

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>

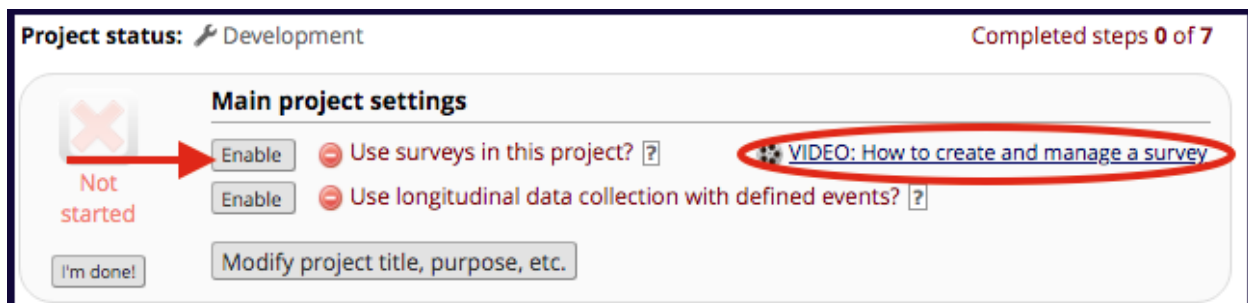
Surveys: Automated Survey Invitations (longitudinal survey data): Help & FAQs:

<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'. Once enabled, the text will become green.



Project status: Development Completed steps 0 of 7



Not started

[I'm done!](#)

Main project settings

[Disable](#)
[Enable](#)


✔
Use surveys in this project?

✘
Use longitudinal data collection with defined events?

[Modify project title, purpose, etc.](#)

[VIDEO: How to create and manage a survey](#)

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



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](#)

Click on 'Enable' under 'Enabled a survey'.

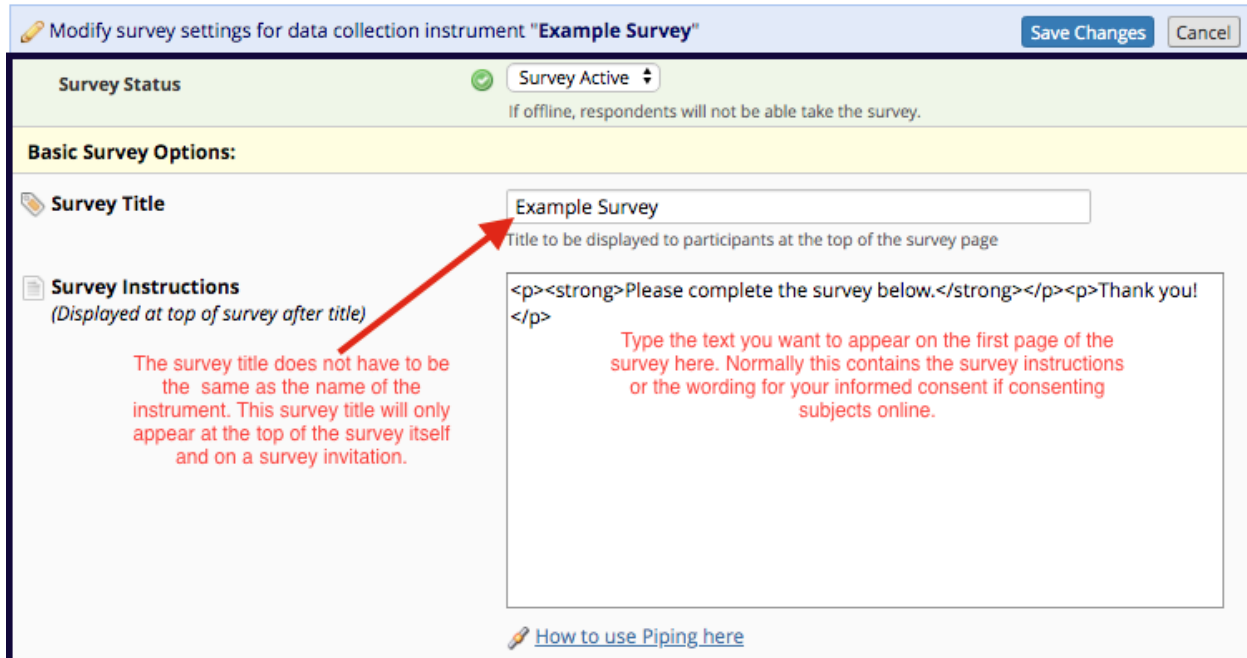
Data Collection Instruments		Survey options:		Add new instrument:		
		Survey Queue Survey Login	Create a new instrument from scratch Import a new instrument from the official REDCap Shared Library ? Upload instrument ZIP file from another project/user or external libraries ?			
		Survey Notifications				
		Upload or download Auto Invitations				
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions		Survey-related options
Example Survey	1		Enable	Choose action		

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

Data Collection Instruments		Survey options:		Add new instrument:		
		Survey Queue Survey Login	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 ?			
		Survey Notifications				
		Upload or download Auto Invitations				
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions		Survey-related options
Example Survey	1			Choose action		Survey settings + Automated Invitations

This will take you to the *Survey Settings* page.

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.



Modify survey settings for data collection instrument "Example Survey" Save Changes 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)

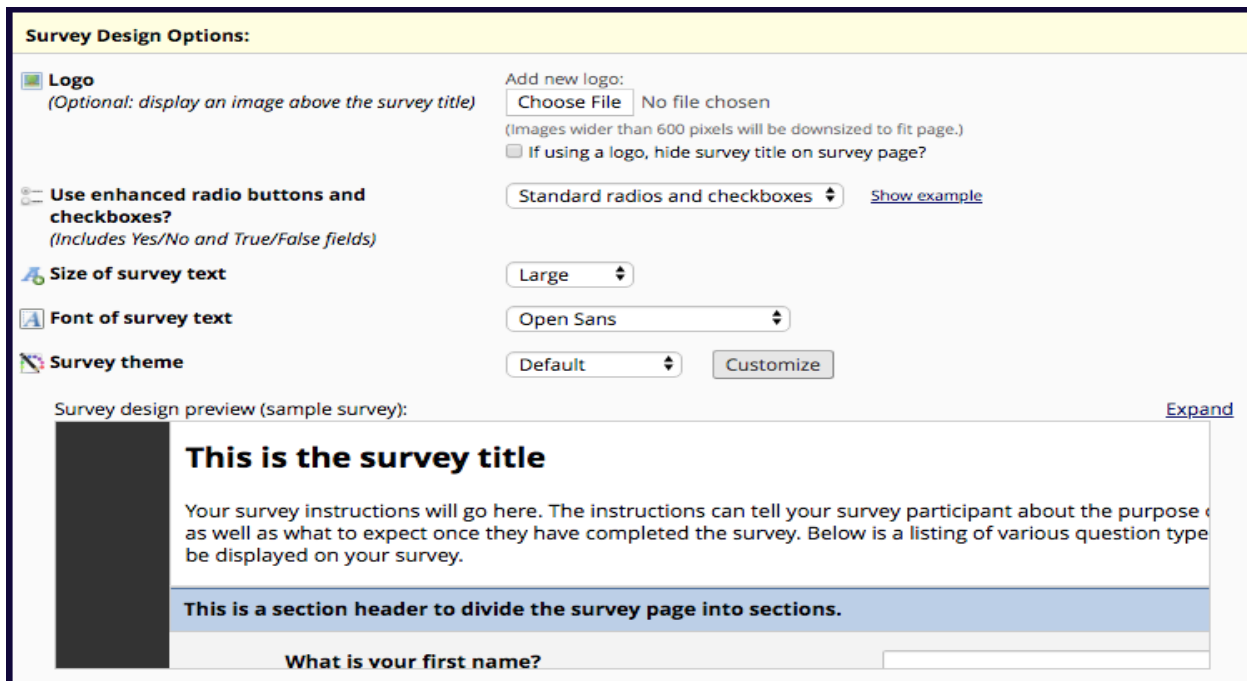
The survey title does not have to be the same as the name of the instrument. This survey title will only appear at the top of the survey itself and on a survey invitation.

