

# Using REDCap Mobile: Practical Suggestions for Remote Data Collection



CAPS Method Core  
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# Aims for the session:

- Understand REDCap interface
- Getting your project onto a tablet
- Navigating the tablet
- Sending data
- Editing your project
- Error messages
- Technology recommendations
- Additional features (time permitting)
  - Making mobile friendly instruments
  - Repeating instruments and longitudinal studies



Adolescent Shamba Maisha Team happy after learning REDCap Mobile

# Getting started on the interface

Takes you to the main page

Most used parts of interface

Review of data already collected; manually enter data

Scheduling, data downloads, data quality checks and other data tools, and most importantly, all of the Mobile App features

The screenshot displays the REDCap web interface for a user logged in as 'Isheira'. The interface is divided into a left-hand navigation menu and a main content area. The navigation menu includes sections for 'Project Home and Design', 'Data Collection', 'Applications', and 'Help & Information'. The 'Applications' section is expanded, showing various tools like 'Alerts & Notifications', 'Calendar', 'Data Exports, Reports, and Stats', 'Data Import Tool', 'Data Comparison Tool', 'Logging', 'Field Comment Log', 'File Repository', 'User Rights and DAGs', 'Data Quality', 'REDCap Mobile App' (which is circled in red), and 'External Modules'. The main content area shows the 'Test' page for a project in 'Development' status. It includes tabs for 'Project Home', 'Project Setup', 'Other Functionality', and 'Project Revision History'. The 'Project Setup' tab is active, displaying a progress bar for 'Completed steps 1 of 8'. The main content area is divided into several sections: 'Main project settings' (with options to 'Disable' or 'Enable' surveys and longitudinal data collection), 'Design your data collection instruments & enable your surveys' (with a 'Not started' status and links to 'Online Designer' and 'Data Dictionary'), 'Define your events and designate instruments for them' (with an 'In progress' status and links to 'Define My Events' and 'Designate Instruments for My Events'), 'Enable optional modules and customizations' (with options to 'Enable' or 'Disable' various modules like 'Repeatable instruments', 'Auto-numbering for records', 'Scheduling module', 'Randomization module', etc.), and 'Set up project bookmarks (optional)'.

# Getting started on the interface

The screenshot displays the REDCap interface for a project. The left sidebar contains navigation links: 'My Projects', 'REDCap Messenger', 'Project Home and Design' (with sub-links for Project Home, Project Setup, Designer, Dictionary, and Codebook), 'Data Collection' (with sub-links for Survey Distribution Tools, Record Status Dashboard, and Add/Edit Records), 'Applications' (with sub-links for Alerts & Notifications, Calendar, Data Exports, Reports, and Stats, Data Import Tool, Data Comparison Tool, Logging, Field Comment Log, File Repository, User Rights and DAGs, Data Quality, REDCap Mobile App, and External Modules), and 'Help & Information' (with sub-links for Help & FAQ, Video Tutorials, and Suggest a New Feature). The main content area is titled 'Test' and shows the project status as 'Development' with 'Completed steps 1 of 8'. The 'Main project settings' section includes options to 'Use surveys in this project?' and 'Use longitudinal data collection with defined events?'. The 'Design your data collection instruments & enable your surveys' section provides links to the 'Online Designer' and 'Data Dictionary'. The 'Define your events and designate instruments for them' section offers links to 'Define My Events' and 'Designate Instruments for My Events'. The 'Enable optional modules and customizations' section lists various options like 'Repeatable instruments', 'Auto-numbering for records', 'Scheduling module', 'Randomization module', 'Designate an email field', and 'Twilio SMS and Voice Call services'. The 'User Rights and Permissions' section provides links to 'User Rights' and 'Data Access Groups'.

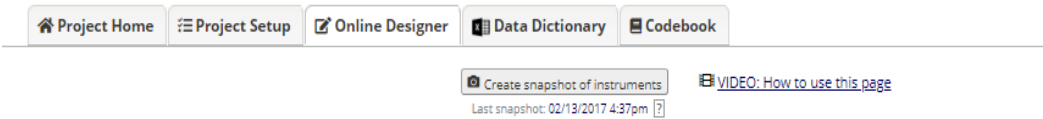
Some quick minor settings that you may select such as repeating instruments or a longitudinal customization (will discuss later)

Where you'll spend a lot of time...setting up the instrument!

Optional customizations, such as randomization or longitudinal "add-ons"

Add team members and manage their access levels

# Making your instruments mobile friendly



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:		Add new instrument:	
		<a href="#">Survey Queue</a> <a href="#">Survey Login</a>		<a href="#">Create</a> a new instrument from scratch	
		<a href="#">Survey Notifications</a>		<a href="#">Import</a> a new instrument from the official <a href="#">REDCap Shared Library</a> ?	
		<a href="#">Upload or download Auto Invitations</a>		<a href="#">Upload</a> instrument ZIP file from another project/user or <a href="#">external libraries</a> ?	
Instrument name		Fields	View PDF	Enabled as survey	Instrument actions
Survey		428	<a href="#">PDF</a>		<a href="#">Choose action</a>

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. Below you have the options to modify an existing instrument, delete an instrument, create a new instrument, download an instrument as a PDF document, or reorder your instruments. However, whether in Draft Mode or not, you are allowed to download the PDF or modify survey settings for any instruments below.

Data Collection Instruments					
		Survey options:		Add new instrument:	
		<a href="#">Survey Queue</a> <a href="#">Survey Login</a>		<a href="#">Create</a> a new instrument from scratch	
		<a href="#">Survey Notifications</a>		<a href="#">Import</a> a new instrument from the official <a href="#">REDCap Shared Library</a> ?	
		<a href="#">Upload or download Auto Invitations</a>		<a href="#">Upload</a> instrument ZIP file from another project/user or <a href="#">external libraries</a> ?	
Instrument name		Fields	View PDF	Enabled as survey	Instrument actions
A_Anthropometry		23	<a href="#">PDF</a>		<a href="#">Choose action</a>
B_Sociodemographics_Part 1: soc dem		23	<a href="#">PDF</a>		<a href="#">Choose action</a>
B Sociodemographics Part 2 Education		104	<a href="#">PDF</a>		<a href="#">Choose action</a>
B Sociodemographics_Part 3: expenses		41	<a href="#">PDF</a>		<a href="#">Choose action</a>
C_Food security		11	<a href="#">PDF</a>		<a href="#">Choose action</a>
D_Food Frequency		60	<a href="#">PDF</a>		<a href="#">Choose action</a>
E_Functional Support		10	<a href="#">PDF</a>		<a href="#">Choose action</a>
F_Child and Youth Resilience Measure		14	<a href="#">PDF</a>		<a href="#">Choose action</a>
G_Rosenberg Self-Esteem Scale		13	<a href="#">PDF</a>		<a href="#">Choose action</a>
H_Alcohol Use		8	<a href="#">PDF</a>		<a href="#">Choose action</a>
I_Generalized Anxiety Disorder 7 Item (GAD7) Scale Score		11	<a href="#">PDF</a>		<a href="#">Choose action</a>
J_Mental Health / Depression		17	<a href="#">PDF</a>		<a href="#">Choose action</a>
K_General Health (SF-36)		38	<a href="#">PDF</a>		<a href="#">Choose action</a>
M_Caregiver-Child Conflict Adolescent Girl		10	<a href="#">PDF</a>		<a href="#">Choose action</a>
N_Intimate Partner Violence		9	<a href="#">PDF</a>		<a href="#">Choose action</a>
O Sexual Behavior_Interviewer admin part 1		56	<a href="#">PDF</a>		<a href="#">Choose action</a>
O Sexual Behavior_Interview admin Part 2		32	<a href="#">PDF</a>		<a href="#">Choose action</a>
O Sexual Behavior_Interviewer admin part 3		50	<a href="#">PDF</a>		<a href="#">Choose action</a>

In online data collections / surveys, you can put everything in one instrument with page breaks to split up long sections of questions for the participant.

For the mobile app, there are no page break functionalities on the tablet/remote device. This means where you might want a true “break,” you should use separate forms.

# Making your questions mobile friendly pt 1

## Choosing your variable type

**Add New Field**

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: ---- Select a Type of Field ----

- Select a Type of Field ----
- Text Box (Short Text, Number, Date/Time, ...)
- Notes Box (Paragraph Text)
- Calculated Field
- Multiple Choice - Drop-down List (Single Answer)
- Multiple Choice - Radio Buttons (Single Answer)
- Checkboxes (Multiple Answers)
- Yes - No
- True - False
- Signature (draw signature with mouse or finger)
- File Upload (for users to upload files)
- Slider / Visual Analog Scale
- Descriptive Text (with optional Image/Video/Audio/File Attachment)
- Begin New Section (with optional text)

I make a notes box for every instrument for the data collectors to communicate with me.

Calculated fields are useful for saving time on variable creation in analysis phase (ex: making BMI) and for data checks (i.e. anthropometry)

Radio > Drop down for app users

Doesn't work with the mobile app

# Making your questions mobile friendly pt 2

**Edit Field**

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

**Field Type:** Multiple Choice - Radio Buttons (Single Answer)

**Field Label:** ☐ Use the Rich Text Editor

1. Did you worry that you would not have enough food?

Dholuo: Bende ni bedo gi paro ni ok ibi bedo gi chiemo moromo?

Kiswahili: Je, ulikuwa na wasi wasi kuwa hautakuwa na chakula cha kutosha?

**Choices (one choice per line)** [Copy existing choices](#)

1, Never  
2, Rarely (1-2 times)  
3, Sometimes (3-9 times)  
4, Often (10+ times)

[How do I manually code the choices?](#)

**Variable Name** (utilized in logic, calcs, and exports)  
foodsecurity\_1 ☐ Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#)

**Required?\*** ☐ No ☒ Yes  
\* Prompt if field is blank

**Identifier?** ☒ No ☐ Yes  
Does the field contain identifying information (e.g., name, SSN, address)?

**Custom Alignment** Right / Vertical (RV)  
Align the position of the field on the page

**Field Note** (optional)  
Small reminder text displayed underneath field

**Action Tags / Field Annotation** (optional)

Learn about [@ Action Tags](#) or [using Field Annotation](#)

**Save** **Cancel**

Number instruments with no skip patterns to help find missing data!

Mark all as required. REDCap Mobile will alert the data collector to a missing question.

You can allow people to have de-identified databases, so you must mark the identifiers for REDCap to exclude.

I use this as a clarifier or reminder for the data collectors. For example, enter the date in XX format; enter 99 if missing, etc.

You can use HTML code to color code the responses by language:  
0, No<font color="green">/Oyoo</font><font color="blue">/La</font>  
1, Yes<font color="green">/Ee</font><font color="blue">/Ndiyo</font>

# Getting REDCap Mobile set up on your device pt 1

## Two steps online:

1. Go to user rights and for the appropriate users, select edit rights. Make sure the “Allows user to collect data offline” is selected

Select user rights

REDcap

University of California, San Francisco

Logged in as Isheira | Log out

My Projects

REDCap Messenger

Project Home and Design

Project Home · Project Setup · Designer · Dictionary · Codebook

Project status: Development

Data Collection

Survey Distribution Tools

Record Status Dashboard

Add / Edit Records

Applications

Alerts & Notifications

Calendar

Data Exports, Reports, and Stats

Data Import Tool

Data Comparison Tool

Logging

Field Comment Log

File Repository

User Rights and DAGs

Data Quality

REDCap Mobile App

External Modules

Help & Information

Help & FAQ

Video Tutorials

Suggest a New Feature

Contact REDCap administrator

Test

This page may be used for granting users access to this project. You may create roles to which you may assign users (optional). Use privileges because they allow you to easily add many users individually. Roles are also a nice way to categorize users and roles, and the table at the bottom allows you to make a glimpse of their user privileges.

Add new users: Give them custom user rights or assign to a role

Add new user

OR

Assign new user

Create new roles: Add new user roles to which users may be assigned

Enter new role name

Create role

Role name (click role name to edit role)

Username or users assigned (click username to edit or assign)

Isheira (Lila Sheira)

Editing existing user "Isheira"

You may set the rights for the user below by checking the boxes next to the application tools to which you wish to grant them access. You may also grant them or deny them access to individual data collection instruments, if so desired. To save your selections, click the "Save Changes" button at the bottom of the page.

Editing existing user "Isheira"

Basic Rights

Expiration Date (if applicable) (M/D/Y)

Highest level privileges:

Project Design and Setup

User Rights

Data Access Groups

Privileges for data exports (including PDFs and API exports), reports, and stats:

Data Exports

De-identified means that all free-form text fields will be removed, as well as any date/time fields and identifier fields.

Add/Edit/Organize Reports

Stats & Charts

Other privileges:

Survey Distribution Tools

Calendar

Data Import Tool

Data Comparison Tool

Logging

File Repository

Data Quality

API

Settings pertaining to the REDcap Mobile App:

REDcap Mobile App

Allow user to download data for all records to the app?

Save Changes

Cancel

Remove user

Data Entry Rights

NOTE: The data entry rights "only" pertain to a user's ability to view or edit data on a web page in REDcap (e.g., data entry forms, reports). It has no effect on data imports or data exports.

My First Instrument

Generalized Anxiety Disorder 7 Item (GAD7) Scale Score

External Modules: Configuration Permissions

Privileges may be defined regarding whether the user can set or modify the configuration of an External Module that has been enabled on this project. Below are the currently enabled modules. NOTE: Only administrators may modify the module configuration permissions here.

