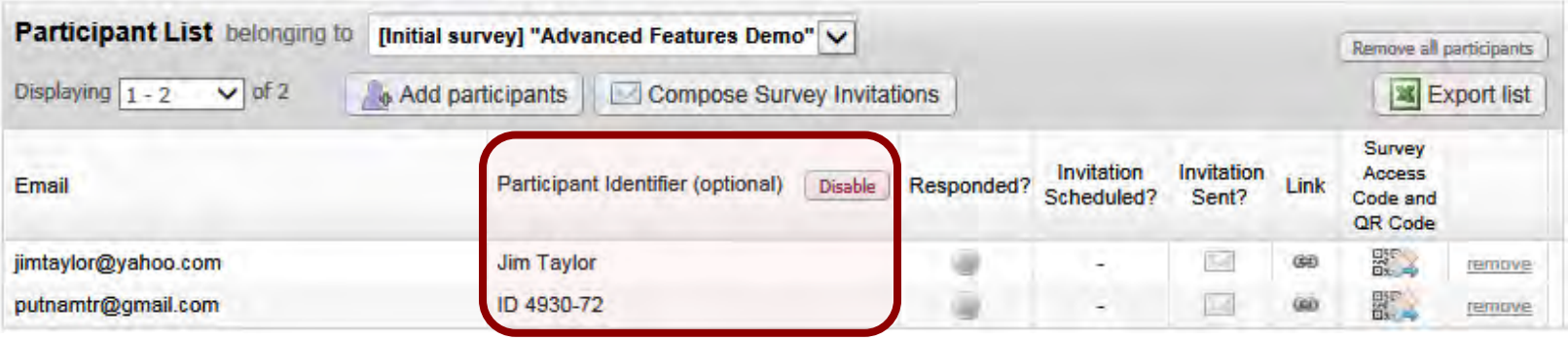
Participant Identifiers

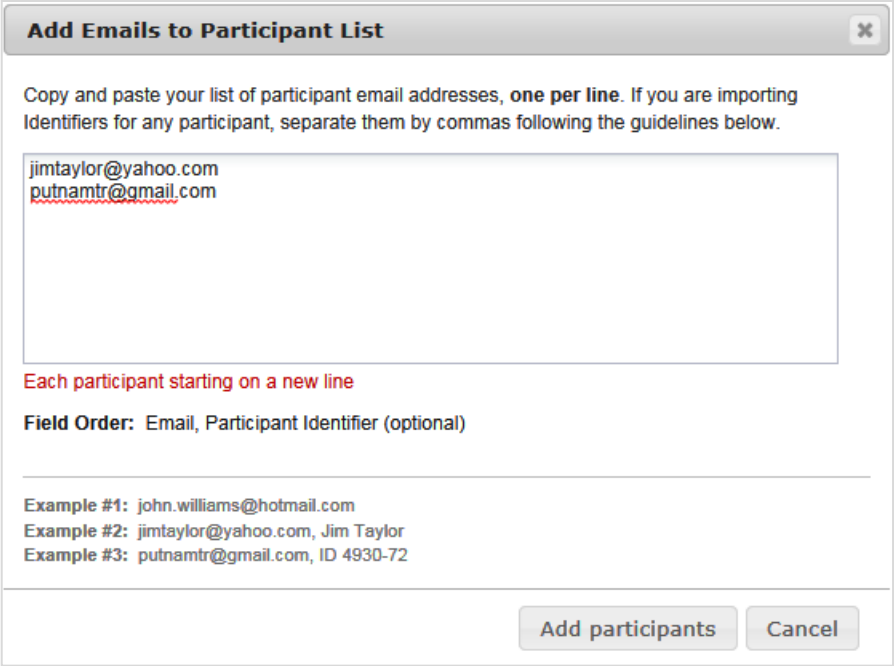
- To keep the survey anonymous, **don't** enable the **Participant Identifier** feature.
- To make the survey non-anonymous, enable the **Participant Identifier** feature.
- The **Participant Identifier** may be the participant's name, an ID number, or whatever you would like.
- It is **not the same** as the project's main primary identifier (Record Number, Record ID, Study ID, MRN).
- The **Participant Identifier** is can be exported along with the data.