<p>Please complete the survey below.</p><p>Thank you!</p>

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

[How to use Piping here](#)

Survey Design Options – This is where you can customize how your survey looks. You can add a logo, used enhanced radio and checkbox buttons, edit survey text font and size and change the survey theme. As you customize you can see the changes in the Survey design preview box.



Survey Design Options:

Logo
(Optional: display an image above the survey title)

Add new logo:
Choose File No file chosen
(Images wider than 600 pixels will be downsized to fit page.)
☐ If using a logo, hide survey title on survey page?

Use enhanced radio buttons and checkboxes?
(Includes Yes/No and True/False fields)

Standard radios and checkboxes [Show example](#)

Size of survey text
Large

Font of survey text
Open Sans

Survey theme
Default Customize

Survey design preview (sample survey): Expand


This is the survey title


Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the survey as well as what to expect once they have completed the survey. Below is a listing of various question types that will be displayed on your survey.

This is a section header to divide the survey page into sections.


What is your first name?

Here is a customized survey design preview



Logo
 (Optional: display an image above the survey title)


Preview (displaying here at max 500 pixel width): [\[X\] Remove Logo](#)



☒ If using a logo, hide survey title on survey page?


Use enhanced radio buttons and checkboxes?
 (Includes Yes/No and True/False fields)

[Show example](#)


Size of survey text


Font of survey text


Survey theme

Preview added Logo →

Selected enhanced buttons →

Changed font →

Changed survey theme →

Survey design preview (sample survey): [Expand](#)

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the survey, as well as what to expect once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

This is a section header to divide the survey page into sections.

What is your first name?

What days of the week do you work? (check all that apply) How enhanced checkboxes look

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

What is your ethnicity?

What is your favorite ice cream? How enhanced radio buttons look

☐ Chocolate

☐ Vanilla

☐ Strawberry

Thanks for taking the survey!

Survey Customizations – This section contains question numbering options, survey on one page or multiple pages, allow PDF downloads of completed surveys, add specific email invitation field, display “must provide value” for required fields, allow respondents to view aggregate survey results, text-to-speech functionality.

Question Numbering – You can select either Auto-numbered or Custom-numbered for the survey questions.

Question Display Format – 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.

Allow participants to download a PDF of their responses at the end of survey – This option will display a button for the participant to download a PDF file of their responses for the survey they just completed.

Survey-specific email invitation field – 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.


The survey-specific email field is similar to the project-level email invitation field except that it is employed only for the survey where it has been enabled. In this way, the survey-level email can override an existing email address originally entered into the Participant List or the project-level email field (if used). This feature allows users to have data entry workflows that require multiple surveys where the participant is different for each survey. (Note: The email field can exist on any instrument in the project, and you may use a different email field on each survey. You may also use the same email field for multiple surveys.)


For ‘Required’ fields, display the red ‘must provide value’ text on the survey page – If enabled the * must provide value will appear beneath all ‘Required’ fields.


Allow survey respondents to view aggregate survey results after completing the survey – After completing the survey, participants can view ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent’s answers will be highlighted in yellow.


Text-To-Speech functionality – Allows text on survey page to be read audibly to participants. When enabled, icons will be displayed next to all text on the survey, and when clicked, the text will be read out loud to the participant (must have device speakers turned on).


Survey Customizations:


 **Question Numbering**


 **Question Display Format**
(One page or multiple pages?)

 **Allow participants to download a PDF of their responses at end of survey?**
Display a button for the participant to download a PDF file of their responses for the survey they just completed.

 **Survey-specific email invitation field**
Designate an email field for sending survey invitations for this survey only. [?](#)

 **For 'Required' fields, display the red 'must provide value' text on the survey page?**

 **Allow survey respondents to view aggregate survey results after completing the survey?**
After completing the survey, participants can view ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent's answers will be highlighted in the results.

 **Text-To-Speech functionality**
(Allows text on survey page to be read audibly to participants.)
When enabled, icons will be displayed next to all text on the survey page, and when clicked, the text will be read out loud to the participant (must have computer speakers turned on).

☐ 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)

This option will not be available if the Survey Auto-continue or Survey Queue auto-start option is enabled. Also, if a field utilizes the @HIDDEN action tag, it will not be displayed in the PDF.

Note: This option will override the project-level email invitation field (if enabled on the Project Setup page) and will also override any email address originally entered into the Participant List. Also, if this field has no value and the project-level email field is enabled, then the project-level email field's value will be used instead.

If 'No', then it will NOT display the following text beneath all 'Required' fields: * must provide value

Additional settings:

10

Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).

☐ Do not show plots for questions lacking diversity in response values?
[\(What does this mean?\)](#)

NOTICE: All text that is spoken is sent to a service hosted at Vanderbilt University that utilizes the IBM Watson Text-to-Speech API service. Be advised that if the survey utilizes piping, for privacy concerns, data piped from Identifier fields will **not** be sent to the service with the rest of the text but will instead be redacted.
[Administrators: How to disable this feature](#)

Survey Access – This section allows you to implement response limits, time limits to complete a survey once an invitation is sent, set an expiration date for the survey and an option on allowing respondents to save and return to survey at a later time.

Response Limit – You can set the maximum number of responses to collect. Prevents respondents from starting the survey after a set number of responses have been collected. An important note about using the Response Limit feature is that if the limit has been reached for a given survey, then the survey will no longer show up in a participant's Survey Queue (if enabled), the Survey Auto-continue option (if enabled on the Survey Settings page) will skip over this survey, and also Automated Survey Invitations (if enabled) will no longer be scheduled for the survey.