Modify Contact Admin Button\*\*

\*\*Module does not have project-level configuration options

Make sure “allows user to collect data offline” selected

Decide if user should have access to ALL data

# Getting REDCap Mobile set up on your device pt 2

## Two steps online:

2. Go to REDCap Mobile App and then make sure you have requested an API token.

Getting the token is not immediate and can take a few hours if you are working in a far away time zone—go on and do it in the early stages of setting up your project.

**REDCap**  
Logged in as Isheira | Log out  
My Projects  
REDCap Messenger  
Project Home and Design  
Project Home · Project Setup  
Designer · Dictionary · Codebook  
Project status: Development  
Data Collection  
Survey Distribution Tools  
Record Status Dashboard  
Add / Edit Records  
Show data collection instruments  
Applications  
Alerts & Notifications  
Calendar  
Data Exports, Reports, and Stats  
Data Import Tool  
Data Comparison Tool  
Logging  
Field Comment Log  
File Repository  
User Rights and DAGs  
Data Quality  
REDCap Mobile App  
External Modules  
Help & Information  
Help & FAQ  
Video Tutorials  
Suggest a New Feature  
Contact REDCap administrator

UCSF University of California, San Francisco | About UCSF | Search UCSF | UCSF Medical Center  
University of California San Francisco  
The ITS Academic Research Systems

**Test**  
**REDCap Mobile App**  
Set Up Project | Dashboard | All App Activity | App Data Dumps | App Logs  
VIDEO: Mobile App Overview | VIDEO: Mobile App Project Setup | VIDEO: Installing the Mobile App

**What is the REDCap Mobile App?**  
The REDCap Mobile App is an app that can be installed on an Android or iOS tablet or mobile device so that data may then be collected in an offline fashion on that device. At some point later on, it may then be synced back to this project on the REDCap server. The app is most useful when data collection will be performed where there is no Internet service (e.g., no WiFi or cellular service) or where there is unreliable Internet service.

Once a user in this project is given 'REDCap Mobile App' privileges, they can navigate to the mobile app page on the left-hand menu and use it to set up this project inside the mobile app on their device. Once the mobile project is set up on the device, the user can collect data (which is stored locally on the device), and then at some point, sync that data back to this project on the REDCap server.

**STEP 1: Download the app on your device**  
You must first download the REDCap Mobile App on your iOS, Android, or BlueStacks (Android emulator) device by clicking the appropriate icon below, or alternatively, if you are not currently on a mobile device, you can search the App Store or Google Play Store for 'REDCap' on your mobile device to find the app there to download. The app is available for the following platforms: iOS 6.0 or later (iPhone 4 and up, iPad 2 and up) and Android 4.3 or later (phones and tablets).

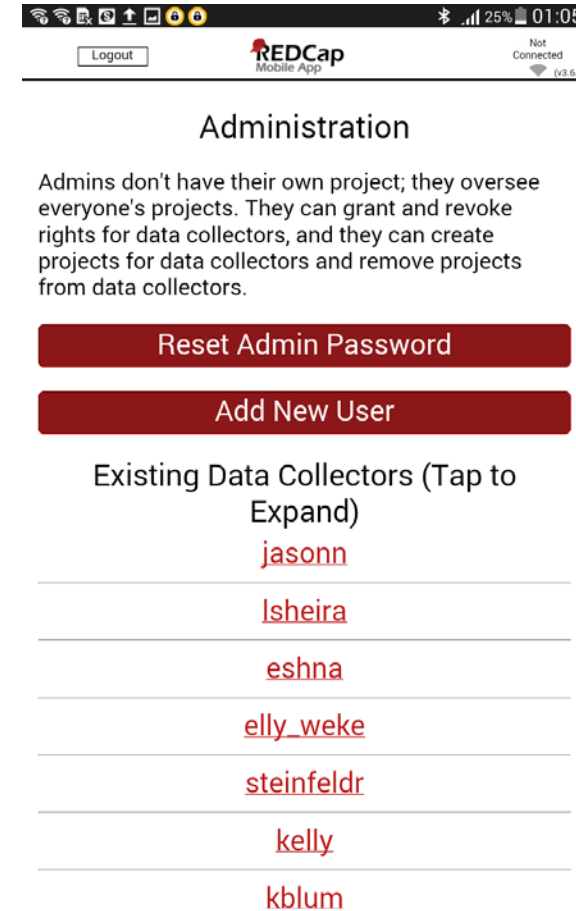
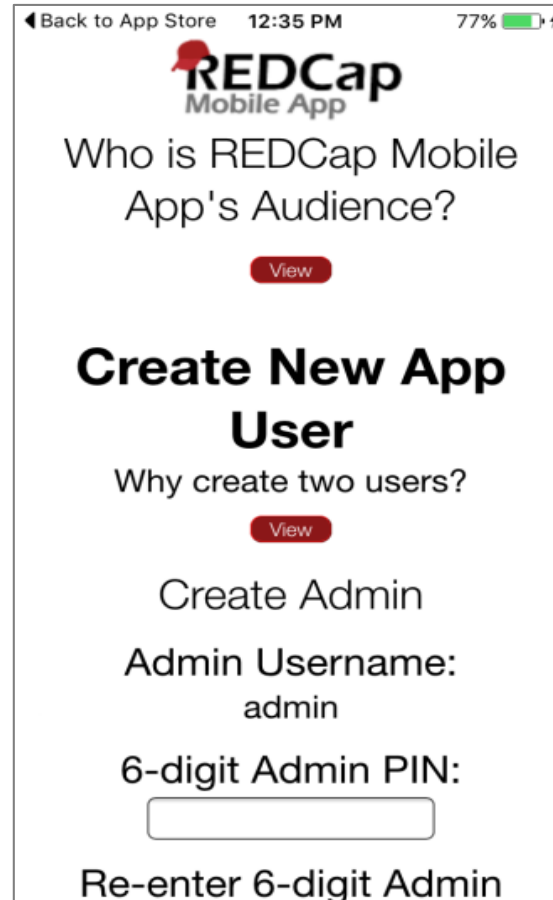
Download on the App Store  
GET IT ON Google play  
Email me links to download the app

**NOTICE:** In order to set up this project in the REDCap mobile app, you must first request an API token.  
Request API token Request pending

# Getting REDCap Mobile set up on your device pt 3

## Three steps on your tablet:

1. Download REDCap from the googleplay or App store (free)
2. Create an admin (only you)



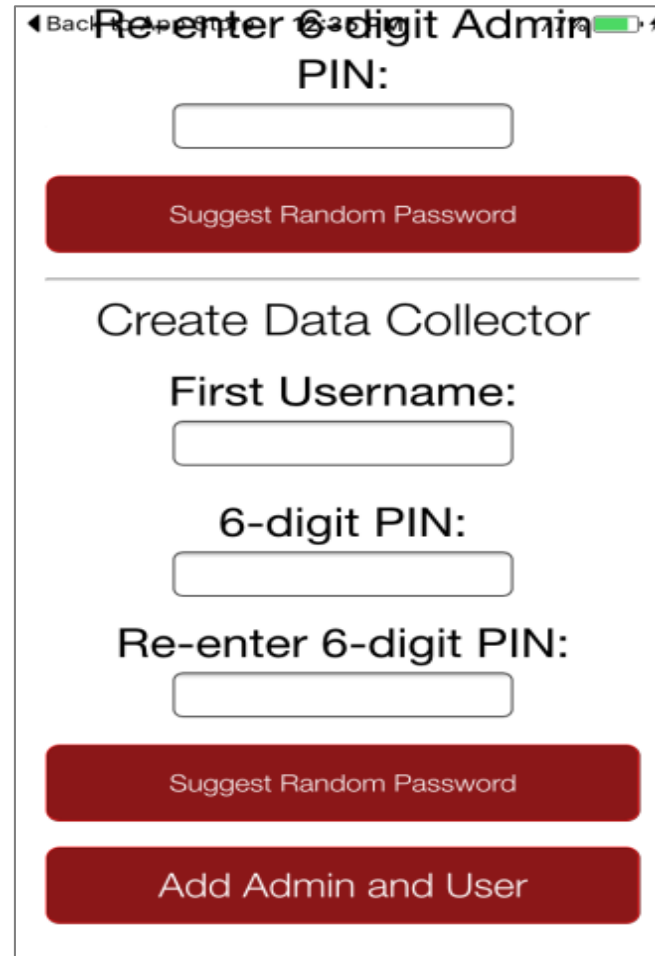
This is the  
only  
interface on  
the admin  
log-in

# Getting REDCap Mobile set up on your device pt 4

## Three steps on your tablet:

1. Download REDCap from the googleplay or App store (free)
2. Create an admin (only you)
3. Create data collectors, i.e., app users IF they are not on the REDCap online system on each device.

❖ In my experience, we have had one device per data collector, so set up one log-in per tablet



The screenshot shows the 'Create Data Collector' screen in the REDCap Mobile app. At the top, it says 'Re-enter 6-digit Admin PIN:' with a text input field below it. Below this is a red button labeled 'Suggest Random Password'. A horizontal line separates this section from the 'Create Data Collector' section. Under 'Create Data Collector', there is a label 'First Username:' followed by a text input field. Below that is a label '6-digit PIN:' followed by a text input field. Then, another label 'Re-enter 6-digit PIN:' followed by a text input field. At the bottom, there are two red buttons: 'Suggest Random Password' and 'Add Admin and User'.

Image borrowed from Vanderbilt University's "Using REDCAP Mobile App" guide, 2016

## Piece of advice:

Document all the usernames and pins in one document for the study coordinators.

People will forget their log ins at first!

# To add a new project: (should only happen once per project)

**Initialize a Project**

**Scan QR Code**

To initialize a REDCap project in this app, first log in to your REDCap server as you normally would in your web browser; then go to the desired project in your My Projects list; and click the "Mobile App" link on the left-hand menu of the project. (If you do not see that link on the menu, then you probably have not been given "App" user rights yet in that project.) On that page, click the "Initialize Project" button to display the QR code, after which you can click the "Scan QR Code" button below to scan that QR code in order to initialize the project in the mobile app.

**Scan QR Code**

**The Alternative Method**

If you have trouble scanning the QR code, then click the "Can't get the QR code to work?" link on the page in your REDCap project. This will provide you with an initialization code that you can then enter into the app. Be sure to move your mouse arrow off of the QR code, or the scan will not work.

Code:

**Submit Code**

**You *\*must\** be  
connected to a semi-  
decent internet  
connection to download  
data for a new project.**

Two ways to get a new project:

1. Scan the code
2. Enter a long code (so try #1 first)

***\*Both options are time sensitive\****

# On the REDCap online platform

After you have had someone scan, you have the opportunity to label the device.

This can be helpful for tracking refreshing, data syncs, cutting a tablet off from sending data, etc among app users

REDCap Mobile App

Set Up Project

Dashboard

All App Activity

App Data Dumps

App Logs

Displayed below are the devices utilizing the REDCap Mobile App for this project and also a log of important activities - namely, the most recent project download and the five (5) most recent synchronizations. You may provide each device with a nickname to more easily identify the device in the activity below and other Mobile App pages. You may also 'block' an individual device so that it may no longer sync data, download data, or even have the project be accessible within the Mobile App on the device. For instance, you might want to block the device if it were stolen. This helps protect your data from being corrupted or from falling into the wrong hands.

Devices Used By The Mobile App

Device UUID	REDCap Nickname for Device	Block Device?
d568566c538cbf9a	<div>Lila's tablet</div> <div>Save Nickname</div>	<div>Unblocked</div> <div>Block Device</div>

Recent Downloads and Uploads (All Devices)

App Event	Time	Effect	Device
Last Refresh	10/02/2019 7:30am	Project Download, but No Data Downloaded	d568566c538cbf9a

REDCap Mobile App

Set Up Project

Dashboard

All App Activity

App Data Dumps

App Logs

Displayed below is a log of all mobile app related activity for all devices. For example, setting up a project in the mobile app or downloading data from REDCap to the app.

