

Creating and Distributing a Single Survey in REDCap – How-To Guide

Any data collection form in REDCap can be enabled as a survey, allowing participants to enter data for themselves, without having access to the REDCap project and its data. Survey participants do *not* need to have GatorLink access to complete surveys, only those who need to see the data and create the surveys need access to the REDCap project.

This guide describes how to create and distribute a *single survey* (the project contains only *one* data collection instrument that is enabled as a survey), methods for collecting anonymous and non-anonymous survey data, how to set up longitudinal survey collection (the *one* survey is distributed *multiple* times to participants) and how to get notified when a participant submits a survey.

REDCap has an online *Help & FAQs* page detailing survey design, the different distribution methods (Public Link vs. Participant List), and the advantages/limitations of each of these methods. It is recommended that you read the relevant sections below *before* sending out your survey to participants.

Survey Design: Help & FAQs:

<https://redcap.ctsi.ufl.edu/redcap/index.php?action=help#ss41>

Surveys: Anonymous Surveys: Help & FAQs:

<https://redcap.ctsi.ufl.edu/redcap/index.php?action=help#ss56>

Surveys: Invite Participants: Help & FAQs:

<https://redcap.ctsi.ufl.edu/redcap/index.php?action=help#ss57>

Surveys: Automated Survey Invitations (longitudinal survey data): Help & FAQs:

<https://redcap.ctsi.ufl.edu/redcap/index.php?action=help#ss58>

Enabling a Data Collection Form as a Survey:

Once you have built the data collection form that is intended to be a survey, the first step is to enable the form to be a survey.

On the *Project Setup* page, click on 'Enable' next to 'Use surveys in this project' (Figure 1). Once enabled, the text will become green (Figure 2).

Figure 1:

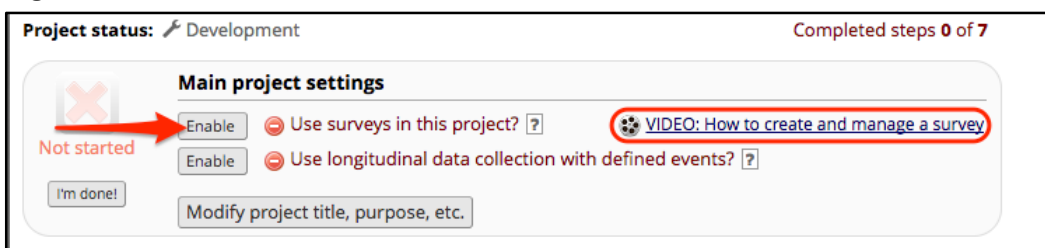
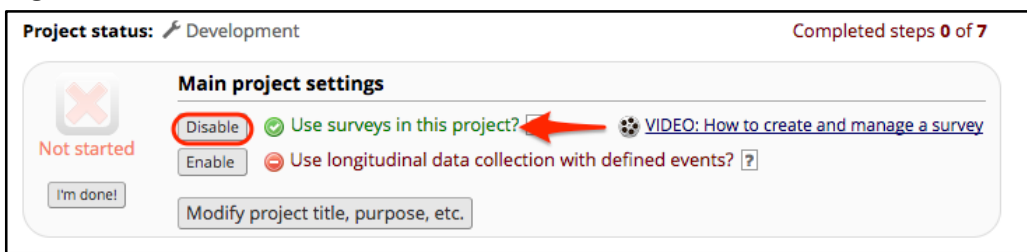
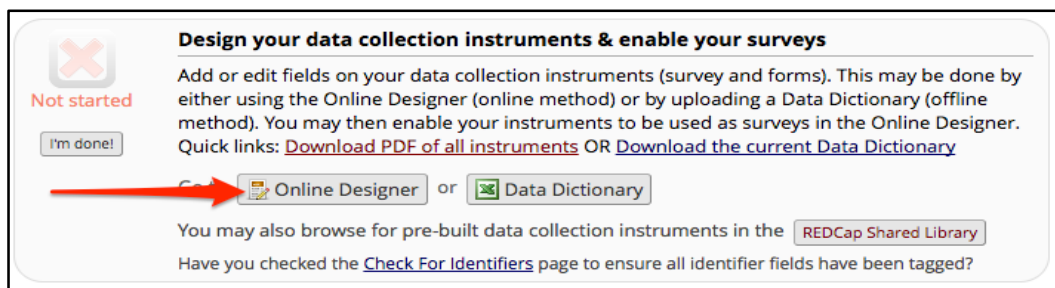


Figure 2:

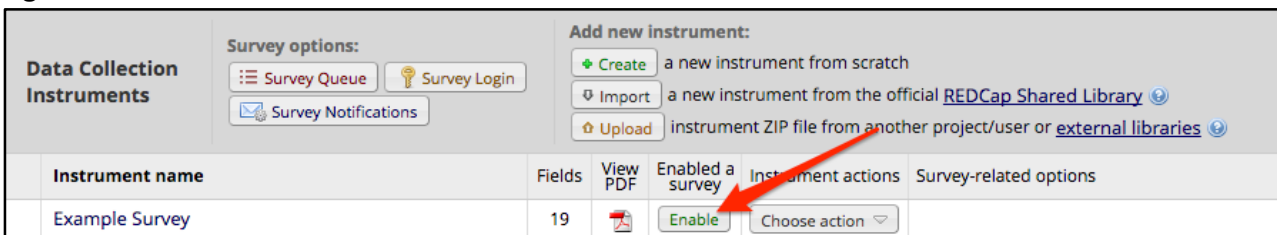


After surveys have been enabled, go to the *Online Designer* page to enable the form itself as a survey.



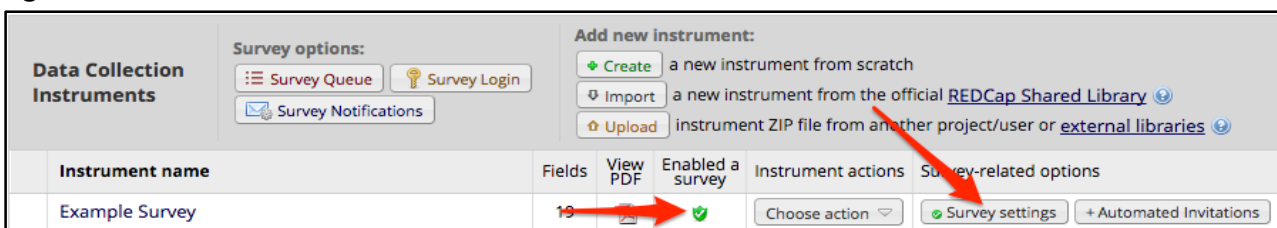
Click on 'Enable' under 'Enabled a survey' (Figure 3).

