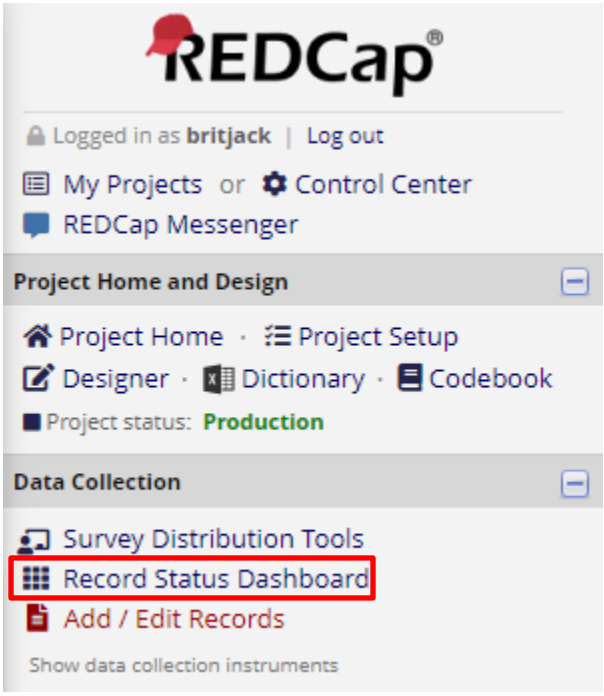
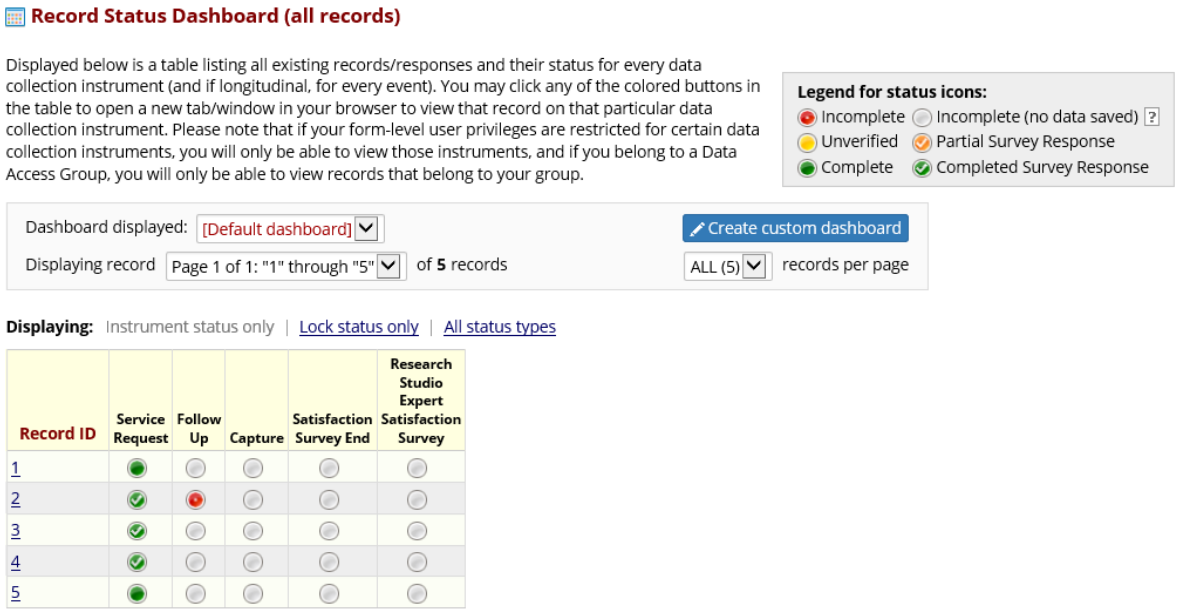
REDCap – How to Open a Follow-Up Survey

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.