Mobile App Dashboard of User Activity

Time / Date	Username	Event	Device
10/02/2019 7:30am	Isheira	Set up project in app	d568566c538cbf9a

# Logging in to the mobile app

Access Requested

**REDCap**  
Mobile App

Log In

Username:

PIN:

**Log In**

[Trouble logging in?](#)

[www.projectredcap.org](http://www.projectredcap.org)

REDCap Software (v3.6.1)  
© 2019 Vanderbilt University

Looks the same if WiFi or not

Logout **REDCap** Mobile App Connected **Isheira** (v3.6.1)

**My Projects**

**Set Up Mobile Project**

**Change My Password**

About the REDCap Mobile App

Updates History

Frequently Asked Questions

Translate the Interface (Translate)

Report a Bug Purpose

Wifi connection

Logout **REDCap** Mobile App Not Connected **Isheira** (v3.6.1)

**My Projects**

Set Up Mobile Project

**Change My Password**

About the REDCap Mobile App

Updates History

Frequently Asked Questions

Translate the Interface (Translate)

Report a Bug Purpose

No Wifi connection

# Inside your device—My Projects



## My Projects

### Adolescent Shamba Maisha--Lab form

Last Download: 2018-11-15 09:35 PM  
0 Records (0 new; 0 modified)

### Adolescent SM Sexual Behavior-Swahili

Last Download: 2018-11-17 12:54 AM  
0 Records (0 new; 0 modified)

### Adolescent SM Sexual Behavior-Dholuo

Last Download: 2018-11-17 12:54 AM  
0 Records (0 new; 0 modified)

### Adolescent SM Sexual Behavior-English

Last Download: 2018-11-17 12:55 AM  
1 Records (1 new; 0 modified)

### Adolescent Shamba Maisha-- ADOLESCENT SURVEY

Last Download: 2018-11-18 04:59 PM  
1 Records (1 new; 0 modified)

### Adolescent Shamba Maisha-- CAREGIVER SURVEY

Last Download: 2018-11-27 08:50 AM  
0 Records (0 new; 0 modified)

Always looks the same



## Exit Interview - Control Participants

Last Download: 2019-01-10 03:58 PM  
2 Records (Some new; 0 modified)

Collect Data

Send Data to Server

Rename Records

Sync Archive

Refresh Setup & Data

Project Admin

Visit REDCap Website

Send Emergency Data Dump

Send Project Logs

Wifi connection



## Exit Interview - Control Participants

Last Download: 2019-01-10 03:58 PM  
2 Records (Some new; 0 modified)

Collect Data

No Connection to Send Data

Rename Records

Sync Archive

Refresh Setup & Data

Project Admin

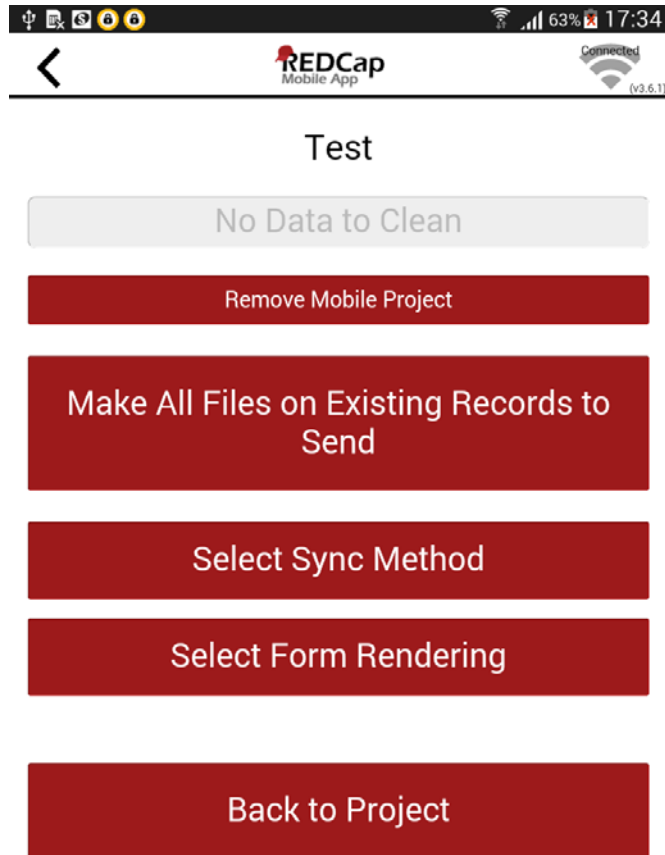
No Data to Dump

No Logs to Send

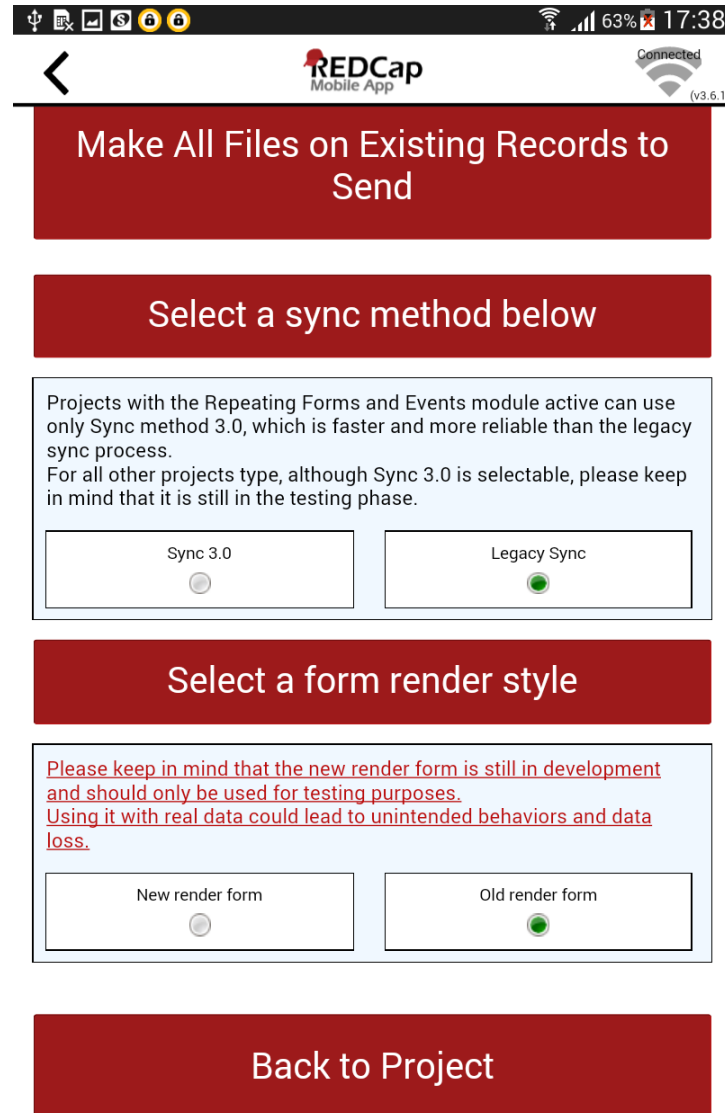
Manage Logs

No WiFi

# Project settings on the tablet



This is what it looks like under project admin

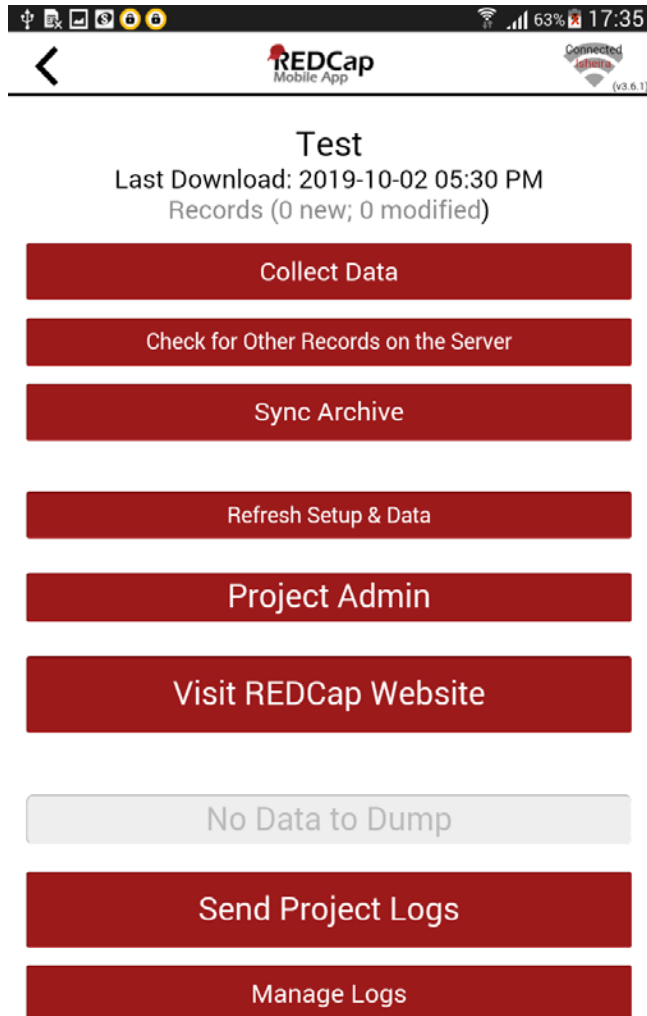


Depending on your project type, select the correct sync method. Only repeating forms and longitudinal studies should use sync 3.0

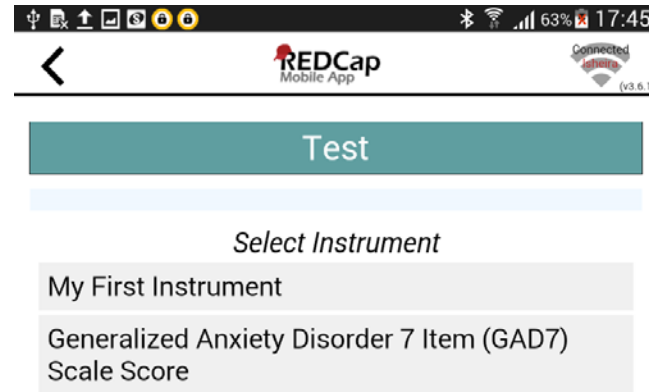
Use the old render form as recommended as the new one is still in development

# Collecting data for a project: 3 simple steps

## 1: Select “Collect data”

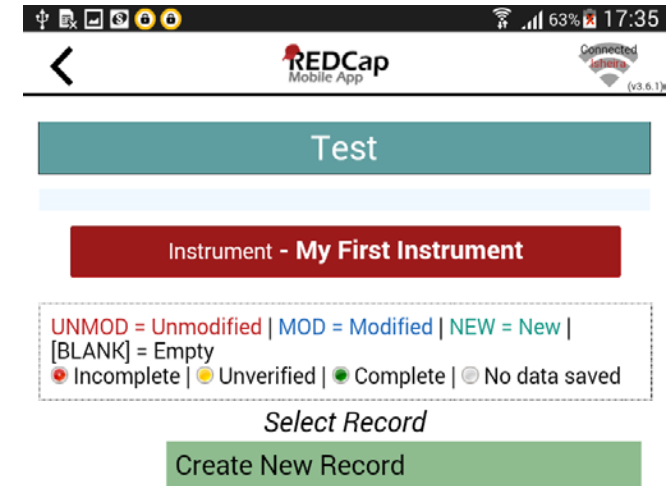


## 2: Select instrument



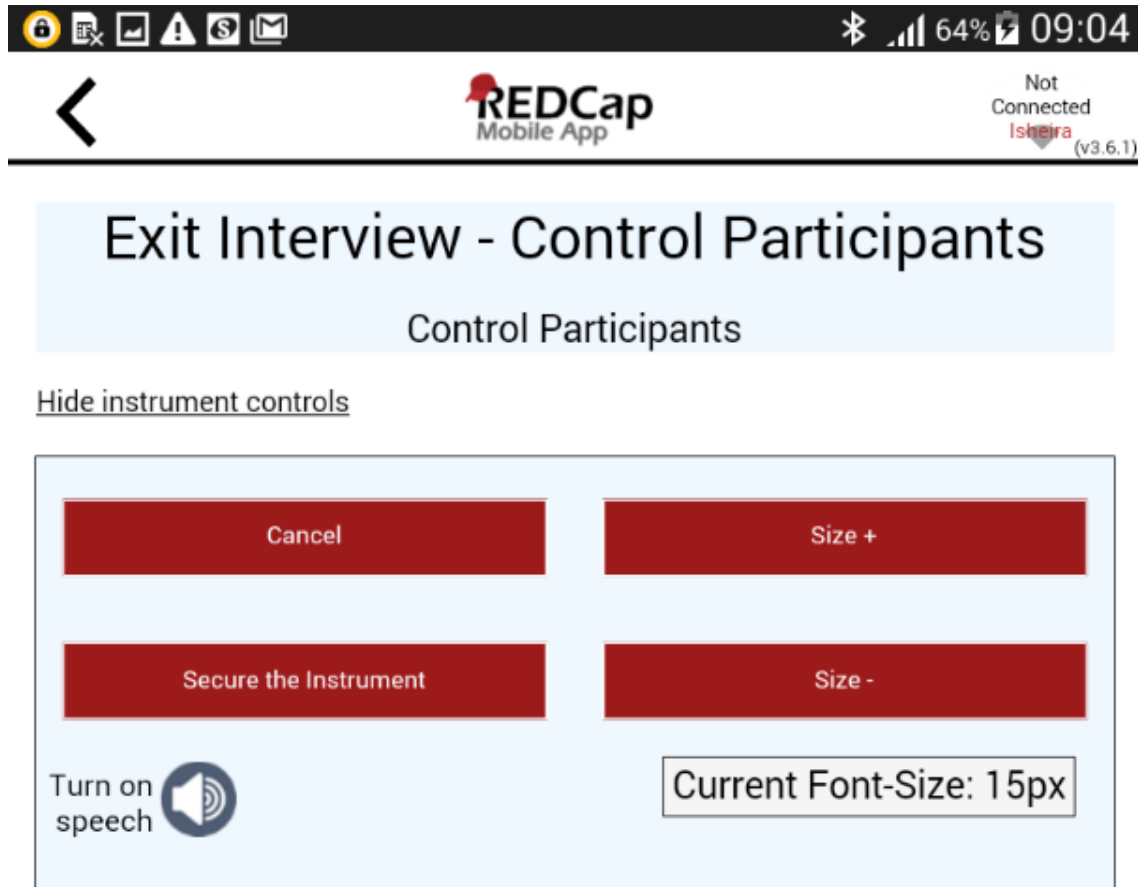
To make sure they must start at the “top”, under project setup, select “enable as a survey” and under options, select “(Optional) Auto-continue to next survey”

## 3: Select “Create New Record”



Once here, select create new record and you are ready to collecting data!

