

Training Survey Guide

CENTER ON DISABILITY &
COMMUNITY INCLUSION



This guide outlines how to use the new CDCI training evaluation survey and UVM’s online survey tool: REDCap.

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Who should complete CDCI’s Training Survey?

CDCI personnel should offer the survey to anyone who attended CDCI-led:

- Courses
- Guest lectures
- Community trainings
- Workshops
- Webinars
- Conferences
- Continuing education
- And other types of trainings

The training survey is NOT for technical assistance (TA) activities.

Why is the CDCI training survey shorter than it used to be?

- We reduced the number of required questions because we found many were not being used across projects.
- If you liked the questions we asked, we can share those with you.
- Also, you can add your own questions, but do not change the CDCI questions or answer choices.
- If you want to add your own questions to the online survey, you will need to do that in REDCap (see instructions below).

How should people complete the survey?

- We recommend you **save time at the end of your training** for people to complete the survey before they leave. You will get more responses and the training will be fresh in their minds.
- We recommend asking participants to **complete the survey online**. You can send participants a link in an email or create a QR code with a link to your survey. This code can be put on a PowerPoint slide or paper, then participants scan it with their phone to open the link.
- Even if you plan to ask people to complete the online survey, you should **have paper copies available** for those who need them.
- Please tell them the name of your training so they can enter this accurately and consistently (paper or online).

Should I use paper or online surveys?

- You can choose to use paper, online, or both to collect data from your participants. Start by thinking about your participants, location, your agenda, etc. Goal is to choose best fit for your training.
- **Paper surveys** can help you get a high response rate because it can be easier to do immediately after the training ends. Also may be your only choice if participants do not have internet access or phone, tablet, computer, etc. that can complete the online survey.
- **Online surveys** can help cut down on needing to enter the data electronically after the training is over. It also reduces errors. This is the preferred method if your participants have access to phone, tablets, computers AND internet during training. Also easier if you plan to ask people to complete surveys after training is over.

- **A mix of paper and online surveys** can help even more people participate, during and after the training, and reduce the amount of data you have to enter later.

What is REDCap?

- REDCap (Research Electronic Data Capture) is a free, UVM-supported, secure, web-based tool to collect and manage data.
- You can use it to create online surveys with more options than UVM's LimeSurvey, and your participant feedback is much more secure. REDCap also has advanced features that can be helpful for some projects.
- REDCap is also where you enter data from paper surveys.
- See this UVM page for more information REDCap:
<https://www.uvm.edu/biostatistics/redcap>

How do I start using REDCap?

- **Go to UVM's REDCap site:**
The REDCap website is: <https://redcap.med.uvm.edu>
- **Get a REDCap account:**
 - Project coordinators should already have accounts, and they should have received an email with instructions for how to login. If not, please contact Lisa Hurst Bouffard.
 - Other project personnel will need to request REDCap accounts by completing the REDCap Request Form:
<https://www.uvm.edu/biostatistics/redcap> with your information and the following responses:
 - **UVM Department:** Center on Disability and Community Inclusion.
 - **Purpose of REDCap Project:** Quality Improvement
 - **Project Title:** Choose the title for your specific project from the list below:
 - AT CDCI Training survey
 - BEST CDCI Training Survey
 - Continence CDCI Training Survey
 - Early Mobility CDCI Training Survey

- Interprofessional Education Project CDCI Training Survey
- I-Team EI Training Survey
- I-Team CDCI Training Survey
- Supported Employment CDCI Training Survey
- Think College CDCI Training Survey
- Vermont Children's Integrated Services CDCI Training Survey
- **Please enter a few sentences describing the use of REDCap in your project:** The purpose of this project is to collect feedback from participants in our trainings. The goal is quality improvement. All trainings at the Center on Disability and Community Inclusion (CDCI) are using the same core set of evaluation questions. This project is the survey specifically for our CDCI project.
- **Learn about REDCap:**
Before getting started, you should review the online training resources to get more familiar with REDCap. Click on the “Training Resources” link in the Welcome to REDCap message, or by clicking here: <https://redcap.med.uvm.edu/index.php?action=training>
To use the your CDCI Training Survey, we recommend you watch:
 - Brief Overview Video (4 minutes)
 - Single Survey Project (5 minutes)

