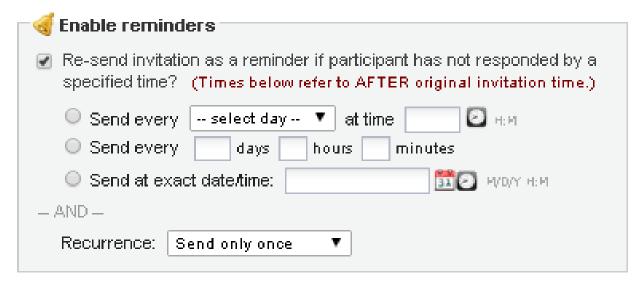# Version 6.3

New feature: Auto-calculations

When performing a data import (via Data Import Tool or API), REDCap will now perform the calculations for any calculated fields that are triggered by the values being imported. For example, if you have a BMI field whose calculation is based off of a height field and a weight field, then if you perform a data import of height and weight values, it will automatically calculate the BMI for each record that is imported and also save those calculations (and thus log them too on the Logging page). Auto-calculations are now also triggered when using cross-form calculations in the case where the calculated field exists on a different instrument than the fields being entered that are used in the calculation. So while in previous versions users would have to go to the instrument where the calculated field existed and would have to click Save to store the calculation, users now no longer have to do that because the calculation is performed and saved automatically at the time when the trigger fields are initially entered or changed. So essentially, users never have to worry that calculations are not being performed or saved in certain situations. They should expect that calculations are now always being saved silently in the background.

New feature: New data quality rule to fix all incorrect values for calculated fields

New Data Quality rule (rule H) will help users find and fix all incorrect values for calculated fields in a project. If any calc fields have ended up with incorrect values (whether due to field changes in the project or due to previous data imports), users can now run rule H not only to find any incorrect calculated values, but it will additionally display a button that, when clicked, will auto-fix ALL of them for the user. This is very powerful, and we have made it as easy as the single click of a button to fix all calculations in an entire project.
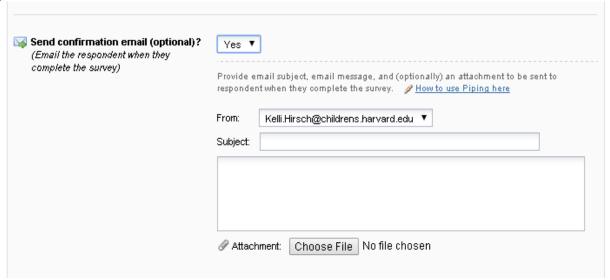
New feature: Survey Invitation Reminders

You may now set reminders for a given invitation to help remind respondents they need to complete a survey if it has not been completed by a specified time. A single reminder may be sent at an exact date/time, or you may schedule up to 5 reminders to be sent according to a set time schedule, such as a recurring time lapse (e.g. every 12 hours after the original invitation) or a recurring day/time (e.g., every day at 10:00AM after the original invitation; every Monday at 4:00PM). If the survey is completed, then any unsent reminders will be erased and will not be sent. Survey invitation reminders can be set in the Compose Survey Invitations popup on the Participant List page, as well as in the Automated Survey Invitations popup on the Online Designer.

New feature: Survey Confirmation Email

On the Survey Settings page in the Online Designer, a survey administrator can now set up an email that will automatically be sent to the respondent when they complete the survey. They may optionally add one attachment to the email, if they wish.   Also, piping can be used in the email's subject and message to help personalize the email.

If the respondent's email address is not on file and thus the confirmation email cannot be sent automatically, then when displaying the survey acknowledgement text at the end of survey, it will display an option for the respondent to enter their email address so that they may receive the confirmation email, it also informs the participant that their email will not be stored.

New feature: The red Required field text (*must provide value) can now be hidden on survey pages, if desired.

If you would rather your respondents not see the red text beneath all your required fields on the survey page, you may use this setting to hide it. This setting can be found on the Survey Settings page in the Online Designer.

New feature: The "Previous Page" button (i.e. Back button) on multi-page surveys can now be hidden, if desired.

Hiding this button may be useful if you wish to prevent respondents from going back to previous pages in the survey. The setting to enable this can be found on the Survey Settings page in the Online Designer.

New feature: "Signature" field type

Allows a person to draw their signature on a survey or data entry form using a mouse, pen, or finger (depending on whether using a desktop computer or mobile device). Once captured, the signature will be displayed as an inline image on the survey page or data entry form.

