

REDCap – Automated Survey Invitations

Automated survey invitations allow a user to send invitations immediately or at a designated time in the future when certain conditions have been met.

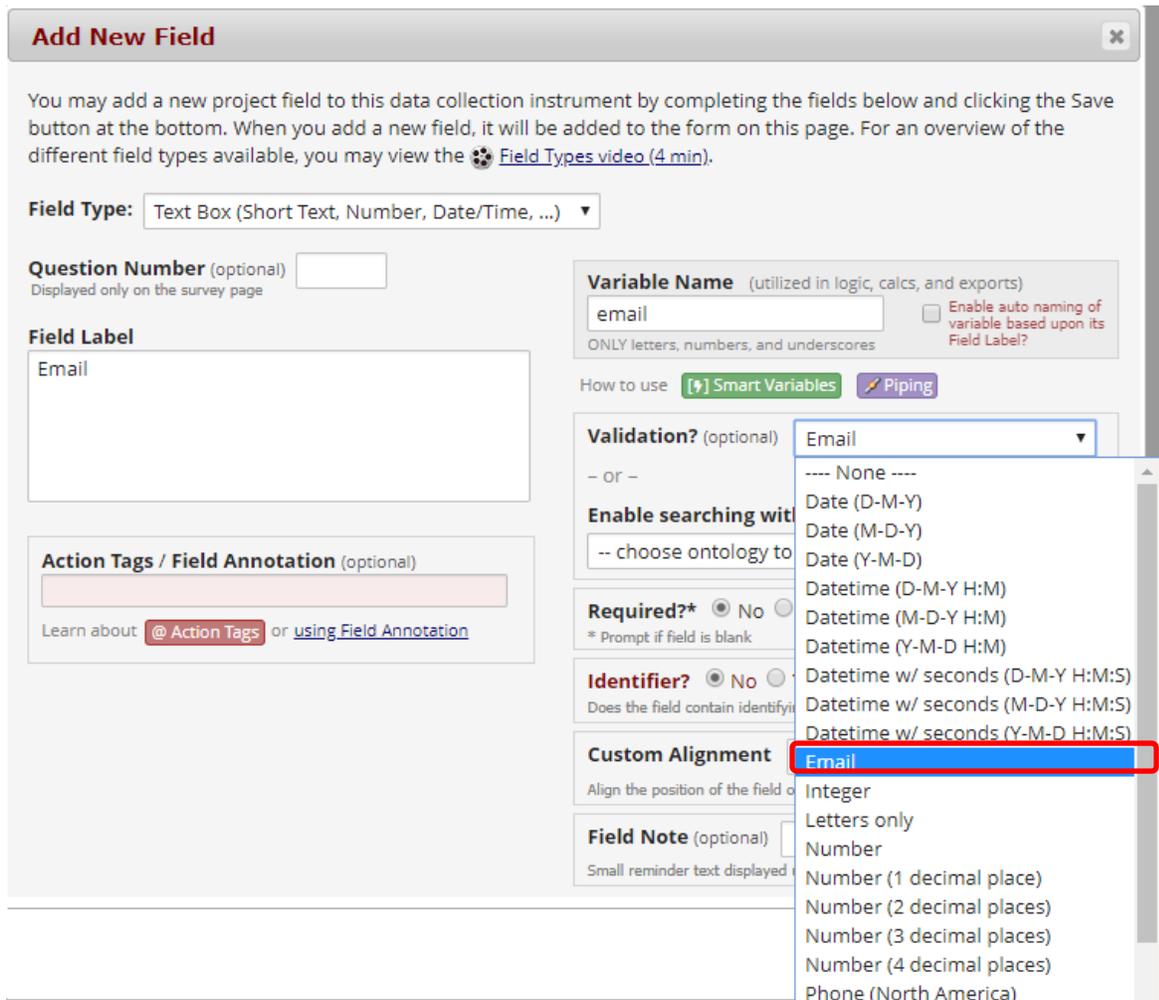
Option 1: Using the public survey link to initiate a Record ID in the project

Step 1:

- To create automatic survey invitations, first enable the forms to be used as surveys

Step 2:

- The initial survey will need to capture email addresses of participants in order for the automated survey invitations to send. Please create a field on the initial survey for email addresses. Ensure the validation for that field is set for 'email.'



The screenshot shows the 'Add New Field' interface in REDCap. The 'Field Type' is set to 'Text Box (Short Text, Number, Date/Time, ...)'. The 'Variable Name' is 'email'. The 'Field Label' is 'Email'. The 'Validation?' dropdown menu is open, showing a list of validation options. The 'Email' option is highlighted with a red box. Other options include 'None', various date and datetime formats, and various number formats.

