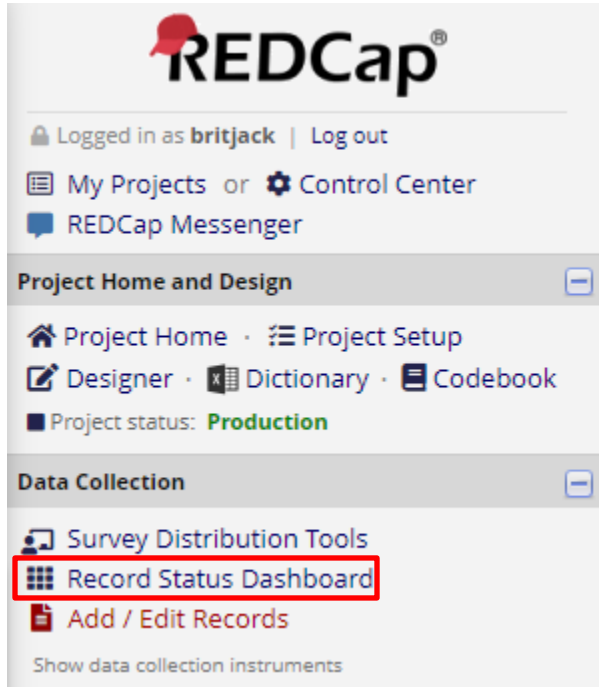


REDCap – How to Open a Follow-Up Survey

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 (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.


























Legend for status icons:

-  Incomplete
-  Incomplete (no data saved) ?
-  Unverified
-  Partial Survey Response
-  Complete
-  Completed Survey Response

Dashboard displayed: [Create custom dashboard](#)

Displaying record of 5 records records per page

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Record ID	Service Request	Follow Up	Capture	Satisfaction Survey End	Research Studio Expert Satisfaction Survey
1					
2					
3					
4					
5					

- 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

Record ID	Service Request	Follow Up	
1			

Follow Up

Invitation status: Survey options

Editing existing Record ID 1

Record ID 1

Initial Follow-Up Email Sent Today M-D-Y
* must provide value

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

General Comments
Expand

Request Status
* must provide value

Form Status

Complete?

- 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

Invitation status: !

Editing existing Record ID 1

Record ID 1

Initial Follow-Up Email Sent
* must provide value

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

General Comments

Request Status
* must provide value Active

Form Status

Complete? Incomplete

Save & Exit Form Save & ...

-- Cancel --

Survey options

Open survey

Log out + Open survey

Compose survey invitation

Survey Access Code and QR Code

Survey

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

Initial Follow-Up Email Sent
* must provide value

CTSI employee that initiated follow-up / triaged request
* must provide value [survey respondent]

General Comments

Request Status
* must provide value Active

Submit