Figure 3:



Now that the form is enabled as a survey, click on 'Survey Settings' (Figure 4) to design your survey.

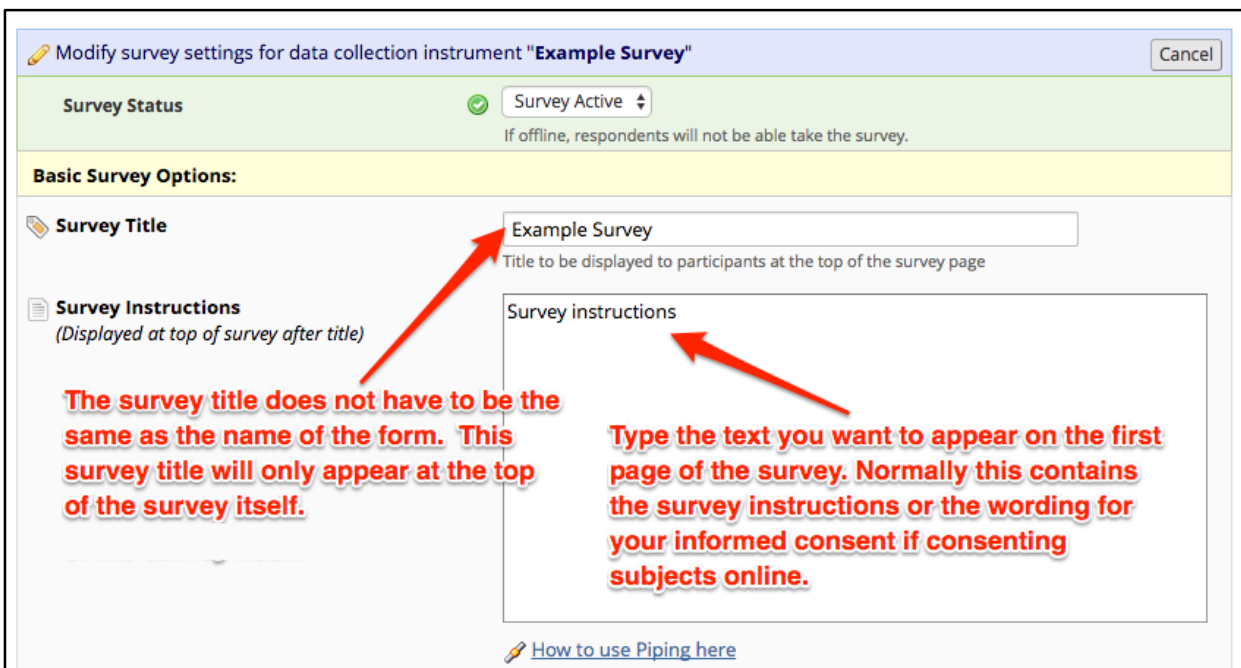
Figure 4:



This will take you to the *Survey Settings* page (Figures 5-8). The *Survey Settings* page is where you design your survey, such as choosing the font, text size and the survey's color theme, and configure its settings, such as the question display format (all on one page or multiple pages),

setting up an expiration date, enabling Text-to-Speech functionality, entering the survey completion text, and setting up confirmation emails for respondents.

Figure 5:



Modify survey settings for data collection instrument "Example Survey" Cancel

Survey Status ✓ Survey Active ↓
If offline, respondents will not be able take the survey.

Basic Survey Options:

Survey Title
Example Survey
Title to be displayed to participants at the top of the survey page

Survey Instructions
(Displayed at top of survey after title)
Survey instructions

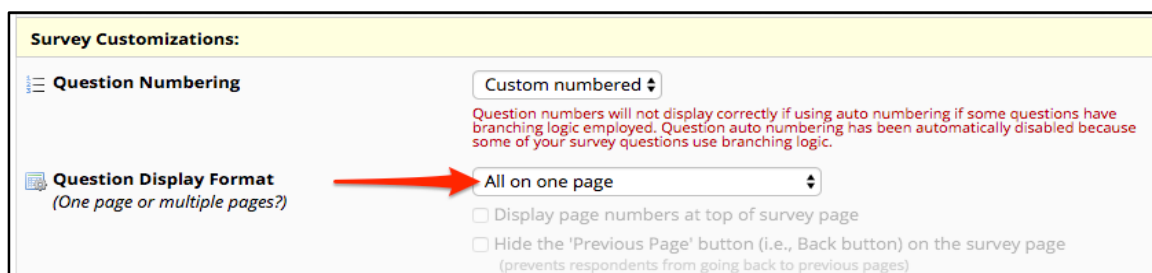
The survey title does not have to be the same as the name of the form. This survey title will only appear at the top of the survey itself.

Type the text you want to appear on the first page of the survey. Normally this contains the survey instructions or the wording for your informed consent if consenting subjects online.

[How to use Piping here](#)

Question Display Format (Figure 6) – The survey can be one page or multiple pages. To break the survey into sections for multiple pages, use the *Begin New Section (with optional text)* field type. Each section will be its own page of the survey.

Figure 6:



Survey Customizations:

Question Numbering Custom numbered ↓
Question numbers will not display correctly if using auto numbering if some questions have branching logic employed. Question auto numbering has been automatically disabled because some of your survey questions use branching logic.