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: Text Box (Short Text, Number, Date/Time, ...)

Question Number (optional)
Displayed only on the survey page

Field Label
Email

Action Tags / Field Annotation (optional)

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

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

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

Validation? (optional) Email
- or -
Enable searching with
-- choose ontology to

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information?

Custom Alignment
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed on the survey page

Validation options:
---- None ----
Date (D-M-Y)
Date (M-D-Y)
Date (Y-M-D)
Datetime (D-M-Y H:M)
Datetime (M-D-Y H:M)
Datetime (Y-M-D H:M)
Datetime w/ seconds (D-M-Y H:M:S)
Datetime w/ seconds (M-D-Y H:M:S)
Datetime w/ seconds (Y-M-D H:M:S)
Email
Integer
Letters only
Number
Number (1 decimal place)
Number (2 decimal places)
Number (3 decimal places)
Number (4 decimal places)
Phone (North America)

Step 3:

- Navigate to the Project Setup tab and locate the 'Enable optional modules and Customizations' bubble. Click Enable for the 'Designate an email field to use for invitations to survey participants.'

Main project settings

Not started

I'm done!

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

Enable Use longitudinal data collection with defined events? [?](#)

Modify project title, purpose, etc.

Design your data collection instruments & enable your surveys

Not started

I'm done!

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](#)

Go to [Online Designer](#) or [Data Dictionary](#) Explore the [REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

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

Enable optional modules and customizations

Optional

I'm done!

Enable Repeatable instruments [?](#)

Disable Auto-numbering for records [?](#)

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

Enable Randomization module [?](#)

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

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

Additional customizations

The 'Enable' button will open a pop-up box where you will select the variable name used for the 'Email' field.

Designate an email field for sending survey invitations

Choose an email field to use for invitations to survey participants:

-- select a field --

-- select a field --

Demographics

email "Email"

mail addresses for sending invitations to your survey participants by designating a field in address captured for that particular field will have that email address show up as the participant's email address in the Participant List (unless an email address has already been entered for that participant in the Participant List directly).

Using the designated email address field can be especially valuable when your first data collection instrument is not enabled as a survey while one or more other instruments have been enabled as surveys. Since email addresses can only be entered into the Participant List directly for the first data collection instrument, the designated email field provides another opportunity to capture the email address of survey participants.

Please be aware that designating an email field means that survey responses can NEVER BE ANONYMOUS because of the fact that the participant's email address can be viewed on a data entry form, which means it is easy to identify the record/response to which the email address belongs.

Step 4:

- On the Online Designer tab, click on 'Automated Invitations' for the first survey to be sent with the automated invitation.

Project Home | Project Setup | **Online Designer** | Data Dictionary

Create snapshot of instruments | VIDEO: How to use this page
Last snapshot: never ?

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

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/user or external libraries

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Demographics	20			Choose action ▾	Survey settings + Automated Invitations
Satisfaction Survey	2			Choose action ▾	Survey settings + Automated Invitations

Step 5:

- Define the conditions for the survey – Compose the message, define the conditions, set the time for the invitation to be sent, optional: enable reminders to be sent if the survey is not completed, and finally activate the survey invitation.

In this example, we will send the Satisfaction Survey immediately after the Demographics Survey is completed.

Define Conditions for Automated Survey Invitations

Instructions: In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. [Tell me more](#)

Info
Survey title: Satisfaction Survey

STEP 1: Compose message

From: jraiken@wakehealth.edu (select any project user to be the 'Sender')
To: [All participants who meet the conditions defined]
Subject: Please complete the survey

Compose | Preview | Send test email

Please take this survey.
You may open the survey in your web browser by clicking the link below:
[survey-link]
If the link above does not work, try copying the link below into your web browser:

NOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-ur] in the text or else the participant will not have a way to take the survey.
You may use HTML formatting in the email message: bold, <u> underline, <i> italics, link, etc.
[How to use Piping in the survey invitation](#)

STEP 2: Conditions
Specify conditions for sending invitations:
 When the following survey is completed:
"Demographics"
AND
 When the following logic becomes true:
(e.g., [age] > 30 and [gender] = "1")
[How do I use special functions?](#)
Test logic with a record: -- select record --
 Ensure logic is still true before sending invitation?

