

## REDCap – Survey Queue

The Survey Queue displays a list of surveys to a participant on a single page. The queue contains the survey's **to be** completed as well as the surveys that have **already been** completed. Surveys are set to appear in the Survey Queue based on conditions set by a user, such as when a particular survey has been completed and/or if certain conditions have been met.

### Section A: If the project forms are surveys

Step 1:

- To create a Survey Queue, first enable the forms to be used as surveys.
- Navigate to the Online Designer and click on Survey Queue.

In this example, all forms are surveys.

| Instrument name | Fields | View PDF | Enabled as survey | Instrument actions | Survey-related options                  |
|-----------------|--------|----------|-------------------|--------------------|---|
| Demographics    | 6      |          |                   | Choose action      | Survey settings + Automated Invitations |
| Test 1          | 0      |          |                   | Choose action      | Survey settings + Automated Invitations |
| Test 2          | 0      |          |                   | Choose action      | Survey settings + Automated Invitations |
| Test 3          | 10     |          |                   | Choose action      | Survey settings + Automated Invitations |

Step 2:

- At the top of the Survey Queue box, a User can click on [Add custom text to display at top of survey queue](#) to add any custom text to the top of the queue.

Custom text to display at top of survey queue (optional) – If no custom text is provided, then [this text](#) will be displayed by default. [Hide]

You may use Piping or HTML formatting in the custom text: `<b>` bold, `<u>` underline, `<i>` italics, `<a href="...">` link, etc. [How to use Piping](#)

Step 3:

- Activate the survey(s) you want included in the queue then complete the 'Display survey in the Survey Queue when...' section for each survey.
  - The surveys can be displayed in the queue based on a) another survey being completed and/or b) based on a logic statement of variables with the project (this is covered in Section B below).
- If you want the survey to automatically start as soon as the condition is met, then click on the 'Auto Start?' checkbox.

In this example, we want the Test 1 survey to appear in the queue once the Demographics survey has been completed. Additionally, in this example, we want to automatically start the Test 1 survey as soon as the Demographics survey has been completed.

Custom text to display at top of survey queue (optional) – If no custom text is provided, then [this text](#) will be displayed by default. [Hide]

Please complete the surveys below. Please contact ABC with any questions. Thank you

You may use Piping or HTML formatting in the custom text: <b> bold, <u> underline, <i> italics, <a href="#"> link, etc. [How to use Piping](#)

| Activated?  | Survey Title | Display survey in the Survey Queue when...   | Auto start?                         |
|---|--------------|--|-------------------------------------|
| <br>Activated<br><input type="button" value="Deactivate"/> | "Test 1"     | <input checked="" type="checkbox"/> When the following survey is completed:<br>"Demographics"<br>AND ▾<br><input type="checkbox"/> When the following logic becomes true: <a href="#">How to use this</a><br><input type="text"/><br>(e.g., [age] > 30 and [gender] = "1") | <input checked="" type="checkbox"/> |

Step 4:

- Continue activating the remaining surveys that will be used in the queue.

To continue with the example, we will want Test 2 and Test 3 to appear once the previous surveys have been completed, but we do not want the auto start functionality for these surveys.

**Set up Survey Queue**

The Survey Queue displays a list of your surveys to a participant all on a single page, in which the queue comprises all surveys that are to be completed (like a 'to-do' list) as well as the surveys that the participant has already completed. [Tell me more](#)

NOTE: The first instrument survey is not displayed below because it does not have a survey that comes before it for which to set conditions.

Custom text to display at top of survey queue (optional) – If no custom text is provided, then [this text](#) will be displayed by default. [Hide]

Please complete the surveys below. Please contact ABC with any questions. Thank you

You may use Piping or HTML formatting in the custom text: <b> bold, <u> underline, <i> italics, <a href="#"> link, etc. [How to use Piping](#)

