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 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.

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

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.
3. 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.

4. 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 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.

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".
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).

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.

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

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.
Step 4: Activate

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