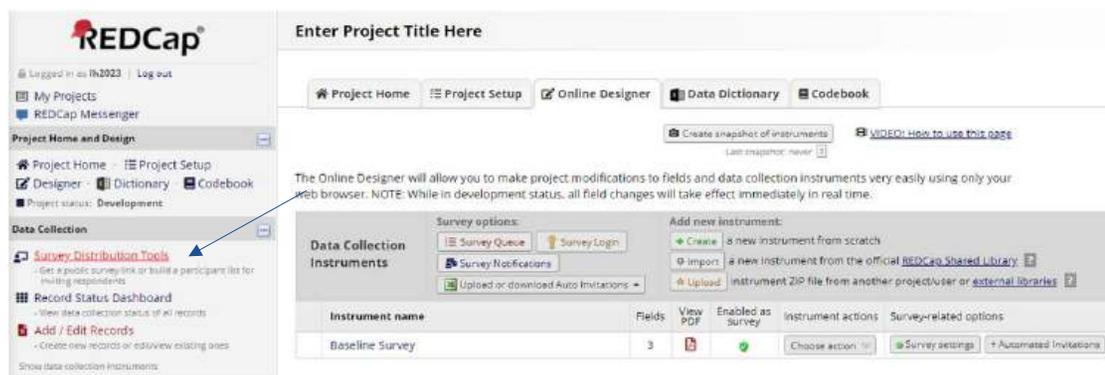
-- Cancel --

Delete Survey Settings

Delete Survey Settings: Please note that deleting the survey settings will NOT delete any responses collected during the survey. Also, deleting the survey settings will NOT reverse 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.

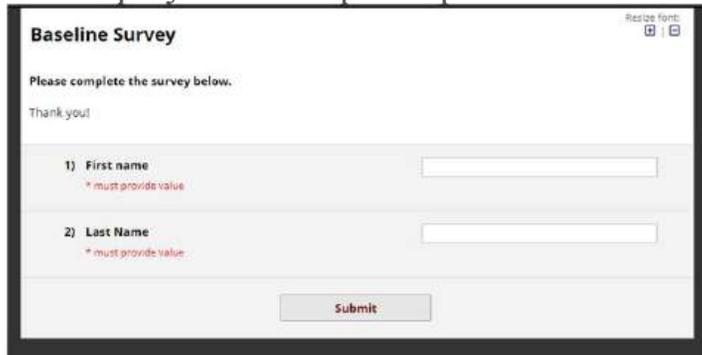
# VP&S REDCap - Surveys

To display the survey from the participant view, select “Survey Distribution Tools” from the left menu under “Data Collection”. Under “Link Actions” click on “Open public survey”.



# VP&S REDCap - Surveys

The display from the participant's view



**Baseline Survey** Resize font: [icon]

Please complete the survey below.

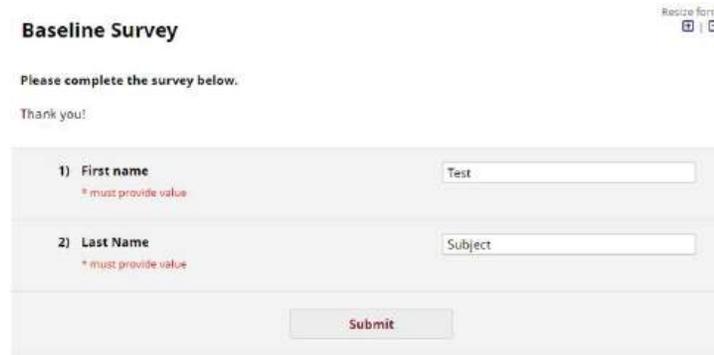
Thank you!

1) **First name**   
\* must provide value

2) **Last Name**   
\* must provide value

**Submit**

Enter data and click “Submit”



**Baseline Survey** Resize font: [icon]

Please complete the survey below.

Thank you!

1) **First name**   
\* must provide value

2) **Last Name**   
\* must provide value

**Submit**

Close the survey



**Close survey**

**Thank you for taking the survey.**

Have a nice day!