New feature: Survey Access Code and Short Code for surveys

When email is not an option, Survey Access Codes can be used to get a respondent started quickly on a survey. They are especially useful if sending a survey invitation to a physical mailing address, or if the respondent is sitting nearby and needs to start the survey on another device. There will be a Survey Access Code for every survey link in a project that utilizes surveys, so users will see a button or icon to retrieve a Survey Access Code on the Public Survey Link page, on the Participant List, and in the survey options at the top of data entry forms that are enabled as surveys.

🎟 **Survey Access Code or ▦ QR Code**

Survey title: **"Test Instrument"**

A Survey Access Code and a QR Code both allow respondents to begin a survey on someone having to email them an invitation. This is especially useful if the responde be sending the survey invitation to a physical mailing address (i.e. 'snail mail'). You i bottom if you wish to print out the instructions for the respondent.

🎟 **Enter the Survey Access Code**

To allow a respondent to begin this survey, have them navigate to the URL below and enter the survey access code. The code is permanent and will never change. (Note: The web address is the same for all projects and surveys, so you may bookmark the address on a computer or device to quickly return to it multiple times.)
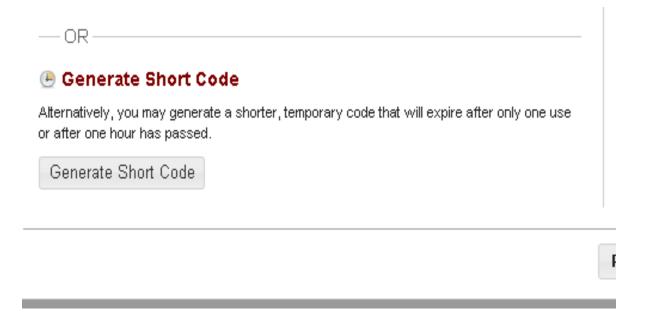
1.) Go to this web address:

http://redcap-dev/redcap_dmz_st/redcap/surveys/

2.) Then enter this code:

4CMYH3CYR

To get a quick, temporary access code (just 5 characters long), there is an option to generate a Short Code to make it even faster to start a survey.

New feature: QR Code for surveys

As an alternative to Survey Access Codes, users can get a respondent navigated to a survey page quickly by using a QR code. If the respondent is physically nearby and has a QR code scanner app on their device, they can quickly scan the QR code for any survey link, which will immediately open the survey webpage on their device. The QR code option is found alongside the Survey Access Code option on the Public Survey Link page, on the Participant List, and other places. If the user or respondent is familiar with using QR codes, QR codes make it very easy to quickly get to a survey page on another device.

Survey Access Code or ▦ QR Code   ✕

Survey title: "**Test Instrument**"

A Survey Access Code and a QR Code both allow respondents to begin a survey on another computer or device without someone having to email them an invitation. This is especially useful if the respondent is currently nearby or if you will be sending the survey invitation to a physical mailing address (i.e. 'snail mail'). You may click the Print button at the bottom if you wish to print out the instructions for the respondent.

✎ Enter the Survey Access Code

To allow a respondent to begin this survey, have them navigate to the URL below and enter the survey access code. The code is permanent and will never change. (Note: The web address is the same for all projects and surveys, so you may bookmark the address on a computer or device to quickly return to it multiple times.)

1.) Go to this web address:

