

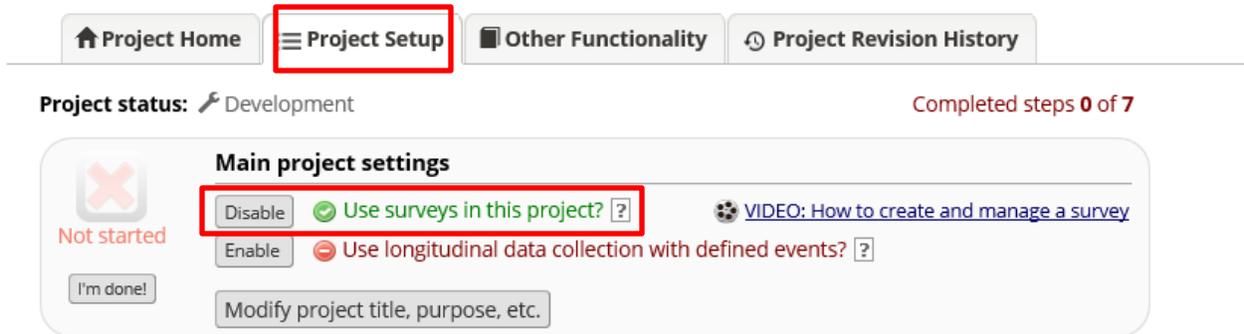
## REDCap – Survey Participant List

If responses do not need to be anonymous, you may use the participant list to capture email addresses to send participants multiple surveys and have the data linked. Below are three (3) options.

### Option 1: The project's first instrument is a survey and you want to use the public URL to capture email addresses for follow-up surveys

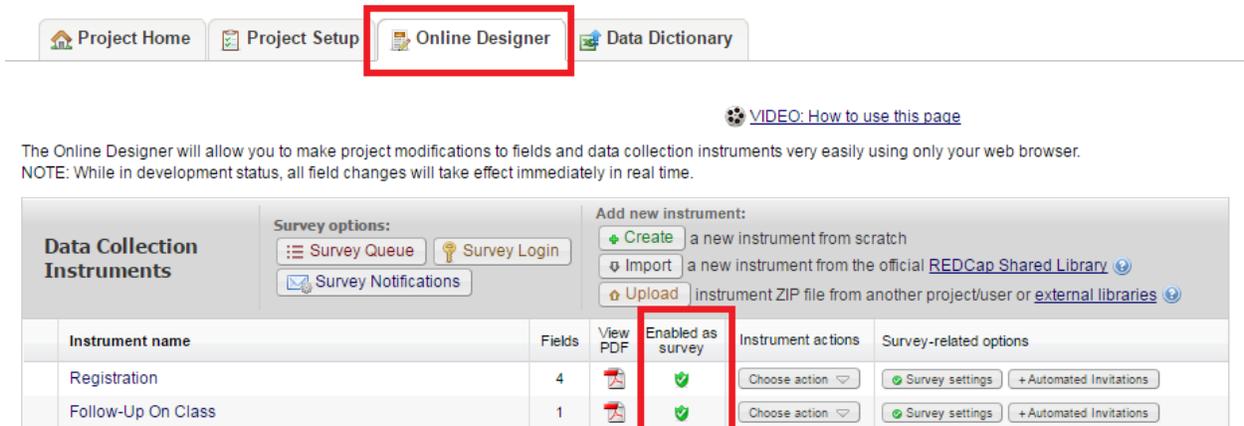
Step 1: Ensure the survey functionality is enabled:

#1) On the Project Setup tab



The screenshot shows the 'Project Setup' tab in REDCap. The 'Project status' is 'Development' and 'Completed steps 0 of 7'. Under 'Main project settings', there are two toggle switches: 'Use surveys in this project?' (checked) and 'Use longitudinal data collection with defined events?' (unchecked). A red box highlights the 'Use surveys in this project?' toggle.

#2) Each individual form that will be a survey is also enabled on the Online Designer tab



The screenshot shows the 'Online Designer' tab in REDCap. The 'Data Collection Instruments' section is visible. A table lists instruments with columns for 'Instrument name', 'Fields', 'View PDF', 'Enabled as survey', 'Instrument actions', and 'Survey-related options'. The 'Enabled as survey' column has a red box around the green checkmarks for 'Registration' and 'Follow-Up On Class'.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Registration	4		<input checked="" type="checkbox"/>	Choose action	<input checked="" type="checkbox"/> Survey settings + Automated Invitations
Follow-Up On Class	1		<input checked="" type="checkbox"/>	Choose action	<input checked="" type="checkbox"/> Survey settings + Automated Invitations

Step 2: If you want to use the public URL to capture email addresses of participants in order for subsequent surveys to be sent to the same participants, then create a field on the initial survey for email addresses. Ensure the validation for that field is set for 'Email.'

