Sending Subject/Patient Surveys: Microsoft 365 Forms, Nebraska Medicine REDCap

NM REDCap and Microsoft 365

Microsoft Office 365 Forms provides an easy method to survey your audience. This system is secure and can be used when Protected Health Information (PHI) is being cited.

A REDCap survey is also a data collection instrument, which can be used when PHI is involved. The surveys are created and sent via REDCap. This program offers options to track who has responded, send follow-up reminders, and notify the sender when responses have been received. While REDCap is more complex, it may provide you with the information you need to successfully track responses.

These two programs are Nebraska Medicine approved when sending surveys that contain PHI. No other programs should be used (i.e. Survey Monkey) to obtain survey data.

Creating a Survey Using Microsoft Office 365 Forms

Office 365 Forms provides a fast, efficient way to create surveys to share. Use the instructions below to try it out.

1. Open **Office 365** and click on the **Menu** button.

2. Select **All apps,** then select **Forms**.

3. A pop-up will appear. Select **Create a new form.**
4. Click **New Form** and then select **Add new**.
5. For questions with a multiple-choice response, click **Choice**. For open-ended responses, select **Text**. For a star rating, select **Rating**. Choose **Date** when asking that the date be added. Use the **…** for additional options.

6. Click on the **Untitled form** to change the name of the survey and to add a description.
7. Click on **Question,** then **Option 1** to add your question and the option of responses.
8. To add additional responses, select **+Add option**.
9. Use **Add "Other" option** to auto populate **Other** as a choice.
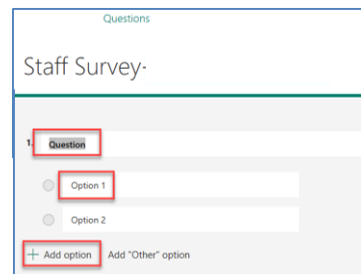
10. To allow **multiple answers** or to make the answer **required**, click the toggle next to the corresponding option. Use **…** to select additional options.
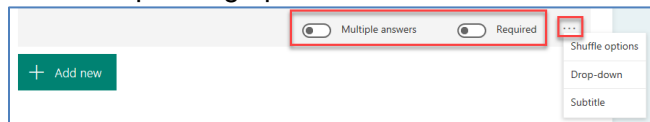
11. Click **+Add new** for additional questions.
12. Select **Preview** from the upper right of the screen to view the survey.
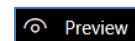
13. Click **Share** to copy a link (for insertion into an email) or the to email the survey directly from **Forms**.
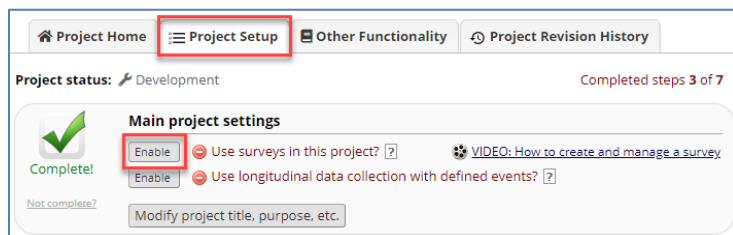
You may wish to send yourself a survey to test the appearance of what patients/subjects will see. When the survey is as intended, please send a copy of the survey to jcarr@nebraskamed.com for approval by the Patient Experience Department and a personal follow-up email to advise of the survey.

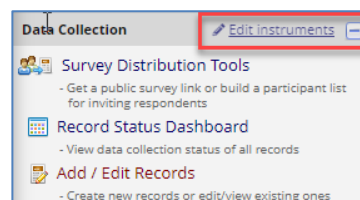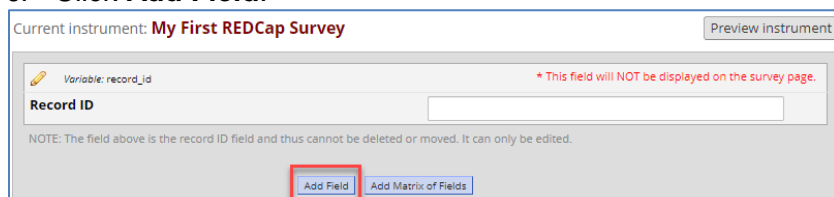# Creating a Survey Using Nebraska Medicine's REDCap

When conducting a survey, REDCap provides a safe and secure way to send and receive responses. Respondents go to the secure webpage and submit their data from anywhere at any time. There is no login required, so a respondent only needs a device with internet access. REDCap can assist in sending out the survey link and tracking responses. Project users can then login to REDCap to access their respondents' data.

