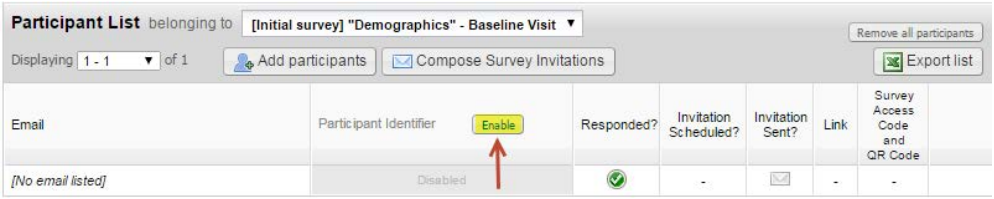
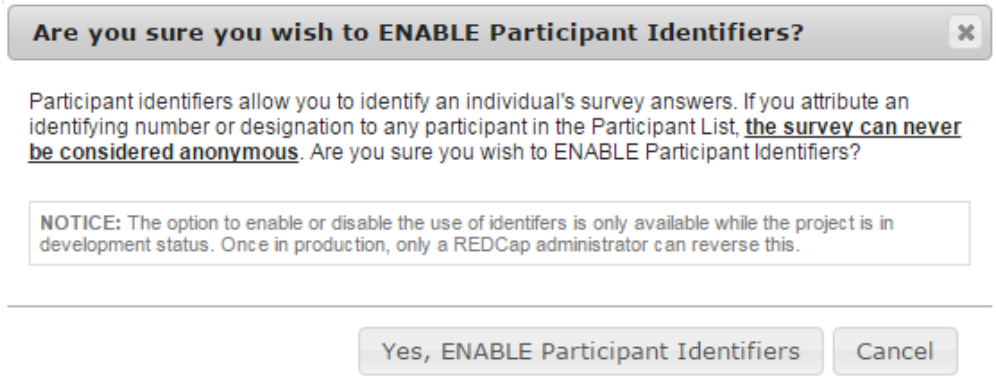
How to Use Participant List

How to Use Participant List, Compose Survey Invitations & 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. When you add a participant, you can also add a Participant Identifier. Unless an Identifier is used, all survey responses collected are considered anonymous. To use this feature, navigate to Manage Survey Participants and then click on the Participant List tab.

If you would like to use a Participant Identifier, you must Enable this before you add your participants. If you enable this feature, the survey is no longer considered anonymous. REDCap will alert you and ask you to confirm that you do want to enable the participant identifier.





To add a participant, click on the Add Participant icon.

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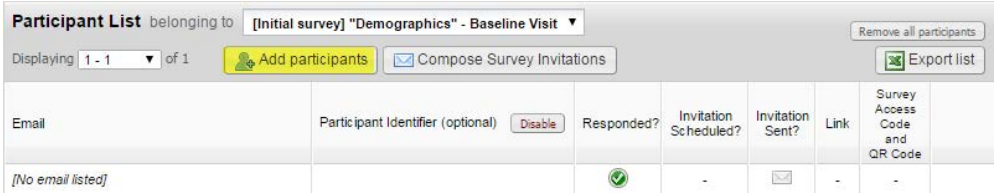
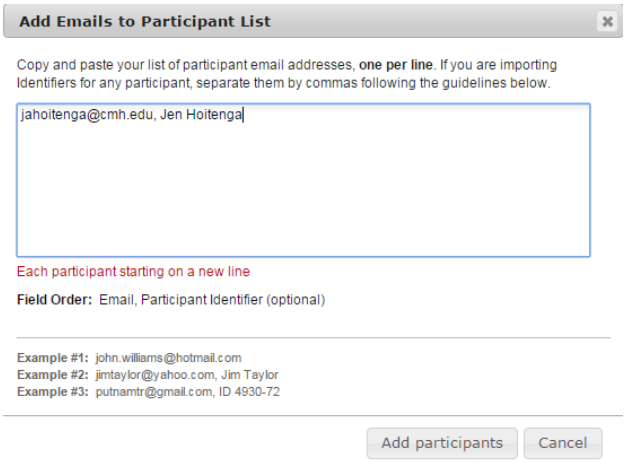
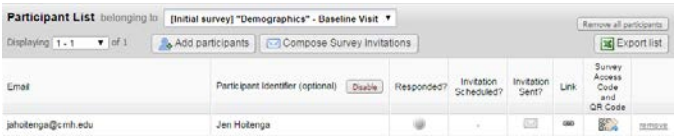