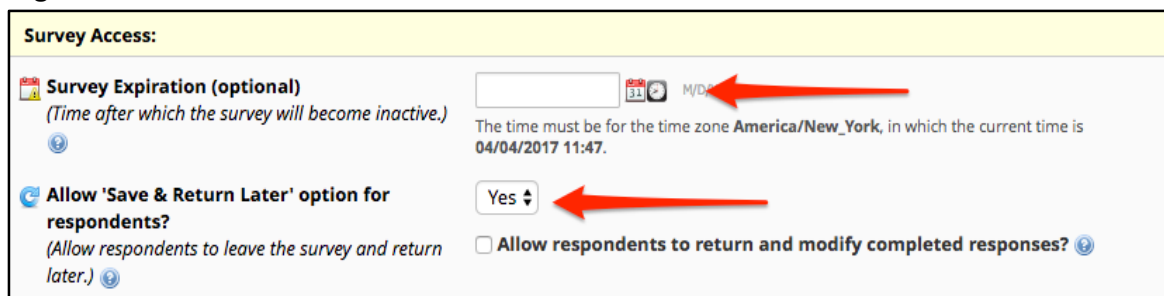
Question Display Format
(One page or multiple pages?) All on one page ↓

☐ Display page numbers at top of survey page

☐ Hide the 'Previous Page' button (i.e., Back button) on the survey page
(prevents respondents from going back to previous pages)

Allow 'Save & Return Later' option for respondents? (Figure 7) – If you're survey is long or you want to allow respondents to save the survey and return to it later, you can enable that here:

Figure 7:



Survey Access:

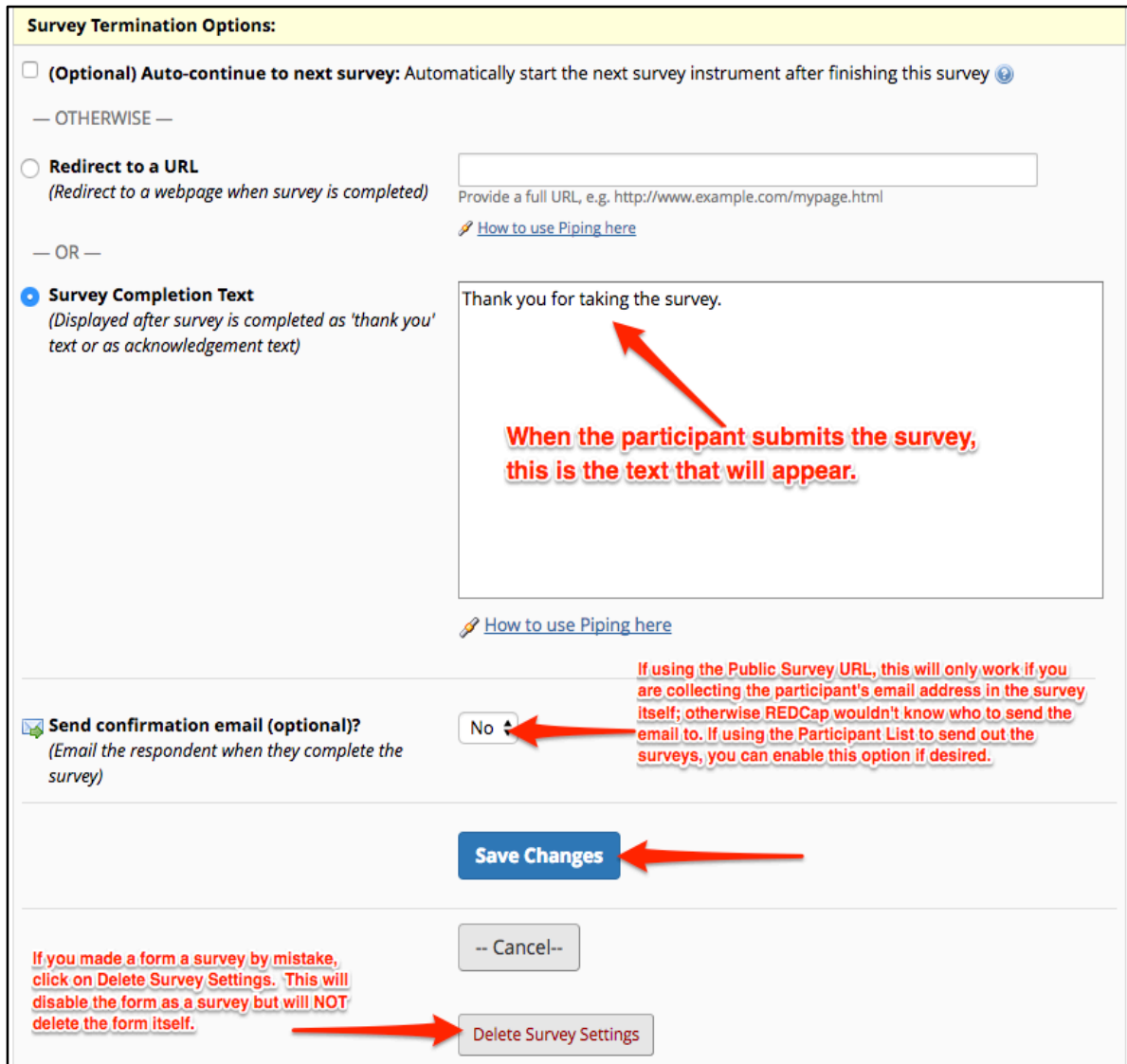
Survey Expiration (optional)
(Time after which the survey will become inactive.)
04/04/2017 11:47 M/D/Y
The time must be for the time zone America/New_York, in which the current time is 04/04/2017 11:47.

Allow 'Save & Return Later' option for respondents?
(Allow respondents to leave the survey and return later.) Yes ↓

☐ Allow respondents to return and modify completed responses? ?

Survey Completion text: This is the text that will appear when the respondent submits the survey. It is not emailed to them, it merely appears on the screen when they click *Submit*.

Figure 8:



Survey Termination Options:

☐ (Optional) Auto-continue to next survey: Automatically start the next survey instrument after finishing this survey ⓘ

— OTHERWISE —

☐ Redirect to a URL
(Redirect to a webpage when survey is completed)

Provide a full URL, e.g. <http://www.example.com/mypage.html>

✎ [How to use Piping here](#)

— OR —

☒ **Survey Completion Text**
(Displayed after survey is completed as 'thank you' text or as acknowledgement text)

Thank you for taking the survey.

✎ [How to use Piping here](#)

✎ [If using the Public Survey URL, this will only work if you are collecting the participant's email address in the survey itself; otherwise REDCap wouldn't know who to send the email to. If using the Participant List to send out the surveys, you can enable this option if desired.](#)

☒ **Send confirmation email (optional)?**
(Email the respondent when they complete the survey)

No ↕

Save Changes

-- Cancel --

✎ [If you made a form a survey by mistake, click on Delete Survey Settings. This will disable the form as a survey but will NOT delete the form itself.](#)

Delete Survey Settings

Now that the survey settings are done, the survey needs to be distributed. There are two methods of distributing the survey: via the *Public Survey Link* and via the *Participant List*.

