This manual explains how to send survey invitations to your survey participants with their names personalized in the email message greeting.

Hello Mary,

Below is a link to our most recent survey.

Thank you.

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

Survey Title
**STEP 1: SETUP THE SURVEY**

1. Setup your Survey Instrument via the **Online Designer**.
2. Enable it as a survey.
3. Set your **Survey Settings**.
Add your survey questions to the survey instrument. These are the questions your participants *should see* on the survey.
### STEP 3: ADD YOUR NON-SURVEY FIELDS

Add your non-survey fields to the survey instrument. These are the fields your participants **should not see** on the survey.

<table>
<thead>
<tr>
<th>Field</th>
<th>Variable: first_name</th>
<th>Variable: last_name</th>
<th>Variable: institution</th>
<th>Variable: title</th>
<th>Variable: email</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institution</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
STEP 4: ADD EMAIL VALIDATION

For the Email Address field, set the Validation type of “Email” from the drop-down selection box.
STEP 5: FINALIZE SURVEY

The survey instrument should now have both survey and non-survey questions.
STEP 6: ADD ACTION TAGS TO NON-SURVEY FIELDS

For every non-survey field, add the Action Tag @HIDDEN-SURVEY in the Field Annotation box.
1. On the **Project Setup** tab, go to the “**Enable optional modules and customizations**” section.
2. Enable the “**Designate an email field**…” feature.
3. Select the email address field, and click Save.
1. Complete the rest of the project settings (user rights, testing, bookmarks, etc).

2. Request the project move to production by the REDCap Administrator.
Add your participants’ information in the **non-survey** fields (either manually via the **Add/Edit link** or via an Excel csv file upload through the **Data Import Tool**).

<table>
<thead>
<tr>
<th>Participant ID</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Mary</td>
</tr>
<tr>
<td>Last Name</td>
<td>Smith</td>
</tr>
<tr>
<td>Institution</td>
<td>University of Chicago</td>
</tr>
<tr>
<td>Title</td>
<td>MD</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:msmit@uic.edu">msmit@uic.edu</a></td>
</tr>
<tr>
<td>Sample Question 1</td>
<td></td>
</tr>
<tr>
<td>Sample Question 2</td>
<td></td>
</tr>
<tr>
<td>Sample Question 3</td>
<td></td>
</tr>
<tr>
<td>Form Status</td>
<td></td>
</tr>
<tr>
<td>Complete?</td>
<td>Incomplete</td>
</tr>
</tbody>
</table>

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**REDCap**
Research Electronic Data Capture
**STEP 10: VERIFY EMAIL ADDRESSES**

1. Click on **Manage Survey Participants**.
2. Go to **Participant List** tab.
3. Verify email addresses are listed in email section.
4. Click on **Compose Survey Invitations**.
STEP 11: COMPOSE SURVEY INVITATION

1. In the message body, using square brackets, pipe in the field name containing the personalized information.
2. Verify selected email addresses in Participant List.
3. Click Send Invitations.

Example: Hello [first_name],

Example Image:

- The screenshot shows a survey invitation interface.
- The message body contains a personalization placeholder, showing how to use square brackets to insert field names.
- The interface includes options for survey title, message composition, and participant list verification.
STEP 12: VIEW SURVEY INVITATION LOG

1. View the Survey Invitation Log.
2. Click on the View Invite icon.

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. 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 may even view the invitation email itself by clicking the icon in the 'View Email' column. Please note that all times below correspond to the time zone "America/Chicago", in which the current time is 05/11/2016 11:43am.
STEP 13: VERIFY EMAIL GREETING

Verify email message greeting was correctly personalized using **piped data** from the field that contained the personalized information.

The example email message greeting is as follows:

*Hello Mary,*

Below is a link to our most recent survey.

Thank you.

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

[Survey Title]

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

[https://redcap.uchicago.edu/surveys/](https://redcap.uchicago.edu/surveys/?s=YSDsbu7Z)

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

**website**
- [https://cri.uchicago.edu/redcap](https://cri.uchicago.edu/redcap)

**email**
- redcap@rt.cri.chicago.edu