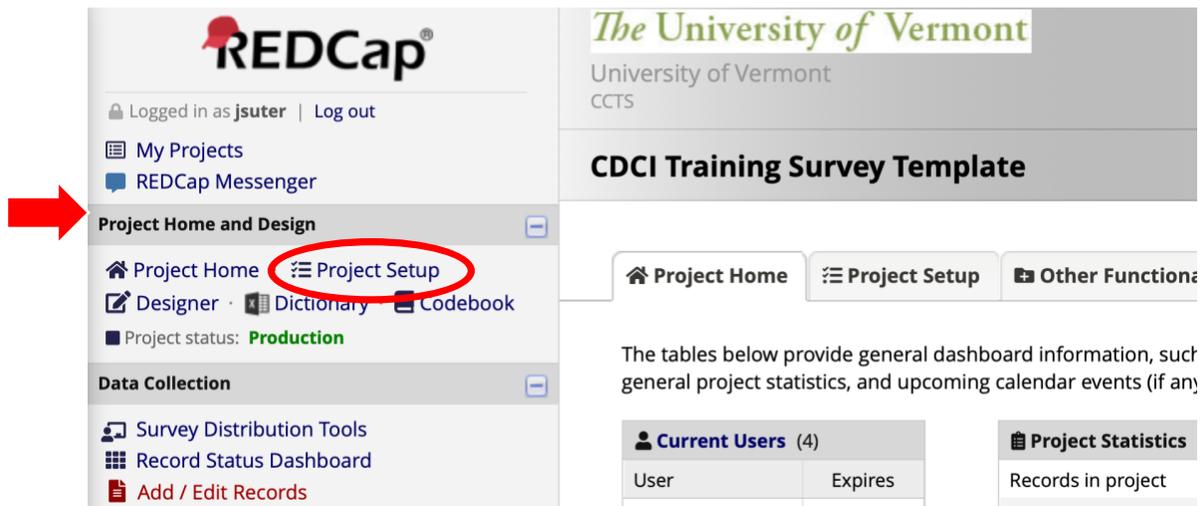
How do I customize the survey for my project and trainings?

Before you start using the training survey, you need to customize a few things to fit your training(s) and needs. Likely this only needs to be done once.

- **A REDCap project has already been created for you titled “[Project Name] CDCI Training Survey”**
This new REDCap project includes one data “instrument” which can be used as an online survey. It includes the required CDCI Training Survey questions, and Lisa and Jesse have been added as users.
- **Customize REDCap project for your Training Survey:**

When you login to REDCap should see a list of your REDCap projects. If this is your first time using REDCap you will only see the project created for you: “[Project Name] CDCI Training Survey”

Clicking on the title of your project will take you the “Project Home” screen. On the left side of the screen you will see a section titled “Project Home and Design” choose “Project Setup” to customize your project and survey.



When you click on “Project Setup” you will see a new screen that gives you a list of tasks to finishing customizing your project. You will see they are labeled “Complete!” “In Progress” or “Not Started”. Each of the tasks is reviewed below:

Main Project Settings (Complete):

The name of your project has already been set up for you. This is where you would change that if needed.

Design your data collection instruments & enable your surveys (Not started):

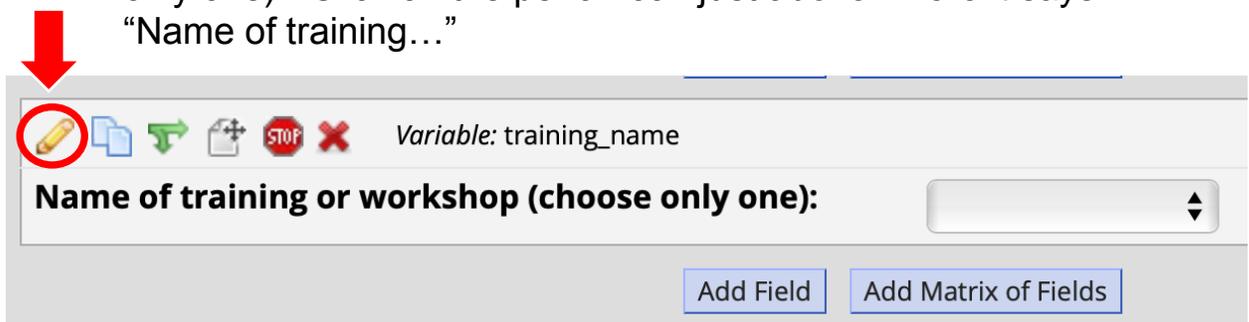
In this step, there are a few changes you need to make using the “Online Designer”.

- **Click on the “Online Designer” button.** A new window opens showing all Data Collection Instruments (i.e., surveys) you have

in this project. It should have just one instrument unless you've added more. Click on the title, "CDCI Training Survey" to open a new window where you can change questions on the survey.