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

Field Label: Email address

Field Annotation (optional): Explanatory notes - not displayed on any page

Variable Name (utilized during data export): email

Validation? (optional): Email

Required?\* No

Identifier? No

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.'

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

Project status: Development Completed steps 0 of 7

**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 named 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 --

You can capture email addresses for sending invitations to your survey participants by designating a field in your project. If a field is designated for that purpose, then any records in your project that have an email 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.**

**NOTE:** If the participant's email address has already been captured directly in the Participant List, then that email address will supersede the value of the email field here when survey invitations are sent to the participant. Also, if the email invitation field exists on multiple longitudinal events, on a repeating instrument, or on a repeating event, the field's value will be synchronized across all instances/events so that changing it in one location will change the value across all events/instances where the field appears.

**Survey-specific email invitation field:** While the email invitation field discussed here is a project-level setting, it is helpful to know that there also exists a survey-level email invitation field option that can be utilized for particular surveys in the project (whereas the project-level field would be applied to ALL surveys). A survey-specific email invitation field can be enabled for any given survey, in which you can designate any email field in your project to use for sending survey invitations for that particular survey. Thus, you can collect several email addresses (e.g., for a student, a parent, and a teacher) and utilize each email for a different survey in the project. Then you can send each person an invitation to their own survey, after which all the survey responses get stored as one single record in the project. See the 'Survey Settings' page in the Online Designer for this survey-level setting.

Save

Cancel

Step 4: 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](#)

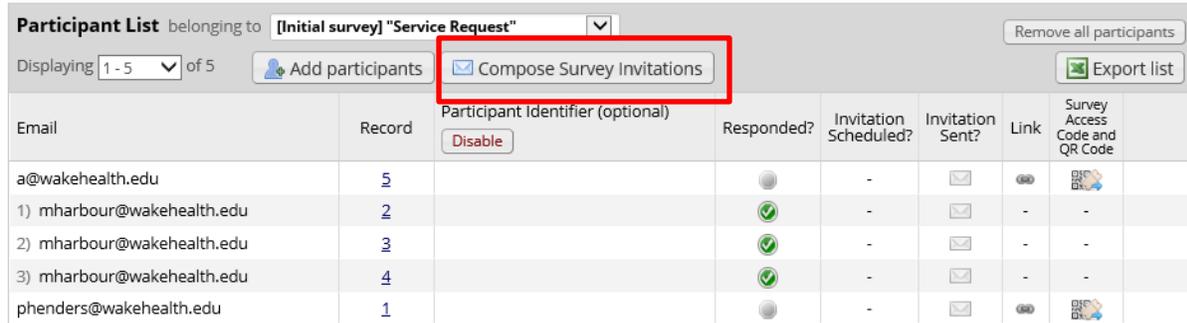
Participant List belonging to [Initial survey] "Service Request"								
Remove all participants								
Displaying 1 - 5 of 5								
 Add participants								
 Compose Survey Invitations								
 Export list								
Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
a@wakehealth.edu	5			-				
1) mharbour@wakehealth.edu	2			-		-	-	
2) mharbour@wakehealth.edu	3			-		-	-	
3) mharbour@wakehealth.edu	4			-		-	-	
phenders@wakehealth.edu	1			-				

Step 5: To send the individuals the follow-up survey, navigate to the Participant List and select the 'Participant List belonging to' from the drop down then click on 'Compose Survey Invitations.'

### Manage Survey Participants



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](#)



Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5	<input type="button" value="Disable"/>	<input type="radio"/>	-	<input type="checkbox"/>		
1) mharbour@wakehealth.edu	2		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
2) mharbour@wakehealth.edu	3		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
3) mharbour@wakehealth.edu	4		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
phenders@wakehealth.edu	1		<input type="radio"/>	-	<input type="checkbox"/>		

Complete the information and then click 'Send Invitations.'

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.

Only the names of individuals who completed the prior survey will be in this list. The system will pre-check the names of the individuals. If you decide against sending a follow-up survey to an individual, you can uncheck their name manually.

### Option 2: A project's first instrument is a survey and you want to use the participant list

This option is available when you have a list of participant emails and you want to send them a link to the survey within REDCap. Using this option, you can choose to keep the survey(s) anonymous.

Step 1: The first form must be enabled as a survey. Refer to [Option 1, Step 1](#) above to ensure the forms have been enabled as surveys.