Adding Participants to Participant List

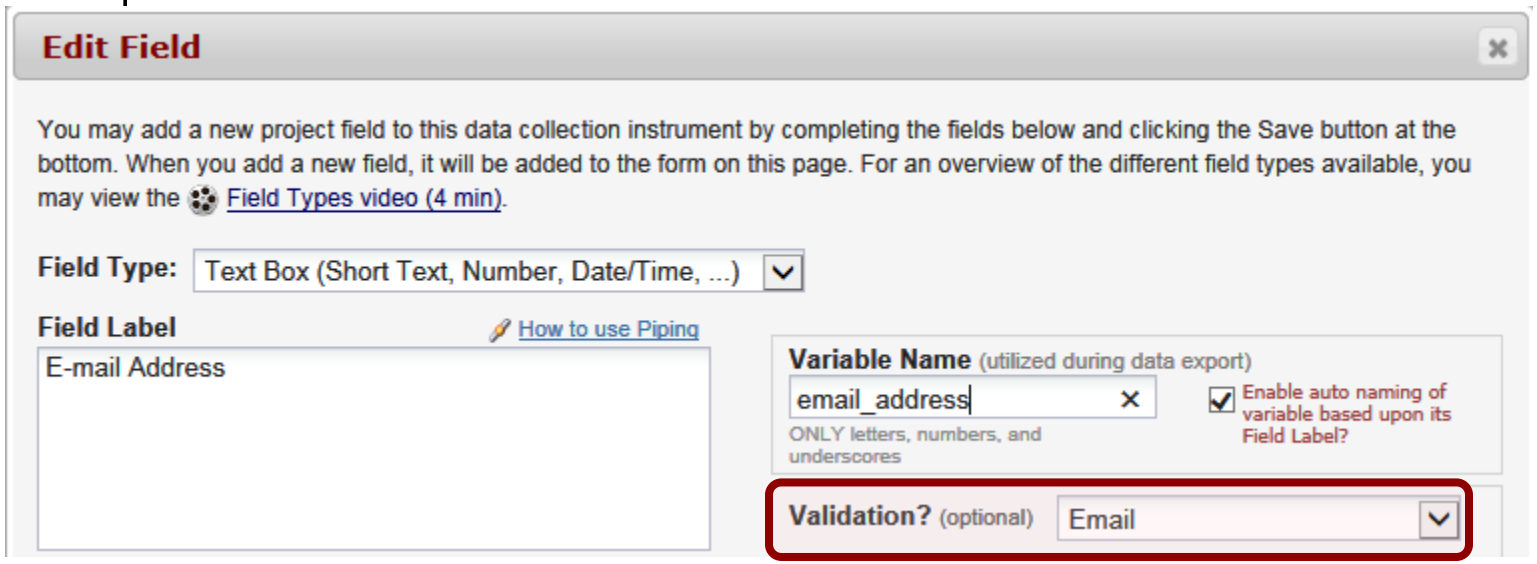
There are different ways of adding participants' email addresses to the **Participant List**:

1. For few participants, manually type email addresses.
2. For many participants, cut-and-paste email addresses.
3. Designate an email address field on another survey or form to populate the **Participant List**.



Designate an Email Field

1. Setup the email address field with **email validation**.



2. Enable the feature on the **Project Setup** tab.

Compose Survey Invitations

Send a Survey Invitation to Participants

Info

Survey title: Advanced Features Demo

1 **When should the emails be sent?**

- (•) Immediately
- ( ) At specified time: M/D/Y H:M

The time must be for the time zone **America/Chicago**, in which the current time is **01/26/2017 12:52**.

2 **Enable reminders**

☐ Re-send invitation as a reminder if participant has not responded by a specified time?