Response Limit continued:

RECORD DELETION NOTE: If records/responses are deleted from the project after the response limit has been reached, in which the number of responses falls below the limit again, then the survey will begin showing up in the Survey Queue again, the Survey Auto-continue option will begin working normally again, and Automated Survey Invitations will begin to be scheduled again. However, in this case, any invitations that did not get scheduled via Automated Survey Invitations after the limit had been reached will **not** get automatically scheduled again if the response count falls below the limit due to the deletion of records/responses, in which case those invitations would have to be scheduled manually.

LONGITUDINAL NOTE: If your project has the longitudinal module enabled, then please keep in mind that the Response Limit will be applied to each event individually where the survey is utilized. For example, if the response limit is set to 50, then even though the survey on Event 1 has reached the limit, the survey on Event 2 and so forth will still be open if the survey on those events have not reached the limit.

Time Limit for Survey Completion – You can set the amount of time that each respondent has to complete the survey based on when they were initially sent the survey invitation. *Note: This feature excludes public survey links.*


Survey Expiration – You can set the time after which the survey will become inactive.

Allow 'Save & Return Later' option for respondents – 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. This option provides respondents with a 'Save & Return Later' button on the survey page, which allows them to save their progress and return where they left off to complete the survey any time in the future.


Allow respondents to return without needing a return code: By default, when respondents click the 'Save & Return Later' button on a survey, they will need the return code provided to them in order to return to the survey later to begin where they left off. But this behavior can be modified by checking the checkbox, which will allow anyone with only the survey link to return to the survey and view all previously entered responses WITHOUT needing a return code. NOTE: If you are collecting identifying information (e.g., PII, PHI), for privacy reasons it is HIGHLY recommended that you leave the option unchecked so as to enforce a return code.

Allow respondents to return and modify completed responses: By default, respondents are not allowed to modify their survey responses if the survey has been fully completed. By checking this checkbox, it allows respondents to return to a completed survey response (via the Save & Return Later functionality) and modify any of their answers in the survey. The survey response will remain as a completed response during this process and afterward. The only thing that will change with regard to the actual status of their survey response is that if the respondent gets to the end of the survey again and completes it again, the survey completion time will be updated with the new time of completion. If the survey has the Survey Login feature enabled, then the user will have to log in with their login credentials in order to return to the completed survey response. If that feature is not enabled, then their auto-generated return code will be required to allow them to return.

Survey Access:


 **Response Limit (optional)**
(Maximum number of responses to collect. Prevents respondents from starting the survey after a set number of responses have been collected.) [?](#)


(e.g., 150) If left blank, the response limit will not be enforced.

 **Time Limit for Survey Completion (optional)**
(The amount of time that each respondent has to complete the survey based on when they were initially sent the survey invitation. Note: This feature excludes public survey links.)


days
 hours
 minutes

If the respondent loads the survey after this time has passed, it will not allow them to begin or continue the survey. (If all are left blank, the time limit will not be enforced.)

 **Survey Expiration (optional)**
(Time after which the survey will become inactive.) [?](#)

 M/D/Y H:M

The time must be for the time zone **America/New_York**, in which the current time is **04/23/2019 09:57**.

 **Allow 'Save & Return Later' option for respondents?**
(Allow respondents to leave the survey and return later.) [?](#)

☐ **Allow respondents to return without needing a return code** [?](#)
☐ **Allow respondents to return and modify completed responses** [?](#)

Survey Termination Options – This section allows additional options on what you want to happen when a respondent completes a survey (e.g., auto-continue to next survey, redirect to a URL, specific survey completion text, store completed survey as a PDF, send confirmation email to respondent).

Auto-continue to next survey – When enabled this will automatically start the next survey instrument after finishing this survey.

Linking surveys together is only supported inside the same event and must be enabled for each survey you wish to link. This feature allows you to have separate survey instruments strung together to appear as though they were a single survey to the survey participant. This is especially useful for complex longitudinal project where different combinations of instruments are given in separate events. If enabled and this is the last survey, the selected termination option below will be used. NOTE: If you wish to utilize more advanced conditional logic to control which survey that the participant goes to next, you should use the Survey Queue feature, which can be enabled in the Online Designer.

Redirect to a URL – This will redirect the respondent to a webpage when a survey is completed.

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*. You can edit this text, use piping and some HTML.

PDF Auto-Archiver – When enabled, upon survey completion, a compact PDF copy of the survey response will be automatically stored in the project's File Repository, from which the archived PDFs can be downloaded at any time.

NOTE: This feature is highly recommended to use while eConsenting participants via a survey. This feature only works when the instrument is completed as a survey.

Send confirmation email – When enabled this option will send a confirmation email to the respondent when they complete the survey. You can also select to include PDF of completed survey as an email attachment. **Since email is not considered a secure form of communication this is NOT recommended if the survey contains identifying information (PHI).**

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)

<p>Thank you for taking the survey.</p><p>Have a nice day!</p>


[How to use Piping here](#)

 **PDF Auto-Archiver**
Upon survey completion, a compact PDF copy of the survey response will be automatically stored in the project's File Repository, from which the archived PDFs can be downloaded at any time.

☒ Disabled

☐ Auto-Archiver enabled

☐ Auto-Archiver + e-Consent Framework [What is the e-Consent Framework?](#)
(includes end-of-survey certification & archival of PDF consent form)

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

No

Survey Distribution

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.



Optional

I'm done!

Enable optional modules and customizations

<input type="button" value="Enable"/>	<input checked="" type="radio"/> Repeatable Instruments ?
<input type="button" value="Disable"/>	<input checked="" type="radio"/> Auto-numbering for records ?
<input type="button" value="Enable"/>	<input checked="" type="radio"/> Scheduling module (longitudinal only) ?
<input type="button" value="Enable"/>	<input checked="" type="radio"/> Randomization module ?
<input type="button" value="Enable"/>	<input checked="" type="radio"/> Designate an email field for sending survey invitations ?

Settings displayed to Administrators only:

☒ Twilio SMS and Voice Call services for surveys ?

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

☒ -- select a field --
 Example Survey
 email "Email"

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.

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.

- Project's first instrument is a Survey & Use of Participant List:** If you 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.

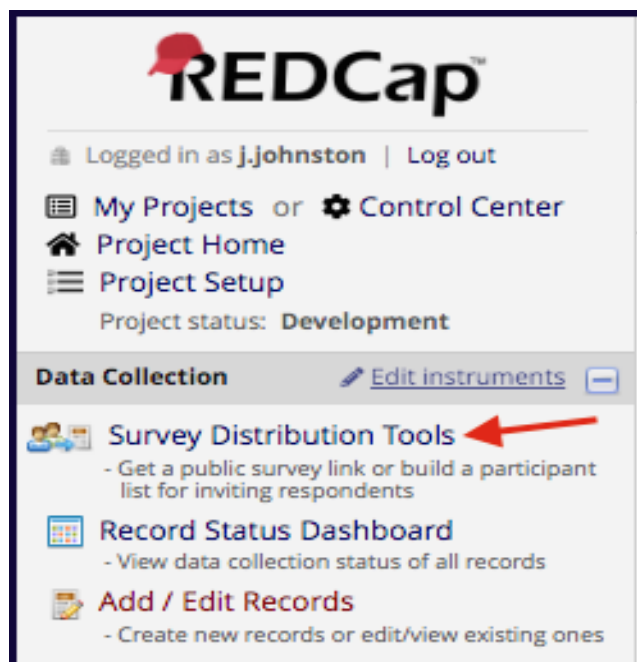
REDCap's user interface has two separate modules for (1) sending emails and tracking responders/non-responders (*Participant List*) and (2) viewing data/responses. Through the REDCap interface, there is *no link between the modules and no connection between the email address entered and the responses 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 'Survey Distribution Tools' under *Data Collection* (left-hand menu) on the *Project Setup* page. This will take you directly to the *Public Survey Link* page.




