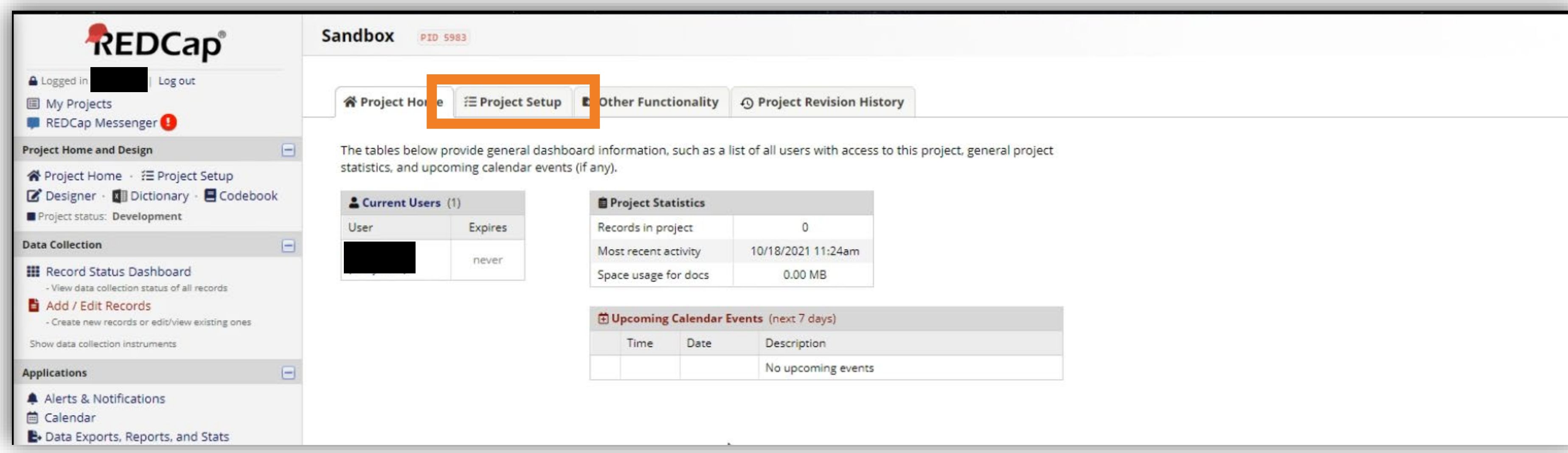
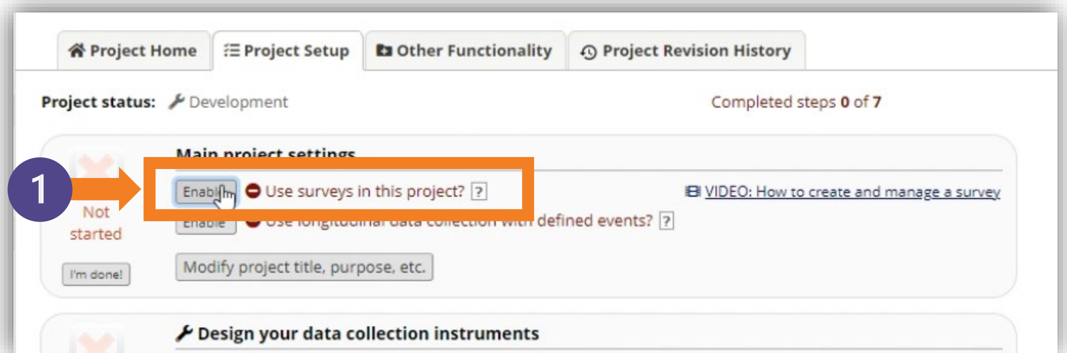
<u>This guide covers:</u>

- Setting-up a survey
- Adding different question types to a survey
- An introduction to basic branching logic

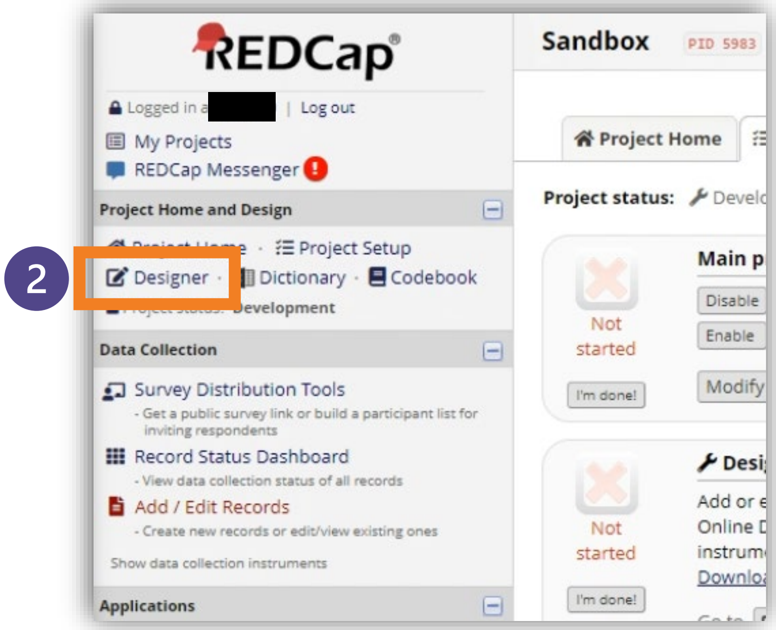


If you want to send individualized URL's to participants <u>after</u> building your survey, please see our separate guide.