Public Survey Link:

Using the *Public Survey Link* is the simplest and fastest way to collect responses for your survey. Responses will be collected **anonymously** (unless the survey contains questions asking for identifying data from the participant). NOTE: Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases, and REDCap does not keep track of which respondents have taken the survey and which have not since the respondent's emails are not captured within the

system. The *Public Survey Link* can be used for longitudinal data collection as long as the 'Designated an email field to use for invitations to survey participants' has been enabled on the *Project Setup* page under 'Enable optional modules and customizations,' and the initial survey collects the respondent's email address.

Participant List:

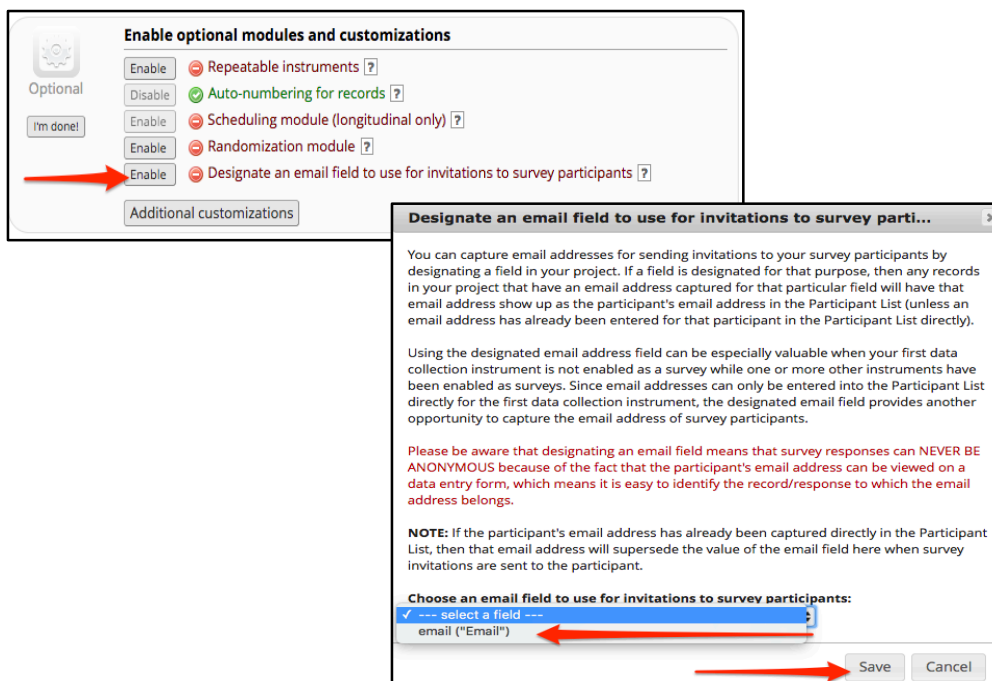
The *Participant List* option allows you to send a customized email to anyone in your list and track who responds to your survey. It is also possible to identify an individual's survey answers by providing an 'identifier' for each participant (this feature must first be enabled on the *Participant List* page). Note: All survey responses collected are considered **anonymous** unless you 1) are using *Participant Identifiers* or 2) have enabled the *Designated an email field to use for invitations to survey participants* (longitudinal data collection only) on the *Project Setup* page under *Enable optional modules and customizations*. If the *Participant Identifier* is not enabled, REDCap will track who has responded and who hasn't on the *Participant List* page, but you will not know which individual survey belongs to which respondent.

How can I send multiple surveys to participants and link their responses?

If the responses need to be anonymous, please see the section *Surveys: Anonymous* below. If responses **do not need to be anonymous**, you must at some point collect individual email addresses to send participants multiple surveys and have the data linked. This can be done in two ways:

1. **Project's first instrument is a Survey & Use of Public URL & Designate an email field:** If you want to utilize the *Public Survey URL* to distribute an initial survey and invite participants for future surveys, the survey MUST contain a text field with *validation = email* to collect the participant's email address.

On the *Project Setup* page → *Enable optional modules and customizations* → Enable: 'Designate an email field to use for invitations to survey participants.' Designate the email address field you are collecting on the first survey.



The screenshot shows the 'Enable optional modules and customizations' section of the REDCap Project Setup page. A red arrow points to the 'Enable' button for 'Designate an email field to use for invitations to survey participants'. Below this, a dialog box titled 'Designate an email field to use for invitations to survey participants...' is open. The dialog box contains instructions on how to designate an email field and a warning that responses will no longer be anonymous. At the bottom, there is a dropdown menu labeled 'Choose an email field to use for invitations to survey participants:' with 'email ("Email")' selected. A red arrow points to the 'Save' button.

When participants complete the first survey, their email addresses will pre-populate the *Participant List* and will allow you to send additional surveys for the same record. Surveys will be automatically linked by Record ID. The 'Participant Identifier' on the *Participant List* will not be editable after the survey has been sent.

LIMITATION: Only participants that answer the first survey with an email address will be able to respond to the follow-up surveys.

2. Project's first instrument is a Survey & Use of Participant List:

If have individual email addresses, you can create a project with multiple surveys. You would add individual emails to the Participant List with or without a Participant Identifier. Then you can send the survey invites through "Compose Survey Invitations."

LIMITATION: Only participants that answer the first survey will be able to respond to the follow-up surveys. If you wish to collect additional surveys for the non-responders, you will need to create additional REDCap projects with the follow-up surveys.

Surveys: Anonymous

Can I use the Participant List to collect anonymous survey data from participants?

Technically, no. Data is not anonymous when collected using the *Participant List*; but it can be "coded" and "unidentifiable" to the project admins.