Survey Distribution Tools



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: 

Link Actions


 Open public survey


 Open public survey +  Log out


 Send me URL via email

 Survey Access Code or  QR Code

Link Customizations

 Get Short Survey Link

 Create Custom Survey Link

 Get Embed Code

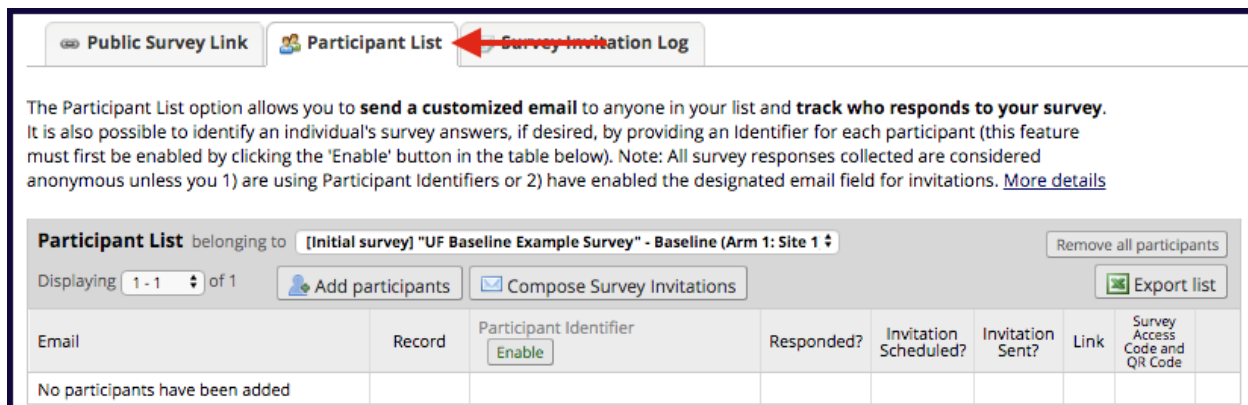
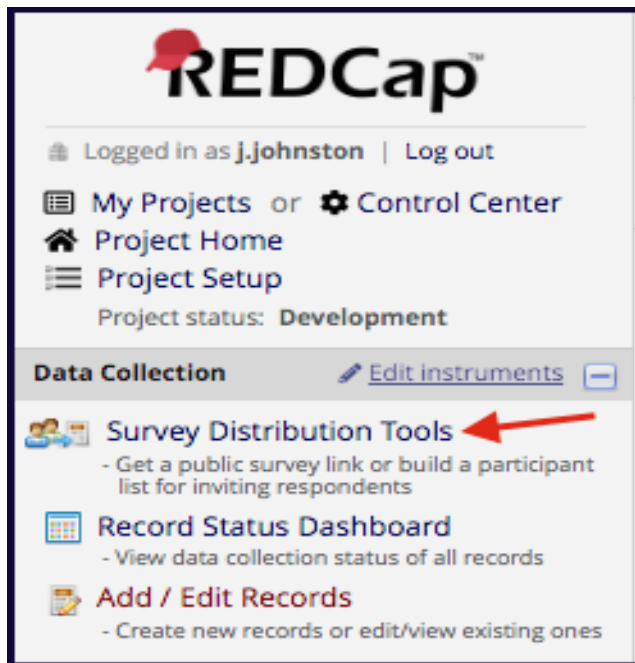
Survey Link to include in emails/flyers, etc.

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.

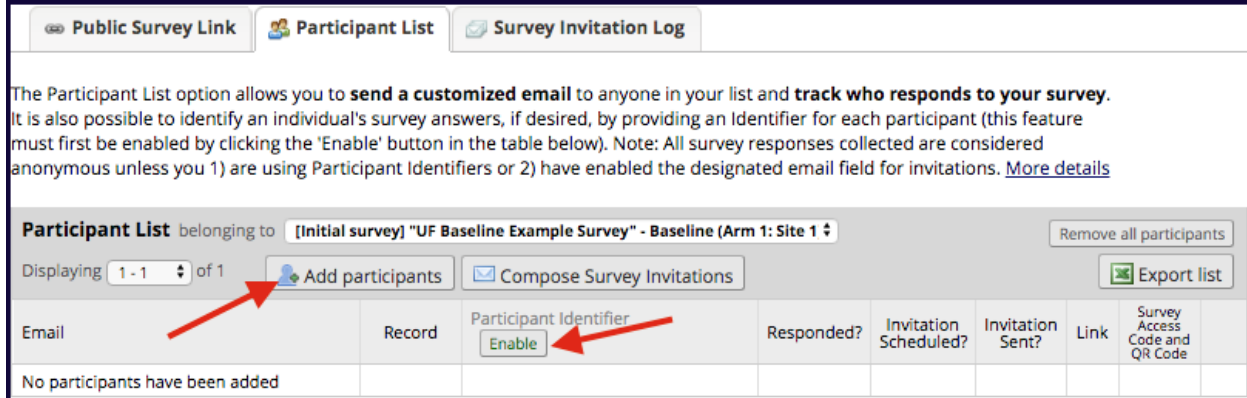
Participant List (non-longitudinal data collection)

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



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] "UF Baseline Example Survey" - Baseline (Arm 1: Site 1)

Displaying 1 - 1 of 1

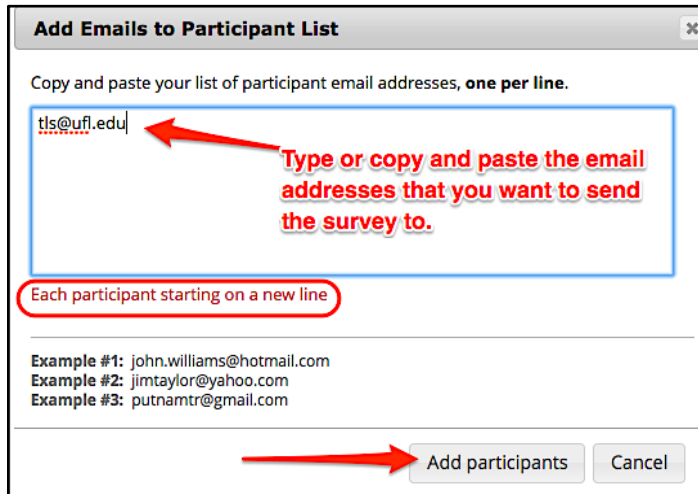
Add participants **Compose Survey Invitations** **Export list** **Remove all participants**

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
		Enable					

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**.

