REDCap

Research Electronic Data Capture

Personalized Survey Greetings

THE UNIVERSITY OF ARIZONA
College of Medicine
Phoenix

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,

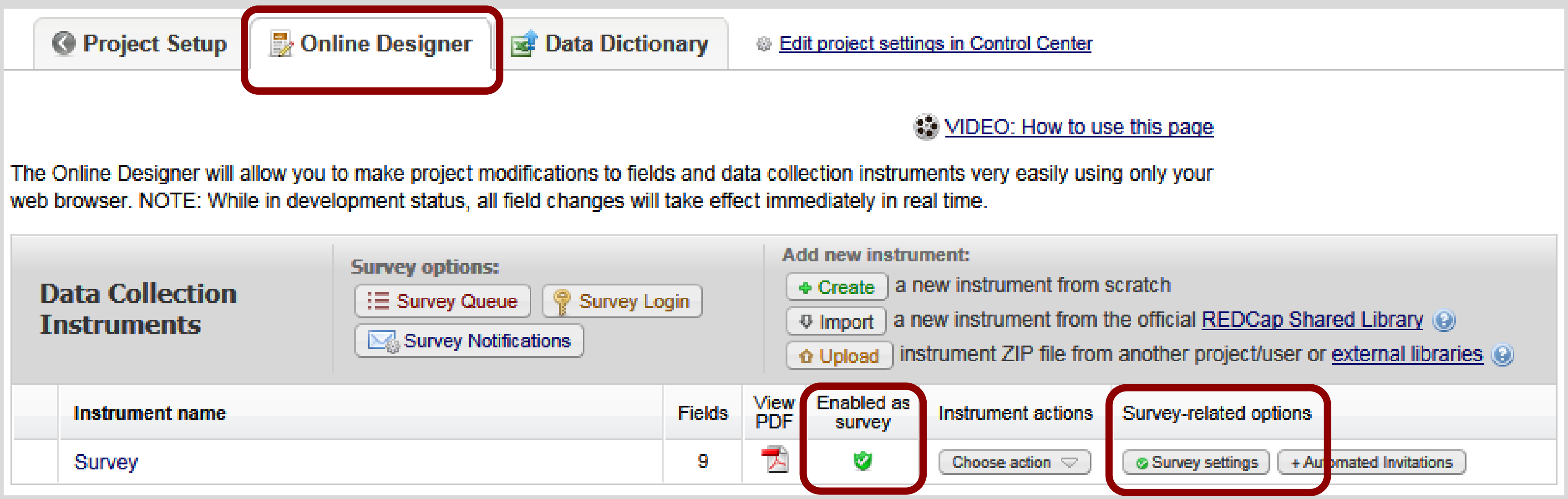
Below is a link to our most recent survey.

Thank you.