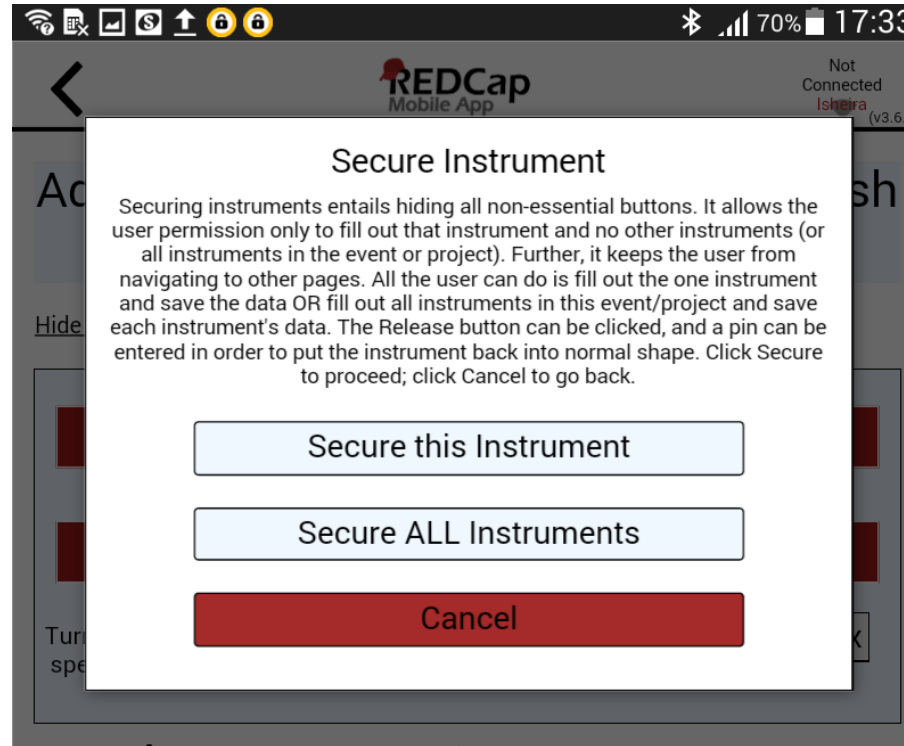
# Screen Controls



- You will only likely need to adjust the font.
- Secure the instrument means you have to enter a password to navigate within the app.
- To exit this, tap “Hide instrument controls”

# Securing the instrument(s)

A unique feature that allows you to essentially lock the screen on the instrument. When might you want to use this feature?



This is the alert that will come up. **Secure this instrument** means they can only stay on that page. **Secure ALL Instruments** means they can move around in a project.

A screenshot of the REDCap Mobile App interface showing the "Adolescent SM Sexual Behavior-English" instrument. The header includes the REDCap logo, "Mobile App", "Not Connected", and the version "v3.6.1". The status bar at the top shows signal strength, 70% battery, and the time 17:34. The instrument title "Adolescent SM Sexual Behavior-English" is displayed in a light blue box, followed by "Sexual Behavior Part 1a English" in a white box. Below this is a red banner with the text "Instrument Locked". The "Record ID" is "1". A red text box contains the instruction: "Now, in the final section, I would like to ask you questions about sexual behavior and reproductive health in order to gain a better understanding of important life issues. The following questions are about testing for HIV." Below this is a question: "Have you ever been tested to see if you have HIV or AIDS?" with three radio button options: "Yes", "No" (selected), and "I don't know". A red asterisk and the text "\* must provide value" are below the question. A "reset" button is in the bottom right. At the bottom of the screen is a large dark red button labeled "Save Record". Below that is another dark red button labeled "Release the Instrument".

This is what the screen looks like for Secure this instrument. Notice you cannot move forward. You must enter your pin to "release" the instrument.

## Test

Generalized Anxiety Disorder 7 Item (GAD7) Scale Score

[Show instrument controls](#)

Record ID 1

Over the last 2 weeks, how often have you been bothered by the following problems?

	Not at all sure	Several days	Over half the days	Nearly every day	
1. Feeling nervous, anxious, or on edge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
2. Not being able to stop or control worrying	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
3. Worrying too much about different things	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
4. Trouble relaxing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
5. Being so restless that it's hard to sit still	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
6. Becoming easily annoyed or irritable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
7. Feeling afraid as if					



# Inside the instrument....

When changing a response after you have already selected one, try to remember to use the reset button.

This is **\*most\*** important for skip patterns and text response questions, so best to get into the habit for all question types.

# Branching (skip patterns)

- Let's say you have the following series of questions:
  - Have you ever been tested for HIV?
    - If YES: When was the last time you had an HIV test?
      - What was the result of this most recent HIV test?
    - IF NO: [auto-branching to the next section]

And then the participant changes their response....

The screenshot shows a survey interface with a dark grey background. At the top, there is a line of text in a non-Latin script: "Dholuo: Koro eokang' mogik, daher penji penjo ewi timbe mag terruok". Below this, a white dialog box with a black border is centered. The dialog box has the title "Erase field?" and the following text: "ERASE CURRENT VALUE OF THE FIELD 'sexbvr\_2' ? The current field for which you just entered data requires that the field named 'sexbvr\_2' be hidden from view. However, that field already has a value, so its value might need to be reset back to a blank value. Click OK to HIDE this field and ERASE its current value. Click CANCEL if you DO NOT wish to hide this field or erase its current value." Below the text are two buttons: a light blue button labeled "Ok" and a dark red button labeled "Cancel". In the bottom right corner of the survey interface, there is a dark red button labeled "reset".

You must first reset the answer. You will then get this error message not just once, but for **every** question linked...it can be annoying!!

# Bottom of the instrument page

Note any issues here, such as participant being distracted, falling asleep, or if there were inconsistent answers. Or any REDCap issues. Note anything that may help explain irregularities in the data.

Mark the form as complete once it is complete!!

Save the record! This is **\*VERY\*** important! It will also take you back to the main screen for the instrument.

This takes you to the next instrument in the order of your instruments

The screenshot shows the bottom section of a REDCap instrument page. At the top, there is a header with the text "edwecne 24 ma okaro mane ok mar Shamba Maisha?". Below this is a section titled "Kiswahili: Je umewahi kupata mafunzo ya kilimo kutoka kwa shirika lisilo la kiserikali au kutoka kwenye serikali katika miezi 24 iliyopita?" with a red asterisk and the text "\* must provide value". Below this is a text area labeled "Please provide notes here". Below the text area is a "Form Status" section with a label "Complete?" and a dropdown menu showing "Incomplete". Below the dropdown are four large red buttons with white text: "Save Record", "Save and Continue", "Save and go to Next Instrument", and "--Cancel--". Red arrows point from the instructions on the left to these UI elements: from the first instruction to the notes text area, from the second instruction to the "Complete?" label, from the third instruction to the "Save Record" button, and from the fourth instruction to the "Save and go to Next Instrument" button.

edwecne 24 ma okaro mane ok mar Shamba Maisha?

Kiswahili: Je umewahi kupata mafunzo ya kilimo kutoka kwa shirika lisilo la kiserikali au kutoka kwenye serikali katika miezi 24 iliyopita?  
\* must provide value

Please provide notes here

Form Status

Complete? Incomplete

Save Record

Save and Continue

Save and go to Next Instrument

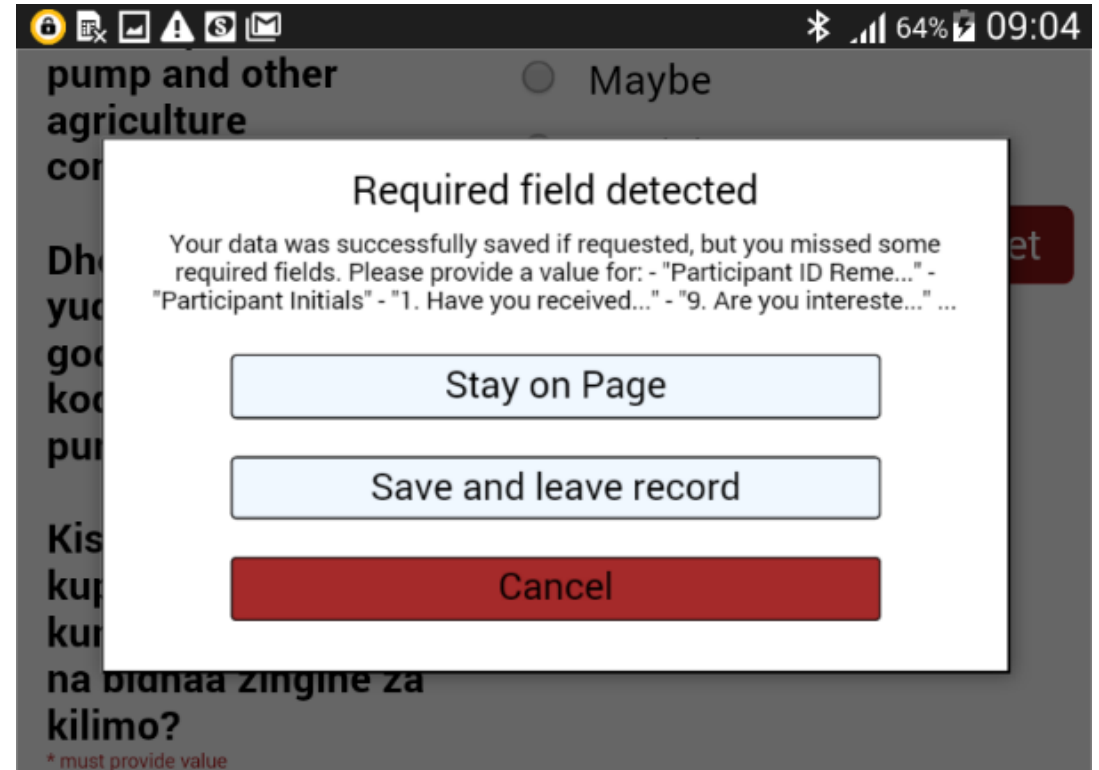
--Cancel--

# Most common error message-DO NOT IGNORE!!

This means the data collector missed a field on the form. If you read the top part carefully it will tell you the first few letters of the question to help you identify.

Hit “cancel”, go find the missing field, correct it, and try again until you don’t see this error!

This nice feature reduces missing data \*only\* if you mark questions as required



# Projects with multiple instruments

eduwecne 24 ma ukalo  
mane ok mar Shamba  
Maisha?

Kiswahili: Je umewahi  
kupata mafunzo ya  
kilimo kutoka kwa  
shirika lisilo la kiserikali  
au kutoka kwenye  
serikali katika miezi 24  
iliyopita?  
\* must provide value

Please provide notes  
here

Form Status

Complete? Incomplete

Save Record

Save and  
Continue


Save and go to  
Next Instrument

--Cancel--



Select save and go  
to next  
instrument.

This will take you  
to the next form  
in the instrument.



REDCap  
Mobile App

Exit Interview - Intervention  
participants\_split  
Financial literacy

[Show instrument controls](#)

Study ID 1

Next we will ask some questions about the financial literacy trainings led by Equity Bank

Dholuo: Maluwe wadhi penji penjo moko ewi tiegruok ewi yore mag omenda ma itimo kod bengi mar Equity

Kiswahili: Yanayofuata ni maswali kuhusu elimu ya kifedha iliyofanywa na Equity Bank

10. How many financial literacy trainings were you able to attend?

☐ 1. Both of trainings

☐ 2. One of the trainings

☐ 3. None of the trainings

Dholuo: Gin tiegruoge adi mag omenda mane idhie?

reset

Kiswahili: Je, uliweza kuhudhuria mikutano mingapi ya elimu yakifedha?  
\* must provide value

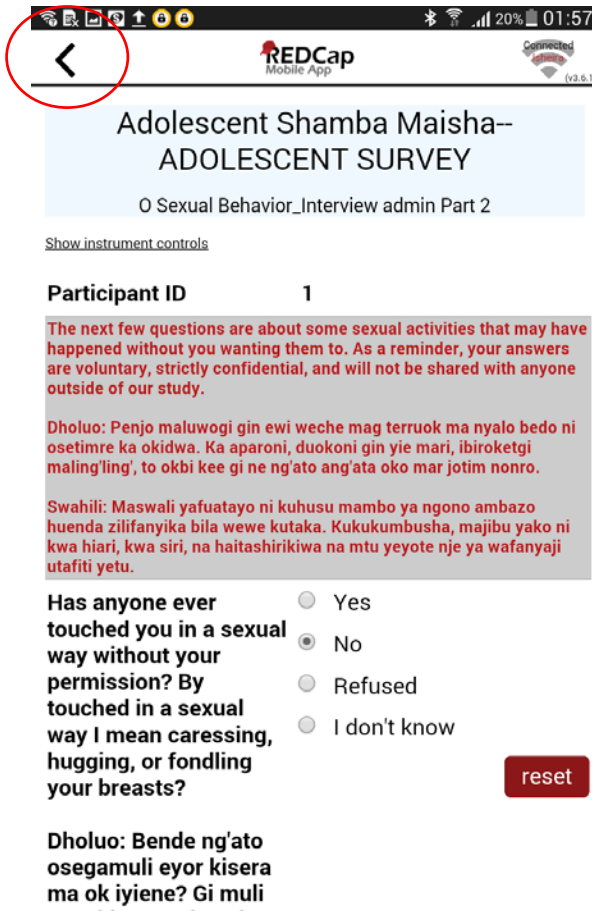
12. Please tell me to what degree you were able to apply the financial literacy training. Would you sav

☐ 1. Frequently applied

☐ 2. Sometimes applied

☐ 3. Rarely applied

# Editing data on the tablet



Adolescent Shamba Maisha--  
ADOLESCENT SURVEY

O Sexual Behavior\_Interview admin Part 2

Show instrument controls

Participant ID 1

The next few questions are about some sexual activities that may have happened without you wanting them to. As a reminder, your answers are voluntary, strictly confidential, and will not be shared with anyone outside of our study.