3 **Compose message**

From: jacevedo@bsd.uchicago.edu

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

How to use Piping in the survey invitation

4 **Participant List**

(those who have not responded completely)

Actions: -- check/uncheck participants --

☑ Email (2 selected)	Participant Identifier	Scheduled?	Sent?	Respond
☑ jimtaylor@yahoo.com	Jim Taylor	-		
☑ putnamtr@gmail.com	ID 4930-72	-		

5 Send Invitations | Cancel

1. Specify when emails should be sent.
2. Enable reminders for non-responses.
3. Compose the email message.
4. Select participants from the list.
5. Send the invitations.

Survey Invitation Message and Link

The unique survey link for each participant will be appended to the end of your email message:

your email message

REDCap survey link

Monthly Survey

jacevedo@bsd.uchicago.edu

Sent: Wed 2/1/2017 12:52 PM

To: Acevedo, Julissa [CRI]

Please take your monthly survey by clicking on the link below.

Thank you.
Research Team

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

If the link above does not work, try copying the link below into your web browser:
https://redcap.uchicago.edu/surveys/?s=xfZdaD8sez

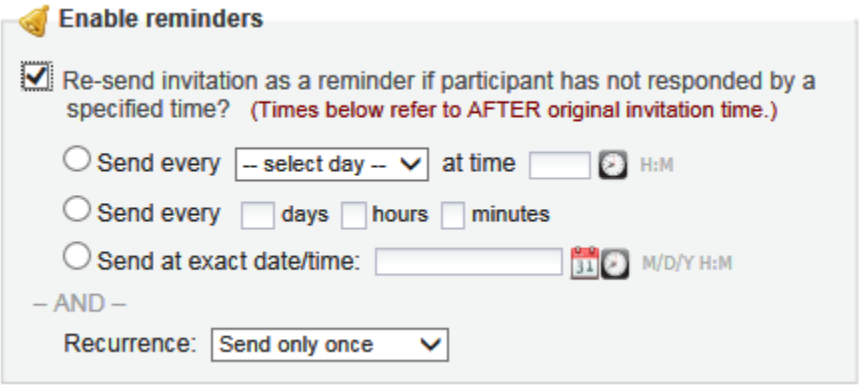
This link is unique to you and should not be forwarded to others.

Non-Response Reminders

1. Survey reminders can only be setup while composing survey invitations. They cannot be setup after invitations have been sent.

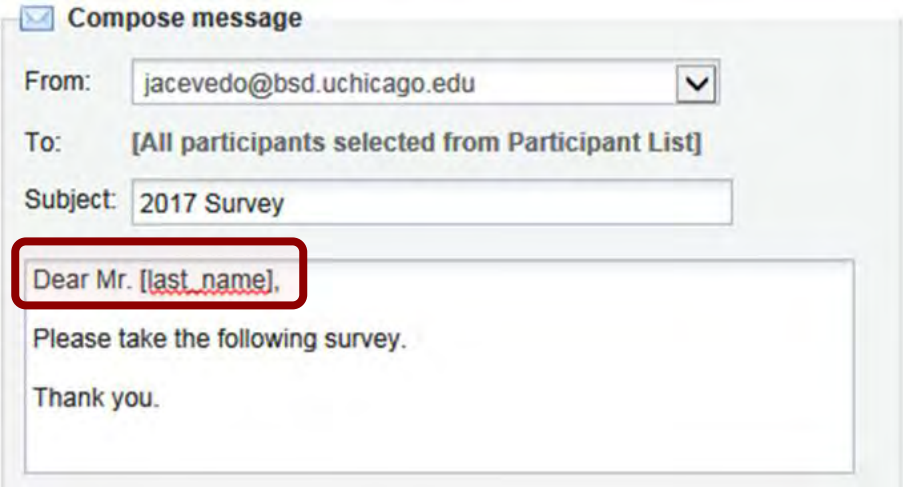
2. They can be sent on specific days of the week, or every X days, or at an exact date/time.