Powered by REDCap

# VP&S REDCap - Surveys

Distributing the survey by “Participant List”- Select “Survey Distribution Tools” from the left menu under “Data Collection” (*not shown*). Click the tab “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, 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](#)

- Sends customized email to participants in list
- Participant can complete survey one time
- Configurable reminders
- Tracks responses
- Option to identify responses
- Use “Survey Invitation Log” to view invitations that have been sent or are scheduled to be sent



After receiving an email invitation and then completing the survey, the participant's response status in the list below will be changed to **Responded** (green checkmark) or **Partial Response** (orange checkmark), otherwise their status will remain as **No Response** (grey circle). Once a participant has responded, they will not be able to take the survey again. If a participant's email address needs to be changed after it has been added to the Participant List, you may simply click on the email address in the list to begin editing it. In order to be able to identify a specific participant's survey responses, you may provide a **Participant Identifier** after adding them to the participant list below, which is displayed as a separate field in the exported data results. The identifier may be the participant's name, an ID number, or whatever you desire. **NOTE:** If a sent email bounces because the email address was entered incorrectly or because the email account is inactive or does not exist, the bounced email will then be redirected back to the sender to notify them that the recipient did not receive the email.



# VP&S REDCap - Surveys

## Distributing the survey by “Participant List” – Automated Survey Invitations (Online

The screenshot shows the REDCap Online Designer interface. At the top, there is a navigation bar with tabs for Project Home, Project Setup, Online Designer (highlighted with a blue circle), Data Dictionary, and Codebook. Below the navigation bar, there are several buttons and links, including 'Create snapshot of instruments' and 'VIDEO: how to use this page'. The main content area is divided into two sections: 'Survey options' and 'Add new instrument'. The 'Survey options' section includes buttons for 'Survey Queue', 'Survey Login', 'Survey Notifications', and 'Upload or download Auto Invitations'. The 'Add new instrument' section includes buttons for 'Create a new instrument from scratch', 'Import a new instrument from the official REDCap Shared Library', and 'Upload instrument ZIP file from another project user or external libraries'. Below these sections is a table with columns for 'Instrument name', 'Fields', 'View PDF', 'Enabled as survey', 'Instrument actions', and 'Survey-related options'. The table contains one row for 'Baseline Survey' with 3 fields and a 'Survey settings' button. Below the table is a dialog box titled 'Define Conditions for Automated Survey Invitations (AST)'. The dialog box has four steps: 'STEP 1: Compose message', 'STEP 2: Conditions', 'STEP 3: When to send invitations AFTER conditions are met', and 'STEP 4: Activated?'. Step 1 includes fields for 'From', 'To', and 'Subject'. Step 2 includes options for 'When the following survey is completed' and 'When the following logic becomes true'. Step 3 includes options for 'Send immediately', 'Send on next', 'Send after lapse of time', and 'Send at exact date/time'. Step 4 includes a checkbox for 'Re-send invitation as a reminder if participant has not responded by a specified time?' and a checkbox for 'Activated?'. The dialog box also includes a 'Save' button and a 'Cancel' button.

The survey invite is sent automatically when either....

- A earlier survey is completed, -or-
- An expression is satisfied (i.e., the value of one or more fields on data forms/surveys satisfies the entered expression)

# VP&S REDCap - Surveys

**Surveys in Longitudinal Projects.** The project may have a mixture of surveys and/or data entry forms.

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

The screenshot shows the 'Edit Field' configuration page in REDCap. At the top, there are 'Survey options' (Survey Overview, Survey Login, Survey Notifications, Upload or download Auto Invitations) and 'Add new instrument' options (Create, Import, Upload). Below is a table of instruments:

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screener	4		<input type="checkbox"/> Enable	Choose action	
Baseline Survey	2		<input checked="" type="checkbox"/> Enable	Choose action	Survey settings + Automated Invitations

The 'Edit Field' section for the 'Email' field includes:

- Field Type: Text Box (Short Text, Number, Date/Time, ...)
- Field Label: Email
- Variable Name: email
- Validation?: Email
- Required?:  Yes
- Identifier?:  Yes
- Custom Alignment: Right / Vertical (RV)
- Field Note: (optional)

Buttons for 'Save' and 'Cancel' are at the bottom.

*<- If the first instrument is a data entry form (Screener), create a text field with validation = email in the first instrument to enter the email address of participants.*

The screenshot shows the 'Enable optional modules and customizations' section. It lists several options with 'Enable' and 'Disable' buttons:

- Repeatable instruments [?]
- Auto-numbering for records [?]
- Scheduling module (longitudinal only) [?]
- Randomization module [?]
- Designate an email field for sending survey invitations [?]** (circled in blue)

Below the list, it says 'Field currently designated: email ("email")'. There are also 'Additional customizations' and 'I'm done!' buttons.

*! In project setup, designate the mail field to use invitations to survey participants.*

# VP&S REDCap - Surveys

**Survey Queue.** Used for sending one invitation for multiple surveys. Participants see a “to-do” list of surveys they need to complete. A very handy tool.