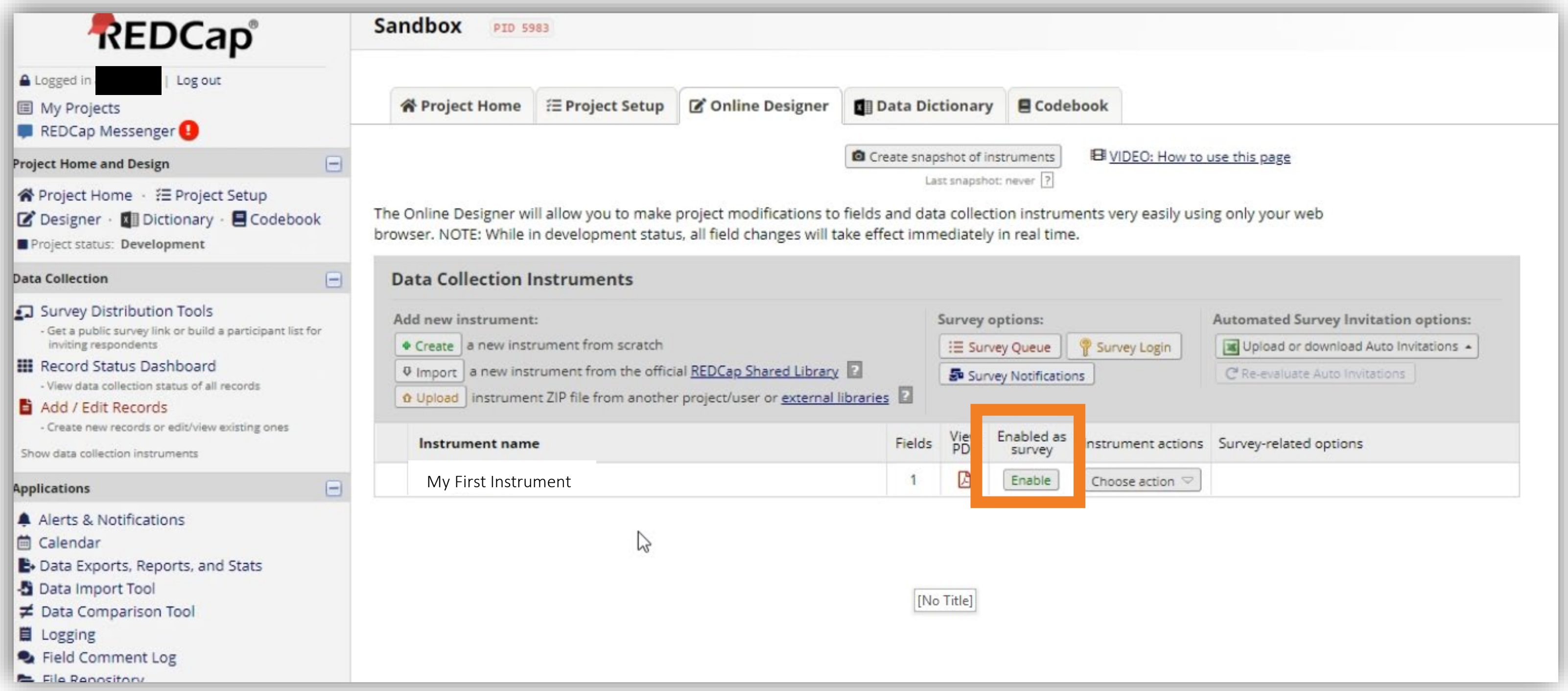
To begin, go to the project set-up tab



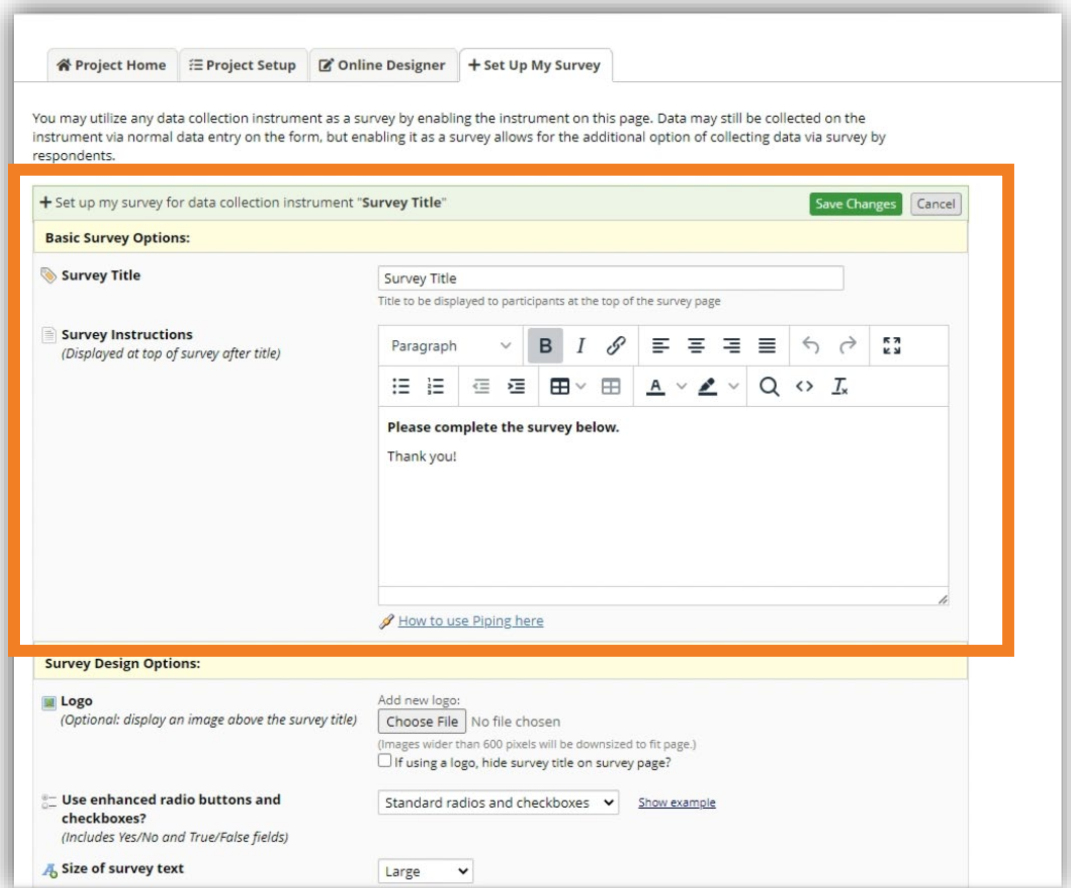
In the ‘main project settings’ (top box) click enable next to ‘use surveys in this project’. A checkmark will appear and the text will turn green.



Next, in the left side bar, go to the designer screen.



A generic placeholder title will populate the 'Instrument name' field. Click 'enable' under 'Enabled as Survey'.



You are now on the survey settings screen

Enter the survey title in the top field. Some common components of the survey instructions field include the purpose of the survey, how long it will take, and what the responses will be used for.