- **No change should be needed for "CDCI Project (choose one)" question.** This is automatically filled out for your participants.
- **Change "Name of training or workshop (choose only one)"**
The next step is to enter the name(s) of your trainings or workshops. You can do this all at once, or several times during the year as you plan new trainings. However, you must make this change BEFORE the training occurs.

Click on the question: "Name of training or workshop (choose only one)." Click on the pencil icon just above where it says "Name of training..."

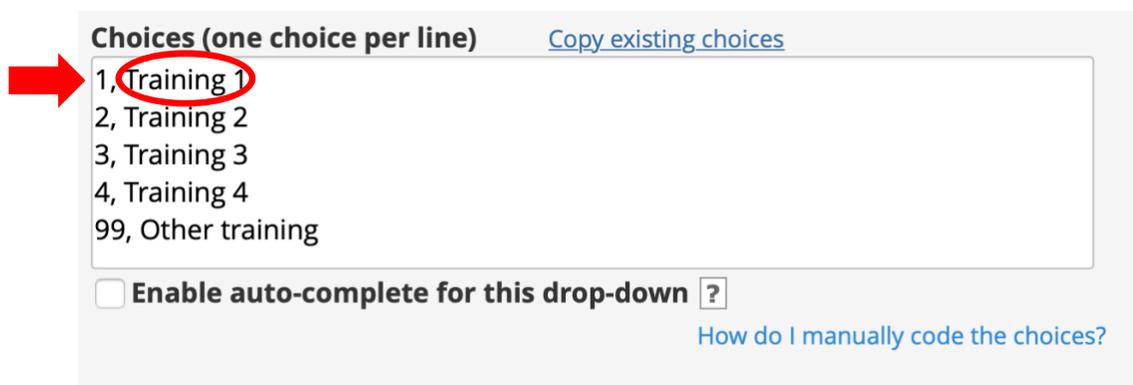


Variable: training_name

Name of training or workshop (choose only one):

Add Field Add Matrix of Fields

The "Field Label" box has the question wording and the "Choices (one choice per line)" box has the answer choices. You need to update the answer choices to match the names of your trainings. The default text is simply Training 1, Training 2, etc.



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

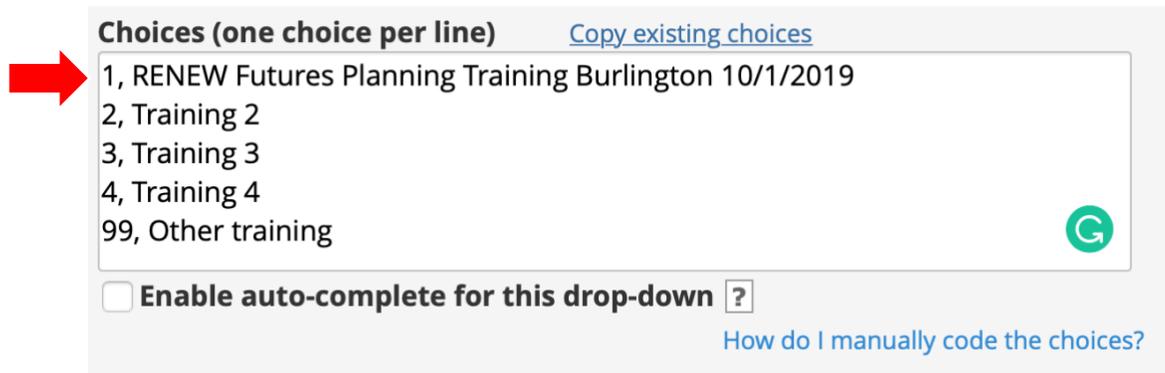
1, Training 1
2, Training 2
3, Training 3
4, Training 4
99, Other training

Enable auto-complete for this drop-down [?](#)

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

To make this change, click in the first line of the box after the number 1, and delete the text "Training 1" and replace it with

the name of your first training. If you have lots of trainings it may help you (and people completing your survey) to have a name that includes the date and location of the training. For example: “RENEW Futures Planning Training Burlington 10/1/2019” Make sure you keep the leading number and comma (“1,”) before the training name:



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

1, RENEW Futures Planning Training Burlington 10/1/2019
2, Training 2
3, Training 3
4, Training 4
99, Other training

Enable auto-complete for this drop-down [?](#)