Dholuo: Penjo maluwogi gin ewi weche mag terruok ma nyalo bedo ni osetimre ka okidwa. Ka aparoni, duokoni gin yie mari, ibiroketgi maling'ling', to okbi kee gi ne ng'ato ang'ata oko mar jotim nonro.

Swahili: Maswali yafuatayo ni kuhusu mambo ya ngono ambazo huenda zilifanyika bila wewe kutaka. Kukukumbusha, majibu yako ni kwa hiari, kwa siri, na haitashirikiwa na mtu yeyote nje ya wafanyaji utafiti yetu.

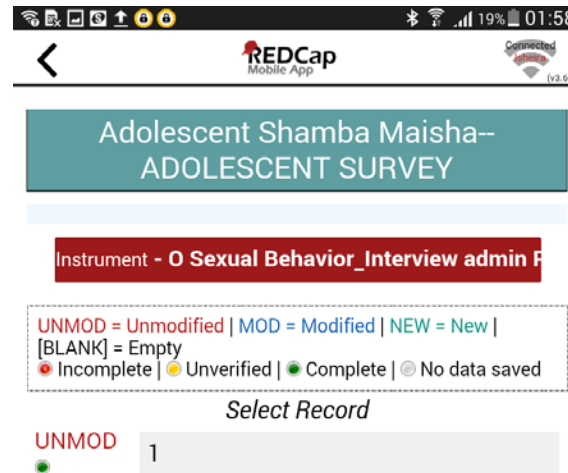
Has anyone ever touched you in a sexual way without your permission? By touched in a sexual way I mean caressing, hugging, or fondling your breasts?

☐ Yes  
☒ No  
☐ Refused  
☐ I don't know

reset

Dholuo: Bende ng'ato osegamuli eyor kisera ma ok iyiene? Gi muli

Save the record and tap the arrow at the top left



Adolescent Shamba Maisha--  
ADOLESCENT SURVEY

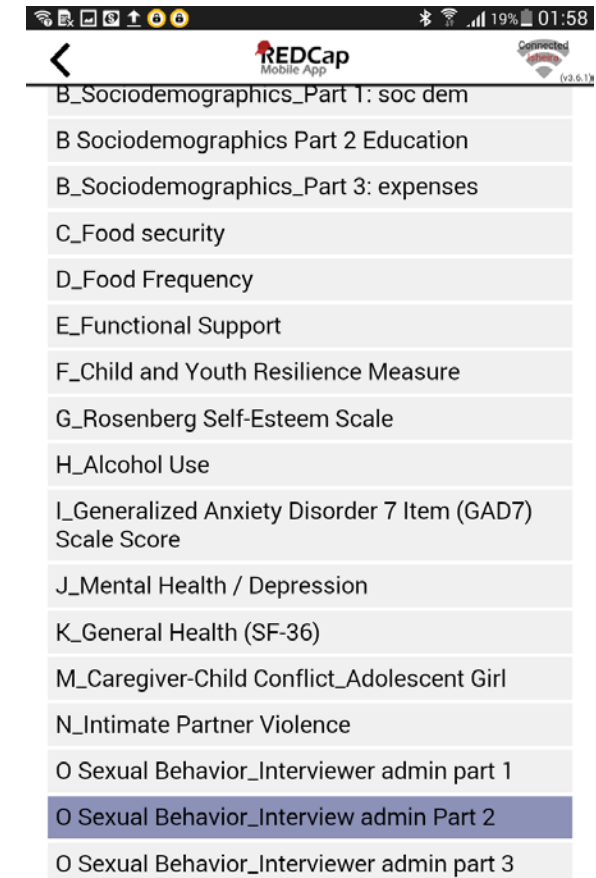
Instrument - O Sexual Behavior\_Interview admin Part 2

UNMOD = Unmodified | MOD = Modified | NEW = New |  
[BLANK] = Empty  
● Incomplete | ● Unverified | ● Complete | ● No data saved

Select Record

UNMOD 1

Tap the red instrument bar to go back to the list of instruments. You just have to remember the record number (most recent on bottom).



B\_Sociodemographics\_Part 1: soc dem

B Sociodemographics Part 2 Education

B\_Sociodemographics\_Part 3: expenses

C\_Food security

D\_Food Frequency

E\_Functional Support

F\_Child and Youth Resilience Measure

G\_Rosenberg Self-Esteem Scale

H\_Alcohol Use

I\_Generalized Anxiety Disorder 7 Item (GAD7) Scale Score

J\_Mental Health / Depression

K\_General Health (SF-36)

M\_Caregiver-Child Conflict\_Adolescent Girl

N\_Intimate Partner Violence

O Sexual Behavior\_Interviewer admin part 1

O Sexual Behavior\_Interview admin Part 2

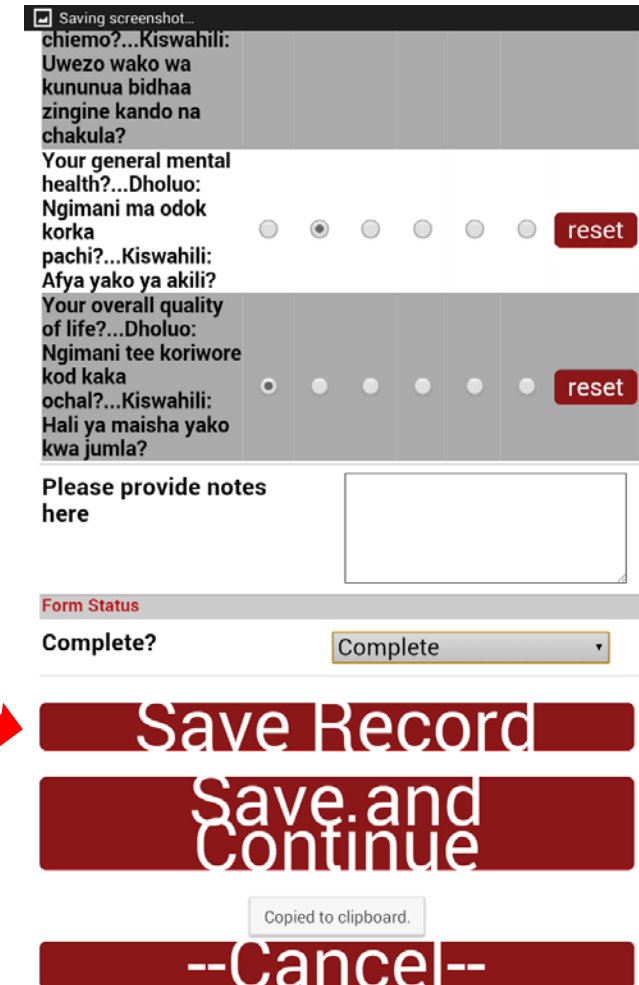
O Sexual Behavior\_Interviewer admin part 3

Select the form you want to edit and select it. Then select the record number. Make sure to use "reset"

# Finishing data collection, part 1

Keep filling out the forms until you reach the final form....you'll know you've reach it when it no longer says "Save and Go to Next Instrument".

Then you can just select save record, which will take you back to the instruments portal for that record



The screenshot shows a data collection form with the following elements:

- A status bar at the top left says "Saving screenshot..."
- Two Likert scale questions in Kiswahili and Dholuo with radio button options and a "reset" button.
- A text input field labeled "Please provide notes here".
- A "Form Status" section with a "Complete?" dropdown menu set to "Complete".
- A row of three large buttons: "Save Record", "Save and Continue", and "--Cancel--".
- A small "Copied to clipboard." notification above the "Cancel" button.

A red arrow points from the text "Then you can just select save record" to the "Save Record" button.

# Finishing data collection, part 2

Exit Interview - Control Participants

Instrument - **Control Participants**

UNMOD = Unmodified | MOD = Modified | NEW = New |  
[BLANK] = Empty  
● Incomplete | ● Unverified | ● Complete | ● No data saved

Select Record

	Create New Record
NEW ●	1
NEW ●	2
NEW ●	3

Notice the colors by the record numbers....red means not complete (i.e. skipped a required question) or it you didn't select "Complete".

This is instrument by instrument, not record by record.

# Longitudinal Studies part 1

Arm 1: Visit

+Add New Arm

Upload or download arms/events

Arm name: Visit

Rename Arm 1

	Event #	Days Offset	Offset Range Min / Max	Event Name	Custom Event Label (optional)	Unique event name (auto-generated)
	1	0	-0/+0	Baseline		baseline_arm_1
	2	21	-0/+0	6 Weeks follow up		6_weeks_follow_up_arm_1
	3	90	-0/+0	3 months follow up		3_months_follow_up_arm_1
	4	180	-0/+0	6 months follow up		6_months_follow_up_arm_1
Add new event		<input type="text"/> Days	<input type="text"/> - <input type="text"/> 0 + <input type="text"/> 0	<input type="text"/>	<input type="text"/>	
		<a href="#">Convert from other units</a>		Descriptive name for this event		Custom Event Label (optional) Example: [visit_date], [weight] kg

Step 1: Define your events (i.e. data collection time points) under **Project Setup** → **Define your events and designate instruments for them** → **Define my events**

Project Setup

Define My Events

Designate Instruments for My Events

Since you have defined multiple events on the [Define My Events](#) page, you may now select which data collection instruments that you wish to utilize for each event by using the table below. This allows you to enter data on any data collection form multiple time for any given project record. Any and all data collection instruments can thus be used for any event defined.

Click the [Begin Editing](#) button to change the relationships below by designating which forms you wish to utilize for which events. When you are finished making changes, click the [Save](#) button to finalize your changes.

Upload or download instrument mappings

Begin Editing

Save

Data Collection Instrument	Baseline (1)	6 Weeks follow up (2)	3 months follow up (3)	6 months follow up (4)
Cover Page (survey)	↓	↓	↓	↓
Patient Health Questionnaire 9 (survey)	↓	↓	↓	↓
Soc Dem Page 1 (survey)	↓	↓	↓	↓
Food Security (survey)	↓	↓	↓	↓
Time allocation (survey)	↓	↓	↓	↓
Diet Diversity (survey)	↓	↓	↓	↓
Maternal Appetite (survey)	↓	↓	↓	↓
Maternal Quality of Life (survey)	↓	↓	↓	↓
Maternal Obstetric History (survey)	↓	↓	↓	↓
Maternal HIV information (survey)	↓	↓	↓	↓
Other HIV History (survey)			↓	
Exclusive Breastfeeding Self Efficacy Scale (survey)		↓	↓	↓

Step 2: Make sure to designate individual instruments for your events under **Project Setup** → **Define your events and designate instruments for them** → **Designate Instruments**

# Longitudinal studies, part 2

Healthy Mothers - Emily Tuthill

UNMOD = Unmodified | MOD = Modified | NEW = New | [BLANK] = Empty

Select Record

Search for Records:

Create New Record

UNMOD	1
UNMOD	2
UNMOD	3
UNMOD	4
UNMOD	5
UNMOD	6
UNMOD	7
UNMOD	8
UNMOD	9
UNMOD	10

Selecting the record looks the same...

However once you select it, you see you have options to pick the different events. Once you select an event, you will only be able to collect data that you previously designated for that specific event.

Healthy Mothers - Emily Tuthill

Record - 4

UNMOD = Unmodified | MOD = Modified | NEW = New | [BLANK] = Empty

Select Event

UNMOD	Baseline
UNMOD	6 Weeks follow up
	3 months follow up
	6 months follow up

# Longitudinal studies, part 3

## 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: [Default dashboard]

[Create custom dashboard](#)

Displaying record Page 1 of 1: "1" through "57" of 57 records

ALL (57) records per page

[+ Add new record](#)

[Table not displaying rows](#)

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

Record ID This field is for REDCap-do not attempt to edit	Baseline										6 Weeks follow up										
	Cover Page	Patient Health Questionnaire 9	Soc Dem Page 1	Food Security	Time allocation	Diet Diversity	Maternal Appetite	Maternal Quality of Life	Maternal Obstetric History	Maternal HIV information	Cover Page	Patient Health Questionnaire 9	Soc Dem Page 1	Food Security	Time allocation	Diet Diversity	Maternal Appetite	Maternal Quality of Life	Maternal Obstetric History	Maternal HIV information	Exclusive Breastfeeding Self Efficacy Scale
1																					
2																					
3																					
4																					
5																					
6																					
7																					
8																					

For longitudinal and cross-sectional projects, REDCap offers a nice dashboard online where you can track completeness of instruments by record ID over events (for longitudinal projects).

# Sending data—part 1



## Exit Interview - Control Participants

Last Download: 2019-01-10 03:58 PM

2 Records (Some new; 0 modified)

Collect Data

Send Data to Server

Rename Records

Sync Archive

Refresh Setup & Data

Project Admin

Visit REDCap Website

Send Emergency Data Dump

Send Project Logs

Connect to  
WiFi and tap  
“Send Data to  
Server”



## Send Data to Server

### Exit Interview - Control Participants

To send back the data collected in the mobile app and push it with your project on the REDCap server, press the button below and begin the process of sending the data.