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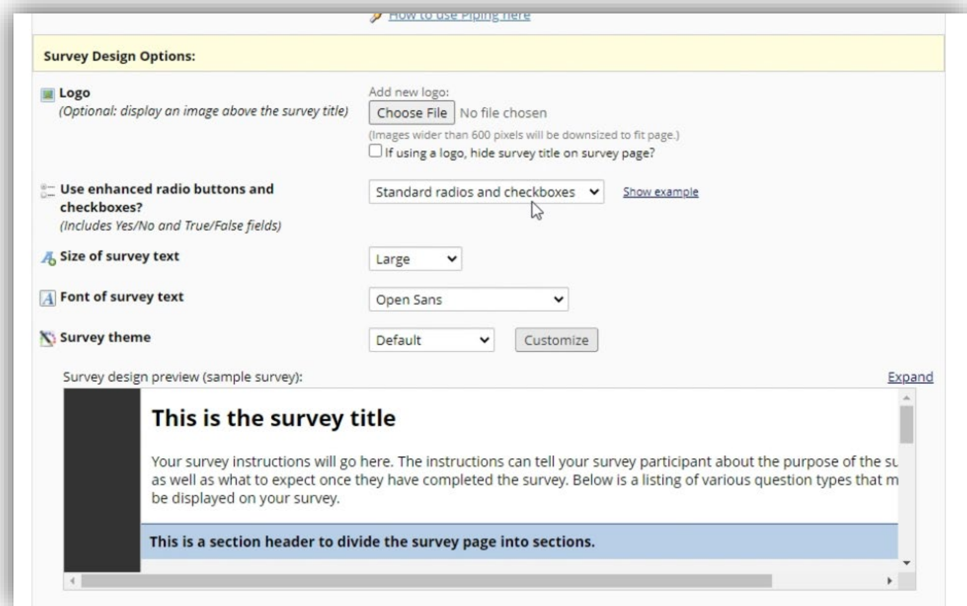

In the next section, you can edit some components that impact the "look and feel" of your survey. This includes adding a logo, enhanced buttons, text survey, and font. The 'plum' survey theme option is aligned with Northwestern branding. Feinberg and Northwestern Medicine logos are available for download from [Feinberg Communications](#).

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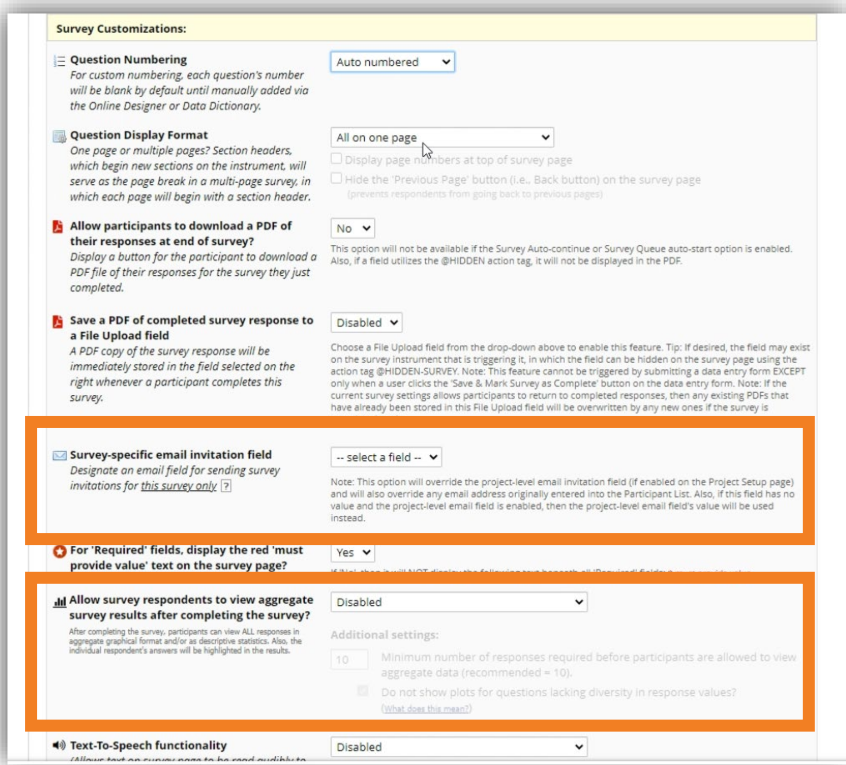
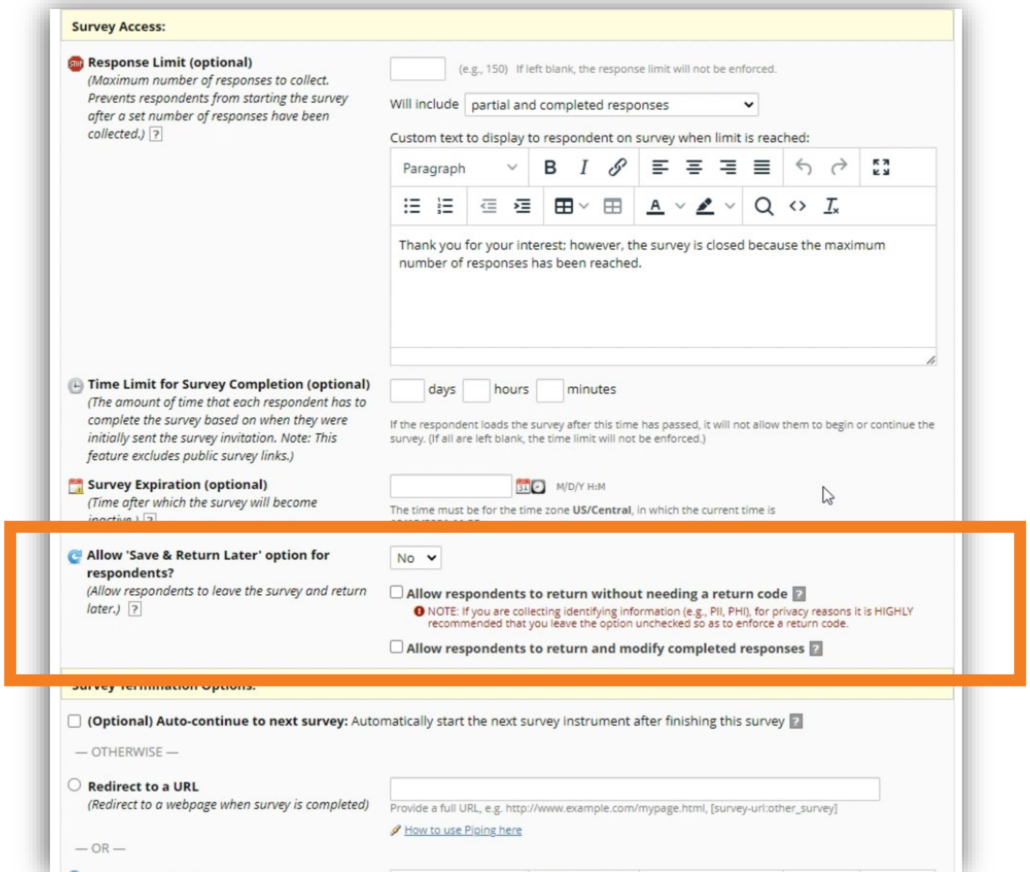


The "Survey Customizations" section has additional options that impact how you want your survey displayed to your audience. Description text below each option provides guidance.