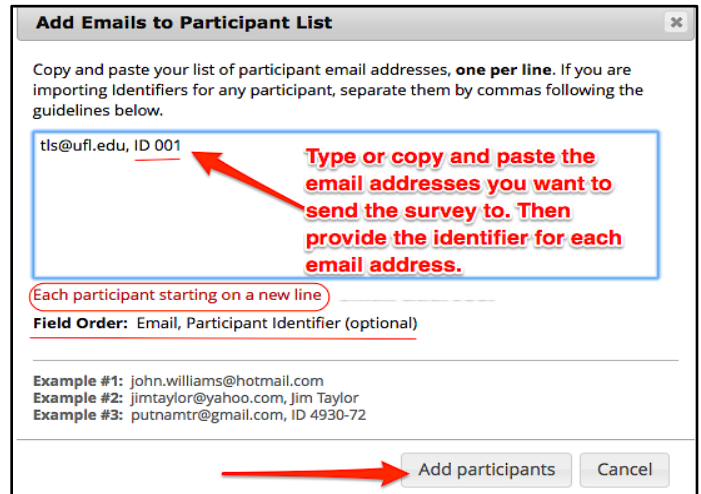
Type or copy and paste the email addresses that you want to send the survey to.

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.

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

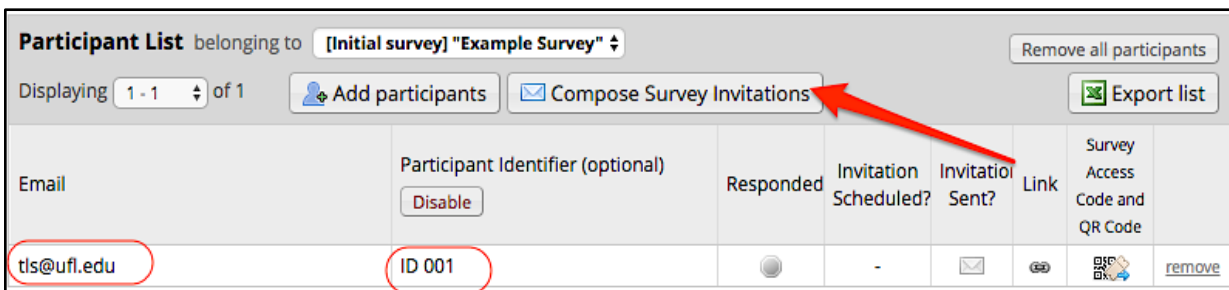
Each participant starting on a new line

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"

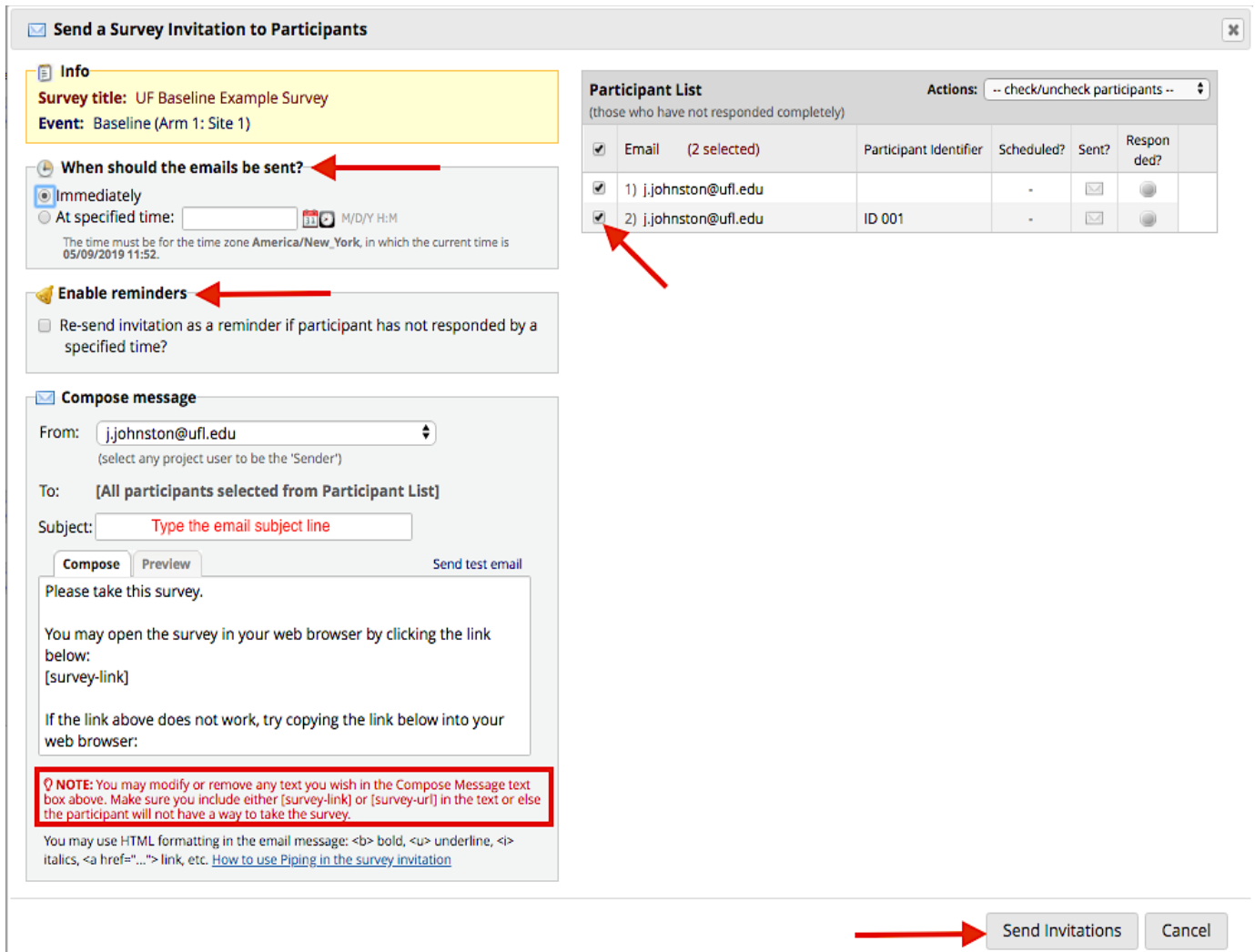
Displaying 1 - 1 of 1

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
	Disable					
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 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: UF Baseline Example Survey
Event: Baseline (Arm 1: Site 1)

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 05/09/2019 11:52.