Begin Send of All Data

Select a Partial Set of Records

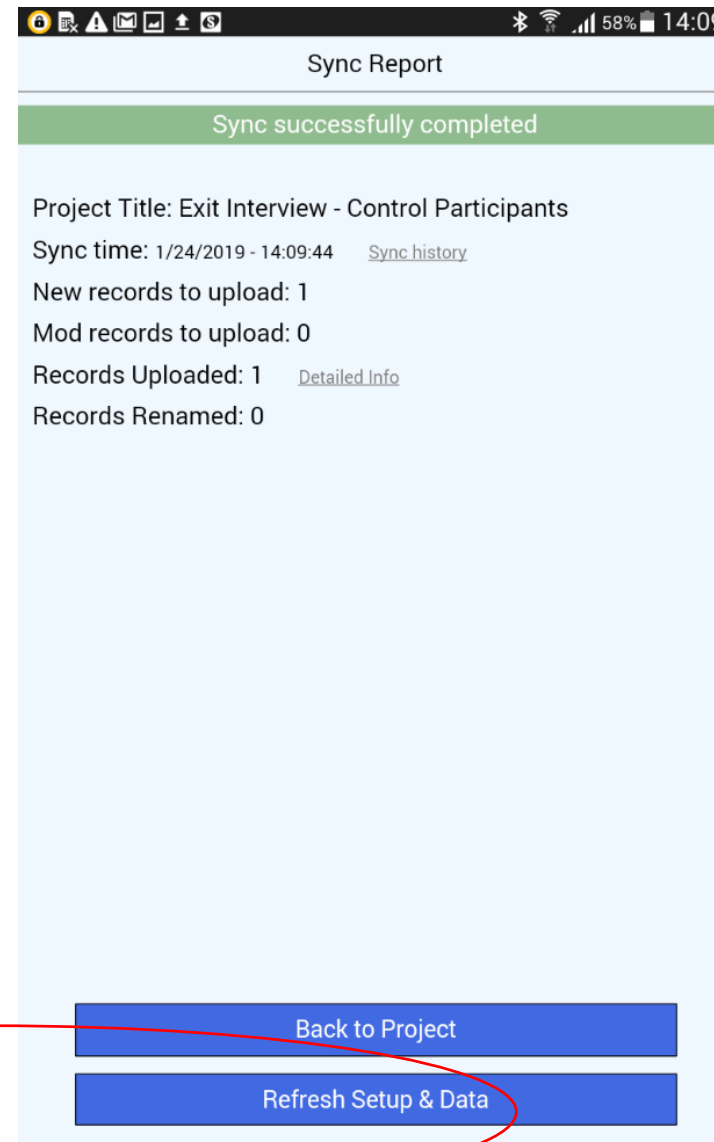
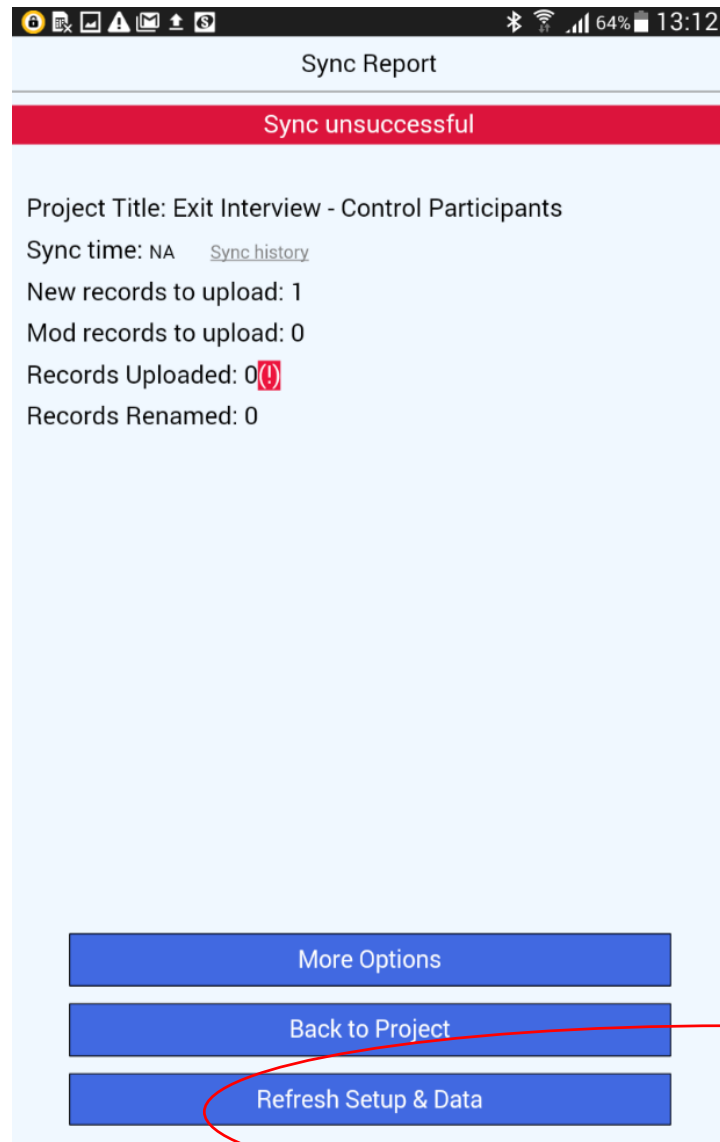
Send Data will look at only new and modified data.

Your project uses autonumbering. The numbers assigned to your records may be reassigned upon upload due to conflicts. Please check the sync report to view any possible reassignments after upload. If a record ID is not reassigned, no message will be made.

2. This is the  
next screen.  
Tap “Begin  
Send of All  
Data”

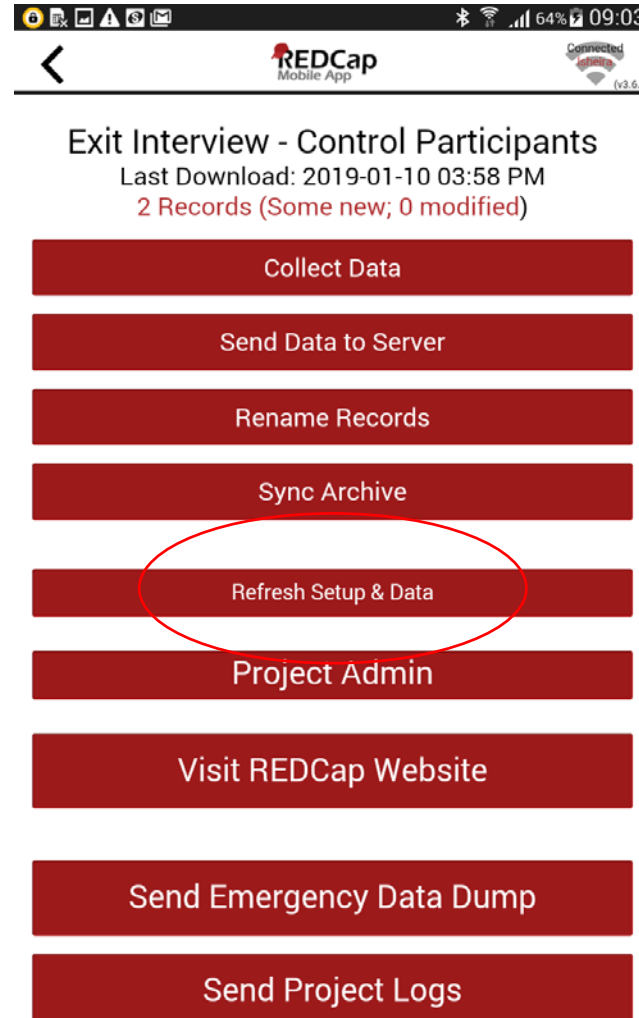
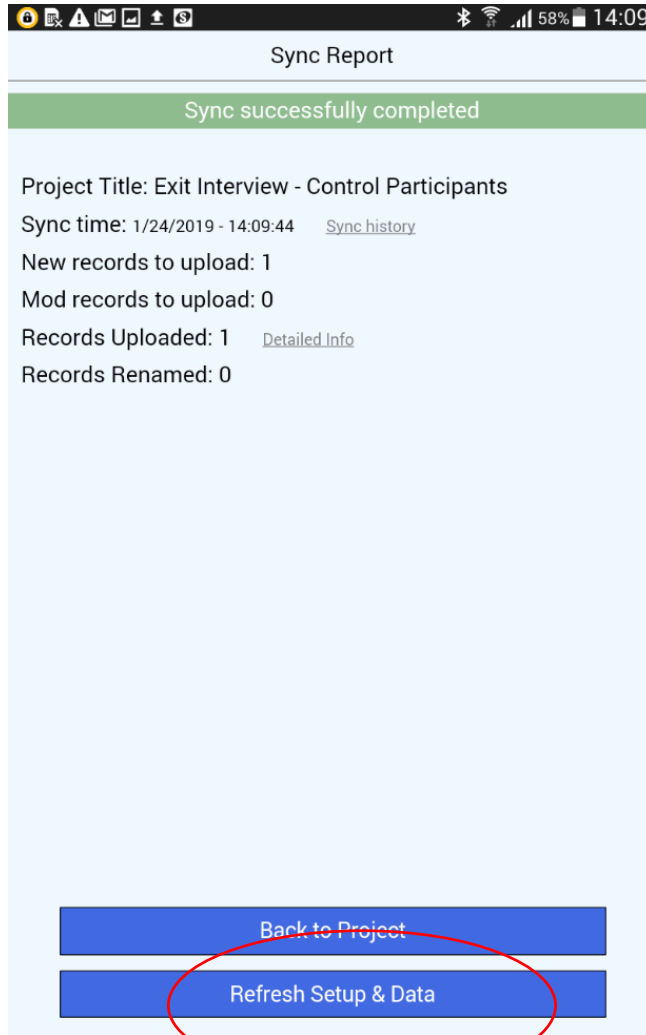
# Sending data—part 2

This is what it looks like if the sync was **unsuccessful**. If that happens, try again.



This is what it looks like if the sync was **successful**. Just select “Back to Project”

# Refreshing the tablet



- REDCap officially recommends that data is refreshed after each sync
- Lila officially recommends that you **DON'T!**
  - For remote data collection in areas with suboptimal internet, wait until you confirmed you have received the data to the server.
- When you refresh set up and data, it erases the data off the tablet. This is ok if all the data is on the server—but if not, you just lost the data!

# Downloading data from the server to your device

- **Cross-sectional studies**

- Do not download the data from the server
  - There is an option for this on user controls for people who you set up on the REDCap webpage

- **Longitudinal studies**

- Trickier among multi-site locations
  - Downloading data from the server is useful for syncing correctly with the dashboard
    - **Must** have strong internet connection
  - May want to copy paste projects and collect by site if not too many sites
  - Otherwise may consider foregoing the dashboard feature



Setting Up Project

Healthy Mothers - Emily Tuthill

Set Up Complete

Do you want to download all 57 records from the project, or do you want to leave the project blank in the app?

Download All 57 Records

Download by Form Status

Get a Partial Set of Data

Do NOT Download Records

# Editing your project after it has gone live: Try to avoid as much as possible!

Online	Next steps...
<p><u>Result 1</u>: All changes approved automatically</p> <p>For example, changing wording or adding a category</p> <p>Adding a new questions</p>	

# Editing your project after it has gone live: Try to avoid as much as possible!

Online	Next steps...
<p><u>Result 1</u>: All changes approved automatically</p> <p>For example, changing wording or adding a category</p> <p>Adding a new questions</p>	<p>All devices collecting data need to be synced to the server (to send all new data) and then refreshed (to download changes)</p>

# Editing your project after it has gone live: Try to avoid as much as possible!

Online	Next steps...
<p><u>Result 1</u>: All changes approved automatically</p> <p>For example, changing wording or adding a category</p> <p>Adding a new questions</p>	<p>All devices collecting data need to be synced to the server (to send all new data) and then refreshed (to download changes)</p>
<p><u>Result 2</u>: Changes need to be reviewed:</p> <ul style="list-style-type: none"><li>• Changing a variable substantially:</li><li>• Changing variable type</li><li>• Changing a skip pattern that affects already collected data,</li><li>• Changing numerical categories (1 to 0, for example)</li></ul>	

# Report from REDCap Administrator

## Adolescent SM Sexual Behavior-Swahili

[RETURN TO PREVIOUS PAGE](#)

You'll receive an email with a link that leads you to an overview like this.

### Details regarding all changes made in Draft Mode:

- Records in project: **1**
- Fields to be added: **0**
- Fields to be modified: **18**
- Total potentially critical issues: **6**
  - Deleted fields that contain data: **0**
  - Potentially critical issues in modified fields that contain data: **6**
- Total field count BEFORE the changes below are committed: **150**
- Total field count AFTER the changes below are committed: **150**
- **Mobile App:** 2 users have initialized this project in the REDCap Mobile App. Please note that they \*may\* be affected by these changes and may not be able to successfully imported their data from the app afterward. You may want to have them first sync all their data back to the server before committing the changes displayed on this page.