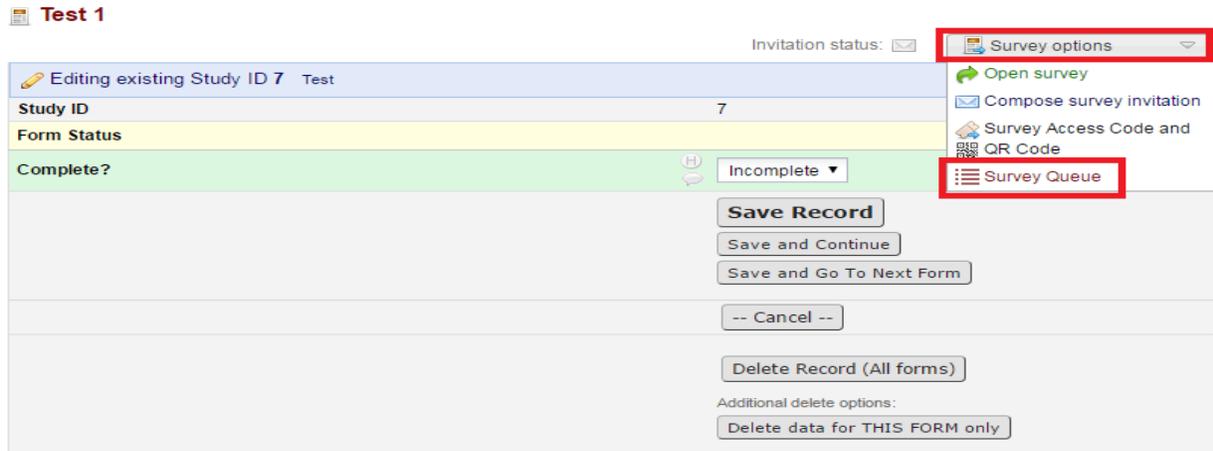
| Activated?  | Survey Title | Display survey in the Survey Queue when...   | Auto start?                         |
|---|--------------|--|-------------------------------------|
| <br>Activated<br><input type="button" value="Deactivate"/> | "Test 1"     | <input checked="" type="checkbox"/> When the following survey is completed:<br>"Demographics"<br>AND ▾<br><input type="checkbox"/> When the following logic becomes true: <a href="#">How to use this</a><br><input type="text"/><br>(e.g., [age] > 30 and [gender] = "1") | <input checked="" type="checkbox"/> |
| <br>Activated<br><input type="button" value="Deactivate"/> | "Test 2"     | <input checked="" type="checkbox"/> When the following survey is completed:<br>"Test 1"<br>AND ▾<br><input type="checkbox"/> When the following logic becomes true: <a href="#">How to use this</a><br><input type="text"/><br>(e.g., [age] > 30 and [gender] = "1")       | <input type="checkbox"/>            |
| <br>Activated<br><input type="button" value="Deactivate"/> | "Test 3"     | <input checked="" type="checkbox"/> When the following survey is completed:<br>"Test 2"<br>AND ▾<br><input type="checkbox"/> When the following logic becomes true: <a href="#">How to use this</a><br><input type="text"/><br>(e.g., [age] > 30 and [gender] = "1")       | <input type="checkbox"/>            |

- Once you have the queue created, click on 'Save.'

Step 5:

- To open a participant's survey queue and to provide them with their Survey Queue URL, navigate to a survey form within an individual's record.

- In the top right of the form, open the drop down selections for 'Survey Options.'
- Click on 'Survey Queue.'
- Note: The queue URL is specific to the participant. Please encourage the participants not to forward their URLs to other participants.



- The survey queue can act as a checklist for the participant. The individual is able to see the list of surveys that have been completed and the surveys that are remaining to be completed (Image 1).
- To obtain the participant's survey queue URL, click the 'Get link to my survey queue' button. This will open the options to a) copy the URL or b) to enter the participant's email address to automatically send the URL (Image 2).

Image 1

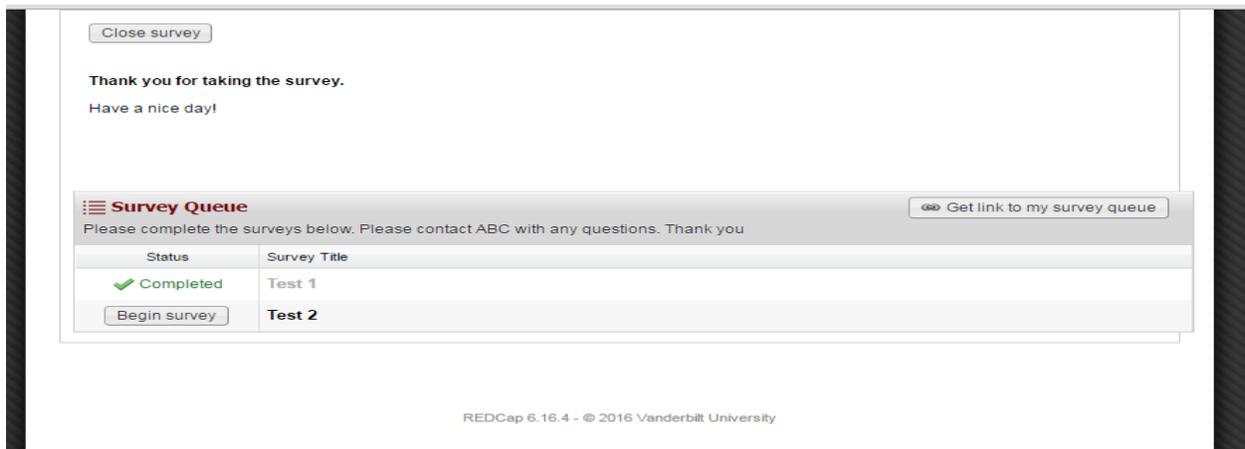


Image 2

**Get link to my survey queue**

To obtain your survey queue link, which will allow you to return to your survey queue in the future, you may copy and paste the link displayed in the text box below, or you may have it emailed to you at your email address.

Copy and paste the survey queue link

— OR —

Send the survey queue link in an email

\* Your email address will not be stored

### **Section B: If the project contains traditional data collection forms and surveys**

If the project contains traditional data collection forms and surveys, and the survey queue is dependent upon certain data collection forms (or variables within other forms) being completed prior to a survey appearing in the Survey Queue, then the 'Display the survey in the Survey Queue when...' section will utilize the 'when the following logic becomes true' option.