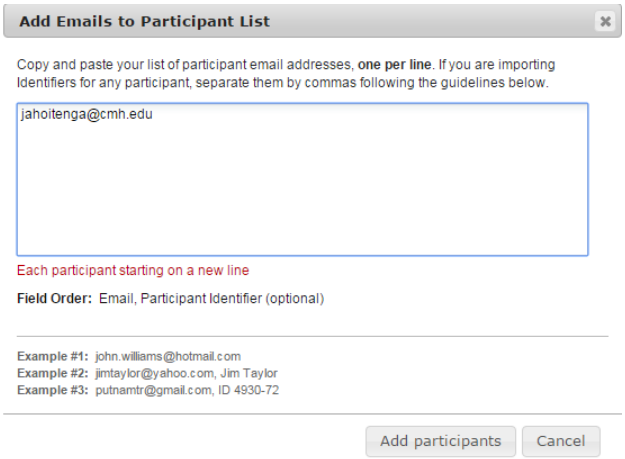
Enter the email address of the recipient and if you are using a Participant Identifier, enter a comma and then enter the participant's name. If you are not using a Participant Identifier, enter each email on a separate line.

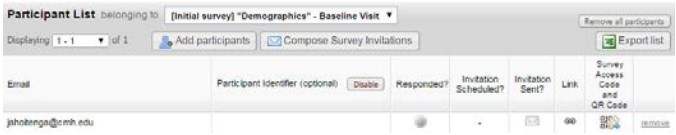
Example with Participant Identifier:





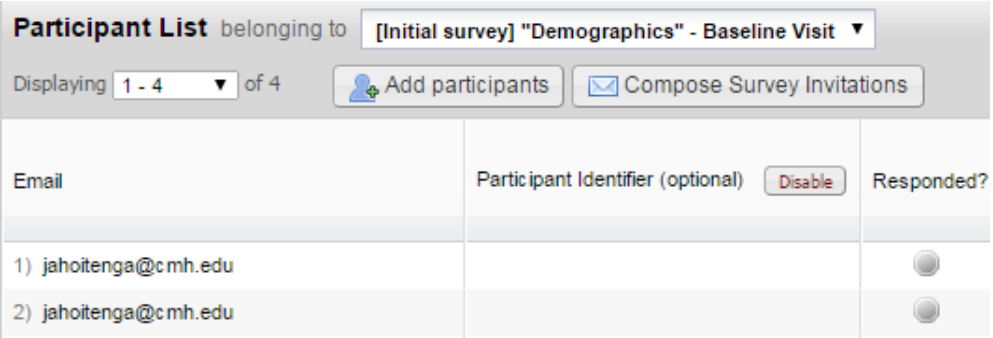
Example without Participant Identifier:





If a participant's email address needs to be changed after it has been added to the Participant List, you may simply click on the email address in the list to begin editing it. You may also remove a participant by clicking the remove link next to the participant's name.

If the participant needs to take your survey more than once, you will need to add the participant the exact number of times they should take the survey. For an example, if you need every participant to take your survey twice, you will need to add them in the Participant List twice. Two invitations will then be sent to the participant, each with its own unique survey link.

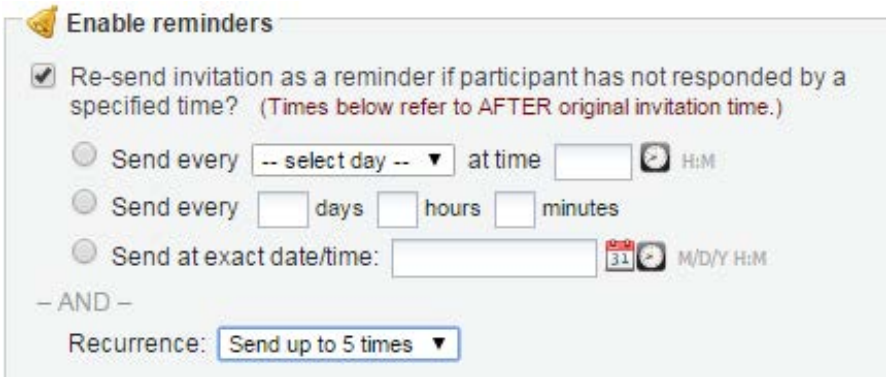


Compose Survey Invitation

Once you have added all of your participants, you may compose a survey invitation by clicking on the "Compose Survey Invitations" icon and then enter the following criteria:

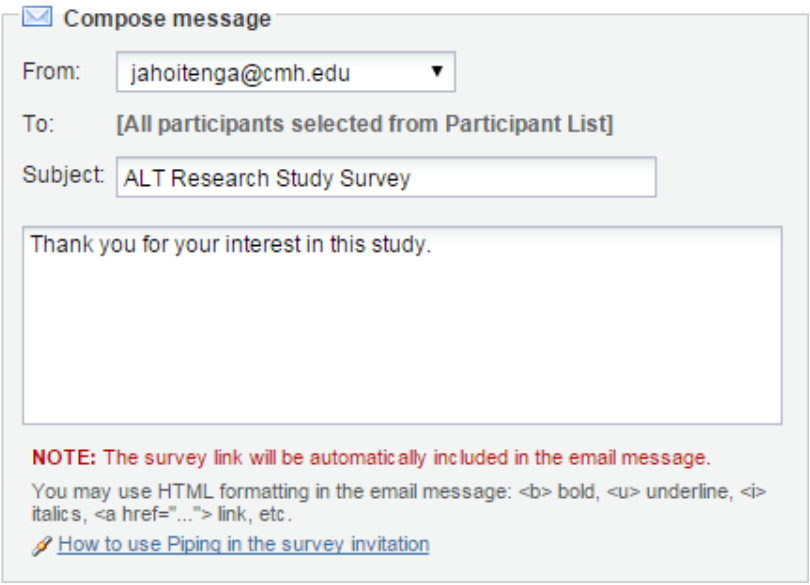
When should emails be sent: Select Immediately or specify a date and time.

Enable Reminders: Check the box if you would like the survey invitation to be sent as a reminder if the participant hasn't answered in a specific amount of time. You may specify to send the reminder every day, every weekday, on a specific day, every x amount of day, hours and/or minutes or send the reminders at a specific date and time. You will also need to specify how many reminders should be sent. The limit is 5.

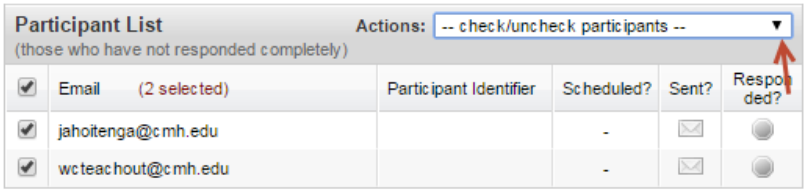


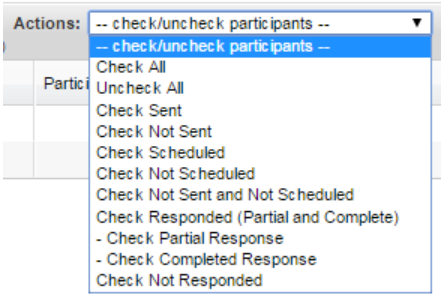
Compose Message:
From: Use the drop down and select an email address.
To: This will automatically be sent to the participants you have entered and selected.
Subject: Enter an optional subject
Message: Enter an optional message.

Note: you may use piping and/or HTML in your survey invitations!



Participant List: Select which participants you want to send the invitation to. You may use the drop down under Actions and select participants who meet specific criteria such as "Check Not Responded".





When you are ready, click Send Invitations.