Fields to be ADDED: *none*

Forms to be ADDED: *none*

Fields to be DELETED: *none*

Forms to be DELETED: *none*

### KEY for Comparison Table below

White cell = no change

Yellow cell = field changed (Black text = new value, Gray text = current value)

Green cell = new project field

# It will detail changes variable by variable

Variable Name	Section Header	Field Type	Field Label	Choices or Calculations
sexbvr_23_v2		radio	Je unaweza kukumbuka tarehe ambayo daktari alikuambia kuwa uko na "genital herpes"	<div> 1, Ndio  0, La  1, Ndio  2, La    *Deleted options are okay since those options have no data.    Compare </div>
sexbvr_26_v2		radio	Je, umewahi kuzungumza na mhudumu wa afya kuhusu kuzuia kupata mimba?	<div> 1, Ndio  0, La  77, Kataa  1, Ndio  2, La  77, Kataa    *Data MIGHT be lost due to deleted choice(s)    Compare </div>

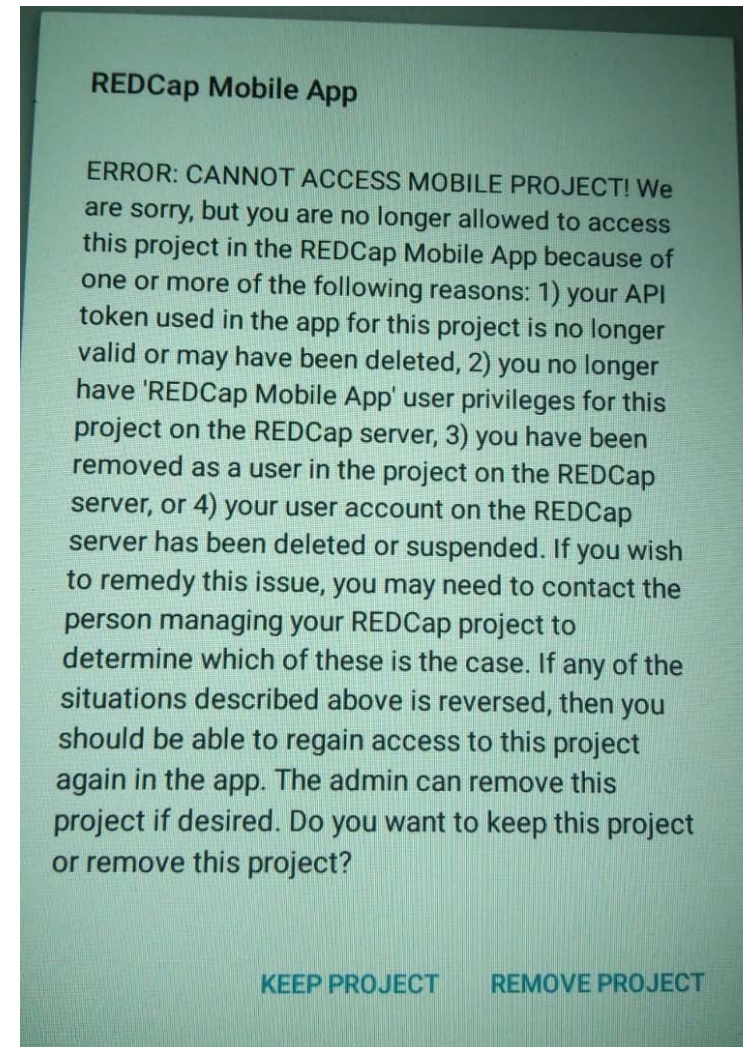
The black text is the new changes/values, grey text current (pre-edit) values

# Editing your project after it has gone live: Try to avoid as much as possible!

Online	Next steps
<p><u>Result 1</u>: All changes approved automatically</p> <p>For example, changing wording or adding a category</p> <p>Adding a new questions</p>	<p>All devices collecting data need to be synced to the server (to send all new data) and then refreshed (to download changes)</p>
<p><u>Result 2</u>: Changes need to be reviewed</p> <p>Changing a variable substantially, like changing variable type, changing a skip pattern that affects already collected data, changing numerical categories (1 to 0, for ex)</p>	<ul style="list-style-type: none"><li>• <b><u>Option 1</u></b>: accept the changes and download the data pre-edits in its current form, save it, and edit it to match the new data format, and merge together later for analysis</li><li>• <b><u>Option 2</u></b>: Make a new variable moving forward, use skip patterns to skip the old variable, and combine the variables in the analysis form (depending on the issue/reason for change)</li><li>• <b><u>Option 3</u></b>: If very few participants and variables, hard code those changes either online (edit form) or in your code (once you download the data)</li></ul>

# Error Messages:

The most common message I have seen and received in late night whatsapp messages!  
Meaning: internet not strong enough.  
Solution: Keep trying to send; try new connection



Mystery error message that prevented data syncing for two weeks!

## **Solution:**

After checking syncing, tablet updates, and other possible issues:

- 1 Enter data manually from tablets onto the server
2. Remove the project and reset it
3. Test sending data

# Remote data management

- Record ID likely won't match your study ID
  - You can also search records by variables you chose (your study ID, site, data collector, etc.)
- Set fields to link instruments to specific data collectors with more than one identifier for large teams
  - For example, interviewer initials, site ID, and participant initials
- Control what staff see by setting certain variables which may reveal arm as identifiers
- Run weekly reports and send to field coordinator to confirm enrollment / completion numbers
- Practice data collection on tablet as well as sending data many times before going live!

## Recruitment Form

You may view an existing record/response by selecting it from one of the drop-down lists below. The records are separated in drop-down list according to their status for this particular data collection instrument. To create a new record/response, click the button below.

Total records: <b>283</b> / Total survey responses: <b>0</b> / Last survey response: <b>survey not yet taken</b>	
Partial Responses (2)	161 ▼
Complete Responses (281)	-- select response -- ▼
<a href="#">Add new record</a>	
<a href="#">Show Unverified Records above</a>	

Data Search	
Choose a field to search <small>(excludes multiple choice fields)</small>	All fields ▼
Search query <small>Begin typing to search the project data, then click an item in the list to navigate to that record.</small>	<div><div>All fields</div><div>participant_id (Participant ID)</div><div>date (Date)</div><div>start_time (Start time)</div><div>survey_start ()</div><div>interviewinitials (Interviewer initials)</div><div>screening_id (Screening ID (facility ID-SM participant ID--screening...))</div><div>recruit_3b (If other, please specify.)</div><div>recruit_13a (Please specify)</div><div>ag_study_id (Based on these answers, the adolescent girl and caregiv...)</div><div>cg_study_id (Enter ID of enrolled caregiver. For SM participant, ...)</div><div>survey_end (End time)</div><div>recruitment_notes ( Please add any notes as needed for the recruitm...)</div></div>

# Technology recommendations

- Androids are cheaper...
  - But you need a gmail account
    - Solution: Make a study email account
- Make sure the device screen is large
  - This helps see skip patterns
  - More user friendly; happy staff=happy study
- Budget data for field staff to send data
- Set up tablets BEFORE you go to the field
- Try different WiFi connections if you are having trouble (4G, for example)
- Try to make sure tablets aren't being used for personal use (wear and tear, loss, theft)



Extra slides—time permitting

# Make instruments quickly pt 1

## 1) Check out the shared library for validated scales

Project Home Project Setup Online Designer Data Dictionary Codebook

Create snapshot of instruments VIDEO: How to use this page  
Last snapshot: 02/13/2017 4:37pm

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.

Survey options: Survey Queue Survey Login Survey Notifications Upload or download Auto Invitations

Data Collection Instruments

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 or external libraries

Thousands of  
ready made  
scales...often  
with scoring!

REDCap Shared Library

The REDCap Shared Library is a repository for REDCap data collection instruments and forms that can be downloaded and used by researchers at REDCap partner institutions. Curated instruments highlighted with a star ★ have been approved for inclusion by the REDCap Library Oversight Committee (REDLOC) after review for research relevance, accuracy in function and coding (see guidelines), and copyright issues. Other instruments and forms are shared by individuals or groups from consortium institutions on "as-is" basis.

You may search below for any available data collection instruments. If you got to this site directly, you will be able to view the shared instruments as they would appear in REDCap or view a PDF version that can be downloaded and/or printed. Otherwise, if you arrived here from the REDCap application, you will have the additional option of importing the form directly into REDCap. If you wish, you may download a list of all library instruments in Excel/CSV format. If you download and utilize an instrument from the REDCap Shared Library, please cite the RSL manuscript. If you have questions or are experiencing issues, please contact redcap@uums.org.

Return to REDCap

Logged in as Lila Sheira (University of California San Francisco)

Keyword search: Generalized Anxiety Disorder 7 Search options: Language: - All - Minimum downloads: 0 Recent additions: show all Curated by REDLOC? show all

Search the library

Shared Library  
Search  
Library Metrics  
My Activity  
Institution Activity  
Consortium Activity  
REDLOC  
REDLOC Login

Found 200 results matching your search Didn't find what you were looking for? Suggest a validated instrument for library inclusion

Title	Downloads
Generalized Anxiety Disorder 7 Item (GAD 7) Scale ★	496
Details: Institution: REDLOC Contact: Brenda Minor Contact email: brenda.l.minor@vanderbilt.edu Submitted by: Brenda Minor Description: The GAD-7 was developed as a brief scale for anxiety during development of the PHQ. Acknowledgement: Developed by Drs. Robert L. Spitzer, Janet B. W. Williams, Kurt Kroenke and colleagues, with an educational grant from Pfizer Inc. No permission required to reproduce, translate, display or distribute Last updated: November 19, 2015	
View as web page View as PDF Import into my REDCap project	
Generalized Anxiety Disorder 7 Item (GAD7) Scale Score ★	497
Neuro-QOL Bank v1.0 - Anxiety ★ [Adaptive instrument]	175
Neuro-QOL Ped Bank v1.0 - Anxiety ★ [Adaptive instrument]	46
Neuro-QOL Ped SF v1.0 - Anxiety ★ [Auto-scoring]	34
Neuro-QOL Ped SF v1.0 - Anxiety ★	11

Current instrument: Generalized Anxiety Disorder 7 Item (GAD7) Scale Score Preview instrument

Add Field Add Matrix of Fields

Matrix group: gad\_7c

Over the last 2 weeks, how often have you been bothered by the following problems?

Variable: sc_gad7	Not at all sure	Several days	Over half the days	Nearly every day	
1. Feeling nervous, anxious, or on edge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
2. Not being able to stop or control worrying	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
3. Worrying too much about different things	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
4. Trouble relaxing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
5. Being so restless that it's hard to sit still	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
6. Becoming easily annoyed or irritable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
7. Feeling afraid as if something awful might happen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset

Add Field Add Matrix of Fields

Variable: sc\_gad7\_not\_sure  
Total - Not at all sure View equation

Add Field Add Matrix of Fields

Variable: sc\_gad7\_several  
Total - Several days View equation

Add Field Add Matrix of Fields

Variable: sc\_gad7\_over\_half  
Total - Over half the days View equation

Add Field Add Matrix of Fields

# Make instruments quickly pt 2

## 2) Use excel to upload questions

Project Home

Project Setup

Online Designer

Data Dictionary

Codebook

Create snapshot of instruments

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

Upload or download Auto Invitations

Add new instrument:

Createa new instrument from scratch

Importa new instrument from the official REDCap Shared Library

Uploadinstrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
My First Instrument	1		Enable	Choose action	
Generalized Anxiety Disorder 7 Item (GAD7) Scale Score	13		Enable	<div><div>Rename</div><div>Copy</div><div>Delete</div><div>Download instrument ZIP</div></div>	

All the options in the online format are now column headers

Easily edit questions or add questions

You can even edit branching, i.e. skip patterns

E2					1. Feeling nervous, anxious, or on edge														
					Swahili:														
	A		C	D	E	F	G	H	I	J	K	L	M	N	O	P			
1	Variable / Field	Form Name	Section Header	Field Type	Field Label	Choices, Calculations, OR Slider Labels	Field Note	Text Validation Typ	Text Valid	Text Valid	Identifier	Branching Required	Custom A	Question	Matrix				
			Over the last 2 weeks, how often have you been bothered by the following																
2	sc_gad1	generalized_anxiety_disorder_7	radio	Swahili:	0, Not at all sure   1, Several days   2, Over half the days   3, Nearly every day														gad_sc
3	sc_gad2	generalized_anxiety_disorder_7	radio	2. Not being at 0, Not at all sure   1, Several days   2, Over half the days   3, Nearly every day															gad_sc
4	sc_gad3	generalized_anxiety_disorder_7	radio	3. Worrying too much about things   0, Not at all sure   1, Several days   2, Over half the days   3, Nearly every day															gad_sc
5	sc_gad4	generalized_anxiety_disorder_7	radio	4. Trouble relaxing   0, Not at all sure   1, Several days   2, Over half the days   3, Nearly every day															gad_sc
6	sc_gad5	generalized_anxiety_disorder_7	radio	5. Being so restless that it is hard to sit   0, Not at all sure   1, Several days   2, Over half the days   3, Nearly every day															gad_sc
7	sc_gad6	generalized_anxiety_disorder_7	radio	6. Becoming easily annoyed or irritable   0, Not at all sure   1, Several days   2, Over half the days   3, Nearly every day															gad_sc
8	sc_gad7	generalized_anxiety_disorder_7	radio	7. Feeling afraid or nervous about everyday activities   0, Not at all sure   1, Several days   2, Over half the days   3, Nearly every day															gad_sc
9	sc_tot_not_sure	generalized_anxiety_disorder_7	calc	Total - Not at all	if ([sc_gad1] = 0, 0, 0) + if ([sc_gad2] = 0, 0, 0) + if ([sc_gad3] = 0, 0, 0) + if ([sc_gad4] = 0, 0, 0) + if ([sc_gad5] = 0, 0, 0) + if ([sc_gad6] = 0, 0, 0) + if ([sc_gad7] = 0, 0, 0)														
10	sc_tot_several	generalized_anxiety_disorder_7	calc	Total - Several	if ([sc_gad1] = 1, 1, 0) + if ([sc_gad2] = 1, 1, 0) + if ([sc_gad3] = 1, 1, 0) + if ([sc_gad4] = 1, 1, 0) + if ([sc_gad5] = 1, 1, 0) + if ([sc_gad6] = 1, 1, 0) + if ([sc_gad7] = 1, 1, 0)														
11	sc_tot_over_half	generalized_anxiety_disorder_7	calc	Total - Over half	if ([sc_gad1] = 2, 2, 0) + if ([sc_gad2] = 2, 2, 0) + if ([sc_gad3] = 2, 2, 0) + if ([sc_gad4] = 2, 2, 0) + if ([sc_gad5] = 2, 2, 0) + if ([sc_gad6] = 2, 2, 0) + if ([sc_gad7] = 2, 2, 0)														
12	sc_tot_every_day	generalized_anxiety_disorder_7	calc	Total - Nearly every	if ([sc_gad1] = 3, 3, 0) + if ([sc_gad2] = 3, 3, 0) + if ([sc_gad3] = 3, 3, 0) + if ([sc_gad4] = 3, 3, 0) + if ([sc_gad5] = 3, 3, 0) + if ([sc_gad6] = 3, 3, 0) + if ([sc_gad7] = 3, 3, 0)														
13	sc_tot_score	generalized_anxiety_disorder_7	calc	Total Score	sum([sc_gad1],[sc_gad2],[sc_gad3],[sc_gad4],[sc_gad5],[sc_gad6],[sc_gad7])														
14	sc_difficult	generalized_anxiety_disorder_7	radio	If you checked 0, Not difficult at all   1, Somewhat difficult   2, Very difficult   3, Extremely difficult															diff_sc

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# Repeating instruments

- When you want to ask someone a question multiple times at one time point
  - Medications and doses
- When you want to collect data not necessarily tied to a visit
  - Hospitalizations, or counts of some outcome

## Repeatable instruments and events

An excellent way to collect repeating data in REDCap is to use repeatable instruments and/or repeatable events. This is sometimes called one-to-many data collection. Some examples may include but are not limited to the following: data from multiple visits or observations, concomitant medications, adverse events, or repetitive surveys (daily, weekly, etc.).