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

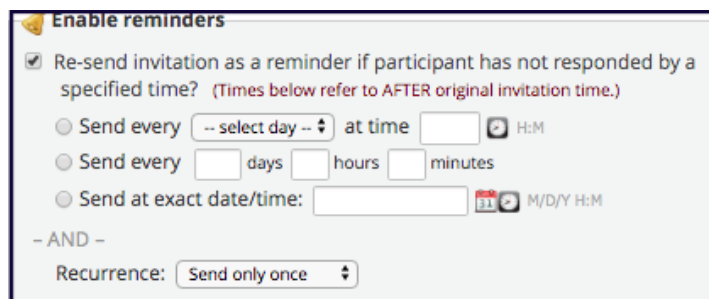
Compose message
From: j.johnston@ufl.edu (select any project user to be the 'Sender')
To: [All participants selected from Participant List]
Subject: Type the email subject line
 Compose Preview Send test email
 Please take this survey.
 You may open the survey in your web browser by clicking the link 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-url] 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](#)

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

<input checked="" type="checkbox"/>	Email (2 selected)	Participant Identifier	Scheduled?	Sent?	Responded?
<input checked="" type="checkbox"/>	1) j.johnston@ufl.edu		-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	2) j.johnston@ufl.edu	ID 001	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Send Invitations **Cancel**

Email Reminders Box



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

☐ Send every days hours minutes





☐ Send at exact date/time: M/D/Y H:M

– AND –

Recurrence: Send only once




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" Remove all participants							
Displaying 1 - 1 of 1	Add participants	Compose Survey Invitations	Export list				
Email	Participant Identifier (optional) Disable	Responded	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
tls@ufl.edu	ID 001		-				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).

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

I'm done!

Enable Repeatable instruments and events ?

Disable Auto-numbering for records ?

Enable Scheduling module (longitudinal only) ?

Enable Randomization module ?

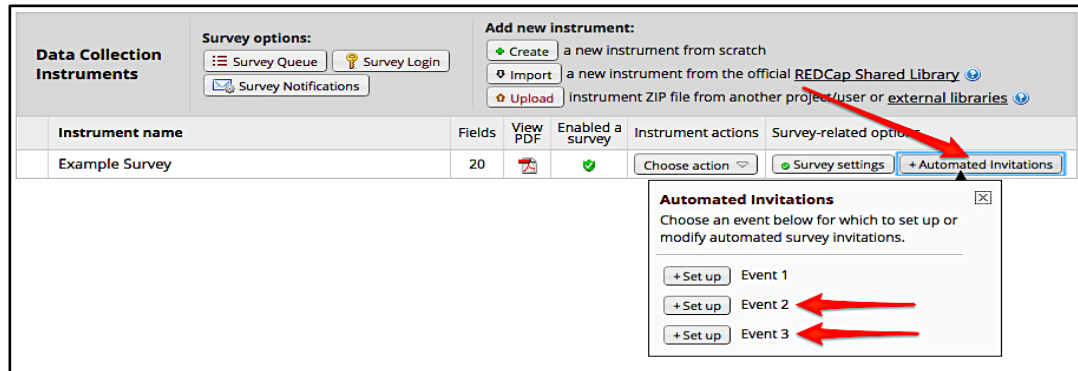
Enable Designate an email field for sending survey invitations ?

Additional customizations

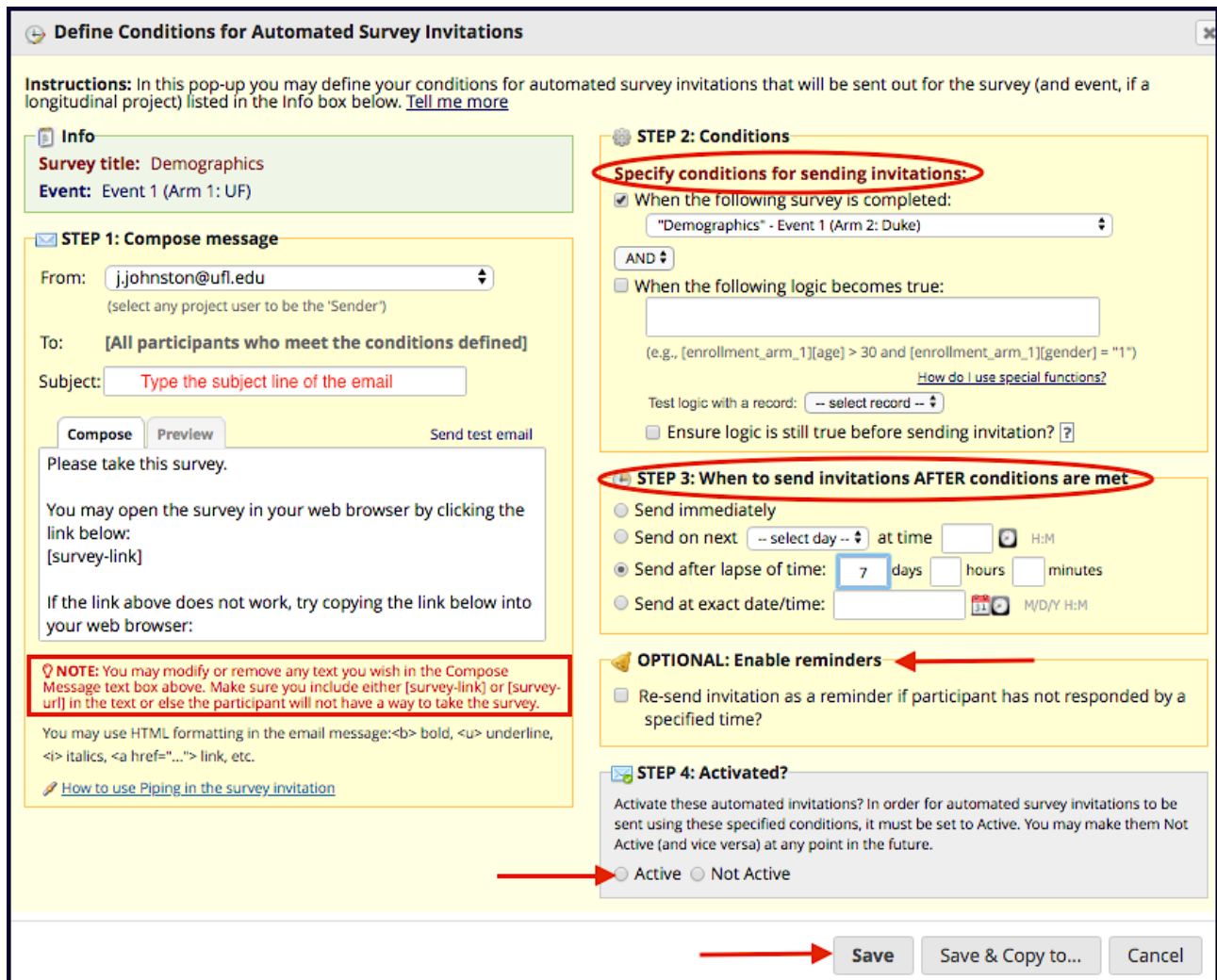
Settings displayed to Administrators only:

Enable Twilio SMS and Voice Call services for surveys ?

