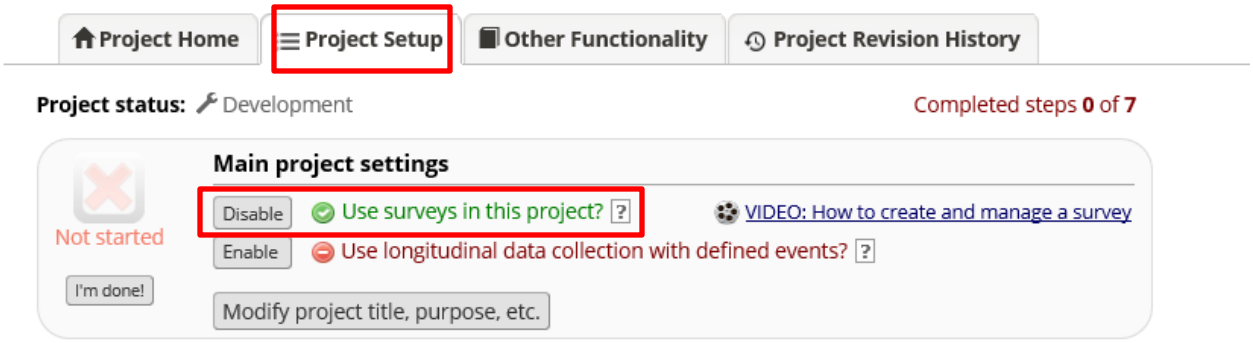
REDCap – Survey Participant List

If responses do not need to be anonymous, you may use the participant list to capture email addresses to send participants multiple surveys and have the data linked. Below are three (3) options.

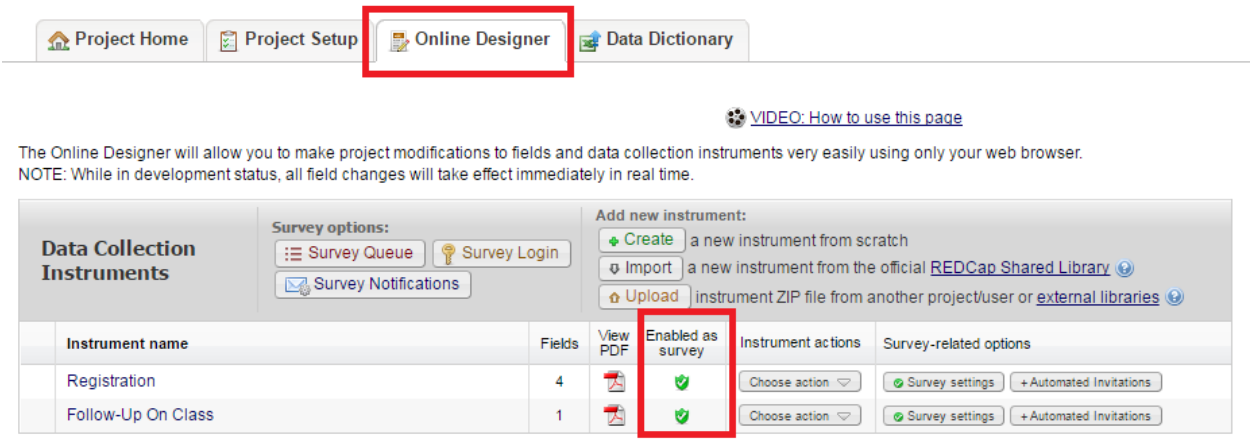
Option 1: The project's first instrument is a survey and you want to use the public URL to capture email addresses for follow-up surveys

Step 1: Ensure the survey functionality is enabled:

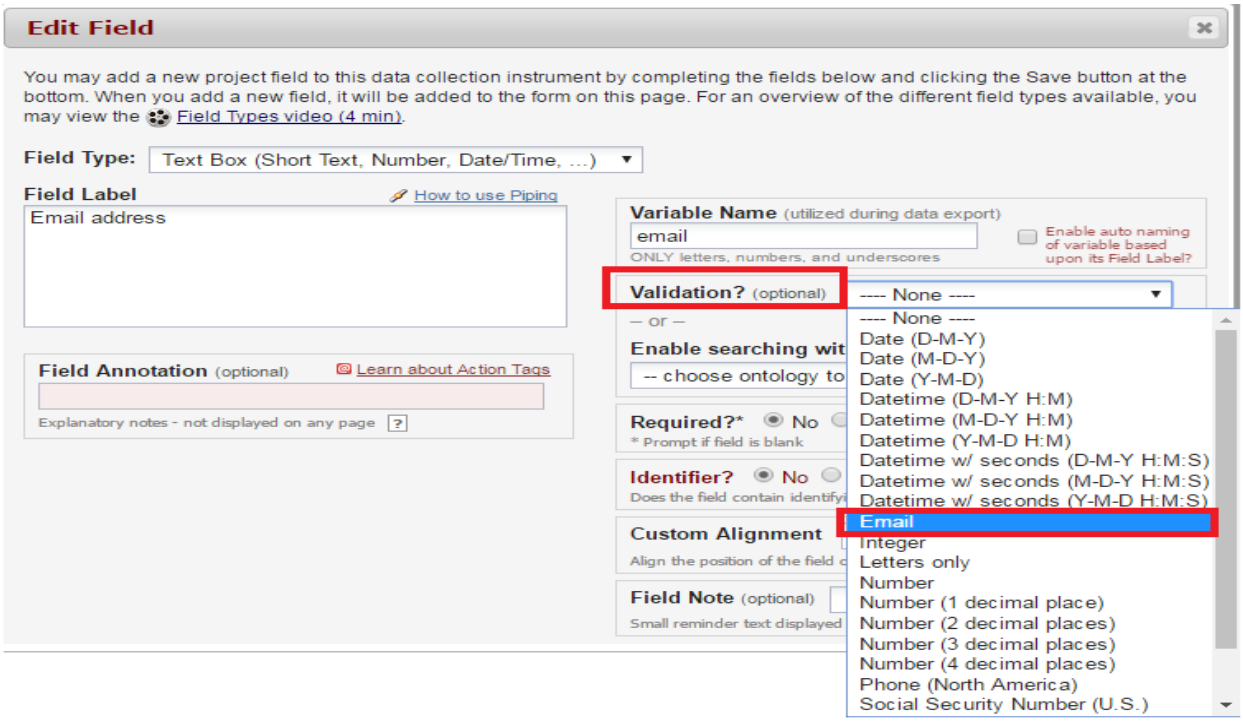
#1) On the Project Setup tab



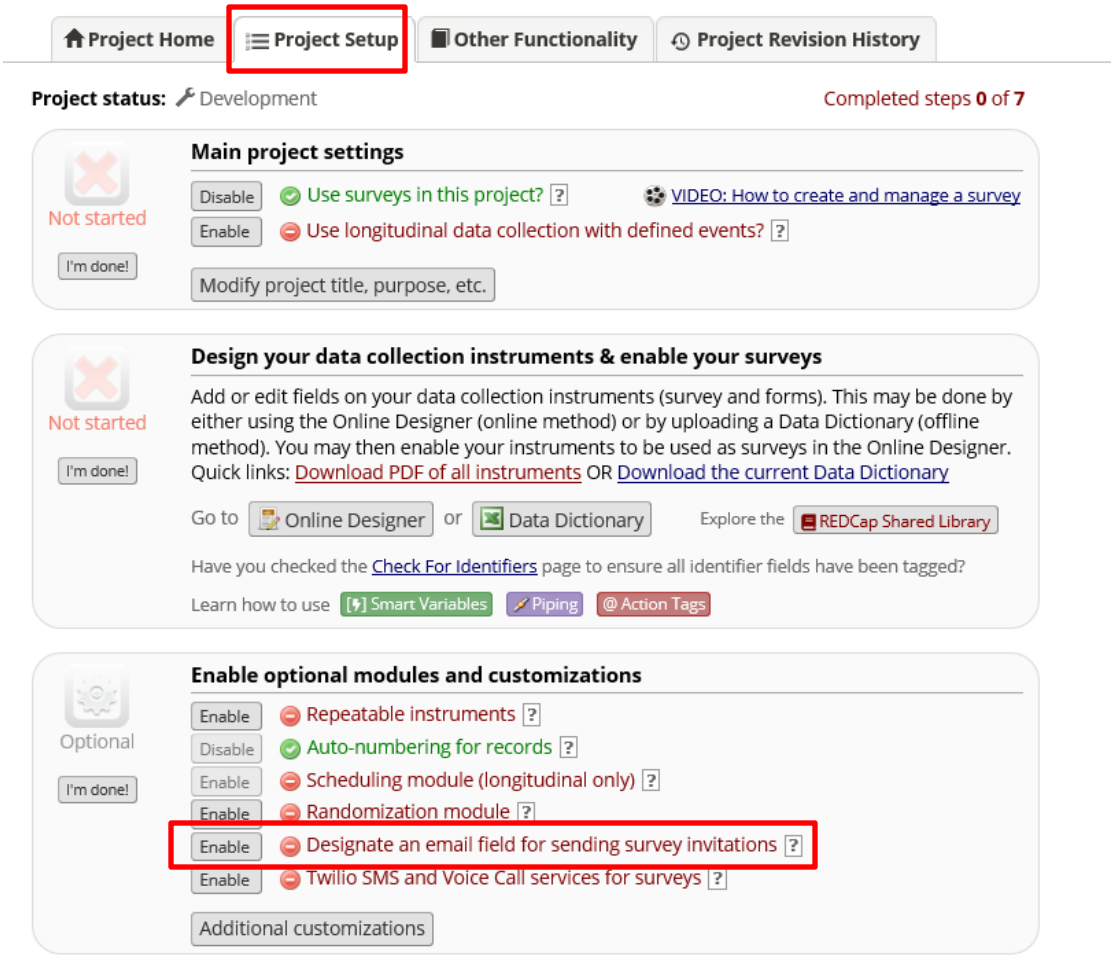
#2) Each individual form that will be a survey is also enabled on the Online Designer tab



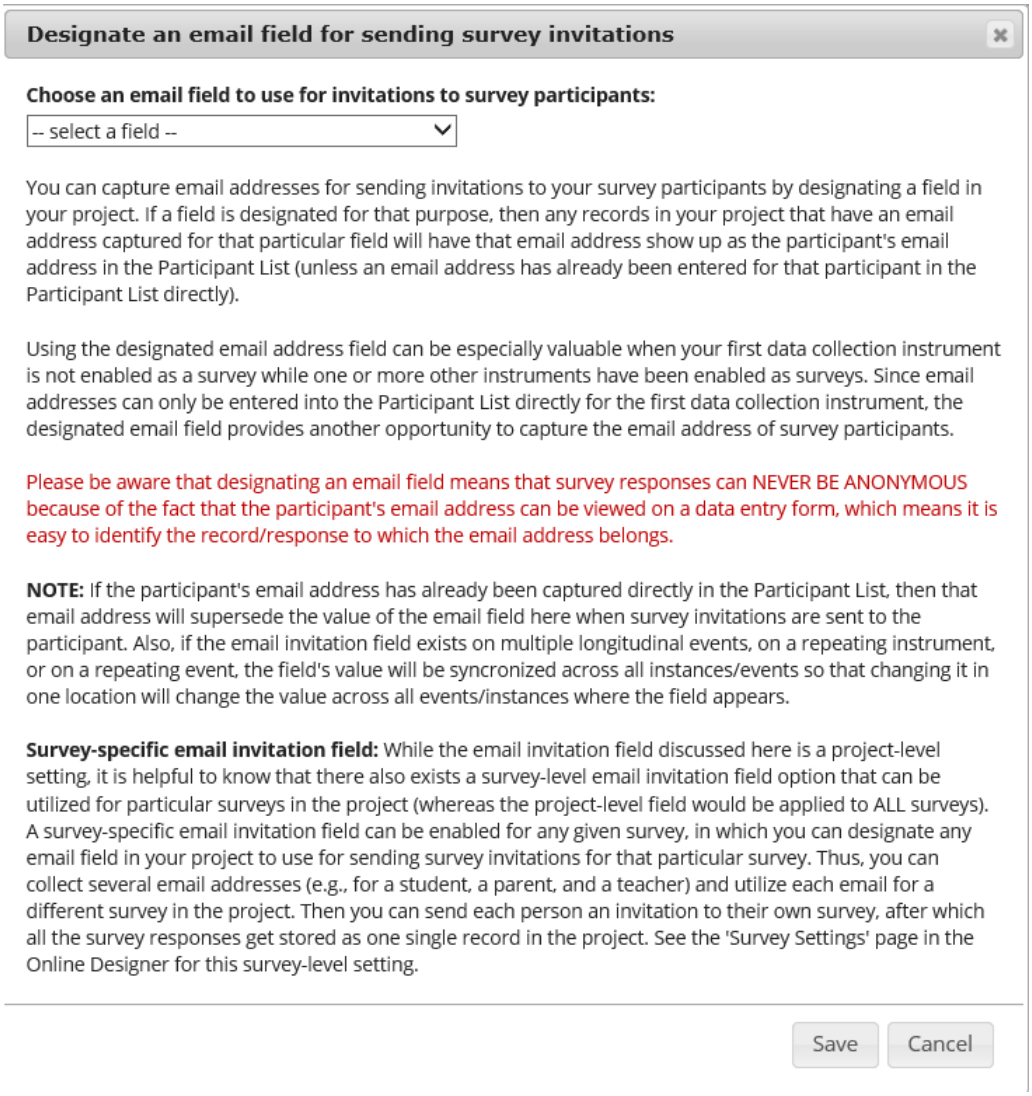
Step 2: If you want to use the public URL to capture email addresses of participants in order for subsequent surveys to be sent to the same participants, then create a field on the initial survey for email addresses. Ensure the validation for that field is set for 'Email.'