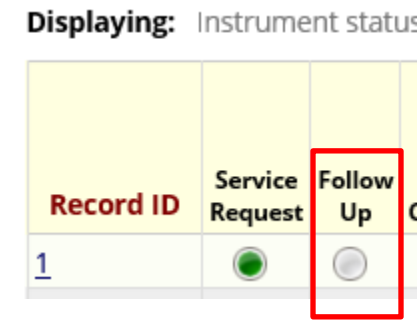
- Step 1
  - To open a follow-up survey for a participant, navigate to the Record Status Dashboard

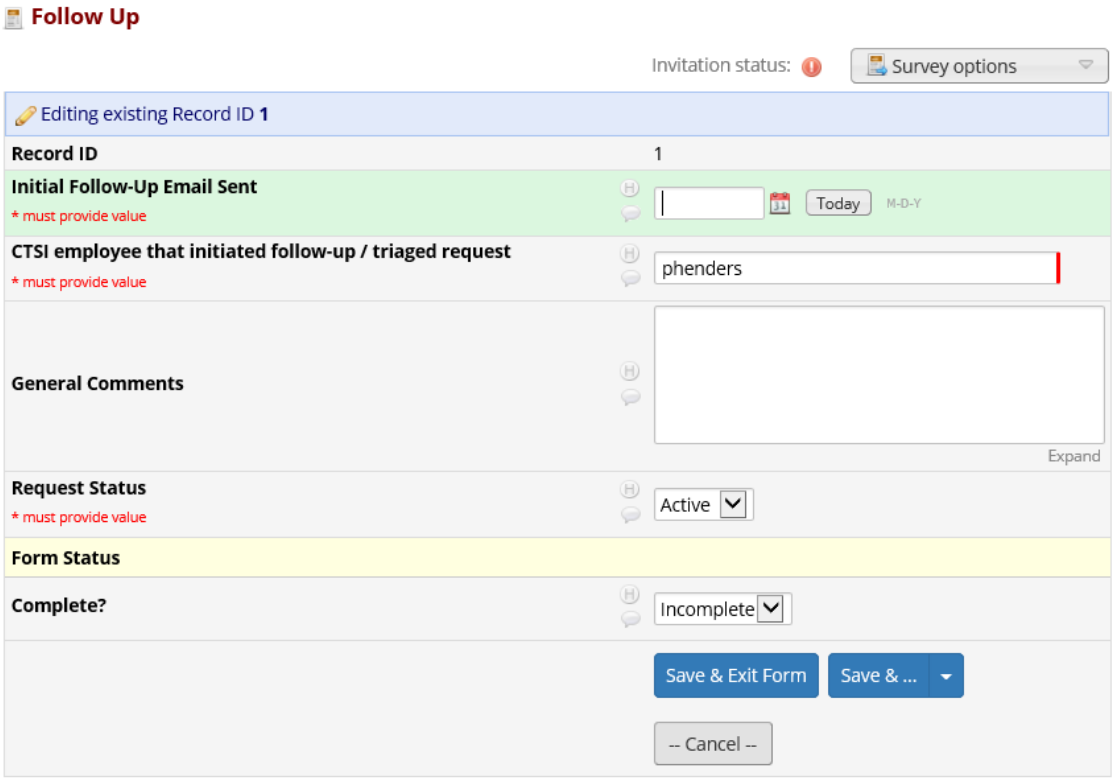




- Step 2
  - Locate the Record for which the next survey needs to be completed.

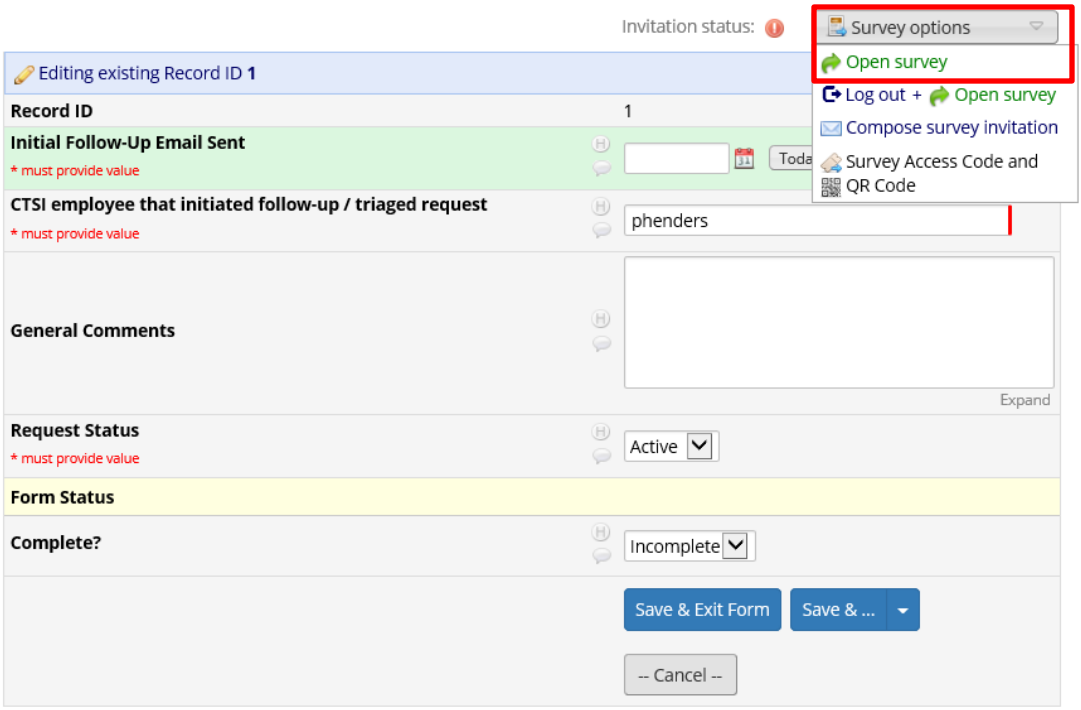
- Click on the grey bubble under the appropriate Survey header.
- This will open the Data Entry Form for that record's survey.