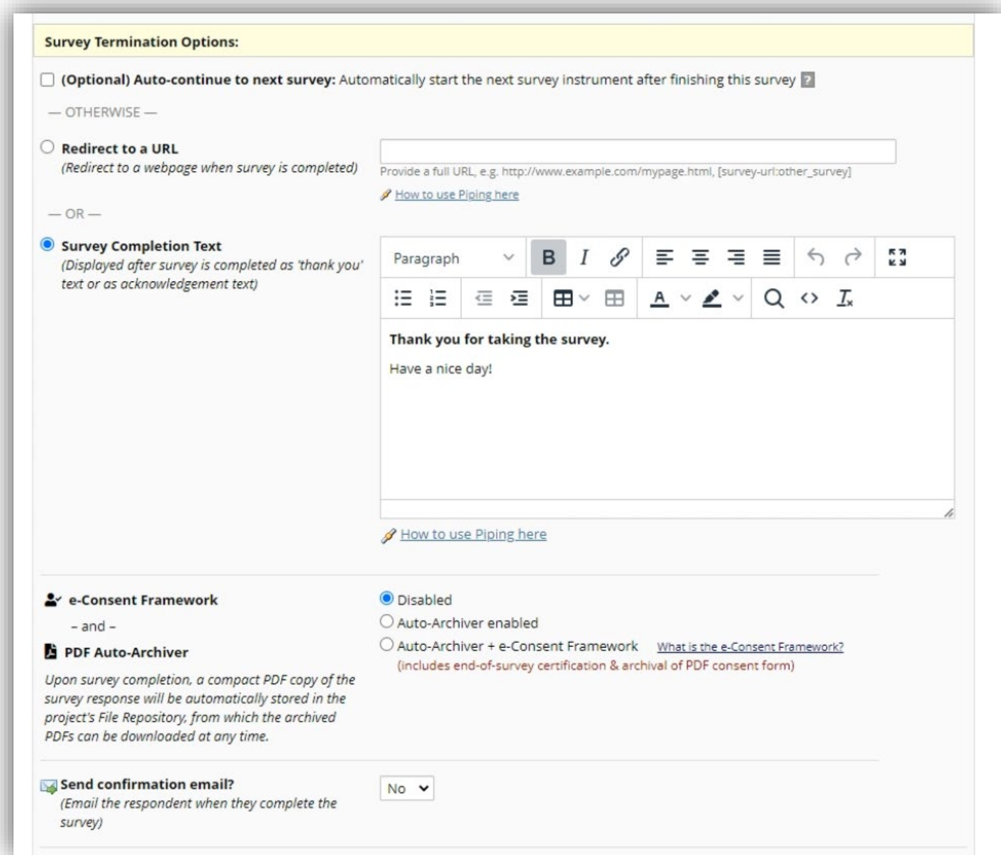
Disregard the "Survey-Specific email invitation field" for public surveys (distributed with a URL). For individualized surveys distributed through email, you will want to select the relevant option.

In most cases, the aggregate survey results option is left disabled.



The next section selects access restrictions for your survey

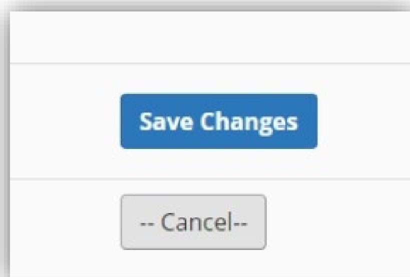
Disregard the “Save and Return Later” field for public surveys. This option only applies to individualized surveys.



The final section will format how respondents will conclude the survey. For new users, we recommend ending the survey with completion text or by redirecting to a URL (e.g., program webpage, etc)

General surveys are most commonly used for program feedback, event registrations, etc so eConsent formatting is rarely needed. For more information on eConsents, please see the separate guide.

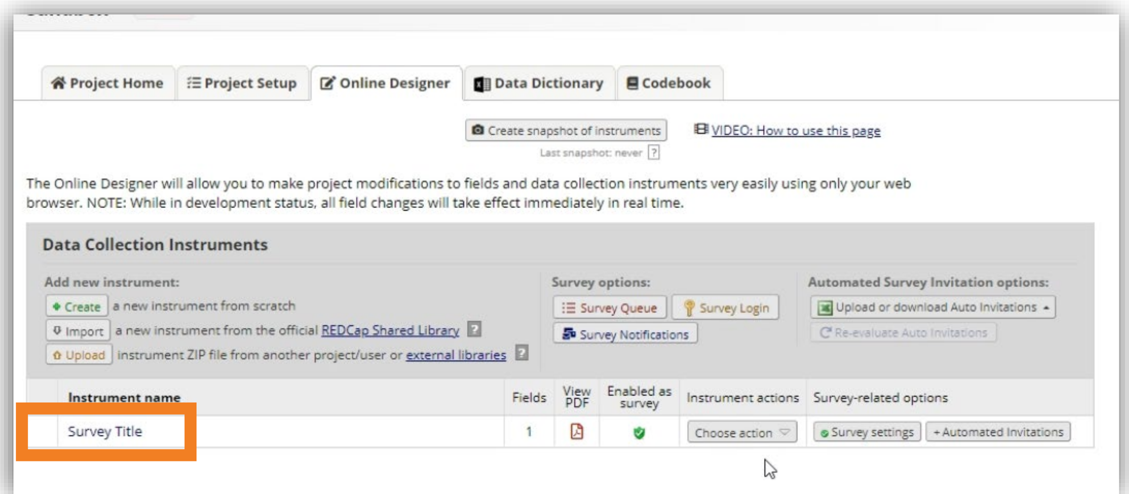
Disregard the "Confirmation Email" field for public surveys. This option only applies to individualized surveys.