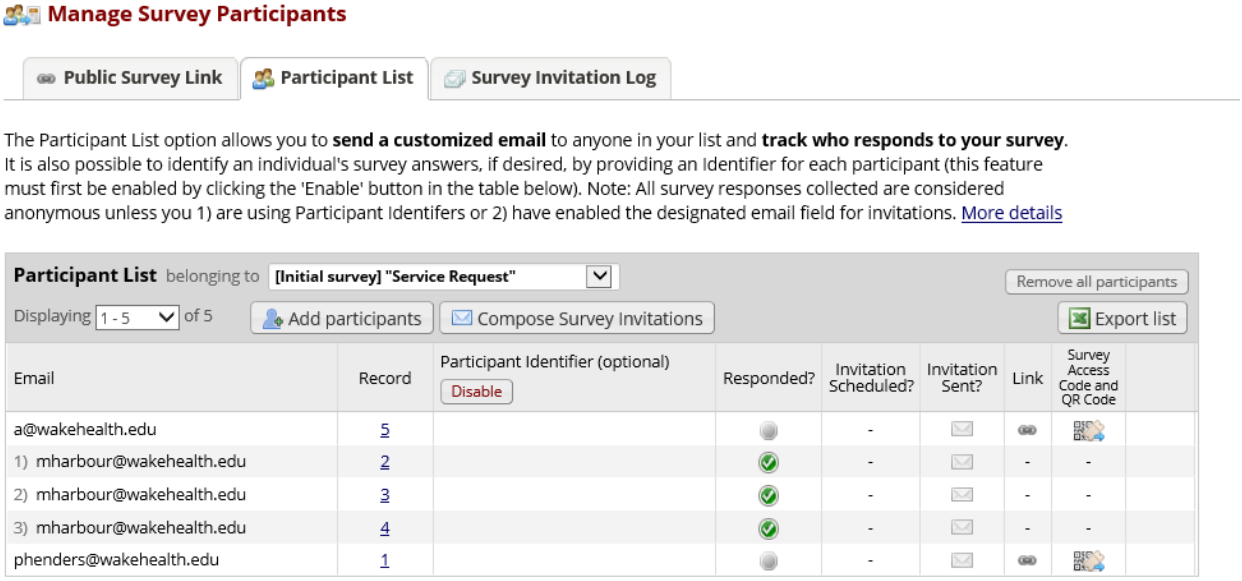
Step 3: Navigate to the Project Setup tab and locate the 'Enable optional modules and Customizations' bubble. Click Enable for the 'Designate an email field to use for invitations to survey participants.'



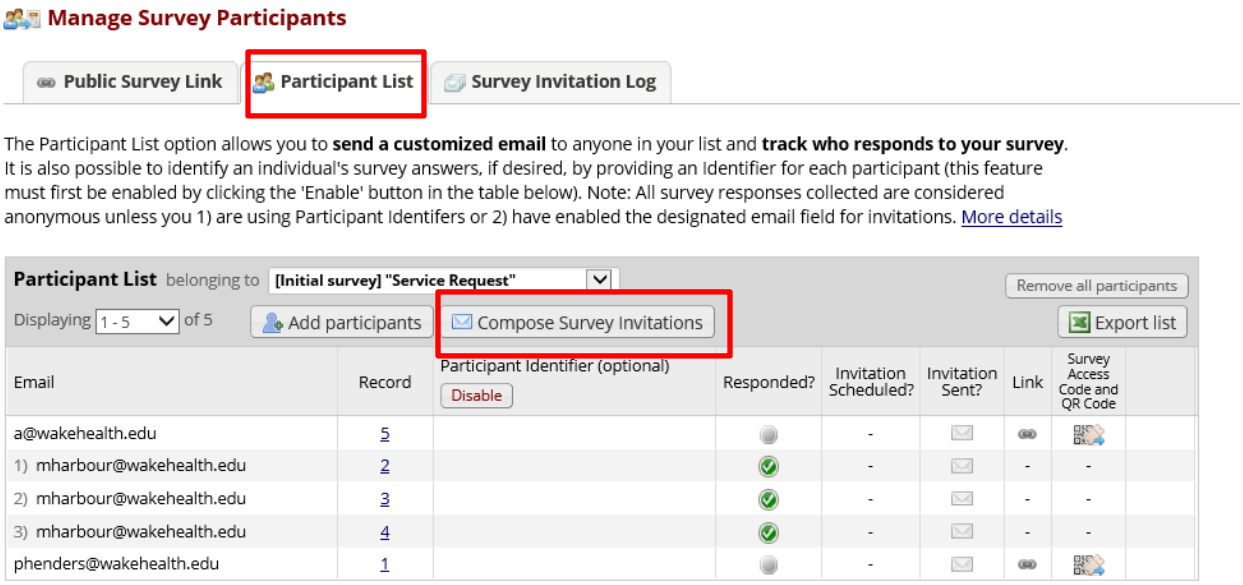
The 'Enable' button will open a pop-up box where you will select the variable named used for the 'Email' field.



Step 4: 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.



Step 5: To send the individuals the follow-up survey, navigate to the Participant List and select the 'Participant List belonging to' from the drop down then click on 'Compose Survey Invitations.'



Complete the information and then click 'Send Invitations.'

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.

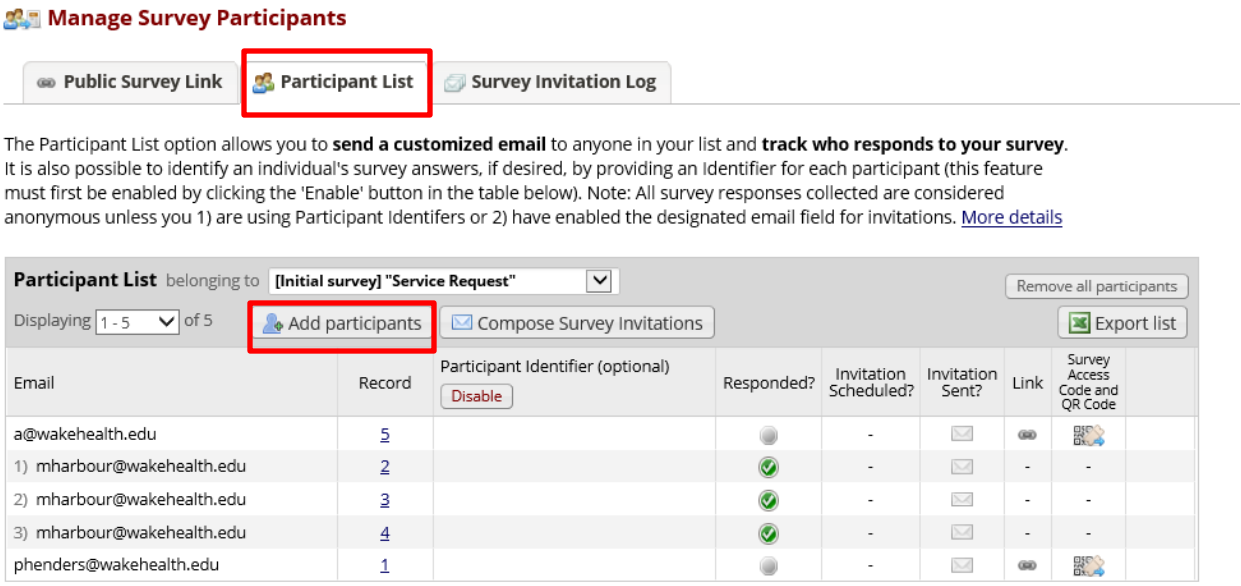
Only the names of individuals who completed the prior survey will be in this list. The system will pre-check the names of the individuals. If you decide against sending a follow-up survey to an individual, you can uncheck their name manually.

