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.

- **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.

**Displaying:** Instrument status

<table>
<thead>
<tr>
<th>Record ID</th>
<th>Service Request</th>
<th>Follow Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Follow Up**

- **Editing existing Record ID 1**

  - **Record ID:** 1
  - **Initial Follow-Up Email Sent:**
    - *must provide value*
  - **CTSI employee that initiated follow-up / triaged request:** phenders
  - **General Comments**
  - **Request Status:** Active
  - **Form Status:**
  - **Complete?** Incomplete

  ![Dropdown options](Survey options)

  ![Save & Exit Form](Save & Exit Form)
  ![Save &...](Save &...)

- **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**

**Survey**

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

<table>
<thead>
<tr>
<th>Question</th>
<th>Value</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>[survey respondent]</td>
</tr>
<tr>
<td>General Comments</td>
<td></td>
</tr>
<tr>
<td>Request Status</td>
<td>Active</td>
</tr>
</tbody>
</table>

Save & Exit Form  Save &...  Submit