REDCap
Research Electronic Data Capture

Personalized
Survey Greetings

THE UNIVERSITY OF CHICAGO MEDICINE & BIOLOGICAL SCIENCES

CENTER FOR RESEARCH INFORMATICS

PERSONALIZED SURVEY GREETINGS

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**.

STEP 2: ADD YOUR SURVEY QUESTIONS

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.

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.

STEP 8: MOVE PROJECT TO PRODUCTION

1. Complete the rest of the **project settings** (user rights, testing, bookmarks, etc).
2. Request the project move to **production** by the REDCap Administrator.

STEP 9: ADD THE PARTICIPANT INFORMATION

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**).
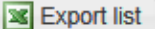
STEP 10: VERIFY EMAIL ADDRESSES

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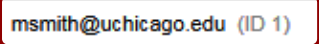4. Click on **Compose Survey Invitations**.

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],

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

STEP 13: VERIFY EMAIL GREETING

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

FOR FURTHER HELP

website
- https://cri.uchicago.edu/redcap

email
- redcap@rt.cri.chicago.edu

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