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).



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: Demographics
Event: Event 1 (Arm 1: UF)

STEP 1: Compose message
From: j.johnston@ufl.edu
To: [All participants who meet the conditions defined]
Subject: Type the subject line of the email
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-url] 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" - Event 1 (Arm 2: Duke)
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: -- 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: 7 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?

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 **Save & Copy to...** **Cancel**

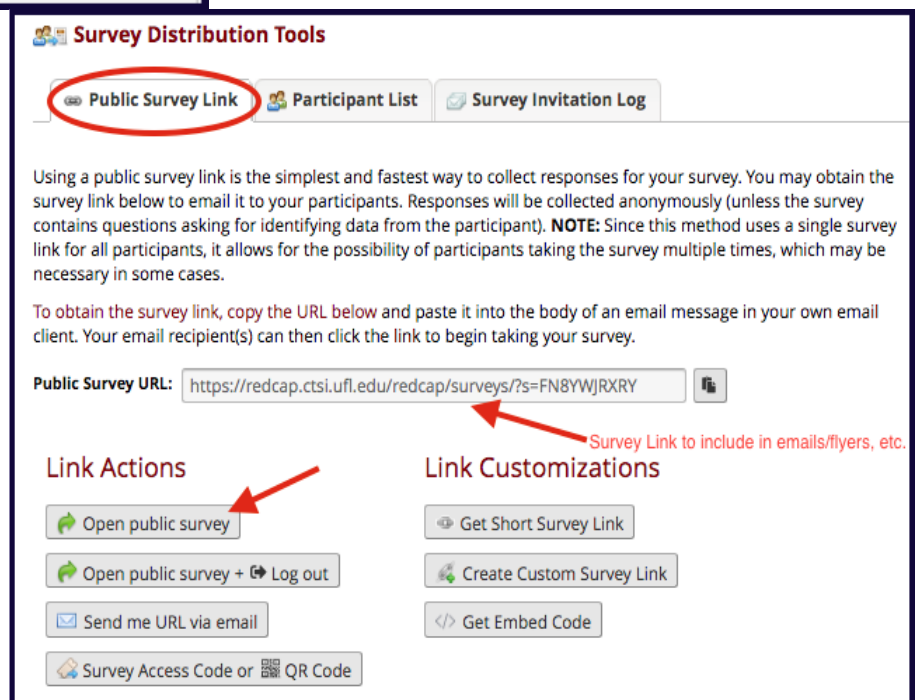
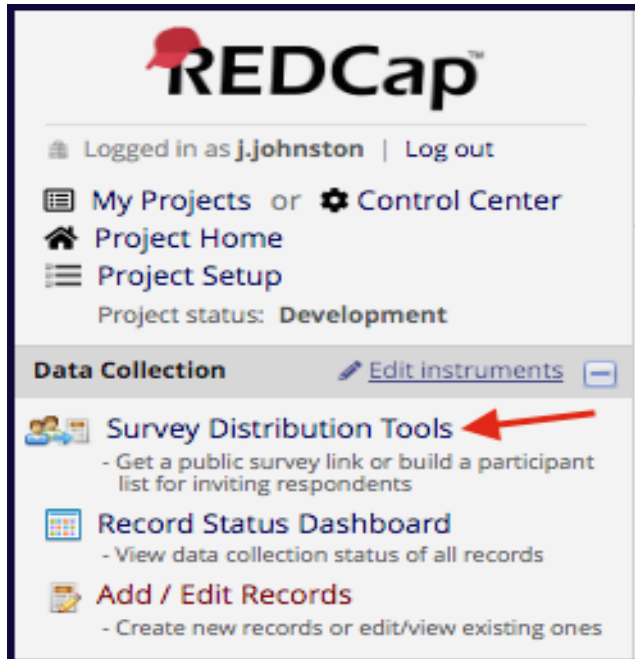
Step 1: Compose your survey email message.

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.



Optional

I'm done!

Enable optional modules and customizations

☐ Repeatable instruments and events ?

☒ Auto-numbering for records ?

☐ Scheduling module (longitudinal only) ?

☐ Randomization module ?



☐ Designate an email field for sending survey invitations ?

Settings displayed to Administrators only:

☐ Twilio SMS and Voice Call services for surveys ?

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

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

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

Automated Invitations

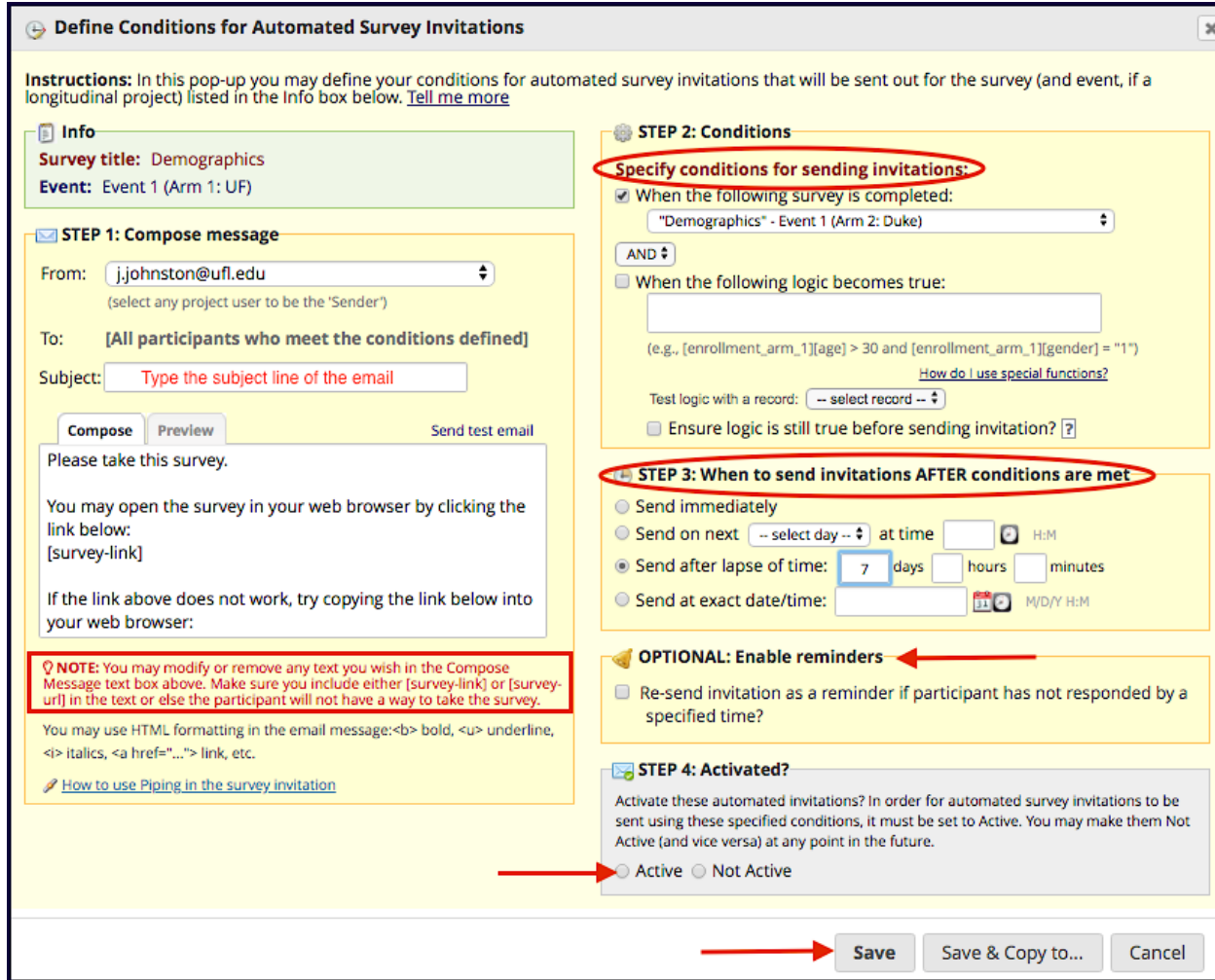
Choose an event below for which to set up or modify automated survey invitations.