3. Up to 2-5 reminders can be scheduled.

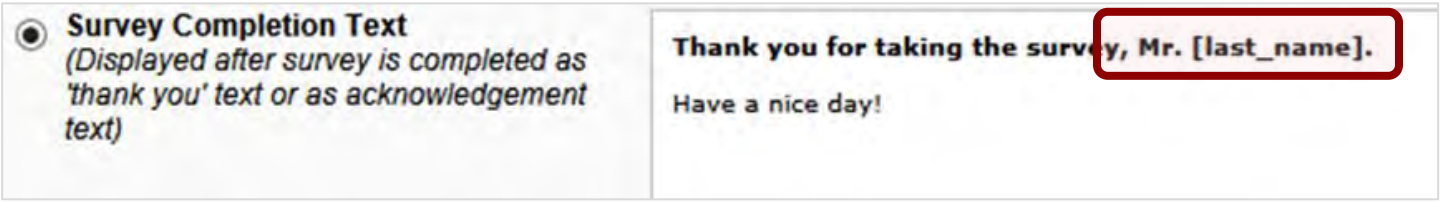


Field Piping

The Piping feature allows you to pipe previously collected data to customize the survey invitation greeting…



…or the survey completion text.



TRACKING SURVEYS

- Participant List
- Survey Log
- Partial Responses
- Editing Responses
- Survey Timestamps

Tracking Surveys via the Participant List

After receiving an email invitation and then completing the survey, the participant's response status in the **Participant List** will be changed to either:

- **Responded** – they toke and submitted the survey
- **Partial Response** – they started but not submitted the survey
- **No Response** – they have not opened the survey

Participant List belonging to [Initial survey] "Advanced Features Demo"

Remove all participants

Displaying 1 - 3 of 3 | Add participants | Compose Survey Invitations | Export list

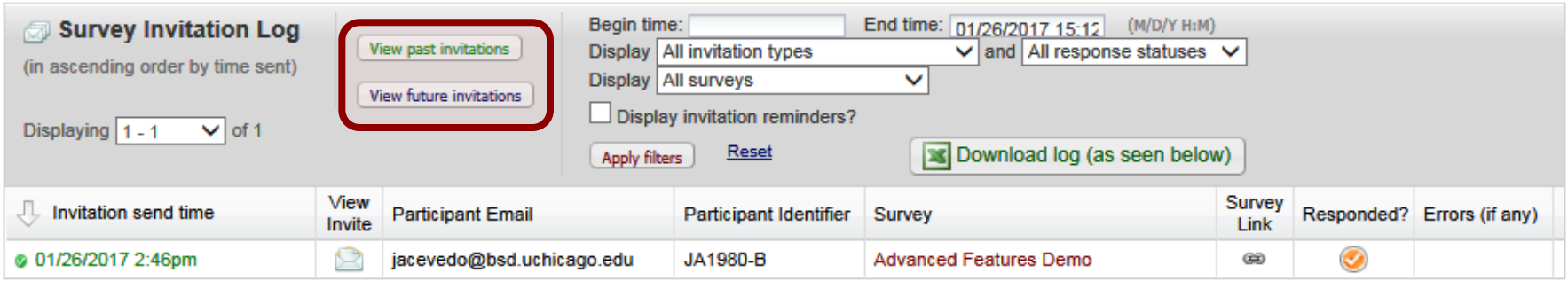
Email	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
jacevedo@bsd.uchicago.edu (ID 1)	JA1980-B		-				
jimtaylor@yahoo.com	Jim Taylor		-				remove
putnamtr@gmail.com (ID 2)	ID 4930-72		-				remove

Tracking Surveys via the Survey Invitation Log

- The **Survey Invitation Log** lists survey invitations that have already been sent or have been scheduled to be sent to survey participants.

- 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.



Partial Responses

For **Partial Responses**, you can use **Compose Survey Invitations** from the **Participant List** to send them a reminder email.

Participant List belonging to [Initial survey] "Advanced Features Demo"

Remove all participants

Displaying 1 - 3 of 3 | Add participants | Compose Survey Invitations | Export list

Email	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
jacevedo@bsd.uchicago.edu (ID 1)	JA1980-B		-				
jimtaylor@yahoo.com	Jim Taylor		-				remove
putnamtr@gmail.com	ID 4930-72		-				remove

If you used the **Save-and-Return** feature, and participants don't remember their code, retrieve it from their partial survey record.