The below instructions are intended for use to build a <u>basic</u> REDCap survey only. (Note: These instructions are specific to NM's REDCap and may vary when using UNMC's version of REDCap.)
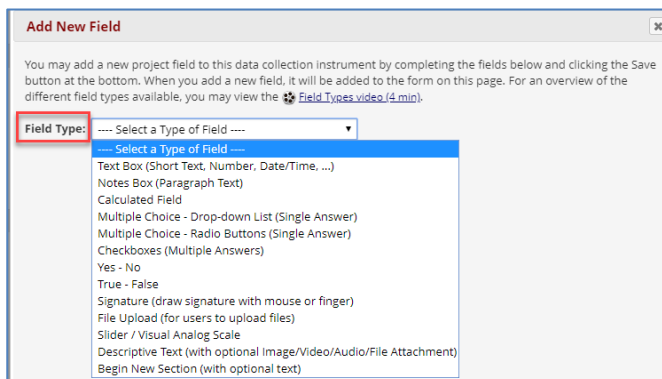
1. Log into REDCap Development after receiving the appropriate project approval. You are taken to your **Projects**.
2. Select the appropriate **project** (or select **New Project→Fill in the missing information→Create Project**).
3. Move to the **Project Setup** tab and click **Enable** next to **Use surveys in this project?** (This enables your survey to be sent to the public.)
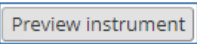

4. On the left of the screen, select **Edit instruments**.

5. Select your **Instrument name** to begin creating questions for the survey.

6. Click **Add Field**.

7. Select the **type of question and display** for your first question.
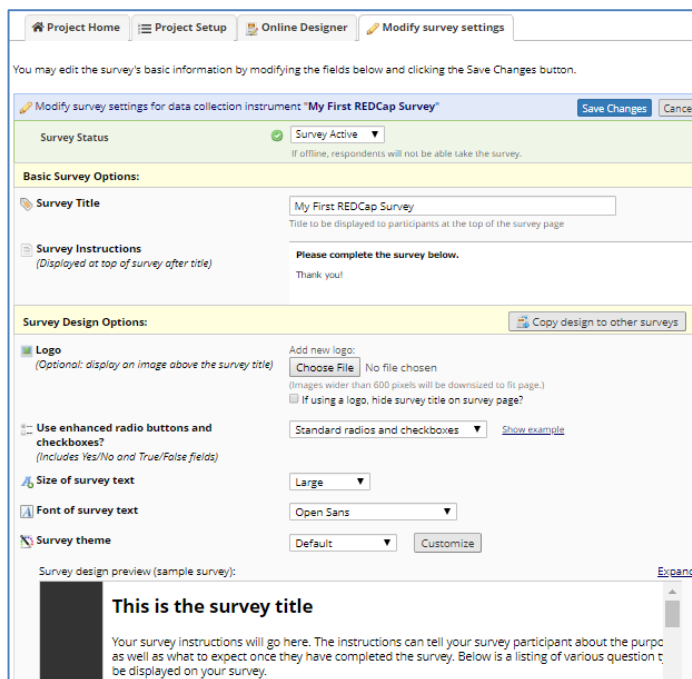   (A multiple-choice question was chosen for this example.)

8. Complete the following fields:
   - **Field Label** Type out the question.
   - **Choices (one choice per line)** Add the options per the question.
   - **Variable Name** Using letters, numbers, and underscores, type short information to describe the question.
   - **Required**? Mark if this is a required answer for the survey.
   - **Identifier**? Mark if the fields contain identifying information about the subject (i.e. name, SSN, etc.).
9. Select **Save**.
10. You are returned to the **Online Designer** tab.
11. To add additional questions, select **Add Field** and repeat steps 7-9.