Step 2: Navigate to *Manage Survey Participants* and then the *Participant List* tab. Click on 'Add Participants' to begin building the participant list.

## 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] "Service Request" Remove all participants

Displaying 1 - 5 of 5 Add participants Compose Survey Invitations Export list

Email	Record	Participant Identifier (optional) <span>Disable</span>	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5		<input type="radio"/>	-	<input type="checkbox"/>		
1) mharbour@wakehealth.edu	2		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
2) mharbour@wakehealth.edu	3		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
3) mharbour@wakehealth.edu	4		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
phenders@wakehealth.edu	1		<input type="radio"/>	-	<input type="checkbox"/>		

Step 3: 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](mailto:ctsiredcap@wakehealth.edu), REDCap Admin. **If you do not enable the Participant Identifier, the survey(s) will be anonymous.**

### Add Emails to Participant List

Copy and paste your list of participant email addresses, **one per line**. If you are importing Identifiers for any participant, separate them by commas following the guidelines below.

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

**Each participant starting on a new line**

**Field Order:** Email, Participant Identifier (optional)

---

**Example #1:** john.williams@hotmail.com  
**Example #2:** jimtaylor@yahoo.com, Jim Taylor  
**Example #3:** putnamtr@gmail.com, ID 4930-72

Add participants Cancel

The names will then appear in the Participant List chart.

Step 4: 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: Service Request

**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 07/23/2018 09:32.

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

**Compose message**  
From: phenders@wakehealth.edu  
To: [All participants selected from Participant List]  
Subject: [ ]

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

<input checked="" type="checkbox"/>	Email (2 selected)	Participant Identifier	Scheduled?	Sent?	Respond
<input checked="" type="checkbox"/>	a@wakehealth.edu (ID 5)		-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	phenders@wakehealth.edu (ID 1)		-	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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: <b> bold, <u> underline, <i> italics, <a href="..."> link, etc.  
[How to use Piping in the survey invitation](#)

Send Invitations Cancel

If a period of time has passed and participants have not completed the survey, you can use the ‘Compose Survey Invitations’ button to re-send the request.

Step 5: To send the individuals the follow-up survey, navigate to the Participant List and select the ‘Participant List belonging to’ from the drop down then click on ‘Compose Survey Invitations.’

**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). Unless an Identifier is used, all survey responses collected are considered anonymous. [More details](#)

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

Displaying 1 - 3 of 3 Add participants Compose Survey Invitations Export list

Email	Participant Identifier	<input type="button" value="Enable"/>	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
mahankin@wakehealth.edu (ID 1)	Disabled		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
mharbour@wakehealth.edu (ID 2)	Disabled		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
mpah_wolfpack@yahoo.com (ID 3)	Disabled		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-

Complete the information and then click 'Send Invitations.'

NOTE: Only the names of individuals who completed the prior survey will be in this list. The system will pre-check the names of the individuals. If you decide against sending a follow-up survey to an individual, you can uncheck their name manually.

**Send a Survey Invitation to Participants**

**Info**  
Survey title: Service Request

**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 07/23/2018 09:32.

**Enable reminders**

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

**Compose message**

From: phenders@wakehealth.edu

To: [All participants selected from Participant List]

Subject:

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: <b> bold, <u> underline, <i> italics, <a href="..."> link, etc.

[How to use Piping in the survey invitation](#)

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

<input checked="" type="checkbox"/>	Email (2 selected)	Participant Identifier	Scheduled?	Sent?	Respond
<input checked="" type="checkbox"/>	a@wakehealth.edu (ID 5)		-	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	phenders@wakehealth.edu (ID 1)		-	<input type="checkbox"/>	<input type="checkbox"/>

If you want to send the follow-up survey to participants even though they did not complete the initial survey, then you will need to create a separate REDCap project.

### Option 3: The project's first instrument is a Data Entry form, but you want to use the participant list to send a survey that is an additional form

If you know the participant email addresses and want the participants to complete a survey at some point within the project, then you can complete the following steps to upload the email addresses to the Participant List for a future survey within the project.

Step 1: Ensure the forms to be used as surveys have been enabled. Refer to [Option 1, Step 1](#) above to ensure the appropriate forms have been enabled as surveys.

Step 2: Create a field on the data collection form for email addresses. Ensure the validation for that field is set for 'Email.'

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

Field Label: Email address [How to use Piping](#)

Field Annotation (optional) [Learn about Action Tags](#)

Explanatory notes - not displayed on any page

Variable Name (utilized during data export): email  Enable auto naming of variable based upon its Field Label?

Validation? (optional): **Email**

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

Identifier?  No  Yes  
Does the field contain identifying information?