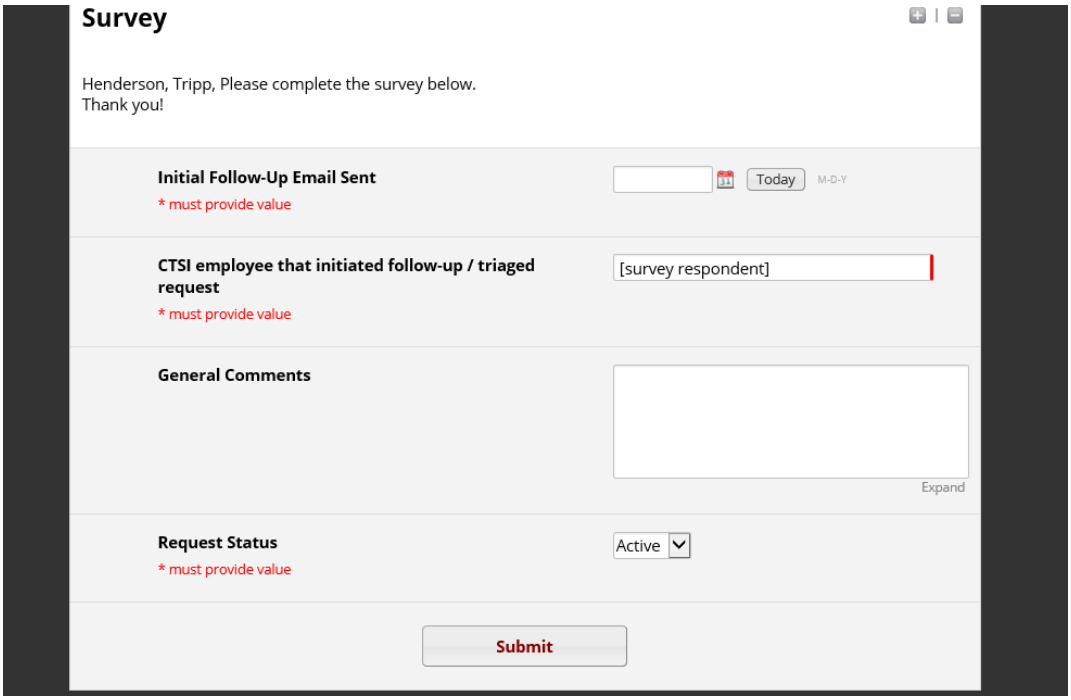




- Step 3
  - Once in the Data Entry view, click on the "Survey Options" dropdown and then select "Open Survey."
  - This will open the form in the Survey view where the participant may enter and submit their information.

Follow Up


Invitation status:
Survey options
Open survey
Log out + Open survey
Compose survey invitation
Survey Access Code and QR Code
Editing existing Record ID 1
Record ID
1
Initial Follow-Up Email Sent
* must provide value
Toda
CTSI employee that initiated follow-up / triaged request
* must provide value
phenders
General Comments
Expand
Request Status
* must provide value
Active
Form Status
Complete?
Incomplete
Save & Exit Form
Save & ...
-- Cancel --


Survey
Henderson, Tripp, Please complete the survey below.
Thank you!
Initial Follow-Up Email Sent
* must provide value
Today
M-D-Y
CTSI employee that initiated follow-up / triaged request
* must provide value
[survey respondent]
General Comments
Expand
Request Status
* must provide value
Active
Submit