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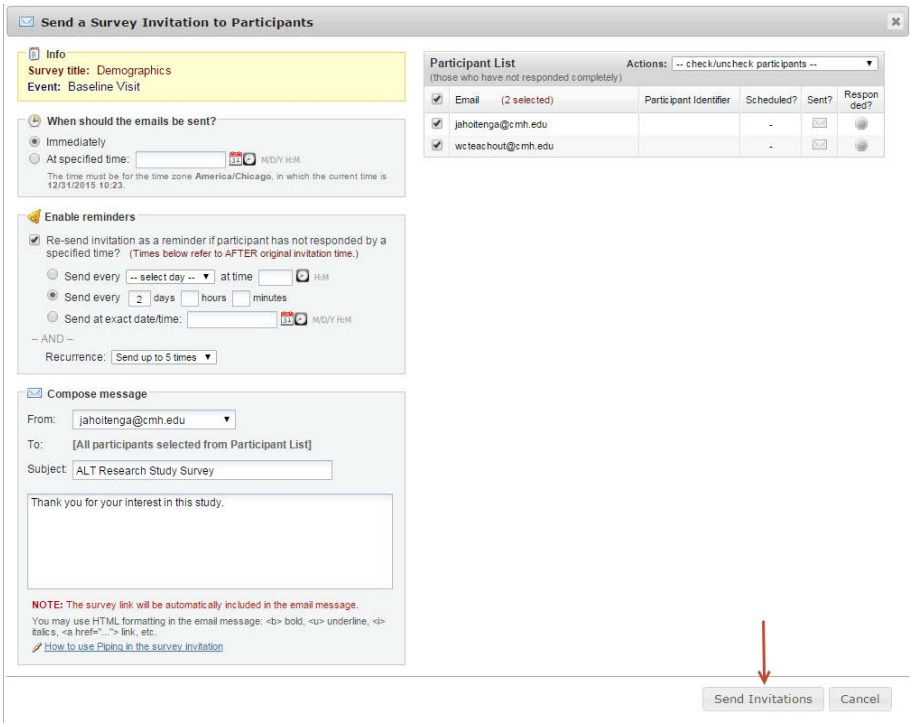
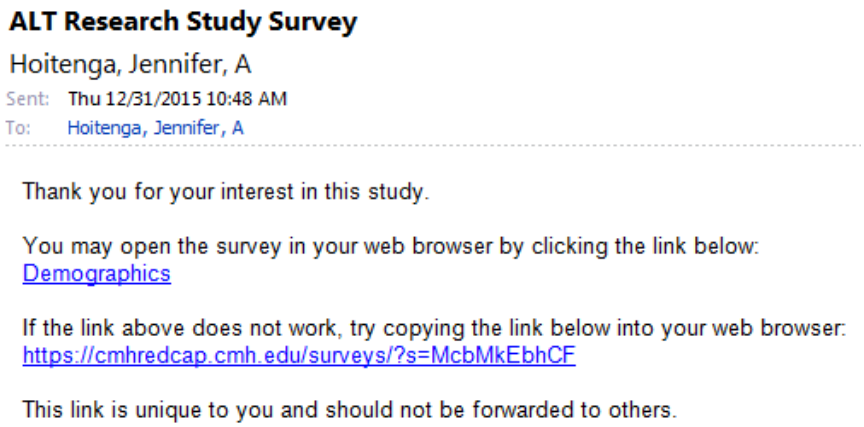
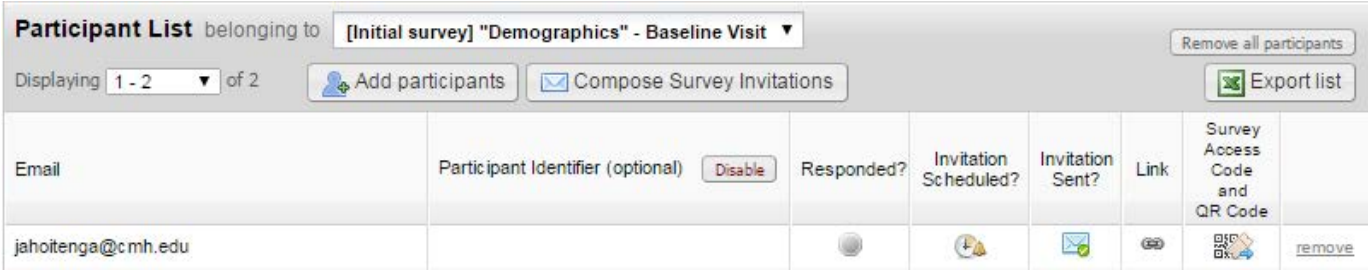


Example of a survey invitation email the recipient will receive:



Once the survey is sent, the Participant List will show you if the participant has responded, if the invitation was scheduled, if the invitation was sent and the unique link to the survey invitation.

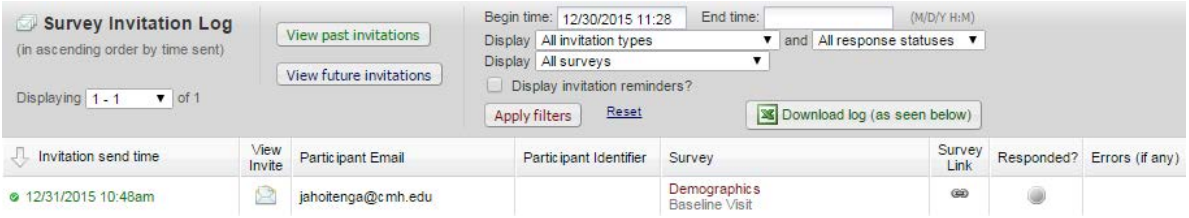
After receiving an email invitation and then completing the survey, the participant's response status in the list below will be changed to **Responded** or **Partial Response**, otherwise their status will remain as **No Response**. Once a participant has responded, they will not be able to take the survey again unless you add them again as a participant.



Survey Invitation Log

The Survey Invitation log displays the survey invitations that have already been sent or have been schedule to be sent to survey participants. To use this feature, navigate to Manage Survey Participants and then click on the Survey Invitation Log tab.

For each invitation, it displays the participant email, participant identifier (if exists), survey name and the date/time in which the invitation was or will be sent. You can also view the invitation email itself by clicking the icon in the “View Email” column.

The Survey Invitation log allows you to filter by specific dates, invitation types (sent invitations, scheduled invitations and failed invitations), response statuses (Unresponded, Partial Responses and Completed Responses) and survey names/events. You have the option to display invitation reminders and to view past or future invitations.

You may export the log by clicking the “Download Log” icon.