Survey response is editable | Edit response | Survey options

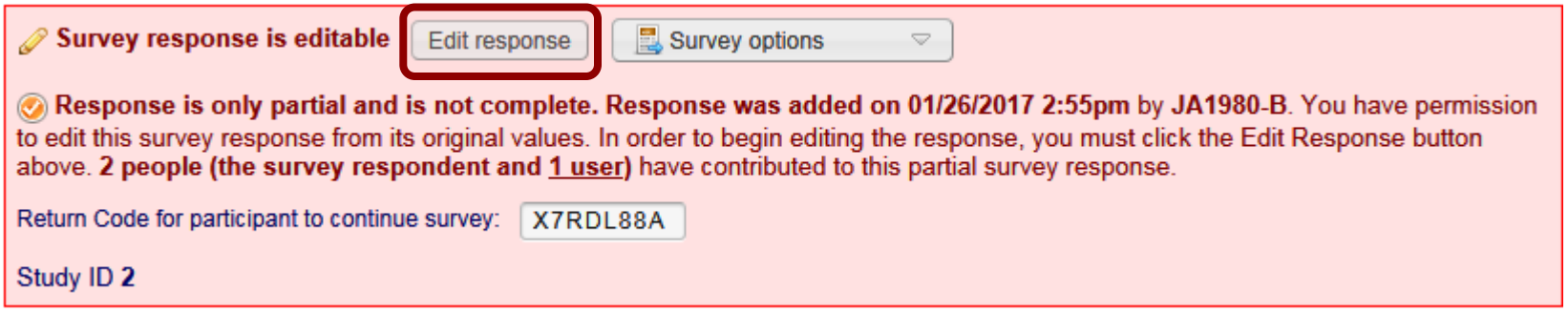
Response is only partial and is not complete. Response was added on 01/26/2017 2:55pm by **JA1980-B**. You have permission to edit this survey response from its original values. In order to begin editing the response, you must click the Edit Response button above. **2 people (the survey respondent and 1 user)** have contributed to this partial survey response.

Return Code for participant to continue survey: X7RDL88A

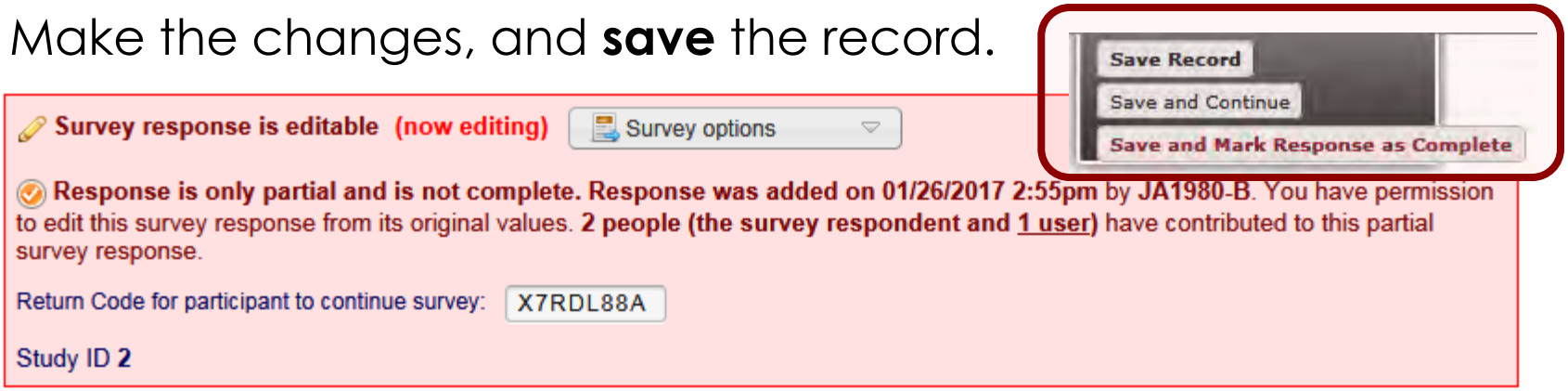
Study ID **2**

Editing Responses

- First, user must have **Edit Survey Responses** user rights for each survey they need to edit.
- Then to edit a response, open data form from **Record Status Dashboard** and click **Edit Response** at top of survey.