STEP 3: When to send invitations AFTER conditions are met

Send immediately
 Send on next -- select day -- at time H:M
 Send after lapse of time: days hours minutes
 Send at exact date/time: M/D/Y H:M

OPTIONAL: Enable reminders

Re-send invitation as a reminder if participant has not responded by a specified time? (Times below refer to AFTER original invitation time.)
 Send every -- select day -- at time H:M

Observations:

- As participants complete the initial survey and provide their email address, the Participant List will begin to fill with the email addresses. Notice that the individuals Record ID number will appear beside their name.

Manage Survey Participants

[Public Survey Link](#)
[Participant List](#)
[Survey Invitation Log](#)

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Participant List belonging to [Initial survey] "Demographics" Remove all participants

Displaying 1 - 1 of 1 Add participants Compose Survey Invitations Export list

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
jraiken@wakehealth.edu	1	Enable Disabled		-		-	-

- On the Survey Invitation Log, we can see that the 'view past invitations' show the automatic email invitation for the Satisfaction Survey has been sent.

Manage Survey Participants

[Public Survey Link](#)
[Participant List](#)
[Survey Invitation Log](#)

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. For each invitation it displays the participant email, participant identifier (if exists), survey name, and the date/time in which the invitation was (or will be) sent. You may even view the invitation email itself by clicking the icon in the 'View Email' column. Please note that all times below correspond to the time zone "America/New_York", in which the current time is 07/31/2018 9:54am.

Survey Invitation Log (in ascending order by time sent)

[View past invitations](#)
[View future invitations](#)

Displaying 1 - 1 of 1

Begin time: 07/31/2018 09:54 End time: (M/D/Y H:M)
 Display All invitation types and All response statuses
 Display All surveys
 Display All records
 Display invitation reminders?
[Apply filters](#) [Reset](#) [Download log \(as seen below\)](#) Delete all selected

Invitation send time	View Invite	Participant Email	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)
09/03/2018 9:00am		jraiken@wakehealth.edu	1		Satisfaction Survey			

- In this example, we set the original email to send immediately after Demographics Survey was submitted. Example email based on our email composition input:

To  Jennifer R. Aiken

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[Satisfaction Survey](#)

If the link above does not work, try copying the link below into your web browser:
http://redcapint.wakehealth.edu/redcap_int/surveys/?s=w6TTWQYwHW

This link is unique to you and should not be forwarded to others.

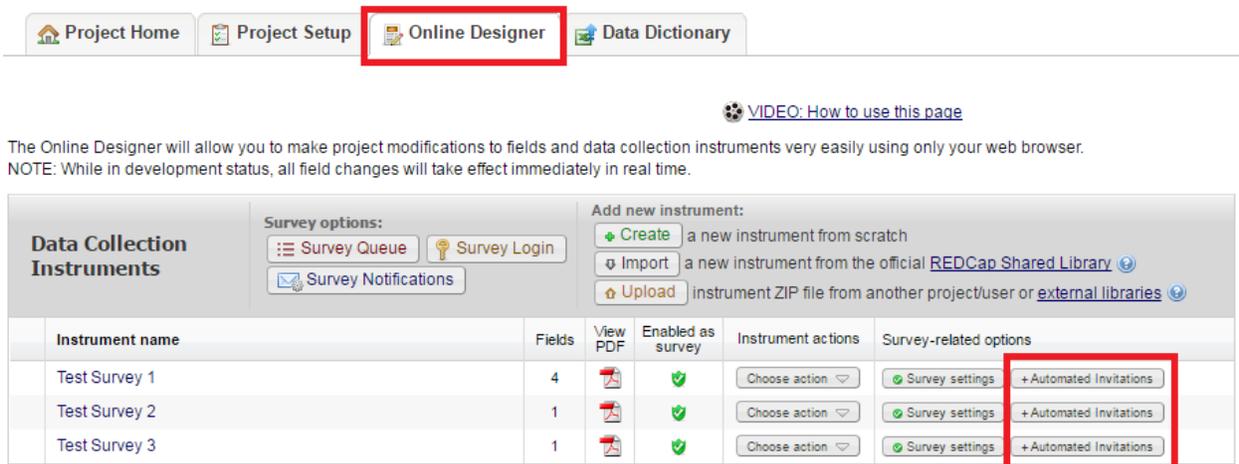
Option 2: Using the participant list to begin the automatic survey invitations

Step 1:

- To create automatic survey invitations, first enable the forms to be used as surveys.

Step 2:

- On the Online Designer tab, click on 'Automated Invitations' for the first survey to be sent with the automated invitation.



