REDCap
Research Electronic Data Capture

Automated Survey
Invitations

THE UNIVERSITY OF CHICAGO MEDICINE & BIOLOGICAL SCIENCES

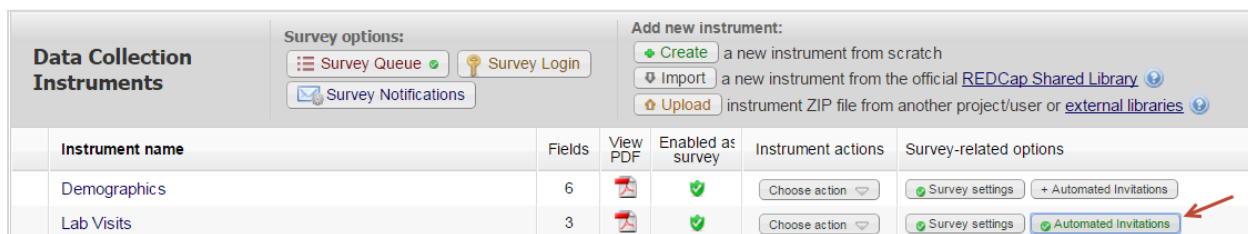CENTER FOR RESEARCH INFORMATICS

Background

Automated survey invitations may be understood as a way to have invitations sent to your survey participants, but rather than sending or scheduling them manually via the Participant List, the invitations can be scheduled to be sent automatically (i.e. without a person sending the invitation) based upon specific conditions, such as if the participant completes another survey in your project or if certain data values for a record are fulfilled. Using the settings below, you may compose your survey invitation message, and then specify the conditions that must be met in order to send/schedule the invitation. You will also need to provide the time at which the invitation will be sent.

When defining the conditions below, you may choose to have survey invitations be triggered by the completion of a survey or when pre-defined logic becomes true (i.e. when the data values of a given record fulfill a requirement). You may use either the logic or survey completion options as triggers, or you may use both together. (Please note that if you set it to be triggered when a specific survey is completed, this also includes if a non-survey user sets the Form Status field as 'Complete' on that survey's corresponding data entry form.) When setting the time after which the invitations will be sent, you may have it send the invitation immediately after the conditions are met or at a relative or fixed time after they are met. Lastly, you will need to activate the automated invitation settings you have defined here, which means that your settings will be initiated immediately and that REDCap will be actively 'listening' in order to send/schedule invitations for your surveys based upon the conditions you defined.

It is also important to recognize that whenever the conditions below are met, the survey invitation will be immediately scheduled at that moment (whether it gets scheduled to be sent immediately, or after one minute, or after one month). So if an invitation, for example, is scheduled based upon data values using the conditional logic, then the invitation will be scheduled to be sent when that logic evaluates as true, even though the data may be changed again afterward, in which the logic may no longer evaluate as true. So even though the data values might be reverted, the invitation will still remain as having been scheduled.

How to Use Automated Invitations
Navigate to Online Designer and click on the Automated Invitations icon.

Step 1: Compose Message
From: Use the drop down and select an email address
To: This will automatically include all participants who meet your criteria.

Subject: Enter an optional subject

Message: Enter an optional message.