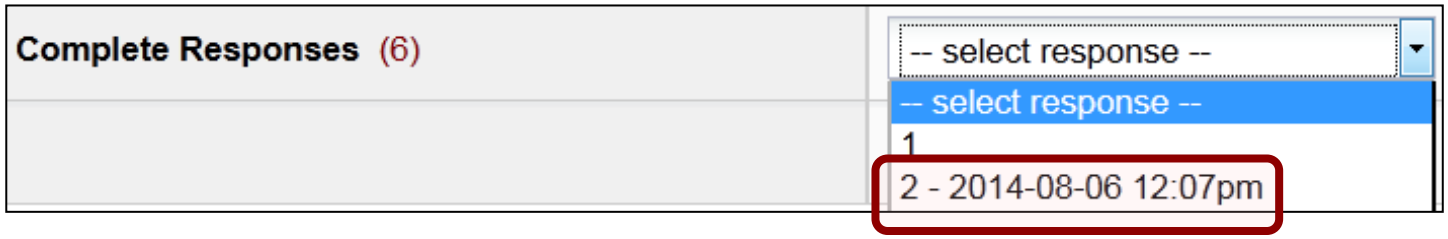
- Make the changes, and **save** the record.



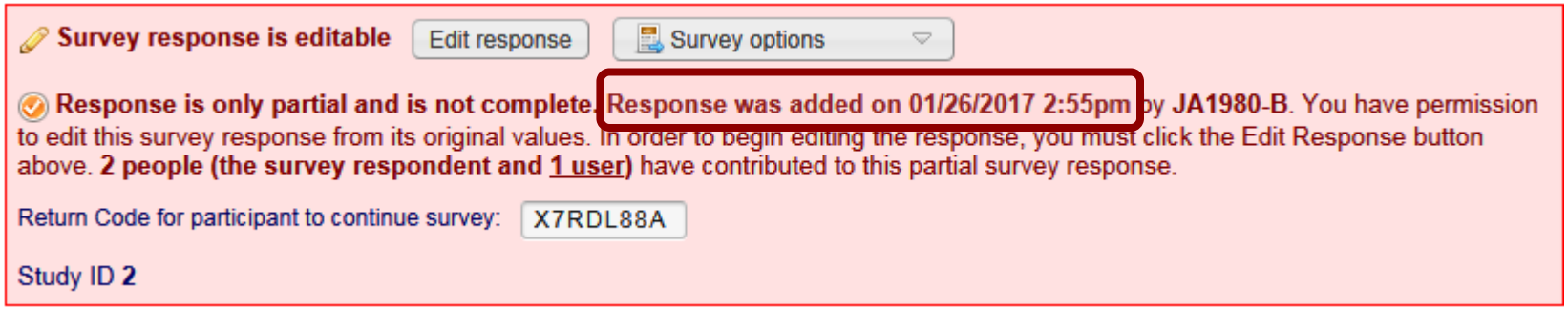
Survey Timestamps

Survey responses get timestamped with the date and time when the **Submit** button was clicked by the participant.

Timestamps appear on the Add/Edit record selector.