Option 2: A project's first instrument is a survey and you want to use the participant list

This option is available when you have a list of participant emails and you want to send them a link to the survey within REDCap. Using this option, you can choose to keep the survey(s) anonymous.

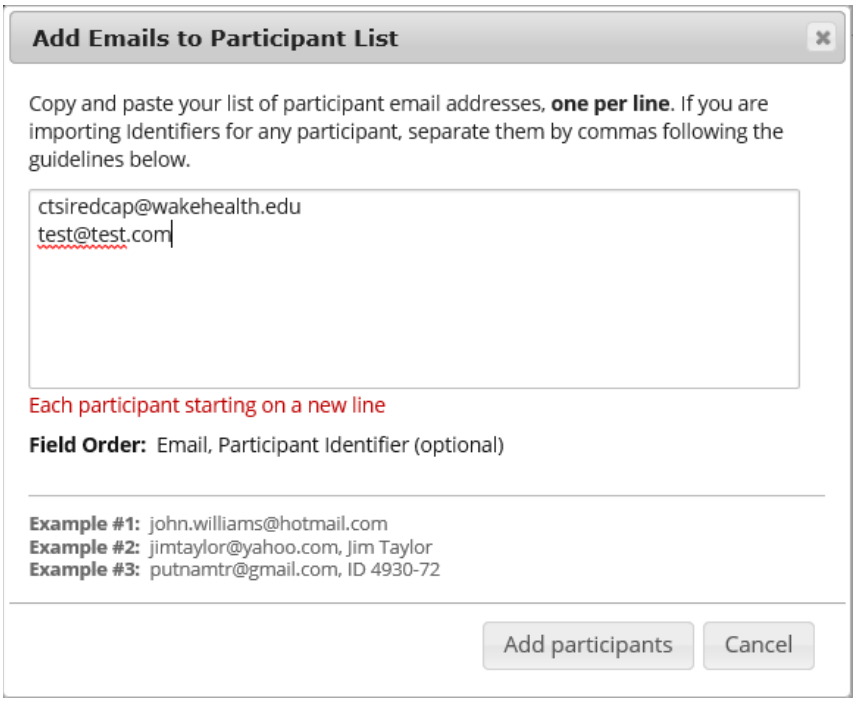
Step 1: The first form must be enabled as a survey. Refer to Option 1, Step 1 above to ensure the forms have been enabled as surveys.

Step 2: Navigate to *Manage Survey Participants* and then the *Participant List* tab. Click on 'Add Participants' to begin building the participant list.



Step 3: Enter the email addresses, one per line.

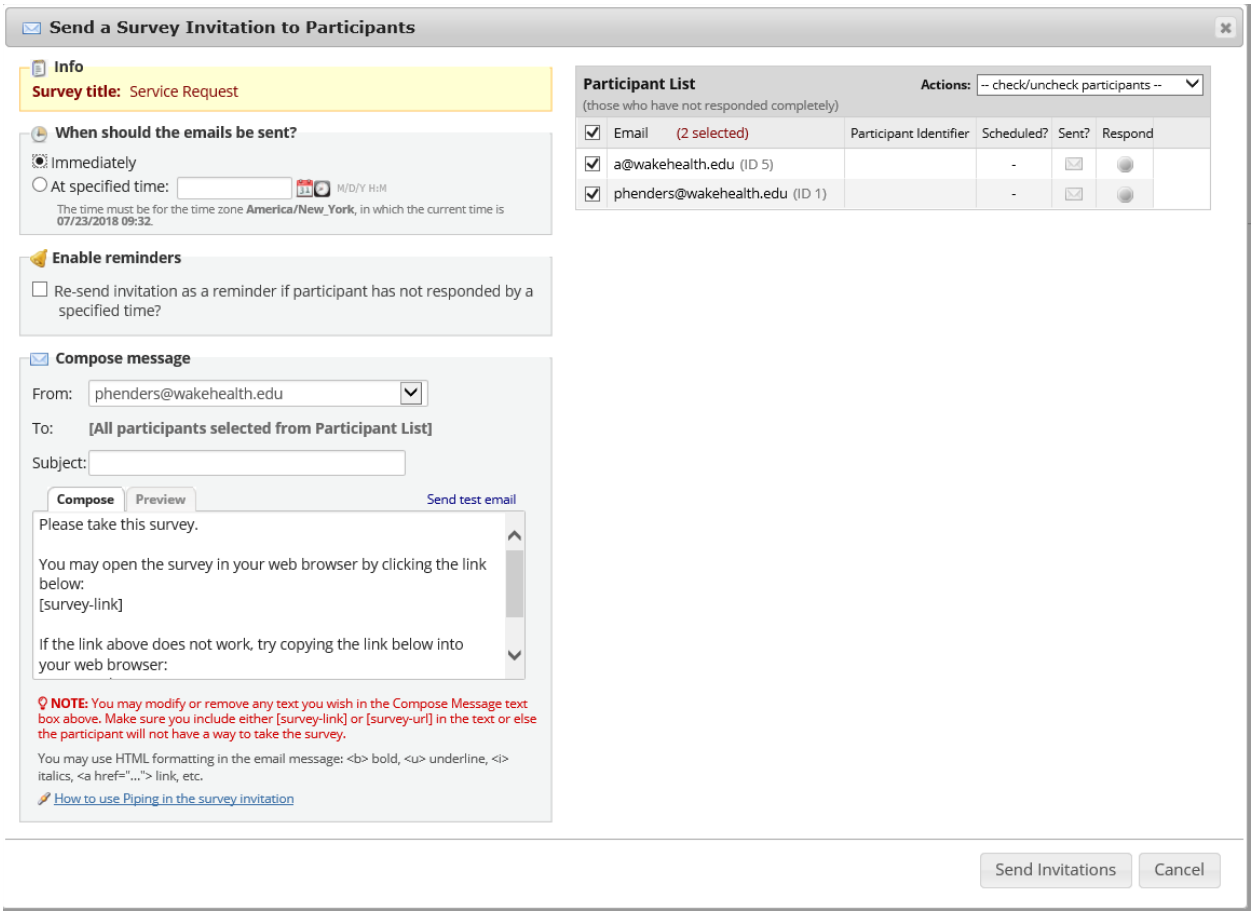
Note: If you want to enable the Participant Identifier option, click on 'enable' before entering the email addresses. As you are entering emails, you can add an identifier behind the email address using a comma as the separator. For example, ctsiredcap@wakehealth.edu, REDCap Admin. **If you do not enable the Participant Identifier, the survey(s) will be anonymous.**



The names will then appear in the Participant List chart.