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: Demographics
Event: Event 1 (Arm 1: UF)

STEP 1: Compose message

From:
(select any project user to be the 'Sender')

To:

Subject:

Please take this survey.

You may open the survey in your web browser by clicking the link below:

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-url] 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:

☐ When the following logic becomes true:

[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: M/D/Y H:M

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

Step 1: Compose your survey email message.

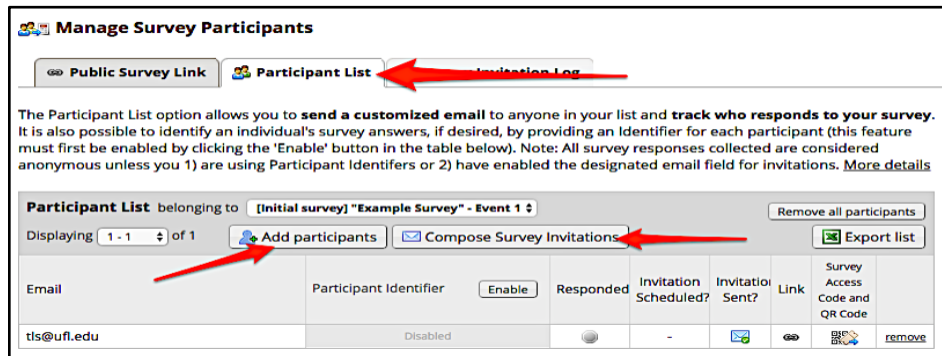
Step 2: Specify the conditions for sending the invitations. For the second survey, you would specify 'When the following survey is completed: "Survey" – Event 1.' For the third survey, you would specify 'When the following survey is completed: "Survey" – Event 2.'

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](#)

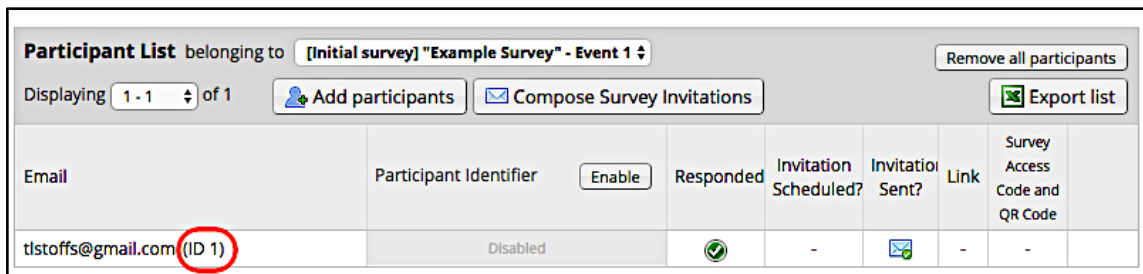
Participant List belonging to: [Initial survey] "Example Survey" - Event 1

Displaying 1 - 1 of 1

[Add participants](#) [Compose Survey Invitations](#) [Export list](#) [Remove all participants](#)

Email	Participant Identifier	Enable	Responded	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
tstoffs@ufl.edu	Disabled			-			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).



Participant List belonging to: [Initial survey] "Example Survey" - Event 1

Displaying 1 - 1 of 1

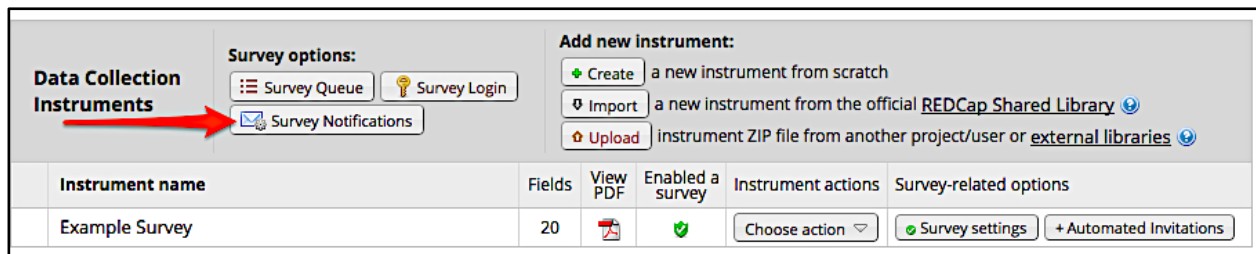
[Add participants](#) [Compose Survey Invitations](#) [Export list](#) [Remove all participants](#)

Email	Participant Identifier	Enable	Responded	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
tstoffs@gmail.com (ID 1)	Disabled			-			

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.'



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 a survey	Instrument actions	Survey-related options
Example Survey	20	View PDF	Enabled a survey	Choose action	Survey settings + Automated Invitations

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.

✕

Email notifications for survey responses

If you or other users wish to be notified via email every time a participant completes a survey, select the users to be notified under each survey listed below by selecting their email address in the user's drop-down list, which may contain each user's primary, secondary, or tertiary email address for their REDCap account. To remove a user as a recipient for the survey notifications, change their email drop-down option to 'not selected', after which they will no longer receive notification emails for that survey.

Example Survey	Recipient email address	Notifications Enabled
J.Johnston (Jeryl Johnston)	j.johnston@ufl.edu (Primary)	<input checked="" type="checkbox"/>

Close

Example email from a survey notification:

[This message was automatically generated by REDCap]

A respondent completed your survey titled "Example Survey" on 05/10/2019 10:06am. 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.