REDCap – How to Open a Follow-Up Survey

Ensure the follow-up forms have been enabled as surveys. For assistance on enabling the survey functionality, please refer to the How to enable the survey functionality guide.

- **Step 1**
  - To open a follow-up survey for a participant, navigate to the Record Status Dashboard

![Record Status Dashboard](image)

**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.

- **Step 2**
  - Locate the Record for which the next survey needs to be completed.
  - Click on the grey bubble under the appropriate Survey header.
  - This will open the Data Entry Form for that record’s survey.
Follow Up

Editing existing Record ID 1

<table>
<thead>
<tr>
<th>Record ID</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Follow-Up Email Sent</td>
<td></td>
</tr>
<tr>
<td>CTSI employee that initiated follow-up / triaged request</td>
<td>phenders</td>
</tr>
<tr>
<td>General Comments</td>
<td></td>
</tr>
<tr>
<td>Request Status</td>
<td>Active</td>
</tr>
<tr>
<td>Form Status</td>
<td></td>
</tr>
<tr>
<td>Complete?</td>
<td>Incomplete</td>
</tr>
</tbody>
</table>

- Step 3
  - Once in the Data Entry view, click on the “Survey Options” dropdown and then select “Open Survey.”
  - This will open the form in the Survey view where the participant may enter and submit their information.
Follow Up

Initial Follow-Up Email Sent
* must provide value

CTSI employee that initiated follow-up / triaged request
* must provide value

General Comments

Request Status
* must provide value
Active

Form Status
Incomplete

Save & Exit Form  Save & ...

Survey

Henderson, Tripp, Please complete the survey below. Thank you!

Initial Follow-Up Email Sent

CTSI employee that initiated follow-up / triaged request

General Comments

Request Status
Active