

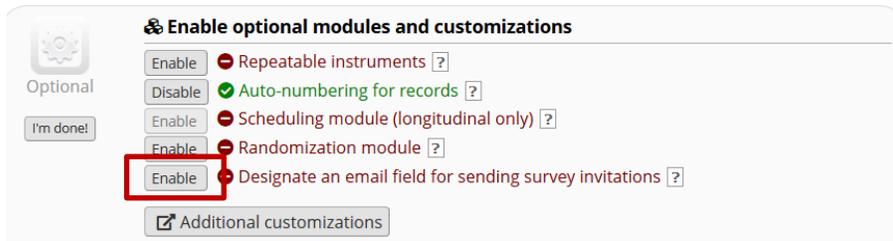
## Frequently Asked Question (FAQ) Library

***How do I automatically send a survey? I would like to send a survey to participants after research staff complete the enrollment form.***

There are two methods that can be used to automatically release a survey to a participant based upon certain conditions: (1.) **Automated Survey Invitations (ASIs)** and (2.) **Alerts and Notifications**. To learn more about Alerts and Notifications refer to [FAQ: Alerts and Notifications](#). To learn about protected email mode, refer to [FAQ: Protected Email Mode](#).

### **To set up the Automated Survey Invitation:**

1. For Automated Survey Invitations (ASI) to work, you must enable the 'Designate an Email Field for Sending Survey Invitations' function on your **Project Setup Page**.



**Enable optional modules and customizations**

Optional

I'm done!

Enable  Repeatable instruments ?

Disable  Auto-numbering for records ?

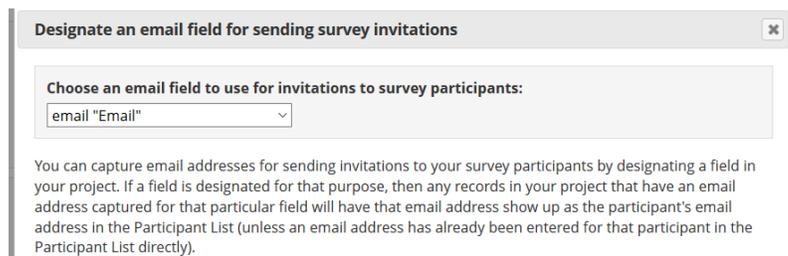
Enable  Scheduling module (longitudinal only) ?

Enable  Randomization module ?

**Enable  Designate an email field for sending survey invitations ?**

Additional customizations

2. Once enabled, choose an email field to use for the survey invitations and then Save.



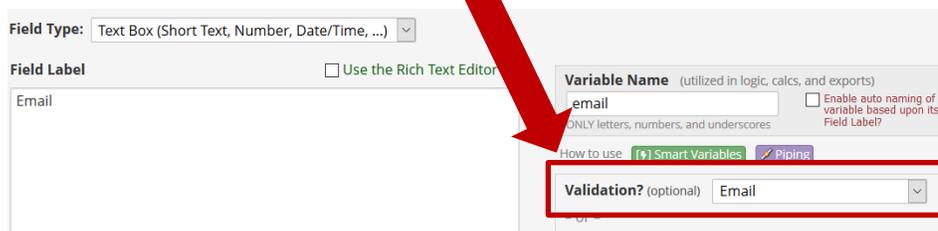
**Designate an email field for sending survey invitations**

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

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).

**Pro Tip:** When designing your data collection form, set the email validation for the target email field in #2 above. Once set, the drop-down box will only show fields that are validated.



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

Field Label: Email

Variable Name: email

Validation? (optional): Email

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- Once you have identified the email field, navigate to the **Online Designer** and click on the “**Automated Invitations**” icon for the appropriate survey. If your project is longitudinal, select the event.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Enrollment	3		Enable	Choose action ▾	
Survey	2			Choose action ▾	 Survey settings  + Automated Invitations

- The *Define Conditions for Automated Survey Invitation* dialogue will be displayed.

### To create the Automated Survey Invitation:

#### STEP 1: Compose message

**From:** Use the drop down and select an email address. The drop-down box will list the email addresses of all users in your project.

**To:** This will automatically include all participants who meet your criteria.

**Subject:** Enter an optional subject.

**Message:** Enter an optional message. You may modify or remove the default 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.

✉ **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

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

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

Piping can be used in survey invitation email subject and message. Click this link to see how to use piping.

## Frequently Asked Question (FAQ) Library

### Step 2: Specify the conditions for sending the invitations



If you would like the survey to be sent after the enrollment form is completed, you can check the box 'When the following logic becomes true' and specify in the condition that the form status of the enrollment form is complete. To do this, look up the field name of the enrollment form complete field in the codebook.



4	enrollment_complete	Section Header: <i>Form Status</i> Complete?	dropdown						
			<table border="1"> <tr> <td>0</td> <td>Incomplete</td> </tr> <tr> <td>1</td> <td>Unverified</td> </tr> <tr> <td>2</td> <td>Complete</td> </tr> </table>	0	Incomplete	1	Unverified	2	Complete
0	Incomplete								
1	Unverified								
2	Complete								

From the codebook, the form complete of the enrollment form is [enrollment\_complete] and the code for complete status is 2. So the condition of the automatic invitation will be [enrollment\_complete]="2".



## Frequently Asked Question (FAQ) Library

To add another condition, you can include additional parameters in the 'When the following logic becomes true' field. In the example below, the survey will be sent when the enrollment form is completed and the [enrolled] field is yes (code=1).

When the following logic becomes true:

[enrollment\_complete]="2" and [enrolled]="1"

If you would like REDCap to check the logic in real-time prior to sending the message, click the box next to 'Ensure logic is still true before sending invitation'. REDCap will re-evaluate the logic against the record's data values whenever the record values are changed AFTER the invitation has been scheduled but BEFORE it has been sent to the respondent. If the logic is no longer true, the invitation will not be sent.

Ensure logic is still true before sending invitation? ?

### Step 3: Indicate when to send invitations AFTER conditions are met

**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: days hours minutes

Send at exact date/time: M/D/Y H:M

Choose to send immediately, send on the next [X] day at the [X] time, send after [X] amount of days, hours and or minutes or send at the exact same date/time.

### Optional: Enable Reminders

Check the box if you would like the survey invitation to be sent as a reminder if the participant has not responded by a specified time.

You may send the reminder every day, every weekday, on a specific day, every [x] number 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.

**OPTIONAL: 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

## Frequently Asked Question (FAQ) Library

### Step 4: Activate

Once you are ready, click **Active** and then **Save**.

#### **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