Custom Alignment: Integer, Letters only, Number, Number (1 decimal place), Number (2 decimal places), Number (3 decimal places), Number (4 decimal places), Phone (North America), Social Security Number (U.S.)

Field Note (optional): Small reminder text displayed

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.'

Project status: Development Completed steps 0 of 7



Not started

I'm done!

### Main project settings

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.



Not started

I'm done!

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

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](#)



Optional

I'm done!

### Enable optional modules and customizations

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 named 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 —

You can capture email addresses for sending invitations to your survey participants by designating a field in your project. If a field is designated for that purpose, then any records in your project that have an email 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.**

**NOTE:** If the participant's email address has already been captured directly in the Participant List, then that email address will supersede the value of the email field here when survey invitations are sent to the participant. Also, if the email invitation field exists on multiple longitudinal events, on a repeating instrument, or on a repeating event, the field's value will be synchronized across all instances/events so that changing it in one location will change the value across all events/instances where the field appears.

**Survey-specific email invitation field:** While the email invitation field discussed here is a project-level setting, it is helpful to know that there also exists a survey-level email invitation field option that can be utilized for particular surveys in the project (whereas the project-level field would be applied to ALL surveys). A survey-specific email invitation field can be enabled for any given survey, in which you can designate any email field in your project to use for sending survey invitations for that particular survey. Thus, you can collect several email addresses (e.g., for a student, a parent, and a teacher) and utilize each email for a different survey in the project. Then you can send each person an invitation to their own survey, after which all the survey responses get stored as one single record in the project. See the 'Survey Settings' page in the Online Designer for this survey-level setting.

Save Cancel

Step 4: When creating a record for the participant, make sure to complete the email address field that was created above in Steps 2 and 3.

### Service Request

Invitation status:  Survey options

 Editing existing Record ID 1

<b>Record ID</b>	1
<b>Date of Request</b> <small>* must provide value</small>	<input type="text" value="09-29-2017"/> <small>M-D-Y</small>
<b>Name of Individual Requesting Service</b> <small>* must provide value</small>	<input type="text" value="Henderson, Tripp"/>
<b>Email</b> <small>* must provide value</small>	<input style="border: 2px solid red;" type="text" value="phenders@wakehealth.edu"/>
<b>Department (Organization if outside of Wake Forest)</b> <small>* must provide value</small>	<input type="text" value="CTSI"/>
<b>Position</b> <small>* must provide value</small>	<input type="text" value="Research Support Staff"/>

Optional: Navigate to the Participant List tab and confirm the email address appears in the chart.

## 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] "Service Request" Remove all participants

Displaying 1 - 5 of 5 Add participants Compose Survey Invitations Export list

Email	Record	Participant Identifier (optional) <span>Disable</span>	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5		<input type="radio"/>	-	<input type="checkbox"/>		
1) mharbour@wakehealth.edu	2		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
2) mharbour@wakehealth.edu	3		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
3) mharbour@wakehealth.edu	4		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
phenders@wakehealth.edu	1		<input type="radio"/>	-	<input type="checkbox"/>		

Step 5: When you are ready to send the survey(s) to the participants, navigate to the Participant List and select the 'Participant List belonging to' from the drop down then click on 'Compose Survey Invitations.'

## 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] "Service Request" Remove all participants

Displaying 1 - 5 of 5 Add participants Compose Survey Invitations Export list

Email	Record	Participant Identifier (optional) <span>Disable</span>	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5		<input type="radio"/>	-	<input type="checkbox"/>		
1) mharbour@wakehealth.edu	2		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
2) mharbour@wakehealth.edu	3		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
3) mharbour@wakehealth.edu	4		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
phenders@wakehealth.edu	1		<input type="radio"/>	-	<input type="checkbox"/>		

Complete the information and then click 'Send Invitations.'

NOTE: If you decide against sending a survey to a participant, you can uncheck their name manually.

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:** Service Request

**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 07/23/2018 09:32.

**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.

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: <b> bold, <u> underline, <i> italics, <a href="..."> link, etc.

[How to use Piping in the survey invitation](#)

**Participant List** Actions: -- check/uncheck participants --

(those who have not responded completely)

	Email	Participant Identifier	Scheduled?	Sent?	Respond
<input checked="" type="checkbox"/>	a@wakehealth.edu (ID 5)		-	✉	⦿
<input checked="" type="checkbox"/>	phenders@wakehealth.edu (ID 1)		-	✉	⦿

NOTE: Please be sure to test the project thoroughly to ensure the Survey Participant List is functioning correctly. Once you have tested the project, please place the project into production before collecting any real data. If the project requires IRB/IACUC approval, please ensure you have approvals before collecting any real data.