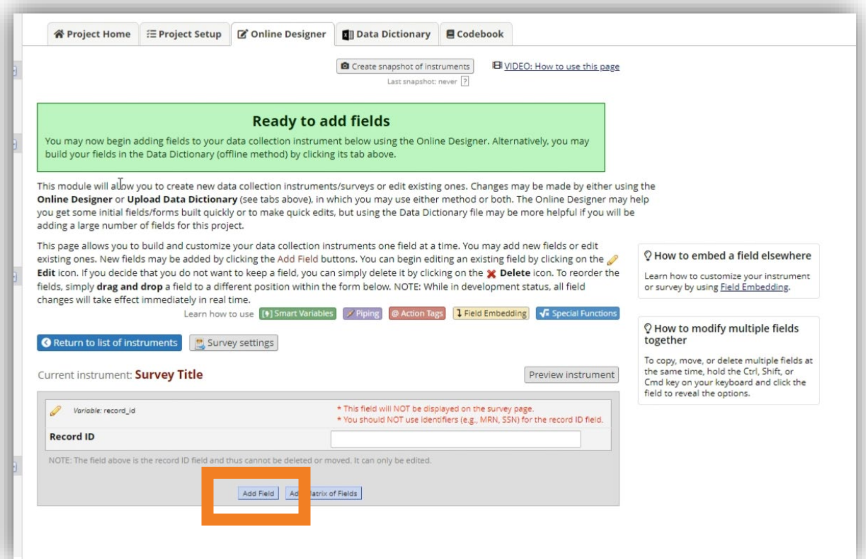
Remember to click "Save Changes"

Changes are not automatically saved.
Do not used your browser 'back' button.

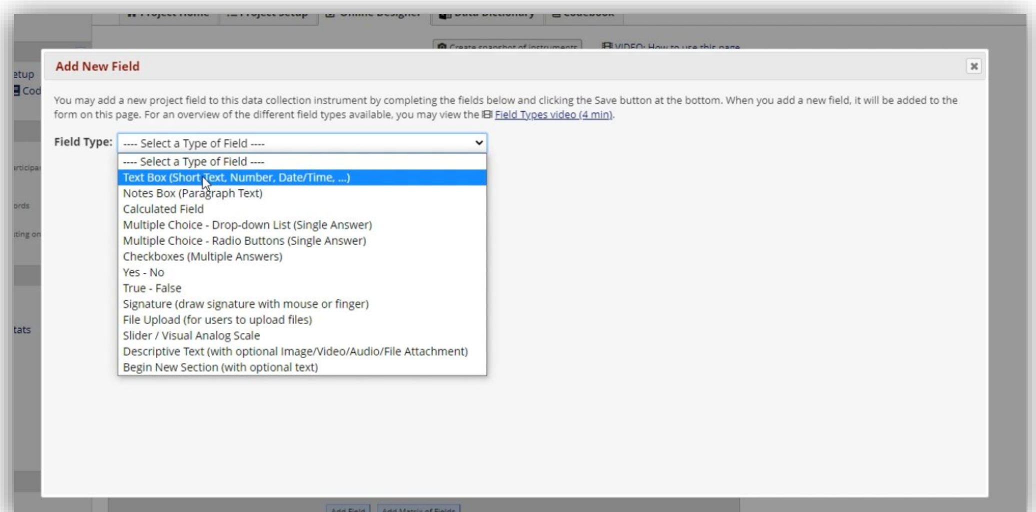
Now that we've managed the survey settings, click on the instrument name to begin adding questions to your survey.



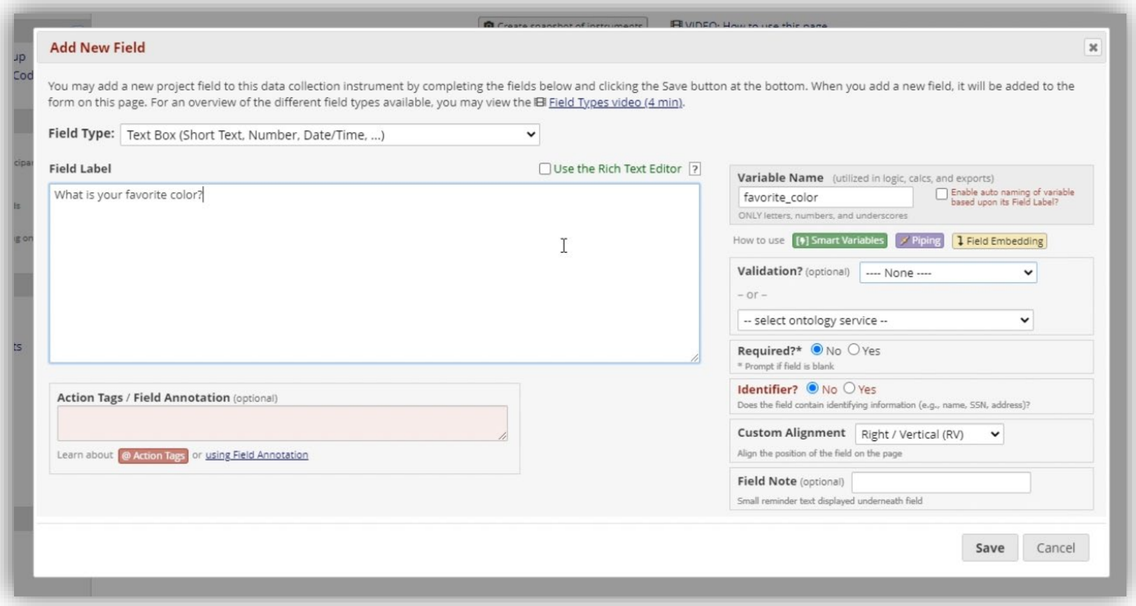
FYI: The "Instrument Actions" dropdown allows you to edit the name of your survey, copy/duplicate an entire survey, delete the survey, or download it. The survey title should be intuitive so that all users can understand *(e.g. "Post Session 1 Evaluation" as opposed to "Survey 1")*



Click “Add Field” to add a question to your survey

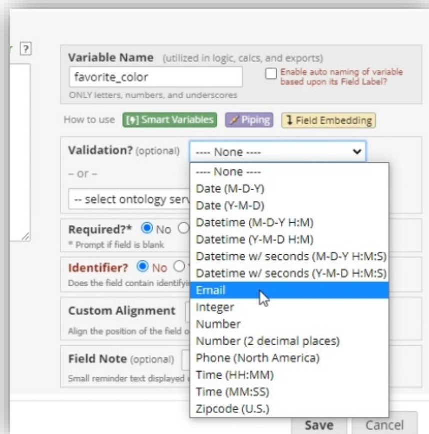


A pop-up will appear with a dropdown to select what type of question you want to add. Please reference our other guides & LinkedIn Learning videos for question type best-practices

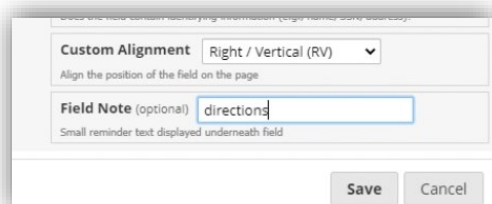


Once you select what type of question you want to ask (referred to as a 'Field Type'), the screen will populate with the fields to format your question. The actual text of the question is called a 'Field Label'

The variable name should be intuitive for you for when you export your results as well as advanced REDCap functions like branching logic. Please note, it will automatically correct to a compatible format (e.g. underscores added) so confirm the name still makes sense after clicking away from the box. Please see our other guides for more information about variable naming conventions.