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screener	4		Enable	Choose action	
Medical History	0		Enable	Choose action	
Baseline Survey	2			Choose action	Survey settings + Automated Invitations
Daily Follow Up	2			Choose action	Survey settings + Automated Invitations

Click “Survey Queue” and activate the surveys to appear in the queue.

Activated?	Survey Title	Display survey in the Survey Queue when...	Auto-starts?
 Activated	Baseline Survey	<input type="checkbox"/> When the following survey is completed: -- select a survey -- AND <input checked="" type="checkbox"/> When the following logic becomes true: [age] > 18 (e.g., [age] > 30 and [sex] = "1") Test logic with a record: -- select record --	<input type="checkbox"/>
 Activated	Daily Follow Up	<input checked="" type="checkbox"/> When the following survey is completed: "Baseline Survey" AND <input type="checkbox"/> When the following logic becomes true: (e.g., [age] > 30 and [sex] = "1") Test logic with a record: -- select record --	<input type="checkbox"/>

Save Cancel

Surveys will appear in the Survey Queue if:

1. Certain conditions are met
2. The participant has completed a particular survey, and/or

# VP&S REDCap - Surveys

Survey Queue participant view.

The screenshot shows the 'Participant List' for a 'Baseline Survey'. It features a table with columns for Email, Record, Participant Identifier, Responded?, Invitation Scheduled?, Invitation Sent?, Link, Survey Access Code and QR Code, and Survey Queue. Below the table is a 'Survey Queue' section with a 'Close survey queue' button, a 'Get link to my survey queue' button, and a table listing surveys with 'Begin survey' buttons.

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	Survey Queue
[No email listed]		Disabcd		-				
[No email listed]		Disabcd		-				
[No email listed]		Disabcd		-				
[No email listed]		Disabcd		-				
[No email listed]		Disabcd		-				
[No email listed]		Disabcd		-				

**Survey Queue** Get link to my survey queue

Listed below is your survey queue, which lists any other surveys that you have not yet completed. To begin the next survey, click the 'Begin survey' button next to the title.

Status	Survey Title
Begin survey	Daily Follow Up

Powered by REDCap

Click "Survey Queue" for the record to see the participant view



Click "Survey Queue" for the record to see the participant view (if conditions are met)

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Survey Queue participant view - completed.



- For long surveys – consider multiple surveys and group into a survey queue, with the auto-start option: **surveys will appear to participants as one survey only.**
  - Advantages: data will be saved at the completion of each survey
  - There will be less chance to lose data in case of poor internet connection
- Survey queues may also be used as “branching logic” at a survey level. For example, if there is a set of questions that are specific to a given gender, instead of adding a branching logic to each question, create a survey with this set of questions only and specify the condition in the survey queue e.g. [gender] = “1”

# VP&S REDCap Application

Use Case – classic project mix of surveys and data entry forms.

Instrument Name	Type	Comments
Demographics	Data form	Contains email type field to capture participant's email address
Screening	Survey	Triggered when email is entered on Demographics form
Consent	Survey	Survey Queue – displayed when screening is complete and if eligibility criteria are met
Initial Data	Survey	Survey Queue – displayed if consent is completed and participant has provided consent
Randomization	Data Form	
Follow Up	Survey	Automated Invite sent 6 months after Initial Data is completed and if subject is randomized

# VP&S REDCap Best Practices

Be consistent in coding your variables

Avoid yes/no and true/false fields, which tend to cause problems if you need to add a third option later—stick to radio buttons and dropdowns

Don't recode variables once you've started collecting data—this will corrupt your data. Just add the next number. The numbers do not have to be in order in the list.

Code “unknowns” as a high number that stands out, like 999

If you have multiple questions that will use the same answer choices, code them all the same

Variable names should be short, alphanumeric, easy to type, and ideally have some level of meaning—these are the labels that REDCap will use to locate your data, and these are what you will be typing over and over when you are doing your analysis

Variable name should not be changed once data collection has begun

If you change a variable name, you will also change all piping, calculations, and branching logic associated with it

Minimize the use of free response fields

The data dictionary is an alternate way to build your project (as opposed to the online design)

As a rule of thumb, use calculations in REDCap if you need to see that calculation for the data collection process—otherwise, save calculations for back end analysis

Variable names should be short, alphanumeric, easy to type, and ideally have some level of meaning—these are the labels that REDCap will use to locate your data, and these are what you will be typing over and over when you are doing your analysis

Use field notes to help the data enterers enter information correctly

Group similar variables together

Wherever possible, use a multiple choice selection instead of asking data enters to type out the information to minimize non-uniform answers and typos



VP&S REDCap Support

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