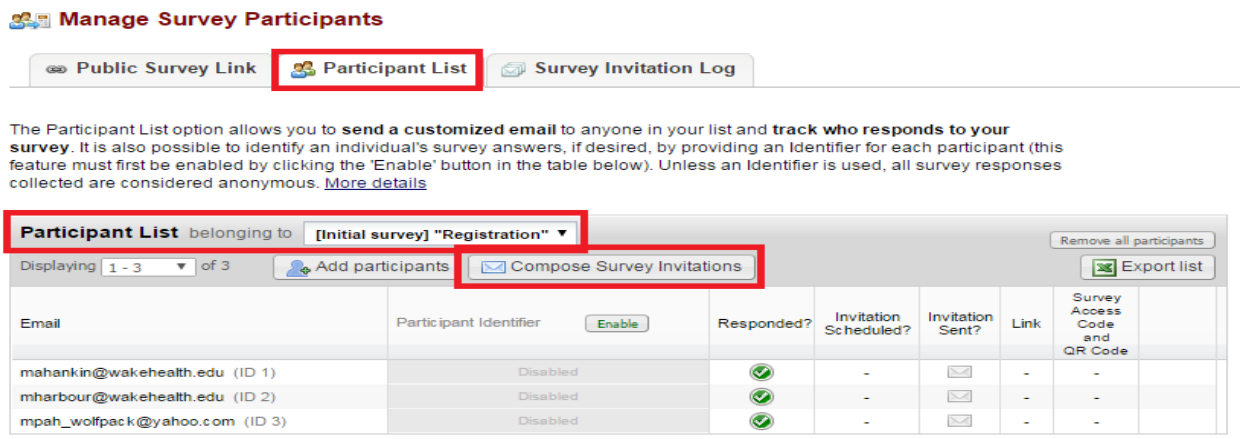
Step 4: Click on 'Compose Survey Invitations.' This will open a pop-up box where you can complete the invitation information.

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.



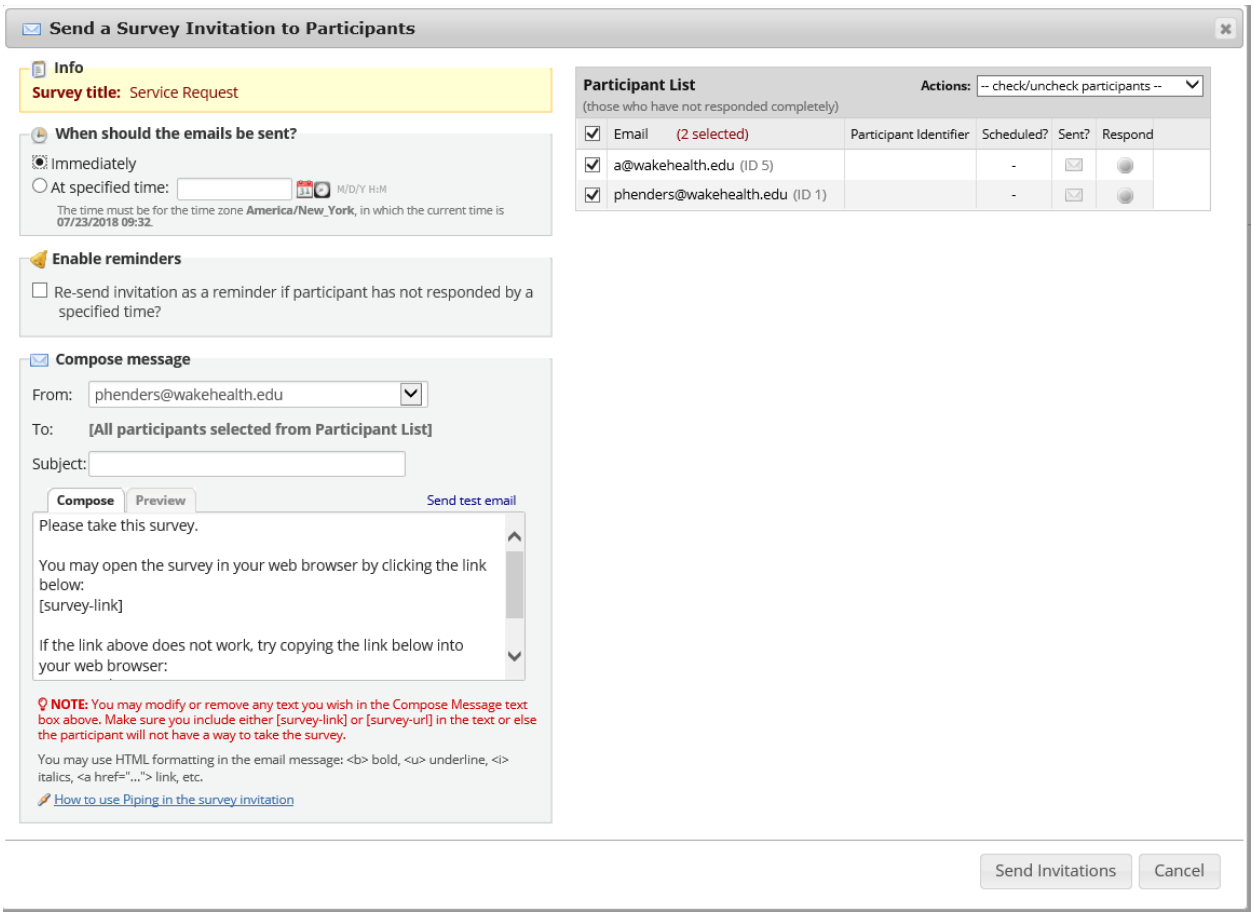
If a period of time has passed and participants have not completed the survey, you can use the 'Compose Survey Invitations' button to re-send the request.

Step 5: To send the individuals the follow-up survey, navigate to the Participant List and select the 'Participant List belonging to' from the drop down then click on 'Compose Survey Invitations.'



Complete the information and then click 'Send Invitations.'

NOTE: Only the names of individuals who completed the prior survey will be in this list. The system will pre-check the names of the individuals. If you decide against sending a follow-up survey to an individual, you can uncheck their name manually.