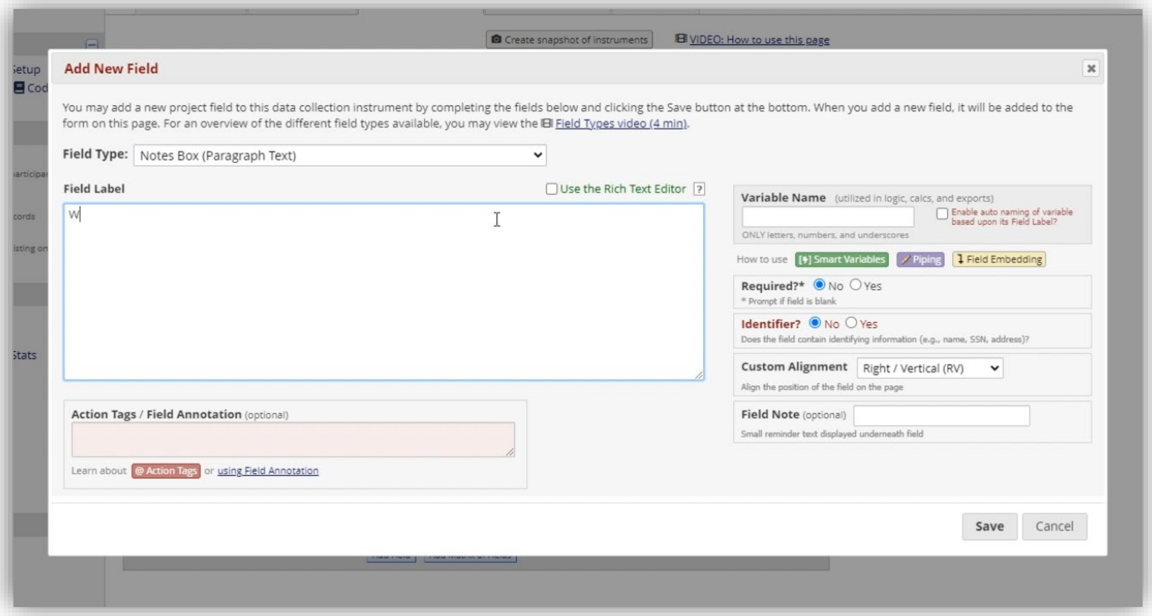


The 'validation' field will help ensure that responses are relevant and formatted correctly. For example, selecting an "Email" validation will alert users if they don't submit a valid email address.



The 'Field Note' option is for if you want to provide additional directions or context for a given question

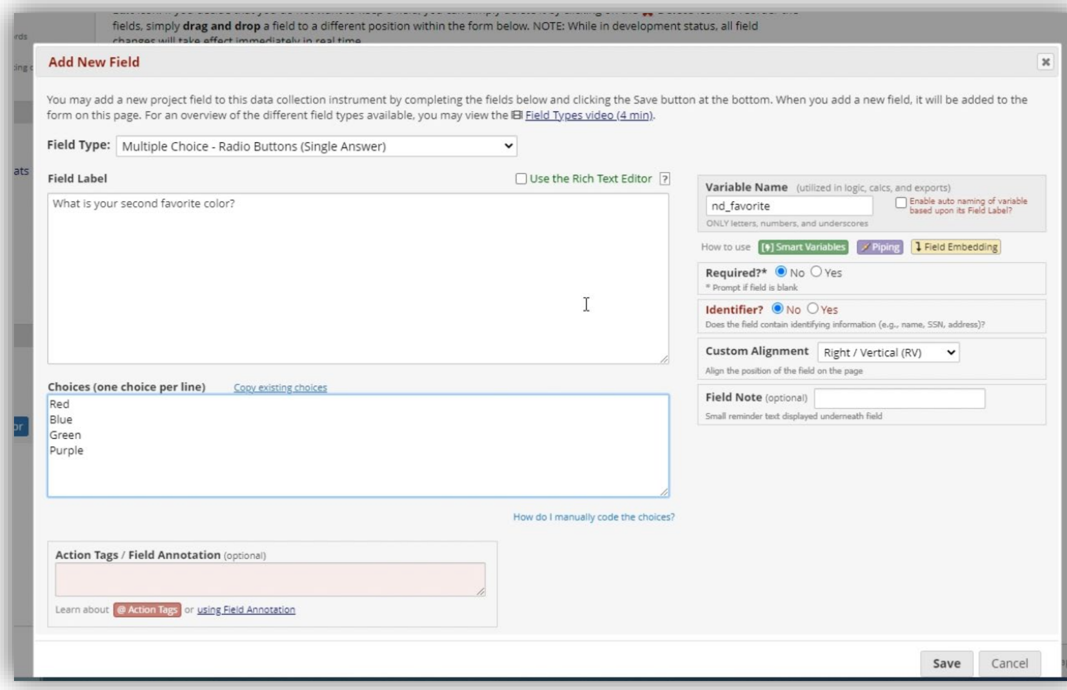
Remember to click "Save"

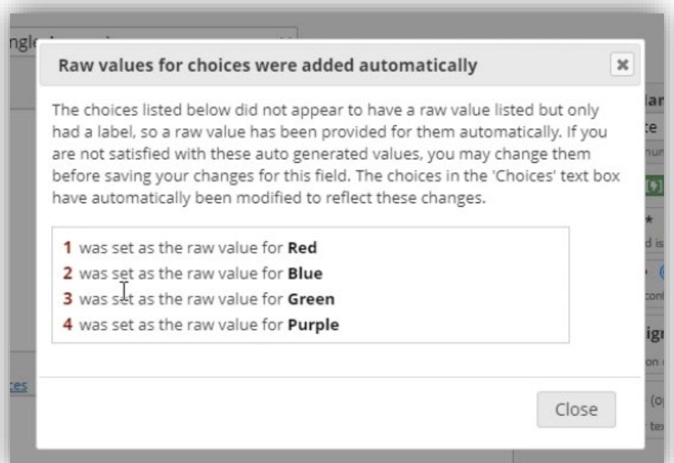


<u>About the "Notes Box" field type option:</u> This option is for open paragraph text for when you want respondents to either explain their responses in more detail or provide open-ended responses (e.g. program feedback, etc)

For multiple-choice questions where you only want respondents to select a single answer, radio buttons is the most common field type.