Step 1:

- Enable any forms that will be used as surveys (instead of as data collection instruments).
- If various forms will be traditional data collection instruments instead of surveys, please do not change them to surveys.
- Navigate to the Online Designer and click on Survey Queue.

In this example, the Demographics form and the Test 2 form will be traditional data collection forms.

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

[VIDEO: How to use this page](#)

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

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  |
|-------------------------------------|-----------------|--------|----------|--|--------------------|---|
| <input checked="" type="checkbox"/> | Demographics    | 6      |          | <input type="checkbox"/> Enable            | Choose action      |   |
| <input checked="" type="checkbox"/> | Test 1          | 0      |          | <input checked="" type="checkbox"/> Enable | Choose action      | <input checked="" type="checkbox"/> Survey settings + Automated Invitations |
| <input checked="" type="checkbox"/> | Test 2          | 0      |          | <input type="checkbox"/> Enable            | Choose action      |   |
| <input checked="" type="checkbox"/> | Test 3          | 10     |          | <input checked="" type="checkbox"/> Enable | Choose action      | <input checked="" type="checkbox"/> Survey settings + Automated Invitations |

Step 2:

- At the top of the Survey Queue box, a User can click on [Add custom text to display at top of survey queue](#) to add any custom text to the top of the queue.

Custom text to display at top of survey queue (optional) – If no custom text is provided, then [this text](#) will be displayed by default. [Hide]

You may use Piping or HTML formatting in the custom text: `<b>` bold, `<u>` underline, `<i>` italics, `<a href="...">` link, etc. [How to use Piping](#)

Step 3:

- Activate the survey(s) you want included in the queue then complete the ‘Display survey in the Survey Queue when...’ section for each survey.
- If you want the survey to automatically start as soon as the condition is met, then click on the ‘Auto Start?’ checkbox.

In this example, we want the

a) Test 1 survey to appear in the queue once the Demographics form has been completed.  
**and**

b) Test 3 survey to appear in the queue once the Test 2 form has been completed.

Since the Demographics form and the Test 2 form are traditional data collection instruments, we will need to use the ‘when the following logic becomes true’ option.

For the purposes of this example, we want the Test 1 survey and the Test 2 survey to appear when the Demographics form and Test 2 form are marked ‘Complete.’

1. Navigate to the codebook to determine the variable names for the complete variables. The codebook can be found on the Project Home page.

In this example, here are our variables from the codebook

|   |                       |   |  |
|---|-----------------------|---|--|
| 7 | demographics_complete | Section Header: <i>Form Status</i><br>Complete? | dropdown<br>0 Incomplete<br>1 Unverified<br>2 Complete |
| 9 | test_2_complete       | Section Header: <i>Form Status</i><br>Complete? | dropdown<br>0 Incomplete<br>1 Unverified<br>2 Complete |

2. Return to the Survey Queue and enter the logic statement into the ‘Display Survey when...’ section. Click on Save.

**Custom text to display at top of survey queue (optional)** – If no custom text is provided, then [this text](#) will be displayed by default. [Hide]

Please complete the surveys below. Please contact ABC with any questions. Thank you

You may use Piping or HTML formatting in the custom text: <b> bold, <u> underline, <i> italics, <a href="..."> link, etc. [How to use Piping](#)

| Activated?  | Survey Title | Display survey in the Survey Queue when...   | Auto start?              |
|---|--------------|--|--------------------------|
| <br>Activated<br><input type="button" value="Deactivate"/> | "Test 1"     | <input type="checkbox"/> When the following survey is completed:<br><div style="border: 1px solid #ccc; padding: 2px; width: 100%;">--- select a survey ---</div> AND ▼<br><input checked="" type="checkbox"/> When the following logic becomes true: <a href="#">How to use this</a><br><div style="border: 1px solid #ccc; padding: 2px; width: 100%;">[demographics_c complete]="2"</div> <small>(e.g., [age] &gt; 30 and [gender] = "1")</small> | <input type="checkbox"/> |
| <br>Activated<br><input type="button" value="Deactivate"/> | "Test 3"     | <input type="checkbox"/> When the following survey is completed:<br><div style="border: 1px solid #ccc; padding: 2px; width: 100%;">--- select a survey ---</div> AND ▼<br><input checked="" type="checkbox"/> When the following logic becomes true: <a href="#">How to use this</a><br><div style="border: 1px solid #ccc; padding: 2px; width: 100%;">[test_2_complete]="2"</div> <small>(e.g., [age] &gt; 30 and [gender] = "1")</small>         | <input type="checkbox"/> |

Continue with Step 5 above for obtaining the Survey Queue URL for the participant.

NOTE: Please be sure to test the project thoroughly to ensure the Survey Queue is functioning correctly. Once you have tested the project, please place the project into production before collecting any real data. If the project requires IRB/IACUC approval, please ensure you have approvals before collecting any real data.