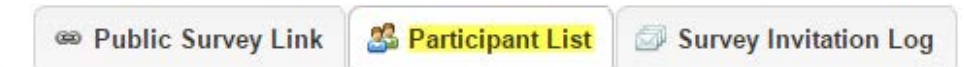





How to Use Participant List, Compose Survey Invitations & Survey Invitation Log

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.

Manage Survey Participants



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.

Email	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
[No email listed]	Disabled 		-		-	-

Are you sure you wish to ENABLE Participant Identifiers?

Participant identifiers allow you to identify an individual's survey answers. If you attribute an identifying number or designation to any participant in the Participant List, **the survey can never be considered anonymous**. Are you sure you wish to ENABLE Participant Identifiers?

NOTICE: The option to enable or disable the use of identifiers is only available while the project is in development status. Once in production, only a REDCap administrator can reverse this.

Yes, ENABLE Participant Identifiers

Cancel

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

Participant List belonging to [Initial survey] "Demographics" - Baseline Visit

Remove all participants

Displaying 1 - 1 of 1

Add participants Compose Survey Invitations Export list

Email	Participant Identifier (optional) <small>Disable</small>	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
[No email listed]			-		-	-

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:

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.

jahoitenga@cmh.edu, Jen Hoitenga

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

Example without Participant Identifier:

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.

jahoitenga@cmh.edu

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

Participant List belonging to [Initial survey] "Demographics" - Baseline Visit

Remove all participants

Displaying 1 - 1 of 1

Add participants Compose Survey Invitations Export list

Email	Participant Identifier (optional) <small>Disable</small>	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
jahoitenga@cmh.edu	Jen Hoitenga		-			

Participant List belonging to [Initial survey] "Demographics" - Baseline Visit

Remove all participants

Displaying 1 - 1 of 1

Add participants Compose Survey Invitations Export list

Email	Participant Identifier (optional) <small>Disable</small>	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
jahoitenga@cmh.edu			-			

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.

Participant List belonging to [Initial survey] "Demographics" - Baseline Visit

Displaying 1 - 4 of 4 Add participants Compose Survey Invitations

Email	Participant Identifier (optional) Disable	Responded?
1) jahoitenga@cmh.edu		<input type="radio"/>
2) jahoitenga@cmh.edu		<input type="radio"/>

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.

When should the emails be sent?

Immediately

At specified time: 31 🕒 M/D/Y H:M

The time must be for the time zone America/Chicago, in which the current time is 12/31/2015 10:23.

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.

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: 31 🕒 M/D/Y H:M

– AND –

Recurrence: Send up to 5 times

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!

 **Compose message**

From:





To: **[All participants selected from Participant List]**

Subject:

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](#)

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”.

Participant List (those who have not responded completely) Actions:

<input checked="" type="checkbox"/>	Email (2 selected)	Participant Identifier	Scheduled?	Sent?	Respon- ded?
<input checked="" type="checkbox"/>	jahoitenga@cmh.edu		-		
<input checked="" type="checkbox"/>	wcteachout@cmh.edu		-		

- Actions:
- check/unchecked participants --
 - Check All
 - Uncheck All
 - Check Sent
 - Check Not Sent
 - Check Scheduled
 - Check Not Scheduled
 - Check Not Sent and Not Scheduled
 - Check Responded (Partial and Complete)
 - Check Partial Response
 - Check Completed Response
 - Check Not Responded

When you are ready, click Send Invitations.

Send a Survey Invitation to Participants

Info
 Survey title: Demographics
 Event: Baseline Visit

When should the emails be sent?
 Immediately
 At specified time: M/D/Y H:MM
The time must be for the time zone America/Chicago, in which the current time is 12/31/2015 10:23.

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 PM
 Send every 2 days hours minutes
 Send at exact date/time: M/D/Y H:MM
 - AND -
 Recurrence: Send up to 5 times

Compose message
 From:
 To:
 Subject:

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> italic, link, etc.
[How to use Piping in the survey invitation](#)

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

Email	Participant Identifier	Scheduled?	Sent?	Response?
<input checked="" type="checkbox"/> jahoitenga@cmh.edu		-	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> wcteachout@cmh.edu		-	<input type="checkbox"/>	<input type="checkbox"/>

Example of a survey invitation email the recipient will receive:

ALT Research Study Survey

Hoitenga, Jennifer, A

Sent: Thu 12/31/2015 10:48 AM

To: Hoitenga, Jennifer, A

Thank you for your interest in this study.

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

[Demographics](#)

If the link above does not work, try copying the link below into your web browser:

<https://cmhredcap.cmh.edu/surveys/?s=McbMkEbCF>

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

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.

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

Displaying 1 - 2 of 2 Add participants Compose Survey Invitations Export list

Email	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
jahoitenga@cmh.edu							remove

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.

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

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.

Survey Invitation Log
(in ascending order by time sent)

Displaying 1 - 1 of 1

View past invitations View future invitations

Begin time: 12/30/2015 11:28 End time: (M/D/Y H:M)

Display All invitation types and All response statuses

Display All surveys

Display invitation reminders?

Apply filters Reset Download log (as seen below)

Invitation send time	View Invite	Participant Email	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)
12/31/2015 10:48am		jahoitenga@cmh.edu		Demographic Baseline Visit			