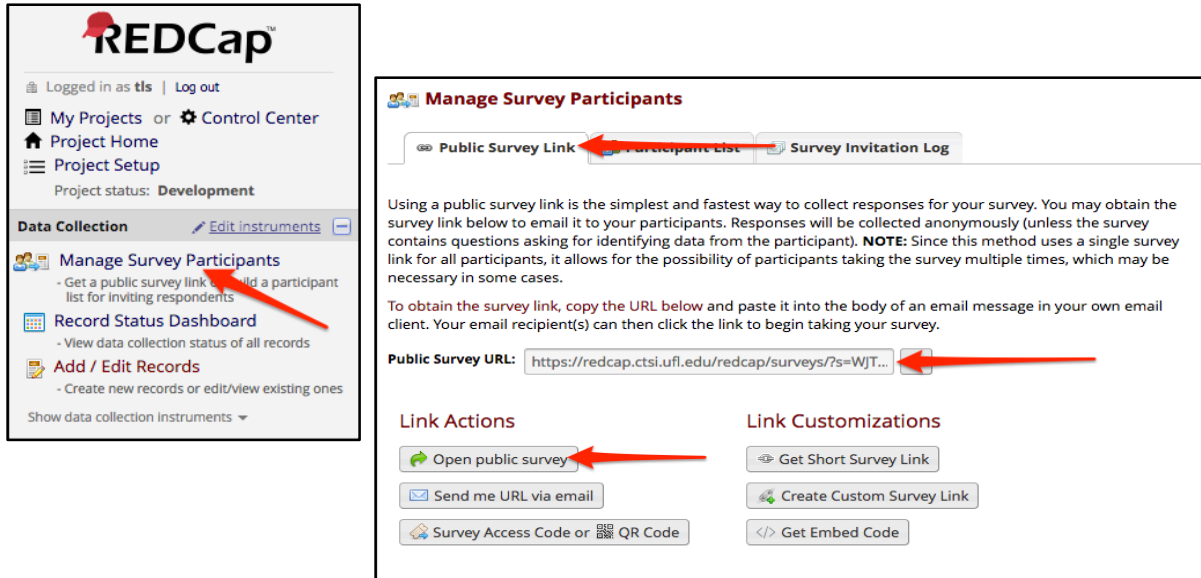
REDCap's user interface has two separate modules for (1) sending emails and tracking responders/non-responders (*Participant List*) and (2) viewing data/responses. Through the REDCap interface, there is *no link between the modules and no connection between the email address entered and the responses collected unless you enter unique values into the "Participant Identifier (optional)" field*. The 'Participant Identifier' field links the email address to the survey responses.

To ensure confidentiality of the data, REDCap tracks responses by attributing it to an email address. If the *Participant List* → 'Participant Identifier' field is not used, the project administrators are not privy to this information.

**** If you truly need anonymous data, use the *Public Survey Link*. ****

Public Survey Link (non-longitudinal data collection)

Public Survey Link: Click on 'Manage Survey Participants' under *Data Collection* (left-hand menu) on the *Project Setup* page. This will take you directly to the *Public Survey Link* page.



Manage Survey Participants

Public Survey Link | Participant List | Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

Public Survey URL: <https://redcap.ctsi.ufl.edu/redcap/surveys/?s=WJT...>

Link Actions

- Open public survey
- Send me URL via email
- Survey Access Code or QR Code

Link Customizations

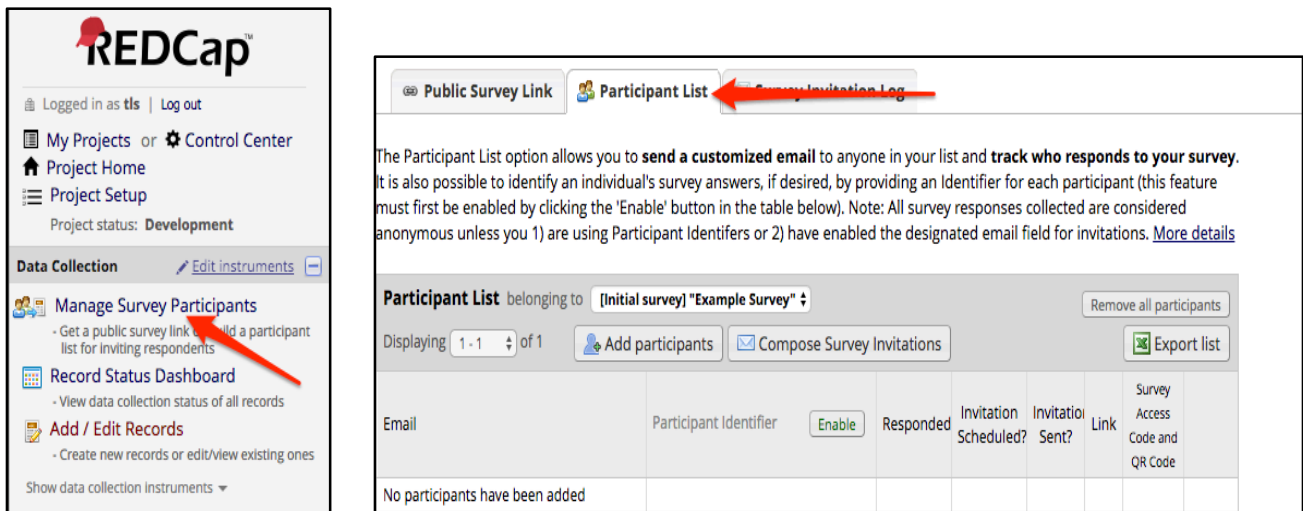
- Get Short Survey Link
- Create Custom Survey Link
- Get Embed Code

To view what the survey will look like to respondents, click on 'Open public survey.'

The 'Public Survey URL' is the link that you would provide to all the desired respondents. This can be emailed to the participants, posted on a website or recruitment letter, saved to a desktop/device, or opened while the respondent is present.

Participant List (non-longitudinal data collection)

Participant List: Click on 'Manage Survey Participants' under *Data Collection* (left-hand menu) on the *Project Setup* page. Then click on 'Participant List.'



Participant List

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] "Example Survey"

Remove all participants

Displaying 1 - 1 of 1

Add participants | Compose Survey Invitations | Export list

Email	Participant Identifier	Enable	Responded	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
No participants have been added							

Participant Identifier: If you need to be able to identify which survey response belongs to which respondent, click on 'Enable' next to *Participant Identifier*. Note: Once you send out the surveys you cannot enable this option for the invites that have already been sent out so the responses will be anonymous.

To add people to the *Participant List*, click on 'Add 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](#)

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

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

Email	Participant Identifier	Responded	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
No participants have been added						

If not using the 'Participant Identifier,' add the email addresses of the respondents, one per line (Figure 1). If using the 'Participant Identifier,' add the email addresses of the respondents, one per line, as well as the participant's identifier (Figure 2). Click on 'Add participants' when all emails have been entered.