> http://redcap-dev/redcap_dmz_st/redcap/surveys/

2.) Then enter this code:
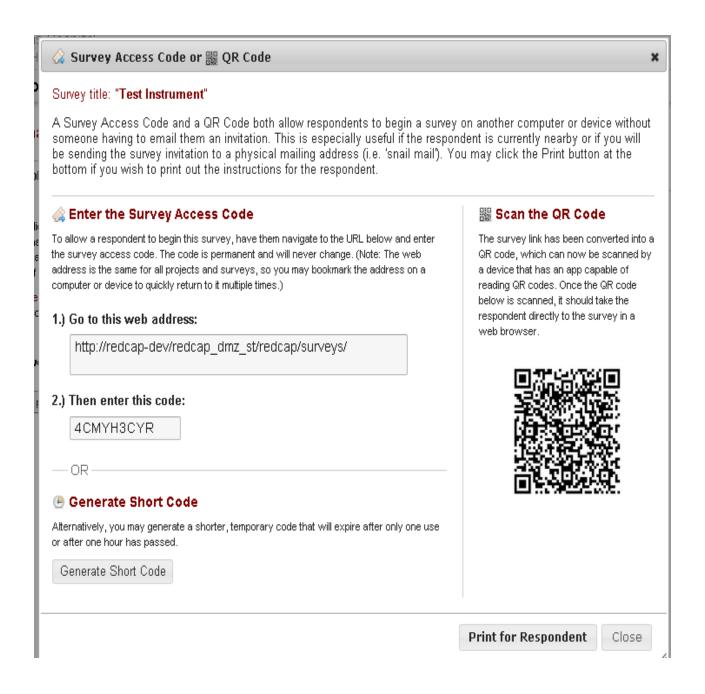
> 4CMYH3CYR

— OR —

🕐 Generate Short Code

Alternatively, you may generate a shorter, temporary code that will expire after only one use or after one hour has passed.

> Generate Short Code

▦ Scan the QR Code

The survey link has been converted into a QR code, which can now be scanned by a device that has an app capable of reading QR codes. Once the QR code below is scanned, it should take the respondent directly to the survey in a web browser.

> Print for Respondent   Close

New feature: Survey Login

Survey administrators can now provide improved security their surveys with a survey login form, in which respondents will be required to enter some login credentials in order to begin a survey or (if the "Save & Return Later" feature is enabled) to return to a previously entered survey response. To enable the Survey Login feature, there is a new button at the top of the instrument list on the Online
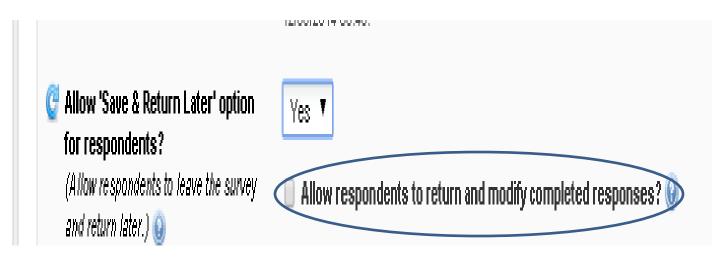
Designer that will open up the Survey Login settings popup. Users who wish to enable Survey Login may choose one, two, or three fields in their project to be used as the login credential fields for surveys in their project.
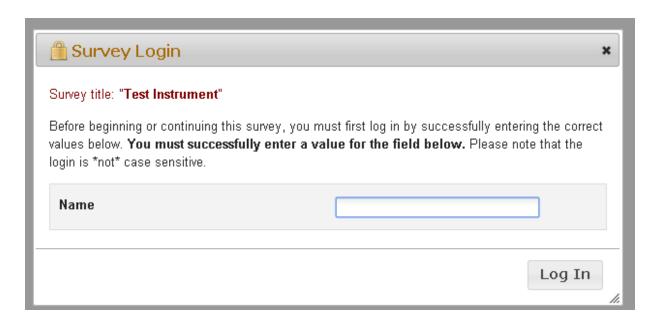

The Survey Login can be enabled for ALL surveys in a project or just selected surveys (in which it can be enabled for each on their Survey Settings page). There are also several other features to allow users to customize the behavior of the Survey Login feature. Note: If a survey has the "Save & Return Later" feature enabled, Return Codes will not be used to return to the survey, but it will use the Survey Login's login credentials instead.

New feature: Ability for survey respondents to return and modify *completed* responses

In previous versions, once a survey was fully completed, the respondent could not return to make any further edits. This new survey option will allow respondents to return after they have fully completed the survey. This feature can be enabled on the Survey Settings page under the "Save & Return Later" section for a given instrument in the Online Designer. Once enabled, a respondent will be able to return to their response and make any edits to it even if they have fully completed the survey.

As part of the "Save & Return Later" feature, respondents will need to provide a Return Code in order to make edits (as is the case in previous versions when returning to partially completed responses). When the feature is enabled, they will be given their Return Code when they finish the survey, after which they may return to that survey link at any time in the future to make edits to their response. If the Survey Login feature is enabled for the survey, then instead of using a Return Code, they will use their login credentials to return to the survey.

If enabled, participants who have completed the survey will still appear in the Participant List in the Compose Survey Invitations popup to allow them to be invited again to edit their completed response. Additionally, their survey link and survey access code will also remain in the Participant List for this same purpose.

Note: If Survey Notifications have been enabled for a survey that has the "Edit Completed Responses" option enabled, then whenever the respondent returns to the survey again and completes the survey again, it will again trigger the Survey Notifications to send an email to those users selected.