12. To view the survey, from the Online Designer tab, select **Preview Instrument.** [Preview instrument]

Managing the Survey Settings

1. Enable your survey by selecting **Enable** next to **Enabled as Survey**. (If your survey was already enabled, while on the **Online Designer tab**, select **Survey settings**.)

   [Survey settings]
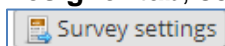
2. You will be presented with a list of personalization choices for your survey, including survey instructions, size of text, maximum number of respondents, etc. Answer each section appropriate to your study.
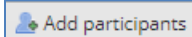
Manage Survey Participants

1. To send survey links to subjects, select **Survey Distribution Tools** from the left navigation menu.
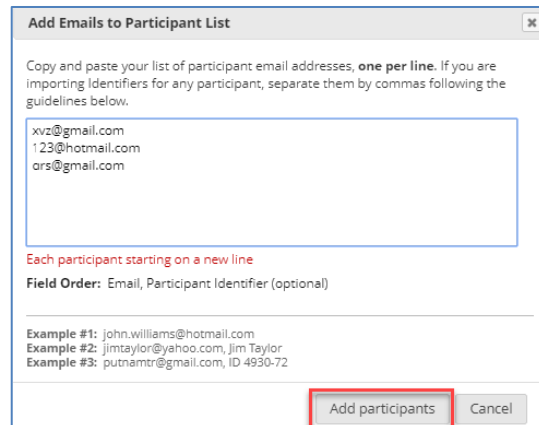
The tab for the **Public Survey Link** is for using a singular URL to your survey, which does not track IP addresses, email addresses, or any other identifying information. This means that any person with that survey link can take the survey multiple times if need be. While this is an optimal feature for some surveys, it is not the best option for projects in which we must ensure that no participant has taken the survey more than one time. The URL can be copied and pasted into an e-mail.

The **Participant List tab** will enable you to send a customized email to anyone in your list and track who responds to your survey. Each email will contain a unique URL that is only valid for one submission.

1. To add the email addresses of your participants to the participant list, from the **Participant List tab,** click **Add participants.**

   [icon] Add participants

2. Type the subjects' email addresses, one per line.

3. Click **Add participants** when you have completed the addition of subjects.
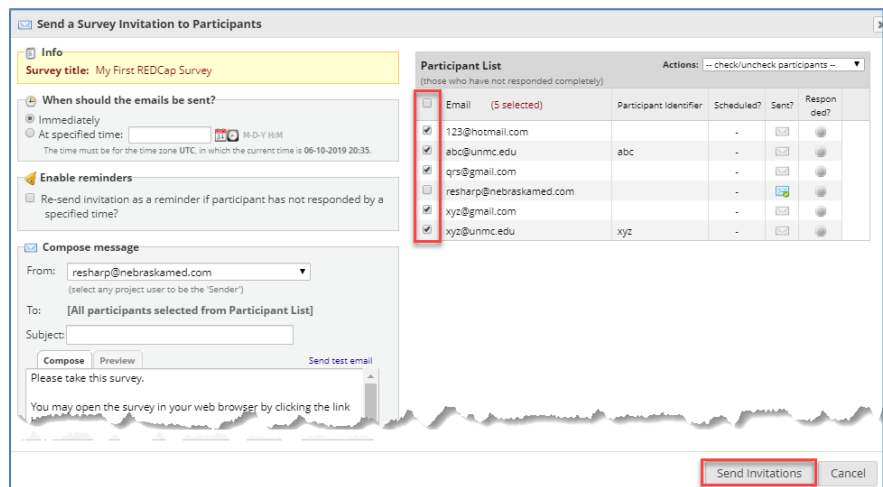
Sending Surveys

1. To send the survey to participants, select **Compose Survey Invitations**.
2. Choose the time at which the emails are sent, the subject of the email, any additional content or comments of the email invitation, and the checklist of participants to whom you would like to send the email.
3. Select **Send Invitations**.
4. A confirmation message will appear.

You may wish to send yourself a survey to test the appearance of what patients/subjects will see. When the survey is as intended, please send a copy of the survey to jcarr@nebraskamed.com for approval by the Patient Experience Department and a personal follow-up email to advise of the survey.

Once approval has been received and to have your project moved to production, please contact Christopher Oster with Information Technology, coster@nebraskamed.com.