In the choices box, list each multiple-choice option on a new line.

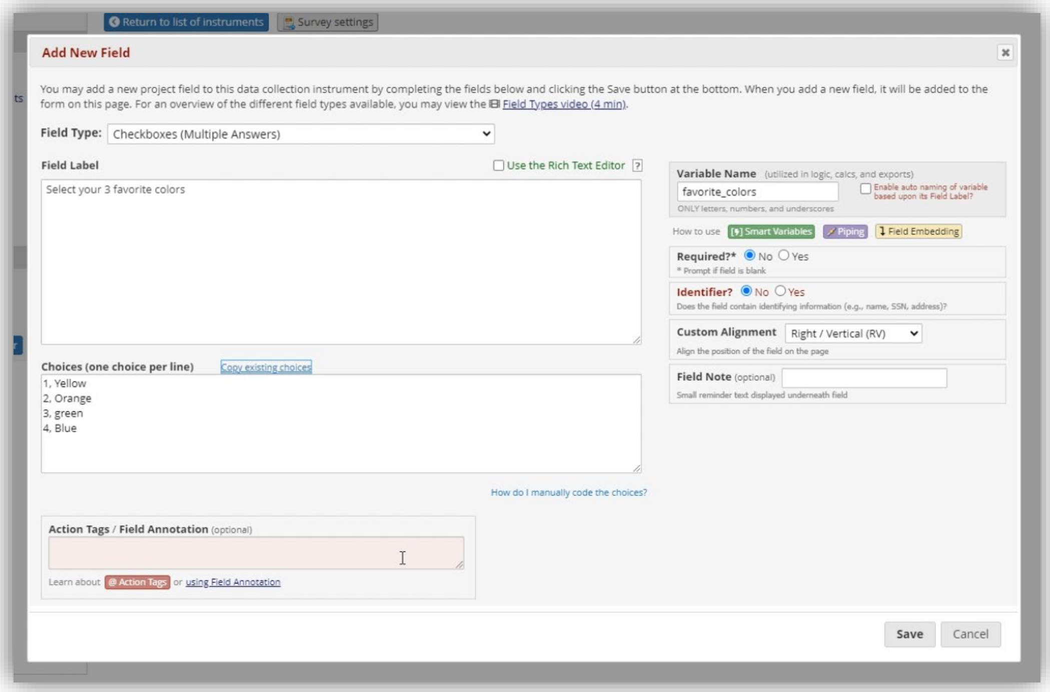




Once you click away from the choices box, REDCap will automatically assign sequential numbers to each of the lines

FYI: *The raw values are not displayed on the survey but can be downloaded in the survey responses to aid with statistical analysis (if applicable)*

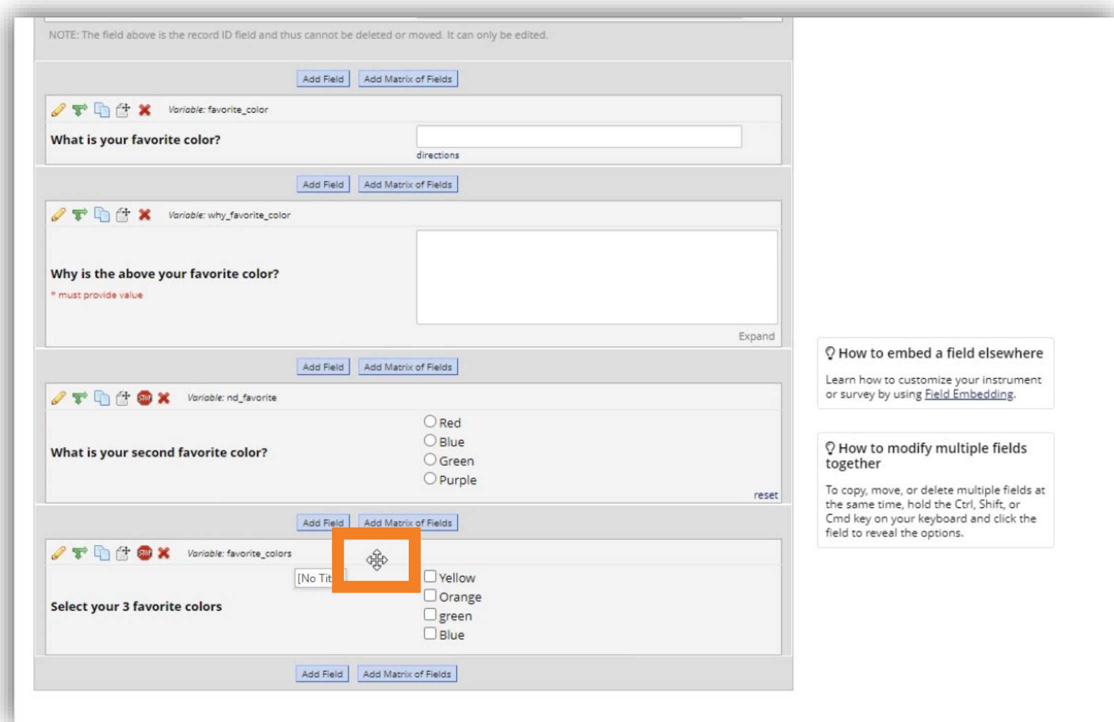
Remember to click “Save”



For questions where respondents can select more than one option, choose the **checkboxes** field type.

Remember to click “Save”

To change the order of survey questions, hover your cursor over the question you want to move until the four-way arrow appears. Then click to drag to the desired position



Branching Logic

Branching Logic is when you want create different pathways for respondents based upon how they answer a specified question. This only works on questions with structured data (e.g. multiple choice, checkboxes – not open text)

First, you'll want to identify the question/variable you want to branch FROM and which question/variable you'll want to branch TO.