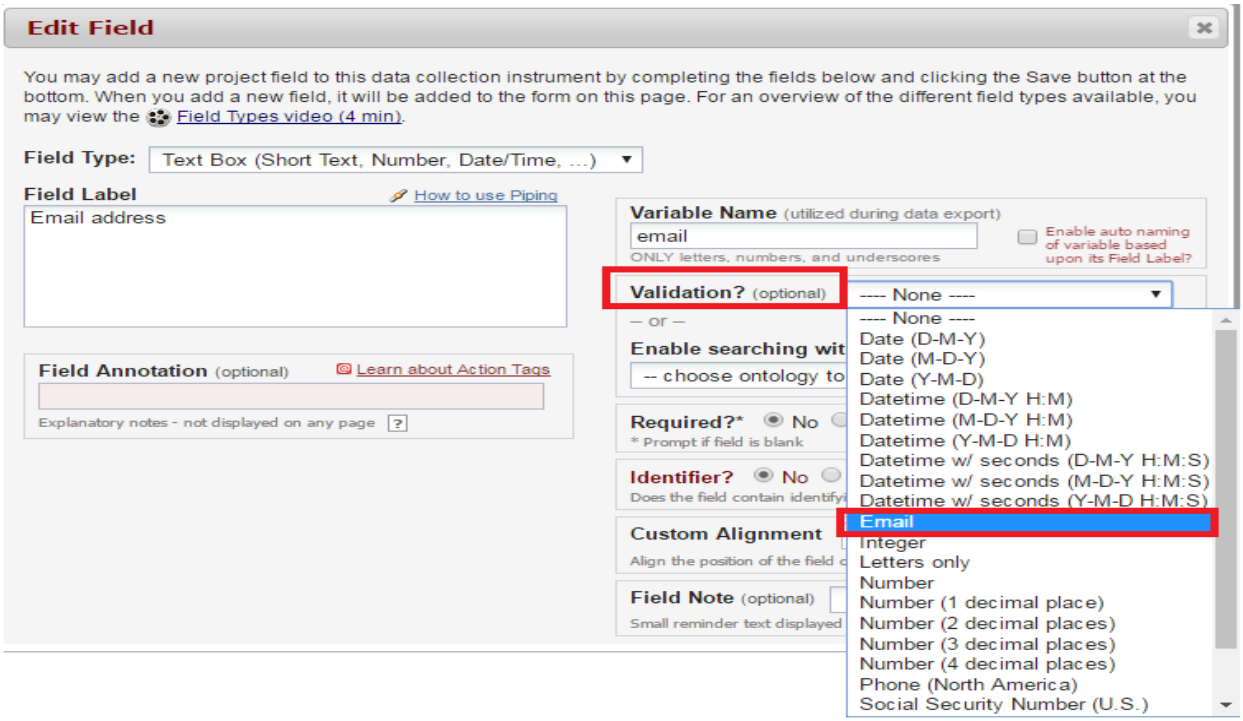
If you want to send the follow-up survey to participants even though they did not complete the initial survey, then you will need to create a separate REDCap project.

Option 3: The project's first instrument is a Data Entry form, but you want to use the participant list to send a survey that is an additional form

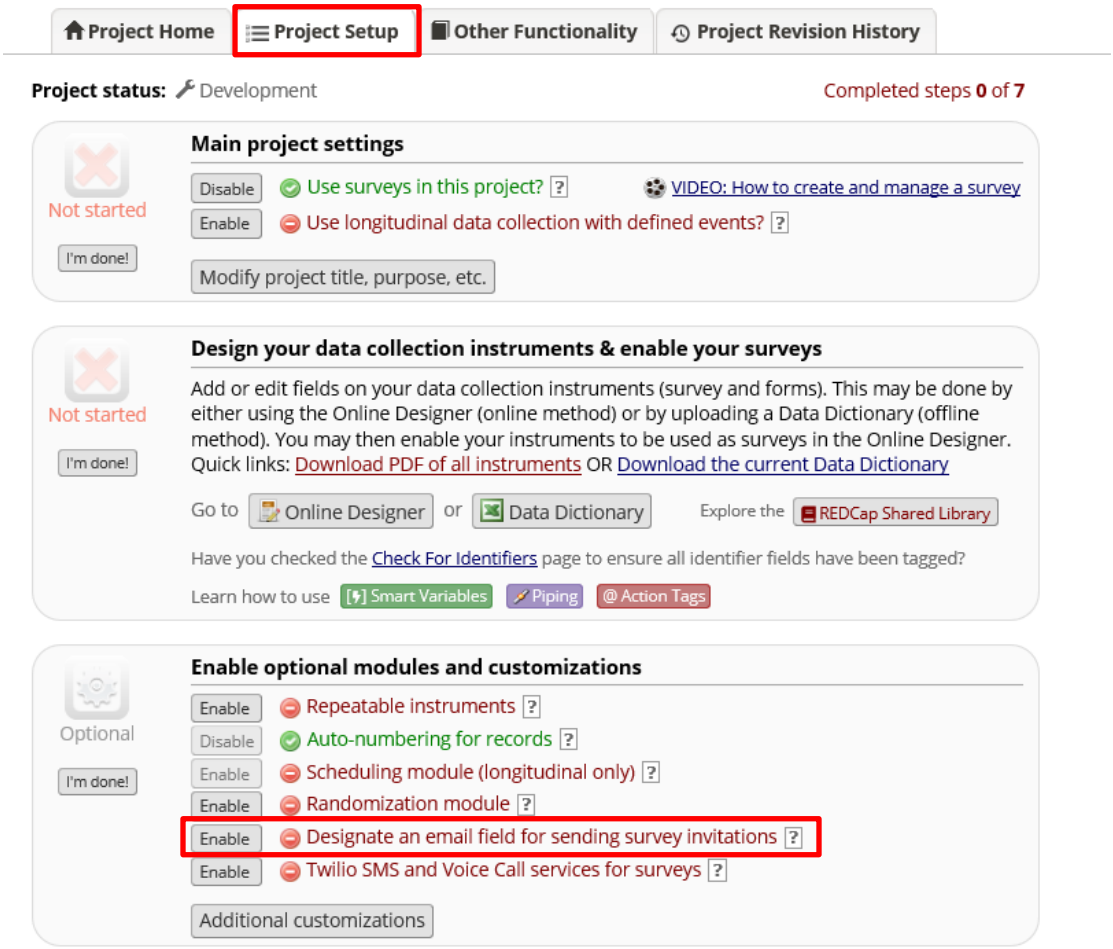
If you know the participant email addresses and want the participants to complete a survey at some point within the project, then you can complete the following steps to upload the email addresses to the Participant List for a future survey within the project.

Step 1: Ensure the forms to be used as surveys have been enabled. Refer to Option 1, Step 1 above to ensure the appropriate forms have been enabled as surveys.