As well as the survey record



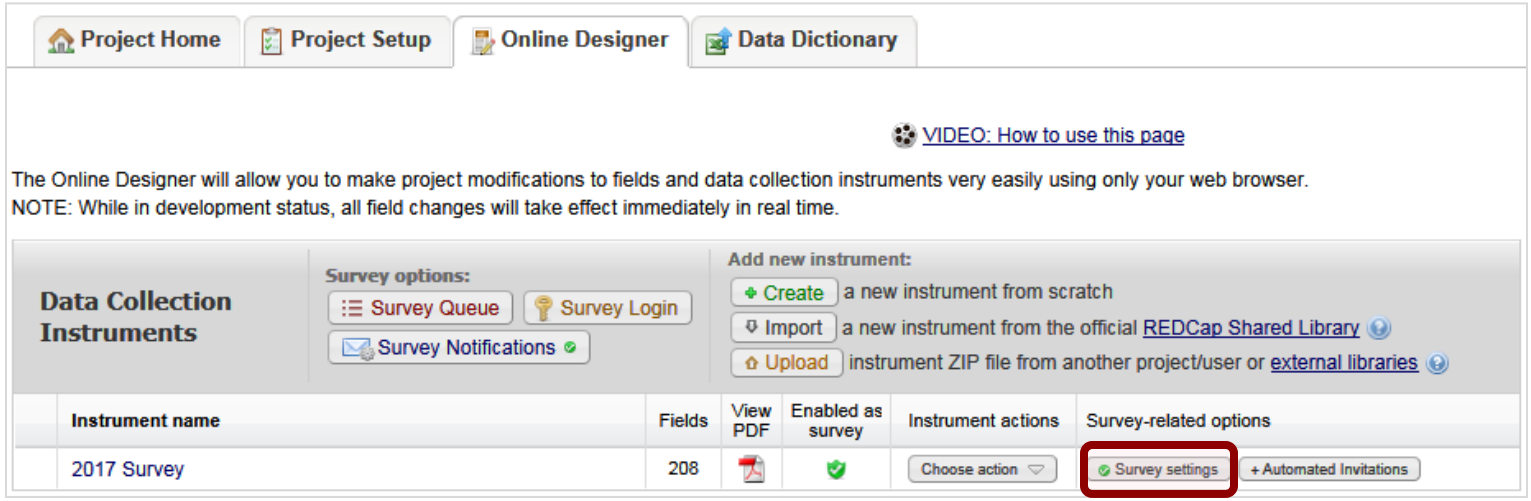
They also be included in exports and reports.

SURVEY TERMINATION

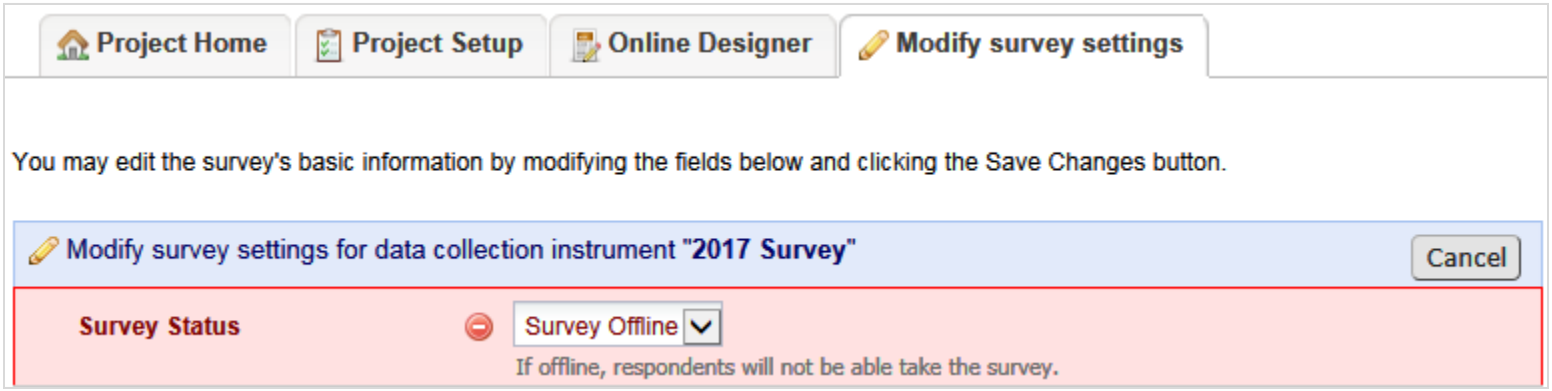
- Inactivate a Survey
- Inactivate or Archive Project

Inactivate a Survey

1. Go to the **Online Designer** and click on **Survey Settings**.



2. Click on **Survey Status** and set to **Survey Offline**.



Inactivate or Archive a Project

Go to **Other Functionality** tab, and either:

- Move to inactive status – data collection over, remains visible
- Archive the project – entire study is over, remains hidden