Project Home | Project Setup | **Online Designer** | Data Dictionary

[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.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Test Survey 1	4			Choose action	Survey settings + Automated Invitations
Test Survey 2	1			Choose action	Survey settings + Automated Invitations
Test Survey 3	1			Choose action	Survey settings + Automated Invitations

Step 3:

- Define the conditions for the survey – Compose the message, define the conditions, set the time for the invitation to be sent, optional: enable reminders to be sent if the survey is not completed, and finally activate the survey invitation.

In this example, we will send the Satisfaction Survey immediately after the Demographics Survey is completed.

Step 4:

- Navigate to the *Manage Survey Participants* link, then the *Participant List* tab. Click on 'Add Participants' to begin building the participant list.

Step 5: Enter the email addresses, one per line.

- Note: If you want to enable the Participant Identifier option, click on 'enable' before entering the email addresses. As you are entering emails, you can add an identifier behind the email address using a comma as the separator. For example: **ctsiredcap@wakehealth.edu, REDCap Admin**

Add Emails to Participant List



Copy and paste your list of participant email addresses, **one per line**.

```
ctsiredcap@wakehealth.edu  
test@test.com  
abc@abc.com
```

Each participant starting on a new line

Example #1: john.williams@hotmail.com

Example #2: jimtaylor@yahoo.com

Example #3: putnamtr@gmail.com

Add participants

Cancel

The names will then appear in the Participant List chart.

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
abc@abc.com		Disabled	<input type="radio"/>	-	<input type="checkbox"/>			remove
ctsiredcap@wakehealth.edu		Disabled	<input type="radio"/>	-	<input type="checkbox"/>			remove
test@test.com		Disabled	<input type="radio"/>	-	<input type="checkbox"/>			remove

Step 6:

- Click on 'Compose Survey Invitations.' This will open a pop-up box where you can complete the invitation information.

Note: When using the Participant List to email survey links, the link is specific to the participant. Please encourage the participants **not** to forward their emails with the link to other participants.

Send a Survey Invitation to Participants
✕

Info
 Survey title: Demographics

When should the emails be sent?
 Immediately
 At specified time: M/D/Y H:M
The time must be for the time zone America/New_York, in which the current time is 07/31/2018 10:03.

Enable reminders
 Re-send invitation as a reminder if participant has not responded by a specified time?

Compose message
 From:
 To: [All participants selected from Participant List]
 Subject:

Compose
Preview
Send test email

Please take this survey.

Participant List Actions: -- check/uncheck participants --
(those who have not responded completely)

<input checked="" type="checkbox"/> Email (3 selected)	Participant Identifier	Scheduled?	Sent?	Respon ded?	
<input checked="" type="checkbox"/> abc@abc.com		-	✉	●	
<input checked="" type="checkbox"/> ctsiredcap@wakehealth.edu		-	✉	●	
<input checked="" type="checkbox"/> test@test.com		-	✉	●	

Observations:

- As participants complete the initial survey, the Participant List will have a green bubble with a checkmark in the 'Responded?' column.

Manage Survey Participants

Public Survey Link

Participant List

Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Participant List belonging to [Initial survey] "Demographics" Remove all participants

Displaying 1 - 4 of 4 Add participants Compose Survey Invitations Export list

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
abc@abc.com		Disabled	●	-	✉	🔗	📄	remove
ctsiredcap@wakehealth.edu		Disabled	●	-	✉	🔗	📄	remove
jraiken@wakehealth.edu	1	Disabled	●	-	✉	-	-	
test@test.com		Disabled	●	-	✉	🔗	📄	remove

- On the Survey Invitation Log, we can see that the 'view past invitations' show the automatic email have been sent.

Manage Survey Participants

- [Public Survey Link](#)
[Participant List](#)
[Survey Invitation Log](#)

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. For each invitation it displays the participant email, participant identifier (if exists), survey name, and the date/time in which the invitation was (or will be) sent. You may even view the invitation email itself by clicking the icon in the 'View Email' column. Please note that all times below correspond to the time zone "America/New_York", in which the current time is 07/31/2018 10:16am.

Survey Invitation Log
(in ascending order by time sent)

Displaying 1 - 2 of 2

[View past invitations](#)
[View future invitations](#)

Begin time: End time: 07/31/2018 10:16 (M/D/Y H:M)
 Display: All invitation types and All response statuses
 Display: All surveys
 Display: All records
 Display invitation reminders?
[Apply filters](#) [Reset](#) [Download log \(as seen below\)](#) [Delete all selected](#)

Invitation send time	View Invite	Participant Email	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)	
07/31/2018 10:13am		jraiken@wakehealth.edu	1		Demographics	-			
07/31/2018 10:14am		jraiken@wakehealth.edu	1		Satisfaction Survey				