Figure 1:

Add Emails to Participant List

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

tls@ufl.edu

Type or copy and paste the email addresses that you want to send the survey to.

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

Figure 2:

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.

tls@ufl.edu, ID 001

Type or copy and paste the email addresses you want to send the survey to. Then provide the identifier for each email address.

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

To send the survey to those on the Participant List, click on 'Compose Survey Invitations.'

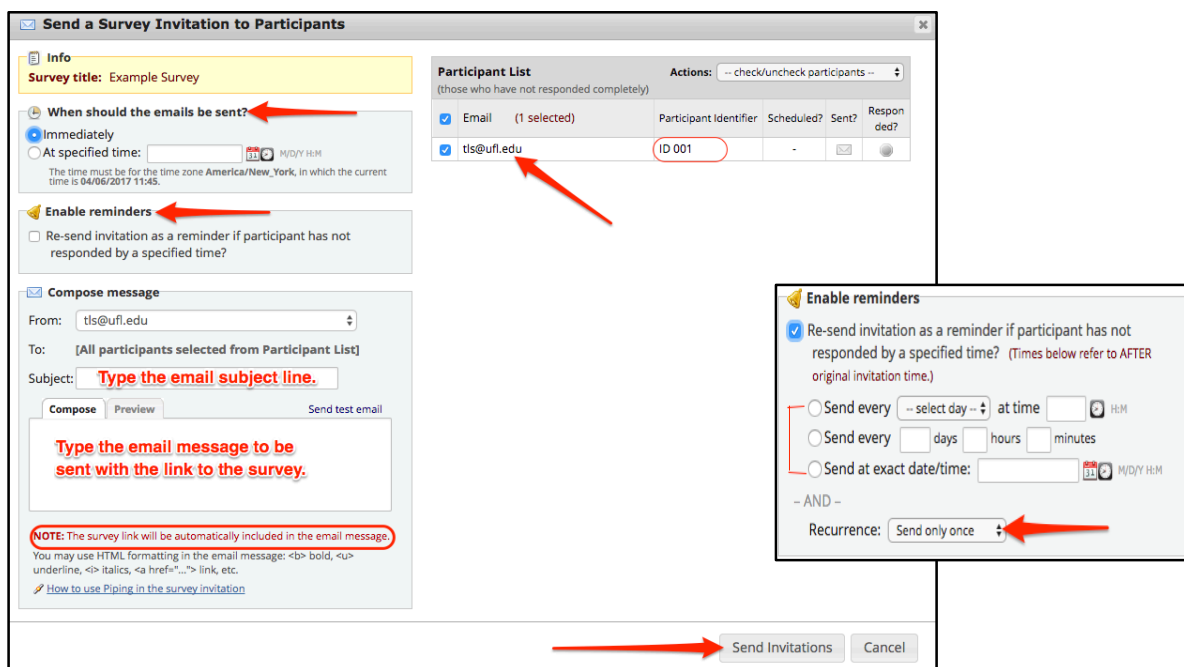
Participant List belonging to [Initial survey] "Example Survey" Remove all participants

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

Email	Participant Identifier (optional)	Responded	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
tls@ufl.edu	ID 001		-			

The *Compose Survey Invitations* page is where you set up when the survey should be sent (immediately vs. a specific date and time), reminder emails if the participant has not responded by a specified time and the email that will go out with the survey invitation. Note: Reminder emails must be set up *before* the survey is sent out and cannot be set up retroactively. If you forget to set up reminders, you'll have to re-send the survey to the participant if they do not respond.

The email addresses with a **blue** checkmark under the 'Participant List' heading are the email addresses that will be sent the invitation to the survey. You can uncheck an email address if you do not want an invitation to be sent to this address.



Send a Survey Invitation to Participants

Info
Survey title: Example Survey

When should the emails be sent?

☒ Immediately
☐ At specified time: [calendar icon] M/D/Y H:M
The time must be for the time zone America/New_York, in which the current time is 04/06/2017 11:45.

Enable reminders

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

Compose message

From: [email dropdown]
 To: [All participants selected from Participant List]
 Subject: **Type the email subject line.**

Compose Preview Send test email

Type the email message to be sent with the link to the survey.

NOTE: The survey link will be automatically included in the email message.
 You may use HTML formatting in the email message: bold, <i> italic, <u> underline, <i> italics, link, etc.
[How to use Piping in the survey invitation](#)

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

Email	Participant Identifier	Scheduled?	Sent?	Responded?
<input checked="" type="checkbox"/> [email address]	ID 001	-	[envelope icon]	[grey bubble]

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 [calendar icon] H:M
☐ Send every [] days [] hours [] minutes
☐ Send at exact date/time: [calendar icon] M/D/Y H:M

~ AND ~
 Recurrence: Send only once

Send Invitations Cancel

Click on 'Send Invitations' when finished. The survey invites have now been sent!

You can go back to the *Participant List* page to see who has responded to the survey, if an invitation has already been sent and the unique survey link for that participant. The grey bubble under 'Responded' will turn **green** when the survey has been submitted. If there is an envelope icon with a green arrow under 'Invitation Sent' then the invitation has already been sent to the individual. To view the unique survey link for the individual, click on the icon under the 'Link' column. To remove an individual from the Participant List, click on 'remove' in the far-right column.

Participant List belonging to [Initial survey] "Example Survey"

Displaying 1 - 1 of 1 [Add participants] [Compose Survey Invitations] [Export list] [Remove all participants]

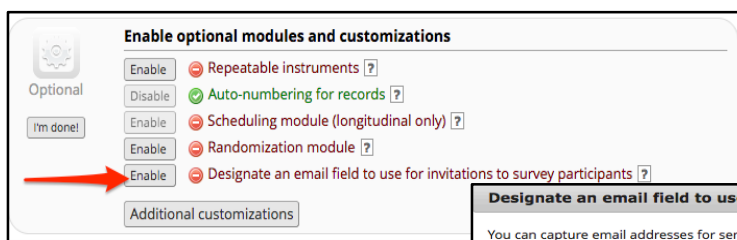
Email	Participant Identifier (optional)	Responded	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
[email address]	ID 001	[grey bubble]	-	[envelope icon with green arrow]	[link icon]	[QR code icon]	[remove]

Public Survey Link (longitudinal data collection)

You can use the *Public Survey Link* for collecting longitudinal data, and have all the surveys linked to the individual, but only if you are collecting the email addresses of the respondents in the initial survey *and* enable the 'Designate an email field' under *Optional Modules and Customizations*. The project must also be set up longitudinally, with *at least 2* events (see below).

