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** 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

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

```
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 took and submitted the survey
- **Partial Response** – they started but not submitted the survey
- **No Response** – they have not opened the survey
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.
For **Partial Responses**, you can use **Compose Survey Invitations** from the **Participant List** to send them a reminder email.

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

![Survey response is editable](image)

- 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**.

   ![Survey Settings](image1)

   The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser.
   
   **NOTE:** While in development status, all field changes will take effect immediately in real time.

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

   ![Survey Status](image2)

   You may edit the survey's basic information by modifying the fields below and clicking the Save Changes button.
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