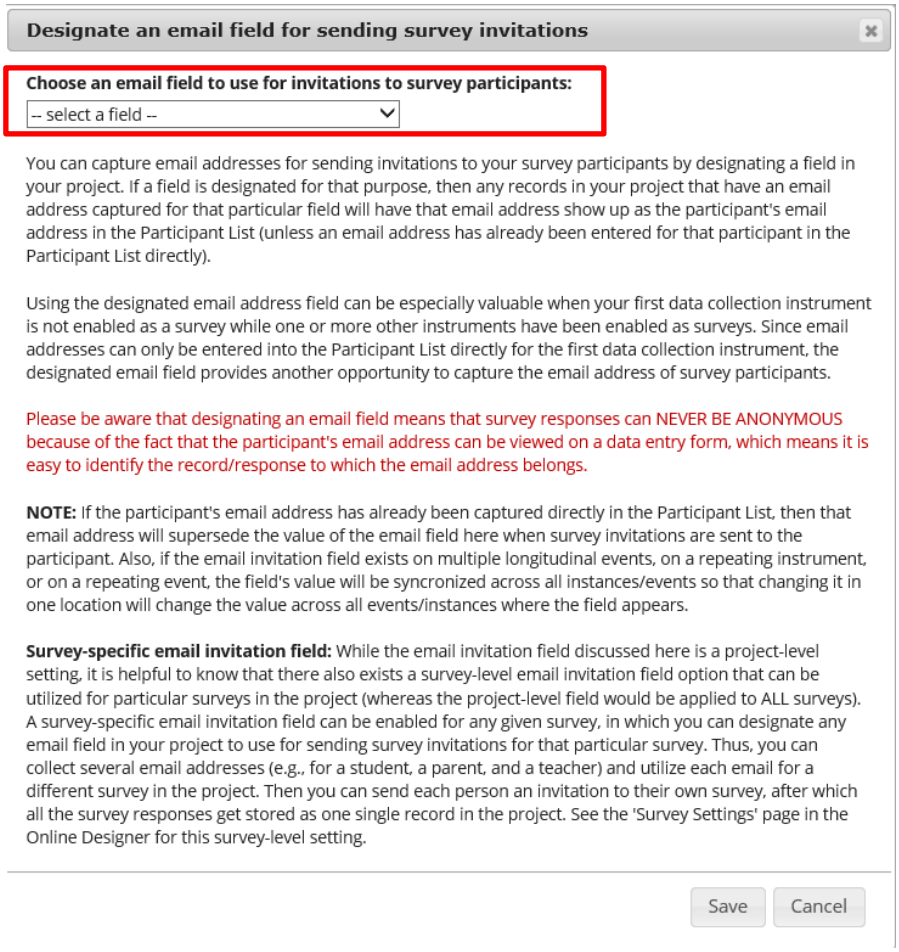
Step 2: Create a field on the data collection form for email addresses. Ensure the validation for that field is set for 'Email.'



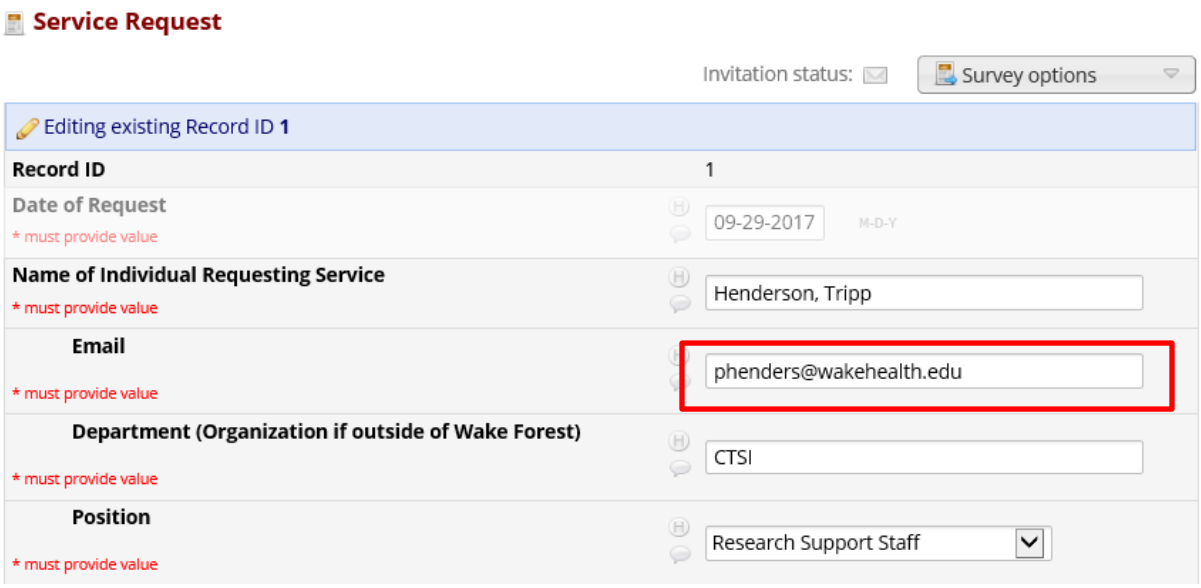
Step 3: Navigate to the Project Setup tab and locate the 'Enable optional modules and Customizations' bubble. Click Enable for the 'Designate an email field to use for invitations to survey participants.'



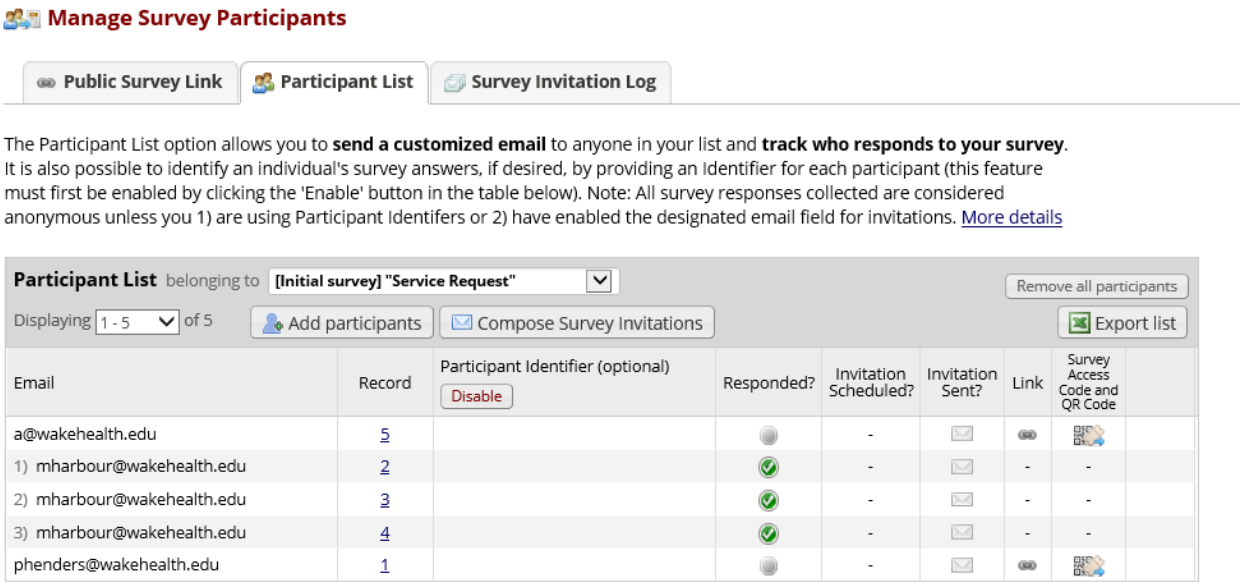
The 'Enable' button will open a pop-up box where you will select the variable named used for the 'Email' field.