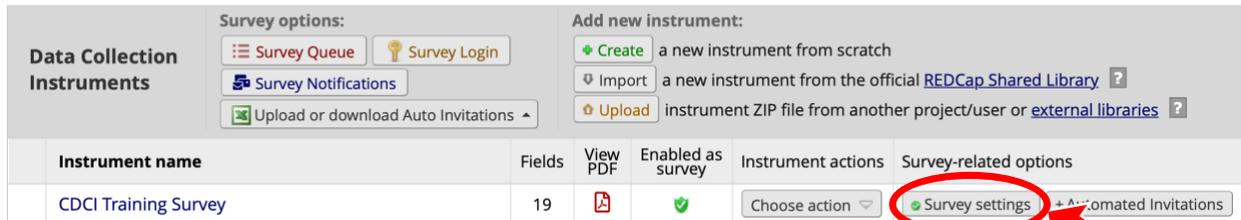
[How do I manually code the choices?](#)

Continue to add your training names, keeping the leading number and comma for each. You can add more than four by adding new rows and starting each line with the next number (e.g., “5, Training name”).

After you make this change, you must click on the “Save” button on the bottom right.

- **Add questions specific to your project (optional).**
This is optional, but if you have other questions that you want to ask beyond the required CDCI Training Survey questions, you can add them to the survey. In the Online Designer decide where you want to add the question and then click on the “Add Field” button. You will need to follow REDCap instructions to choose the appropriate Field Type (e.g., multiple choice, text box), Field Label, Variable Name, etc. to match your needs.
- **Customize Survey Settings**
After you customize the questions in the survey, you need to customize how the survey will look online and what will happen after participants complete it.
 - **Open the Online Designer in Project Setup**

This is the page that lists the CDCI Training Survey. To edit the questions you clicked on the survey title. To customize the survey choose “Survey settings” on the right side of the screen.



- **Basic Survey Options (optional)**

After choosing “Survey Settings” you will see a new page allowing you to edit how your online survey looks and behaves. In the first section you can update the Survey Title that participants see as well as the instructions that appear on the first page of the survey. Both of these can be updated to match the needs of your project.

- **Survey Design Options (optional)**

In this section you can change the logo (default is CDCI), font, and theme (i.e., color scheme). The default theme is blue, and if you would like to use the same white and green color scheme we use for CDCI trainings, choose the “customize” button and adjust the options to fit these (Choose “+ Save custom theme” when done):

- General page background color: White
- General button text color: Black
- Survey title text color: Black
- Survey title background Color: White
- Section headers text color: White
- Section headers background color: Green
- Survey questions text color: Black
- Survey questions background color: White

- **Survey Customizations (changes not recommended)**

We do not recommend changing any of these settings, but feel free to learn about them and if there’s something you want to edit check with Jesse if you have questions.

- **Survey Access (changes not recommended)**
We also do not recommend making changes here.
- **Survey Termination Options (changes recommended)**
This section determines what happens after people finish their training survey. The default is to go to CDCI's homepage ("Redirect to a URL"). We recommend you change this to your project page or another page relevant for your audience.

One thing you can do is upload a certificate of completion for your training to a website, and then link to that website here. That way people can download their certificate after they complete your survey.

Or, you can check the box for "Survey Completion Text" if you want people to receive a brief message from you. You will need to write the message in the box provided.

- **Make sure to choose "Save Changes" before leaving.**

What else is needed to setup my survey?

- **Return to the Project Setup page**
Choose the "I'm done!" button for "Design your data collection instruments & enable your surveys"
- **Update who can access your REDCap project**
 - Data in REDCap is secure, so only people with UVM REDCap accounts and access to specific projects can access your survey data.
 - Under "User Rights and Permissions" choose the button labeled "User Rights".
 - You are already connected to this project, you have been assigned "Project lead" but you need to add other people so they can access it.
 - Under "Add new users" type the person's name in the second box that says "Assign new user". Click on their name that should pop up, then click on "Assign to role". If you do not see their name they may not have a REDCap account yet.

- Jesse Suter and Lisa Hurst-Bouffard are assigned to role: “CDCI Core”
 - If you want others in your project to have access, add them either as “Project lead” (to enter data) or “See Reports” if you only want them to have access to reports but not enter or edit data.
- Return to Project Setup and check the “I’m done!” button for User Rights and Permissions.
- **Test your project thoroughly before collecting data**
 - In Project Setup you will see recommendations to “Test your project thoroughly”. This is especially important if you have added new questions.
 - Data collection “Survey Distribution Tools”
 - Check the “I’m done!” button for Test your project thoroughly.
- **Launch your survey!**
 - In Project Setup the final set is to “Move your project to production status”
 - You should do this *after* you have made your changes and tested them thoroughly and *before* you collect survey data.
 - When you are ready, click on the button that says “Move project to production”
 - You will be asked if you want to keep existing data or delete. If you have only entered data for testing choose Delete ALL data.
 - Then click on the button “YES, Move to Production Status”

How do I update the paper survey?