Data Collection Instrument	Event 1 (1)	Event 2 (2)	Event 3 (3)
Example Survey (survey)	✓	✓	✓

On the *Project Setup* page → *Enable optional modules and customizations* → Enable: 'Designate an email field to use for invitations to survey participants.' Designate the email address field you are collecting on the first instance of the survey.



Enable optional modules and customizations

Optional:

- ☐ Repeatable instruments ?
- ☒ Auto-numbering for records ?
- ☐ Scheduling module (longitudinal only) ?
- ☐ Randomization module ?
- ☐ Designate an email field to use for invitations to survey participants ?

Designate an email field to use for invitations to survey participants

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.

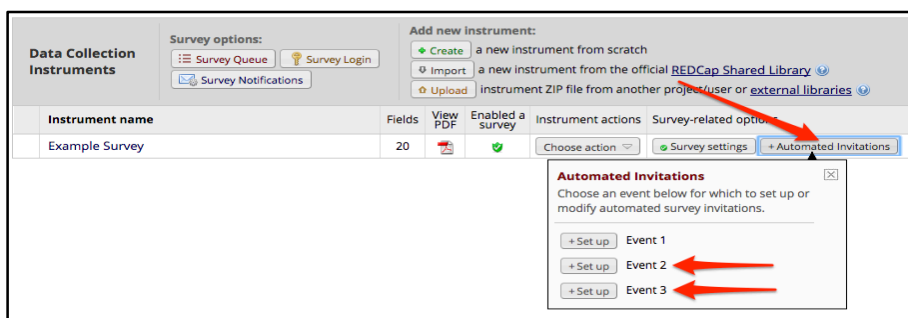
NOTE: If the participant's email address has already been captured directly in the Participant List, then that email address will supersede the value of the email field here when survey invitations are sent to the participant.

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

☒ --- select a field ---

☐ email ("Email")

The next step is to set up 'Automated Invitations' for the surveys that will be sent out *after* the 'first' survey is sent out. The 'first' instance of the survey (i.e., Event 1) will still be sent out using the *Public Survey URL* method. Click on 'Automated Invitations' to set up the following surveys (i.e., Events 2 and 3).



Data Collection Instruments

Survey options:

Add new instrument:

- a new instrument from scratch
- a new instrument from the official REDCap Shared Library
- instrument ZIP file from another project (user or external libraries)

Instrument name	Fields	View PDF	Enabled a survey	Instrument actions	Survey-related options
Example Survey	20			Choose action ▾	<input type="button" value="Survey settings"/> <input type="button" value="Automated Invitations"/>

Automated Invitations

Choose an event below for which to set up or modify automated survey invitations.

Event 1

Event 2

Event 3

Automated Survey Invitations set up page:

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: Example Survey
Event: Event 2

STEP 1: Compose message
From:
(select any project user to be the 'Sender')
To: [All participants who meet the conditions defined]
Subject:
Compose **Preview** **Send test email**
Type the text of the email you want to be sent out with the survey link.
NOTE: The survey link will be automatically included in the email message.
 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:
 "Example Survey" - Event 1
 AND
☐ When the following logic becomes true:
 (e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][gender] = "1")
[How do I use special functions?](#)
 Test logic with a record:
☐ Ensure logic is still true before sending invitation? ☐

STEP 3: When to send invitations AFTER conditions are met.
☐ Send immediately
☐ Send on next at time
☒ Send after lapse of time: days hours minutes
☐ Send at exact date/time:

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

STEP 4: Activated?
 Activate these automated invitations? In order for automated survey invitations to be sent using these specified conditions, it must be set to Active. You may make them Not Active (and vice versa) at any point in the future.
☒ Active ☐ Not Active

Save **Cancel**

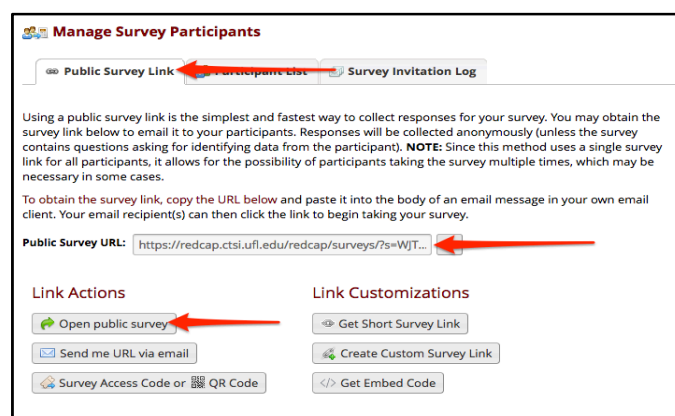
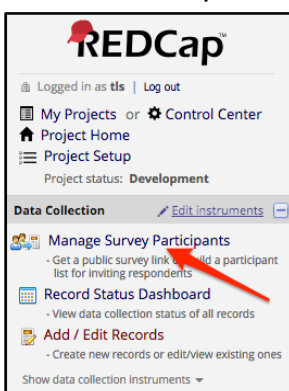
Step 1: Compose your survey email message.

Step 2: Specify the conditions for sending the invitations. For the second survey, you would specify 'When the following survey is completed: "Survey" – Event 1.' For the third survey, you would specify 'When the following survey is completed: "Survey" – Event 2.'

Step 3: Specify when the next survey should be sent out once the person completes the previous survey.

Step 4: Active your surveys by clicking on 'Active.' The automated survey invitations will not be sent until they are activated.

Click on 'Save' once finished. To send the initial survey, go to the *Public Survey Link* page to obtain the survey's URL.



Participant List (longitudinal data collection)

You can use the *Participant List* for collecting longitudinal data, and have all the surveys linked to the individual, by entering the email addresses of the respondents into the Participant List *and* by enabling the ‘Designate an email field’ under *Optional Modules and Customizations*. The project must also be set up longitudinally, with *at least 2* events (see below).