Below you can specify a data collection instrument or a whole event of instruments to be infinitely repeatable, in which each repeating instrument or event can be repeated a different number of times for each record. You may set any event in the project to be repeatable \*or\* alternatively set selected instruments to be repeatable within an event. **The 'Repeat Entire Event' option means that all the event's instruments will repeat together and stay connected, whereas the 'Repeat Instruments' option implies that the instruments will repeat separately and independently from each other on that event.** Once an instrument or event is set to repeat, you will see options on the Record Home Page to add another instance of the instrument/event for the currently selected record.

	Event Name	Repeat entire event or selected instruments?	Instrument name (select instruments to repeat)	Custom label for repeating instruments (optional) ?
✓	Event 1	Repeat Instruments (repeat ▾)	<input type="checkbox"/> My First Instrument	<input type="text"/>
		-- not repeating --	<input type="checkbox"/> Generalized Anxiety Disorder ...	<input type="text"/>
	Visit 1	Repeat Entire Event (repeat all instruments together)	order ...	<input type="text"/>
		Repeat Instruments (repeat independently of each other)		<input type="text"/>

Save

Cancel

# Finalizing your project online

- REDCap walks you through the seven steps you should take to make your project “live”
- Pro tip:
  - Take snapshots of your measures as you develop them
    - Online designer tab, only while in draft mode
  - Save a backup version of your study once finalized
    - Other functionality → save copy

Adolescent Shamba Maisha--ADOLESCENT SURVEY

Project Home Project Setup **Other Functionality** Project Revision History

Project status: ☒ Production Completed steps 7 of 7

**Main project settings**

Some options below are disabled because they may not be modified once the project is in production status.

Complete!  ☒ Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey.](#)

Not complete?  ☒ Use longitudinal data collection with defined events? [?](#)

**Design your data collection instruments & enable your surveys**

Complete!  Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Not complete?   or

Learn how to use [Smart Variables](#) [Piping](#) [Action Tags](#)

**Enable optional modules and customizations**

Some options below are disabled because they may not be modified once the project is in production status.

Complete!  ☒ Repeatable instruments [?](#)

Not complete?  ☒ Auto-numbering for records [?](#)

☒ Scheduling module (longitudinal only) [?](#)

☒ Randomization module [?](#)

☒ Designate an email field for sending survey invitations [?](#)

☒ Twilio SMS and Voice Call services for surveys [?](#)

**Set up project bookmarks (optional)**

# Action tags

Action tags are a powerful way to further refine and/or improve your instruments. Some of my favorites include:

- @NOW
  - For text box entry, enters current time and date
- @TODAY
  - For text box entry, enters current date
- @NONEOFTHEABOVE
  - For a select all question, also makes a non of the above which doesn't allow it to be selected simultaneously with one of the options
- @CHARLIMIT
  - Limits text box to your chosen length
- @HIDDEN – my favorite!
  - Makes a question hidden
  - Can be used in conjunction with the @NOW to track survey times and to make sure it matches data collector entered @TODAY
  - Can track average survey times

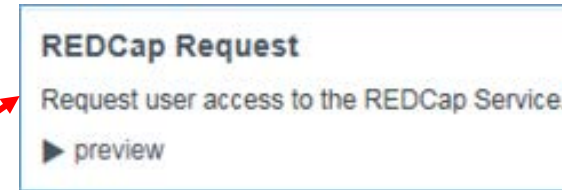
### What are Action Tags?

Add	@HIDECHOICE	by commas. For example, to hide the choice 'Monday (1)', you would have @HIDECHOICE="1", but if you wanted to additionally hide 'Tuesday (2)', you would have @HIDECHOICE="1,2". NOTE: If the hidden choice has already been selected for a given record, then the choice will not be hidden on the survey or form for that record/event. NOTE: Hidden choices will still appear in reports and data exports. NOTE: This action tag can only be utilized for the following field types: Checkbox, Radio, Drop-down, Yes-No, and True-False. NOTE: This action tag works only in limited fashion with a matrix of fields, in which it will simply hide the checkbox/radio for a field in the matrix but still display the column for that choice in the matrix.
Add	@LATITUDE	Allows a Text field to capture the latitude of the user, in which the user will be prompted on the webpage to allow or deny this. Once the value is captured, it will not be changed when visiting the page at a later time. The field will be disabled and will not allow users to edit the value, but it will allow them to remove the value altogether. NOTE: While the GPS value will be very accurate when captured on a mobile device, it will not be nearly as accurate when using a browser on laptops and desktop computers.
Add	@LONGITUDE	Allows a Text field to capture the longitude of the user, in which the user will be prompted on the webpage to allow or deny this. Once the value is captured, it will not be changed when visiting the page at a later time. The field will be disabled and will not allow users to edit the value, but it will allow them to remove the value altogether. NOTE: While the GPS value will be very accurate when captured on a mobile device, it will not be nearly as accurate when using a browser on laptops and desktop computers.
Add	@MAXCHECKED	Allows a checkbox field to have a maximum number of checkboxes that can be checked. If other checkbox options are clicked after the maximum has been reached, those choices will not be able to be checked. The format must be @MAXCHECKED=#, in which # is a positive integer. For example, @MAXCHECKED=3 will allow a maximum of 3 checkbox choices to be checked. NOTE: This action tag can only be utilized by Checkbox fields, and it does not get enforced during data imports.
Add	@MAXCHOICE	Causes one or more specified choices to be disabled (i.e., displayed but not usable) for a checkbox, radio button, or drop-down field after a specified amount of records have been saved with that choice. For example, @MAXCHOICE(0=50,1=75,2=50) would imply that once 50 records have selected the '0' coded choice, that choice will become disabled for any record viewed afterward that does not have that choice saved, such as when the form/survey is opened for a new record, and thus 75 records for choice '1', 50 for choice '2', etc. The format must be the action tag name followed by the choice designations inside parentheses, in which each will follow the format of ChoiceCode=MaxCount with each choice separated by commas. Note: For longitudinal projects, when counting the number of choices saved for records, it will treat all events as separate, meaning that in the example above, choice '0' can have a max number of 50 selections in EACH event in the project.
Add	@NONEOFTHEABOVE	Allows for the designation of a checkbox choice to be a 'none of the above' option, thus ensuring that no other choices are checked if that one choice is selected. This means that if that particular option is selected, it will alert the user that all other checked-off choices will be unchecked. And if the 'none of the above' option is already checked when the user checks off another choice, it will automatically uncheck the 'none of the above' option. This action tag makes it possible to have a 'none of the above' option without the risk of users mistakenly having other choices selected at the same time. The format must follow the pattern @NONEOFTHEABOVE=??, in which ?? is the coded value of the 'none of the above' checkbox choice - e.g., @NONEOFTHEABOVE=98. Alternatively, it is possible to set multiple options as a 'none of the above' option at the same time, in which the coded values must be comma delimited inside single or double quotes - e.g., @NONEOFTHEABOVE='45,99'. This is useful for certain situations, such as if you have a 'none of the above' option and also have a 'refuse to answer' option, thus allowing either of those to be the only option that can be selected at a time. NOTE: This action tag can only be utilized by Checkbox fields.
Add	@NOW	(e.g., 2017-08-01 12:34:56) Loads the current user's date-time into a blank Text field - similar to the @TODAY tag but additionally includes the time portion. If the field has validation, the value will adjust to match the date format. NOTE: The time used will be the user's local time, which is derived from their device/computer and might be different from the server if in another timezone. Also, do not use this tag on fields with branching logic because it will always prompt the user to erase the value, so look at using @HIDDEN instead if you wish to hide the field.

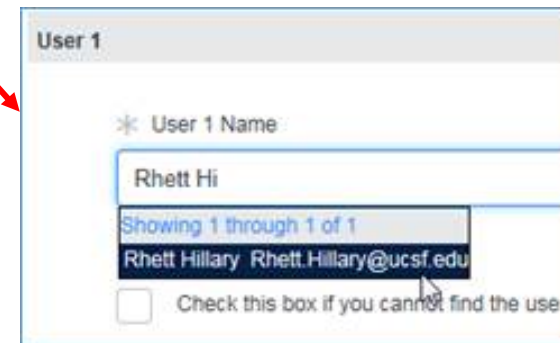
Close

# Adding external collaborators to your project

1. Use this link: [https://ucsf.service-now.com/ess/order\\_accounts.do](https://ucsf.service-now.com/ess/order_accounts.do)
2. Select the REDCap Request option.
3. On the second page of the form enter the person's name in the User 1 Name field. Select the appropriate person's name from the drop-down menu.
4. If the collaborator is non-UCSF select the "Check this box" option and complete the First Name, Last Name and Email fields. Ignore the UCSF ID field.

A rectangular button with a blue border. The text "REDCap Request" is in bold. Below it, in smaller text, is "Request user access to the REDCap Service." At the bottom left is a small play icon followed by the word "preview".

**REDCap Request**  
Request user access to the REDCap Service.  
▶ preview

A screenshot of a form section titled "User 1". It contains a label "\* User 1 Name:" followed by a text input field containing "Rhett Hi". Below the input field is a dropdown menu showing "Showing 1 through 1 of 1" and a single option "Rhett Hillary Rhett.Hillary@ucsf.edu". Below the dropdown is a checkbox labeled "Check this box if you cannot find the user". A red arrow points from the text in step 3 to the dropdown menu.

**User 1**

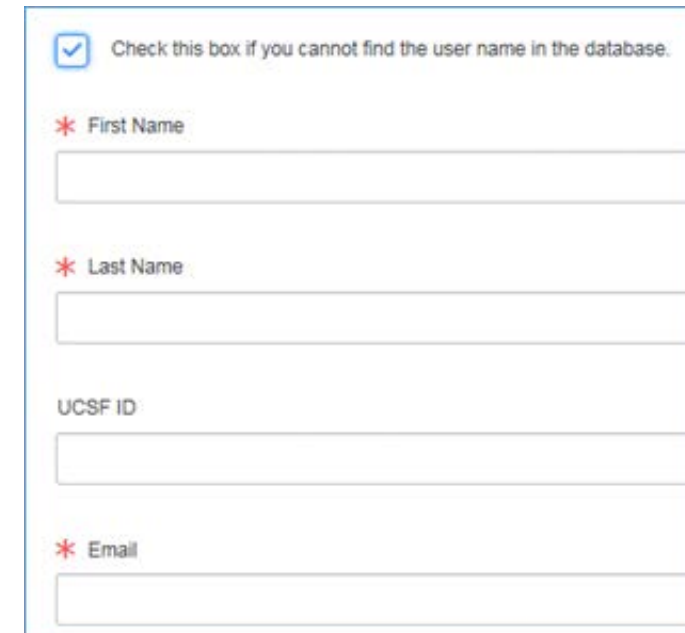
\* User 1 Name:

Rhett Hi

Showing 1 through 1 of 1

Rhett Hillary Rhett.Hillary@ucsf.edu

☐ Check this box if you cannot find the user

A form for adding external collaborators. It starts with a checked checkbox labeled "Check this box if you cannot find the user name in the database." followed by three required fields: "First Name", "Last Name", and "Email", each with a red asterisk and an input field. Below these is the "UCSF ID" field, which is not required and has an empty input field.

☒ Check this box if you cannot find the user name in the database.

\* First Name

\* Last Name

UCSF ID

\* Email

# Additional REDCap Features

- Scheduling feature
- Record ID is REDCap made. For longitudinal studies, you may want to make a document linking it with your unique id.
- Data reports—especially useful if you code scale scores
- Data reports-most useful on forms with no skip patterns
- Data comparison tool

# Resources

- <https://projectredcap.org/wp-content/uploads/2016/08/In-Depth-Guide.pdf>
- <https://projectredcap.org/wp-content/uploads/2016/08/REDCap-Mobile-App-Guide.docx>
- There are lots of youtube videos on Longitudinal modules and repeating measures which I highly recommend
- You can email me too: [Lila.Sheira@ucsf.edu](mailto:Lila.Sheira@ucsf.edu)