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

Step 2: Conditions – Specify the conditions for sending the invitations

You may select "When the following survey is completed" and then use the drop down and select a survey. If you would like to add additional logic as to when the next survey should be displayed, use the Boolean operator box and select AND/OR and then check the box next to "When the following logic becomes true" and then add your logic in the text box. For an example, you may want your second survey to start after your first survey is completed AND the participant's age is greater than 12. To do this, I would add my variable for the participant's age field in square brackets and then the greater than sign and the number in quotations. [age] > 12.
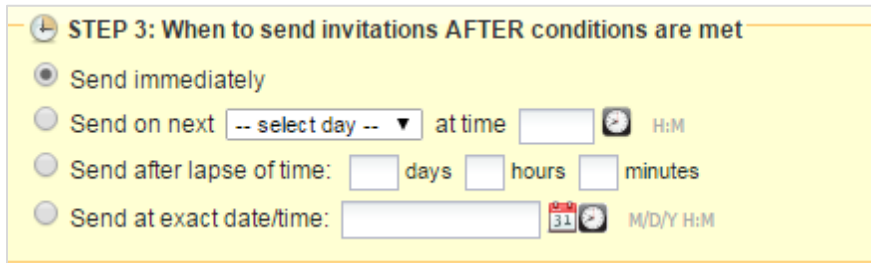
If you would like REDCap to check the logic in real time prior to sending the message, click the box next to "Ensure logic is still true before sending invitation". REDCap will re-evaluate the logic against the record's data values whenever the record values are changed AFTER the invitation has been scheduled but BEFORE it has been sent to the respondent. If the logic is no longer true, the invitation will not be sent.
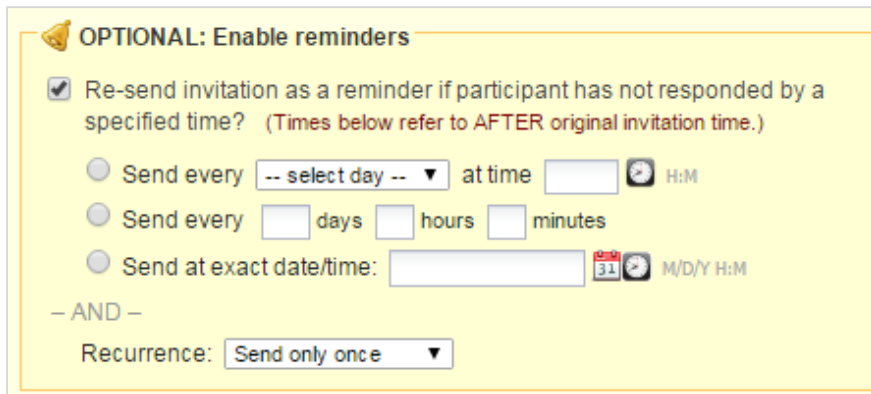
Step 3: When to send invitations AFTER conditions are met

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.
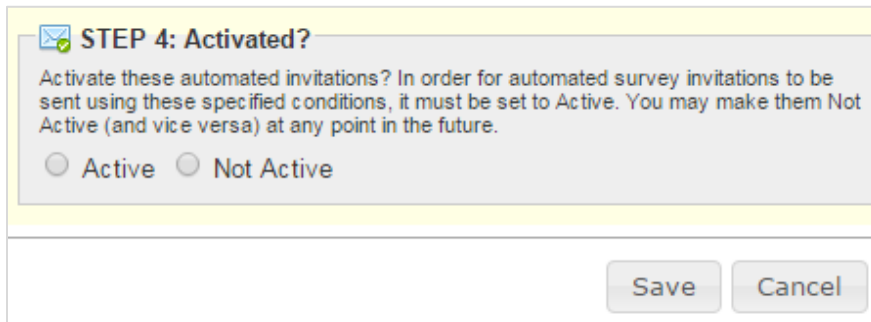

Optional: Enable Reminders

Check the box if you would like the survey invitation to be sent as a reminder if the participant 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.

Step 4: Activate

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

Using the Public Survey Link versus the Participant List with Automated Survey Invitations

If you use the **Public Survey Link**, the survey cannot be anonymous as you will need to request the participant's email address in order to send future automated surveys. That email address field must then be designated as the email field to use for invitations to survey participants.

To designate an email field to use for invitations to survey participants, navigate to Project Setup and click Enable next to "Designate an email field to use for invitations to survey participants".

From the drop-down box, choose an email field to use for your survey invitations and then click Save. **Note:** The field should already have 'Email' validation applied to it.

If instead you are adding your survey participants through the **Participant List**, the above step is not necessary. The Automated Survey Invitations can be scheduled to be sent automatically based upon specific conditions as described in Steps 1-4 above.