Begin Editing

Save

Data Collection Instrument	Event 1 (1)	Event 2 (2)	Event 3 (3)
Example Survey (survey)	✓	✓	✓

On the *Project Setup* page → *Enable optional modules and customizations* → Enable: ‘Designate an email field to use for invitations to survey participants.’ Designate the email address field you are collecting on the first instance of the survey.

Enable optional modules and customizations

Optional:

Designate an email field to use for invitations to survey participants

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.

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

✓ --- select a field ---

email ("Email")

The next step is to set up ‘Automated Invitations’ for the surveys that will be sent out *after* the ‘first’ survey is sent out. The ‘first’ instance of the survey (i.e., Event 1) will still be sent out using the *Participant List/Compose Survey Invitations* method. Click on ‘Automated Invitations’ to set up the following surveys (i.e., Events 2 and 3).

Data Collection Instruments

Survey options:

Add new instrument:

- a new instrument from scratch
- a new instrument from the official REDCap Shared Library
- instrument ZIP file from another project (user or external libraries)

Instrument name	Fields	View PDF	Enabled a survey	Instrument actions	Survey-related options
Example Survey	20			Choose action ▾	<input type="button" value="Survey settings"/> <input type="button" value="Automated Invitations"/>

Automated Invitations

Choose an event below for which to set up or modify automated survey invitations.

Event 1

Event 2

Event 3

Automated Survey Invitations set up page:

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: Example Survey
Event: Event 2

STEP 1: Compose message
From:
(select any project user to be the 'Sender')
To: [All participants who meet the conditions defined]
Subject:
Compose **Preview** **Send test email**

NOTE: The survey link will be automatically included in the email message.
 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:

AND
☐ When the following logic becomes true:

(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][gender] = '1')
[How do I use special functions?](#)
 Test logic with a record:
☐ Ensure logic is still true before sending invitation? ☐

STEP 3: When to send invitations AFTER conditions are met
☐ Send immediately
☐ Send on next at time H:M
☒ Send after lapse of time: days hours minutes
☐ Send at exact date/time:

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

STEP 4: Activated?
 Activate these automated invitations? In order for automated survey invitations to be sent using these specified conditions, it must be set to Active. You may make them Not Active (and vice versa) at any point in the future.
☒ Active ☐ Not Active

Save **Cancel**

Step 1: Compose your survey email message.

Step 2: Specify the conditions for sending the invitations. For the second survey, you would specify 'When the following survey is completed: "Survey" – Event 1.' For the third survey, you would specify 'When the following survey is completed: "Survey" – Event 2.'

Step 3: Specify when the next survey should be sent out once the person completes the previous survey.

Step 4: Active your surveys by clicking on 'Active.' The automated survey invitations will not be sent until they are activated.

Click on 'Save' once finished.

To send the initial survey, go to the *Participant List* page to enter the email addresses and compose the initial survey invitation.

Manage Survey Participants

Public Survey Link **Participant List** **Invitation Log**

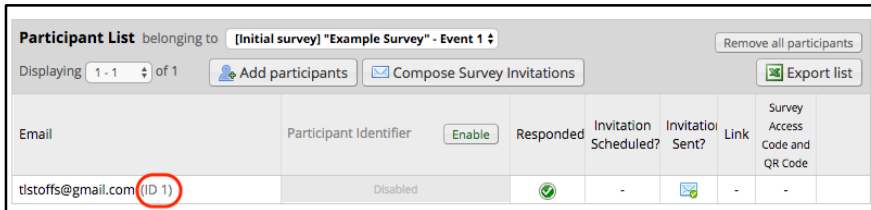
The Participant List option allows you to send a customized email to anyone in your list and track who responds to your survey. It is also possible to identify an individual's survey answers, if desired, by providing an identifier for each participant (this feature must first be enabled by clicking the '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:
 Remove all participants

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

Email	Participant Identifier	Enable	Responded	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
tls@ufl.edu	Disabled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Link	QR Code remove

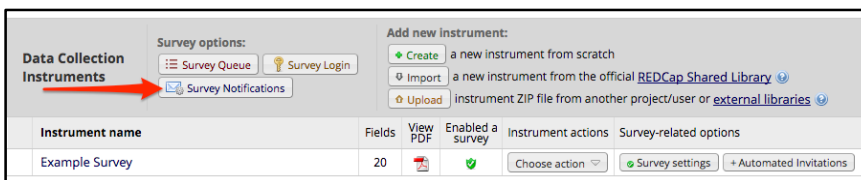
It is recommended that you DO NOT enable the Participant Identifier if collecting data longitudinally using the Participant List. Because you are using the *Designate email field* option, REDCap knows which record the email belongs to and will notate the subject's Record ID when the survey is completed (see below).



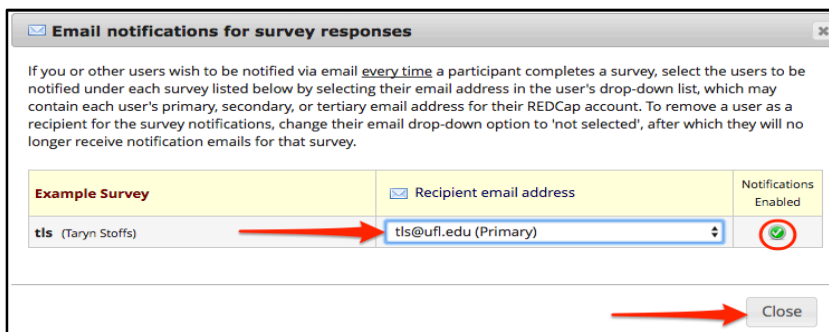
If you do enable the 'Participant Identifier' field, the identifier you give them will appear next to their email address instead of their Record ID, making their Record ID number harder to find if you needed to pull up this respondent's survey results.

How to get notified when a survey has been submitted:

Go to the *Online Designer* page and click on 'Survey Notifications.'



A list of all project users and their email addresses will be listed here. To select who gets the survey notification emails, select their email address under the *Recipient email address* column. Once enabled, there will be a green checkmark under *Notifications Enabled* column.



Example email from a survey notification:

[This message was automatically generated by REDCap]

A respondent completed your survey titled "Example Survey" on 04/06/2017 4:28pm. You may [view their responses here](#).

If you no longer wish to receive email confirmations triggered by survey responses, simply uncheck the checkbox for your user name for this survey in the Notifications pop-up on the [Online Designer](#) page, if you have privileges to access that page.