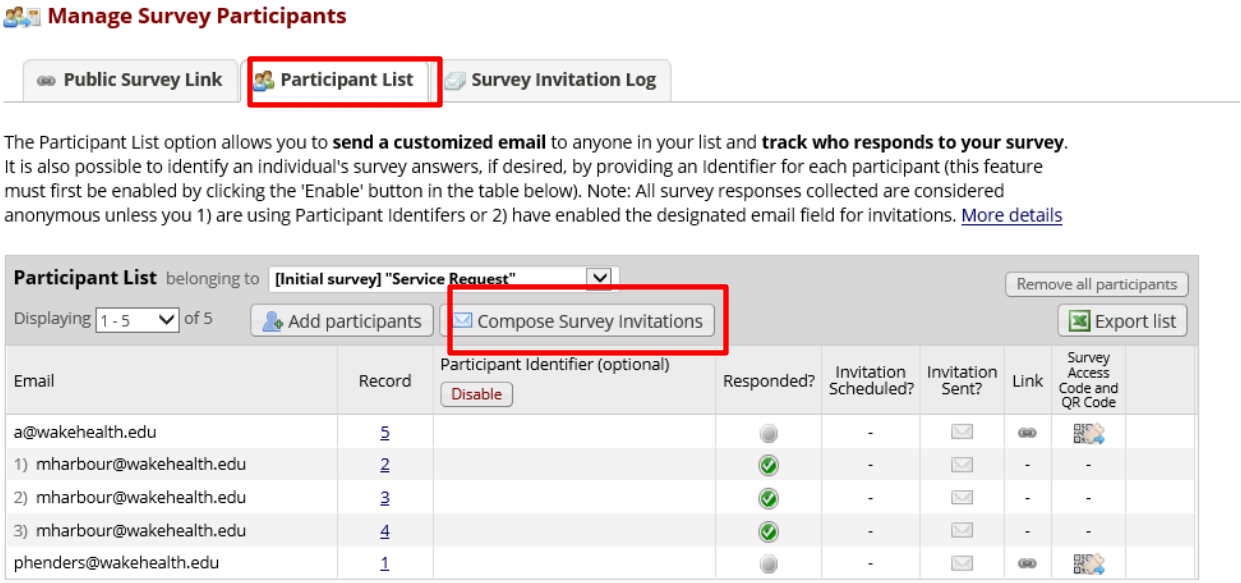
Step 4: When creating a record for the participant, make sure to complete the email address field that was created above in Steps 2 and 3.



Optional: Navigate to the Participant List tab and confirm the email address appears in the chart.



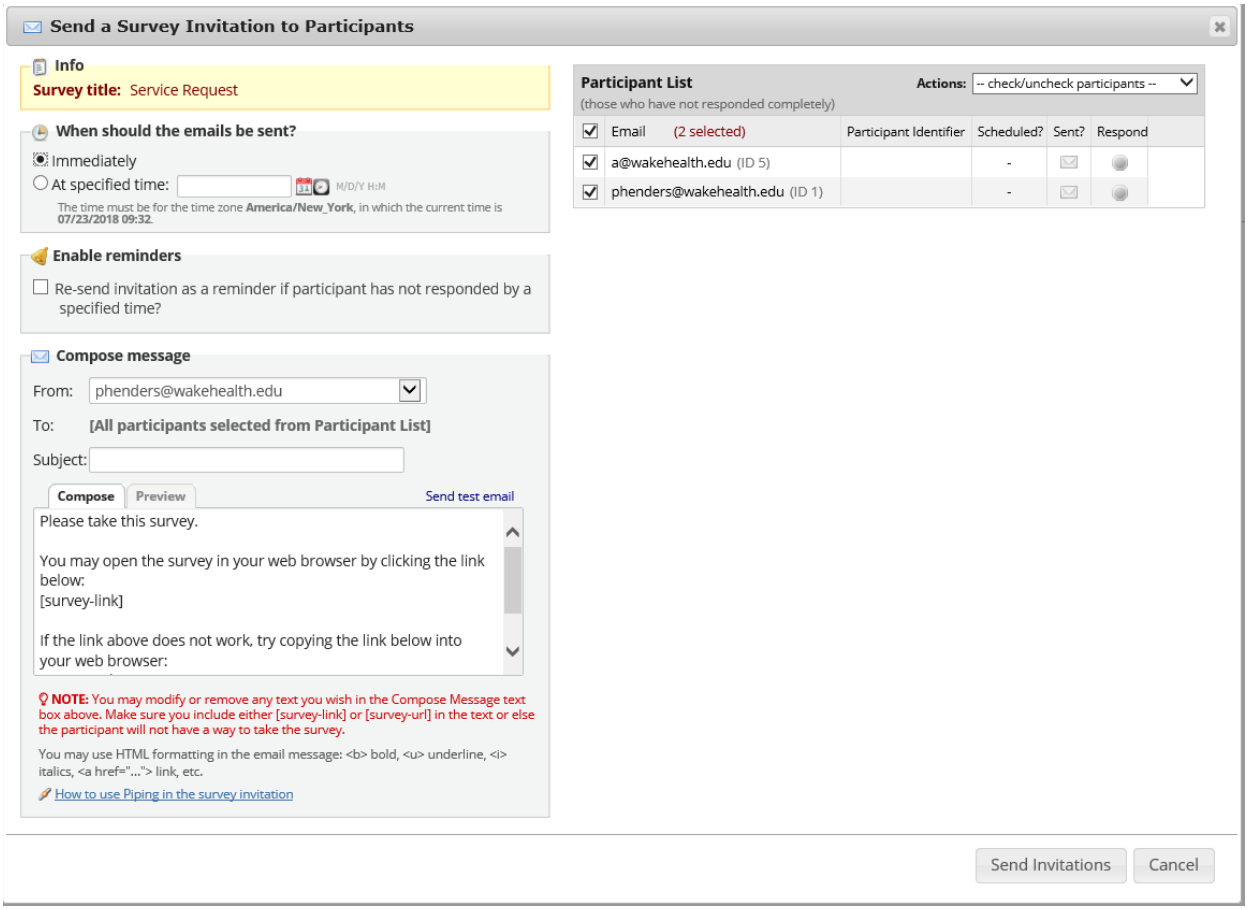
Step 5: When you are ready to send the survey(s) to the participants, navigate to the Participant List and select the 'Participant List belonging to' from the drop down then click on 'Compose Survey Invitations.'



Complete the information and then click 'Send Invitations.'

NOTE: If you decide against sending a survey to a participant, you can uncheck their name manually.

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.



NOTE: Please be sure to test the project thoroughly to ensure the Survey Participant List is functioning correctly. Once you have tested the project, please place the project into production before collecting any real data. If the project requires IRB/IACUC approval, please ensure you have approvals before collecting any real data.