Automated survey invitations allow a user to send invitations immediately or at a designated time in the future when certain conditions have been met.

**Option 1: Using the public survey link to initiate a Record ID in the project**

**Step 1:**
- To create automatic survey invitations, first enable the forms to be used as surveys

**Step 2:**
- The initial survey will need to capture email addresses of participants in order for the automated survey invitations to send. Please create a field on the initial survey for email addresses. Ensure the validation for that field is set for ‘email.’
Step 3:

- Navigate to the Project Setup tab and locate the ‘Enable optional modules and Customizations’ bubble. Click Enable for the ‘Designate an email field to use for invitations to survey participants.’

The ‘Enable’ button will open a pop-up box where you will select the variable name used for the ‘Email’ field.
Step 4:

- On the Online Designer tab, click on ‘Automated Invitations’ for the first survey to be sent with the automated invitation.

Step 5:

- Define the conditions for the survey – Compose the message, define the conditions, set the time for the invitation to be sent, optional: enable reminders to be sent if the survey is not completed, and finally activate the survey invitation.

In this example, we will send the Satisfaction Survey immediately after the Demographics Survey is completed.
Observations:

- As participants complete the initial survey and provide their email address, the Participant List will begin to fill with the email addresses. Notice that the individuals Record ID number will appear beside their name.

- On the Survey Invitation Log, we can see that the ‘view past invitations’ show the automatic email invitation for the Satisfaction Survey has been sent.
• In this example, we set the original email to send immediately after Demographics Survey was submitted. Example email based on our email composition input:

To: Jennifer R. Aken

Please take this survey.

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

If the link above does not work, try copying the link below into your web browser: http://redcapint.wakehealth.edu/redcap_int/surveys/?s=w6TTWQYwHY

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

Option 2: Using the participant list to begin the automatic survey invitations

Step 1:
• To create automatic survey invitations, first enable the forms to be used as surveys.

Step 2:
• On the Online Designer tab, click on ‘Automated Invitations’ for the first survey to be sent with the automated invitation.

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.

Step 3:
• Define the conditions for the survey – Compose the message, define the conditions, set the time for the invitation to be sent, optional: enable reminders to be sent if the survey is not completed, and finally activate the survey invitation.

In this example, we will send the Satisfaction Survey immediately after the Demographics Survey is completed.
Step 4:

- Navigate to the *Manage Survey Participants* link, then the *Participant List* tab. Click on ‘Add Participants’ to begin building the participant list.

Step 5: Enter the email addresses, one per line.

- Note: If you want to enable the Participant Identifier option, click on ‘enable’ before entering the email addresses. As you are entering emails, you can add an identifier behind the email address using a comma as the separator. For example: ctsiredcap@wakehealth.edu, REDCap Admin
The names will then appear in the Participant List chart.

Step 6:

- Click on ‘Compose Survey Invitations.’ This will open a pop-up box where you can complete the invitation information.

Note: When using the Participant List to email survey links, the link is specific to the participant. Please encourage the participants not to forward their emails with the link to other participants.
Observations:

- As participants complete the initial survey, the Participant List will have a green bubble with a checkmark in the ‘Responded?’ column.

- On the Survey Invitation Log, we can see that the ‘view past invitations’ show the automatic email have been sent.
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 also 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/New_York", in which the current time is 07/31/2018 10:16am.

<table>
<thead>
<tr>
<th>Invitation send time</th>
<th>View Invite</th>
<th>Participant Email</th>
<th>Record</th>
<th>Participant Identifier</th>
<th>Survey</th>
<th>Survey Link</th>
<th>Responded?</th>
<th>Errors (if any)</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/31/2018 10:13am</td>
<td></td>
<td><a href="mailto:jwilson@malehealth.edu">jwilson@malehealth.edu</a></td>
<td>1</td>
<td></td>
<td>Demographics</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/31/2018 10:14am</td>
<td></td>
<td><a href="mailto:jwilson@malehealth.edu">jwilson@malehealth.edu</a></td>
<td>1</td>
<td></td>
<td>Satisfaction Survey</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
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