If you’re going to be using a paper survey, you will need to update the CDCI Training Survey template in Microsoft Word. Even if you plan to ask people to complete the survey online, we recommend having paper backups.

- **If you have not made any changes to the online survey, you can use the CDCI Training Survey template as is.**
- **If you added questions, you need to update the paper survey.**

- You can simply update the provided MS Word template survey to match your changes.
- For multiple choice questions, we recommend you number the answer choices to match the numbers in REDCap (see examples in template). This will make your data entry from paper survey into REDCap much easier.

How do I invite people to complete survey online?

Once your project is “in production” you can begin collecting data. To save you the work of entering data manually, we recommend asking your participants to complete the survey online (though have paper surveys as backup).

- **Get the survey link:**

When you are logged into REDCap and have your training survey project open, you will see a column with many choices on the left side of the screen. Under the heading “Data Collection” choose “Survey Distribution Tools”

The screenshot shows the REDCap interface for a project titled "CDCI Training Survey Guide Test" at The University of Vermont. The user is logged in as "jsuter". The left sidebar is expanded to "Data Collection", where "Survey Distribution Tools" is highlighted with a red circle and a red arrow. The main content area shows "Main project settings" with a green checkmark and "Use surveys in this project?" checked. Other settings include "Use longitudinal data collection with defined events?" (unchecked) and a "Modify project title, purpose, etc." button.

The next screen will give you a direct link to your survey (“Public Survey URL”). You can also click on the button labeled “Survey Access Code or QR Code” to get two simpler ways of accessing the survey: (1) A single UVM REDCap survey address (<https://redcap.med.uvm.edu/surveys/>) followed by a code specific to

your survey. (2) A QR code that can be scanned with a smart phone or other device to open the survey.

- **Share link with your participants:**

Once you have the link you can share it with your participants by sending it by email, putting it on your PowerPoint slides, printing it and giving it to your participants, etc.

How do I enter paper surveys into REDCap?

There are two ways: (1) Entering the data directly into REDCap or (2) Entering the data into an Excel spreadsheet. REDCap is preferred, and once you learn how to do it, it should be easier than the spreadsheet. In addition, it will allow you to review your training data in reports.

1. Enter data into REDCap

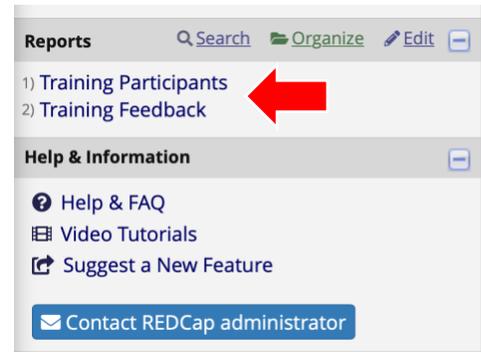
- Under the same heading where you got the survey link (Data Collection) you will see a link to “Add / Edit Records”.
- Clicking this will take you to an Add / Edit Records screen where you can select “+ Add new record”
- This opens a simplified version of the online survey for you to manually enter the participant feedback from the paper survey.
- After you enter the responses, change the final question “Complete?” from Incomplete to Complete.
- Before you discard your paper surveys, should make sure the data has been saved. You can do this by opening one of the two reports also found in the left column toward the bottom of the page (see below).

2. Enter data into Excel spreadsheet: Contact Jesse for template

Where can I see the training survey feedback?

- In the left hand column of the Project Setup page toward the bottom is a section titled “Reports.”
- The first report, **Training Participants** shares information about who completed the surveys.

- The second report, **Training Feedback** shares their satisfaction and other ratings about the training.
- At the top of the screen you can choose to look at data from just one of your trainings by choosing the appropriate “Live filter” with the button labeled “[Name of training...]”
- The report automatically shows you responses as a large table.
- If you want to view a summary of the data, at the top of the screen choose the button “Stats and Charts”
- This summary is also the best way to get summary information you need to enter the training activity into NIRS.



What do I do if I need help?

You can get help from Valerie Wood, Lisa Hurst-Bouffard, or Jesse Suter for basic help questions REDCap. The official support for REDCap at UVM is [Jeff Priest](#) 802-656-0621.