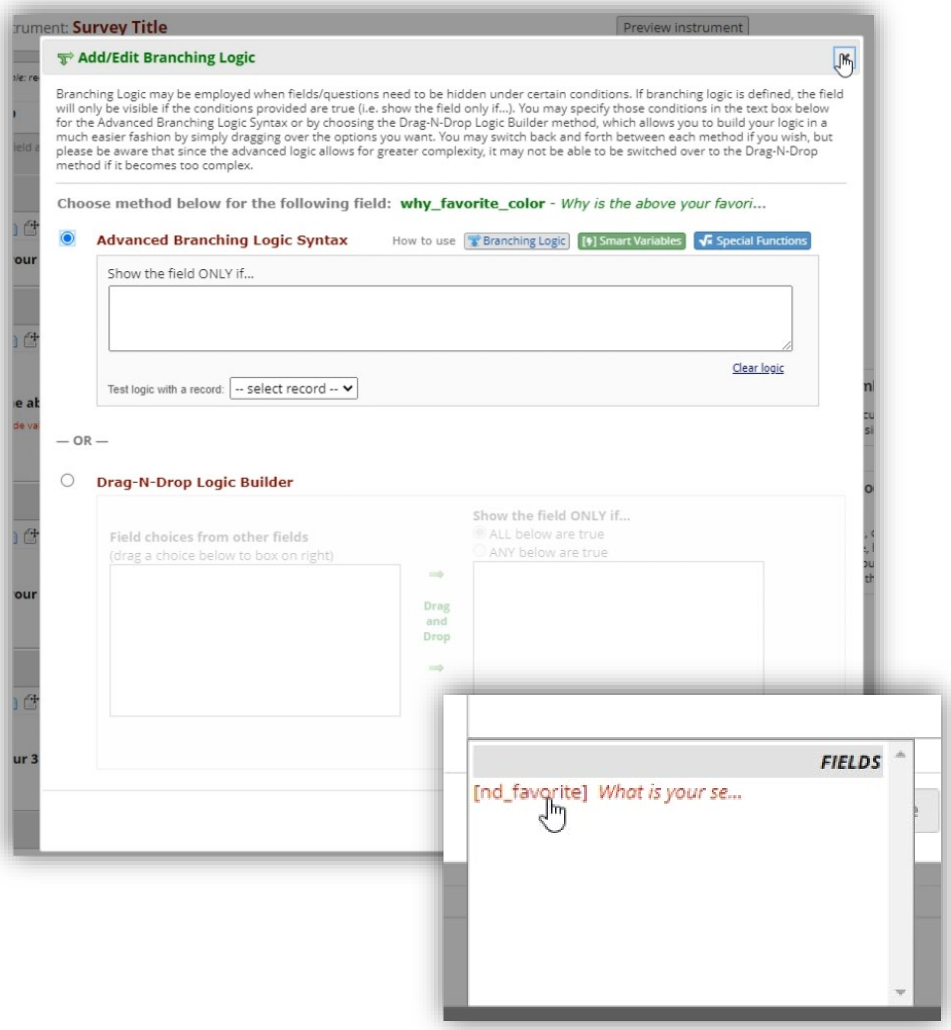
Go to the question/variable you want to branch TO and click the green arrow button. You'll indicate which question you want to branch FROM on the next screen.

Clicking the green arrow button is the same as saying:

"I only want respondents to see this question if they answer a previous question in a specific way"

Branching Logic

Continued



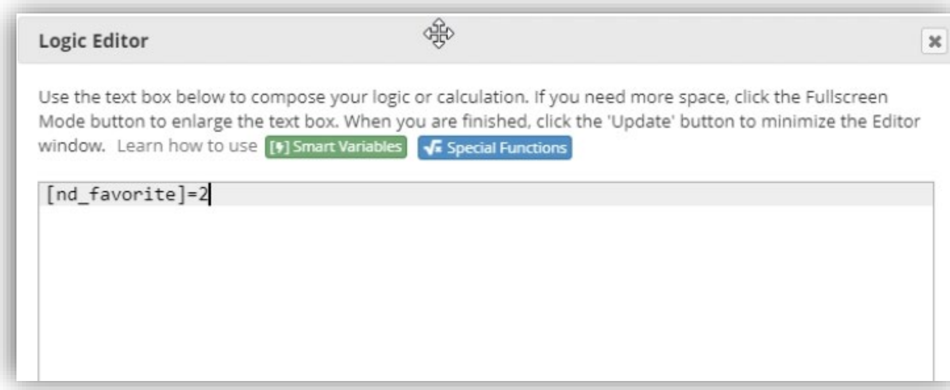
Click the box below 'Show the field ONLY if…' and type in an open bracket ("["). After the bracket, start typing in variable name of the question that you want to redirect FROM.

REDCap will auto-populate any corresponding variable names and reminder text of the field label (e.g. the question).

Branching Logic

Continued

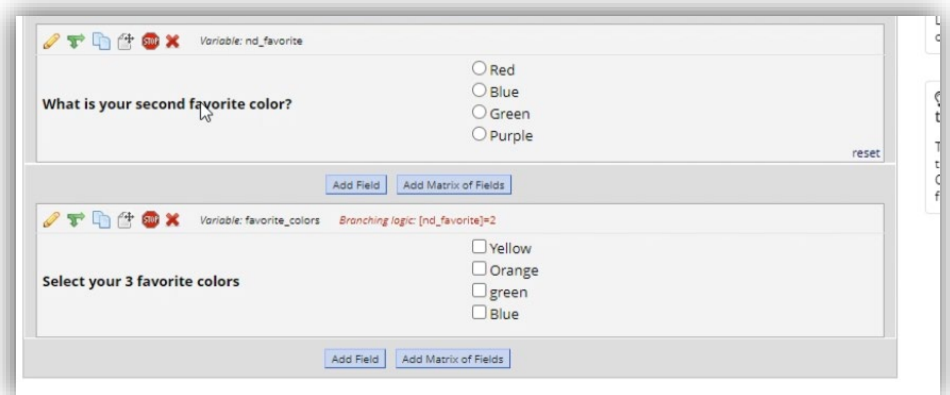
After the variable populates, type in “=“ and select the number corresponding to answer you want to redirect from in the respective question



Variable: “nd_favorite”

The branching logic code of [nd_favorite]=2 means:

“Only show this question if the response to prior question is the 2nd choice (Blue)”



The branching logic code appears in red text. Re-click the green arrows to edit this

<u>From here there are two different ways to test & distribute your survey:</u>

- A public survey (general URL – allows for multiple responses)
- An individualized survey where each respondent gets a unique URL

See our separate guides for testing & distributing your survey

Northwestern University
NUCATS
Clinical and Translational Sciences Institute