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

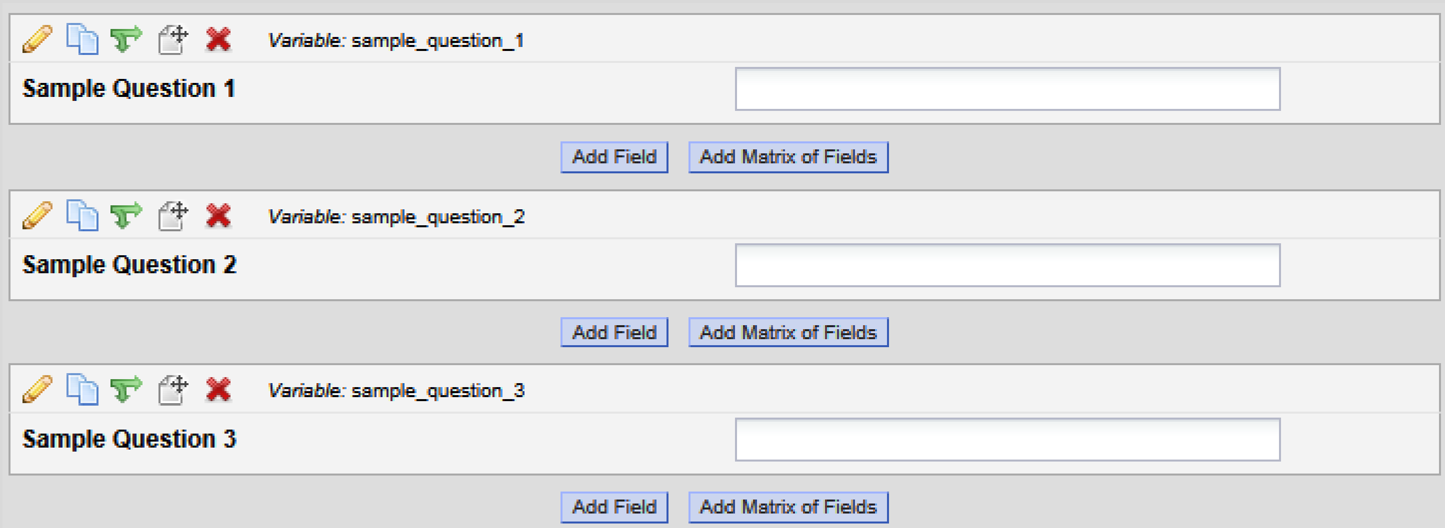
Step 1: setup the survey

1. Setup your Survey Instrument via the **Online Designer**.
2. Enable it as a survey.
3. Set your **Survey Settings**.



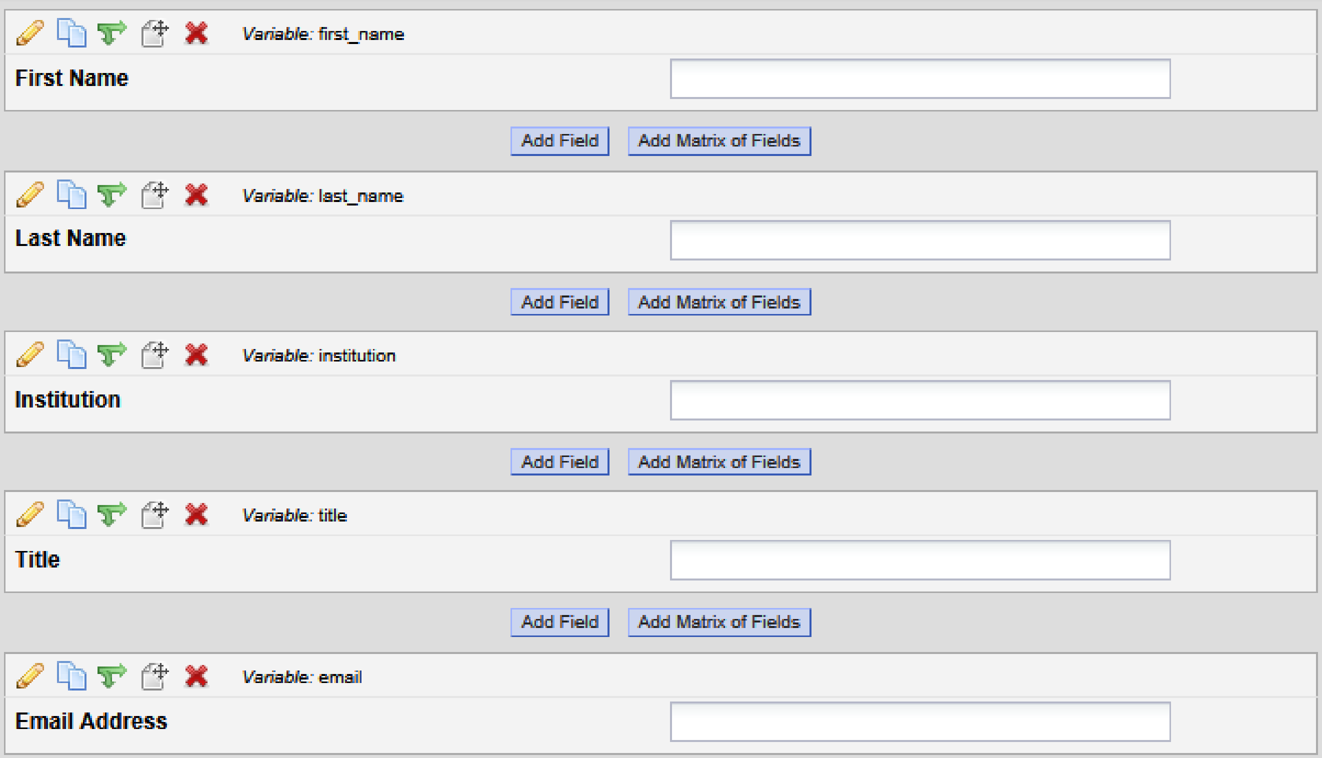
STEP 2: ADD YOUR SURVEY QUESTIONS

Add your survey questions to the survey instrument. These are the questions your participants **should see** on the survey.



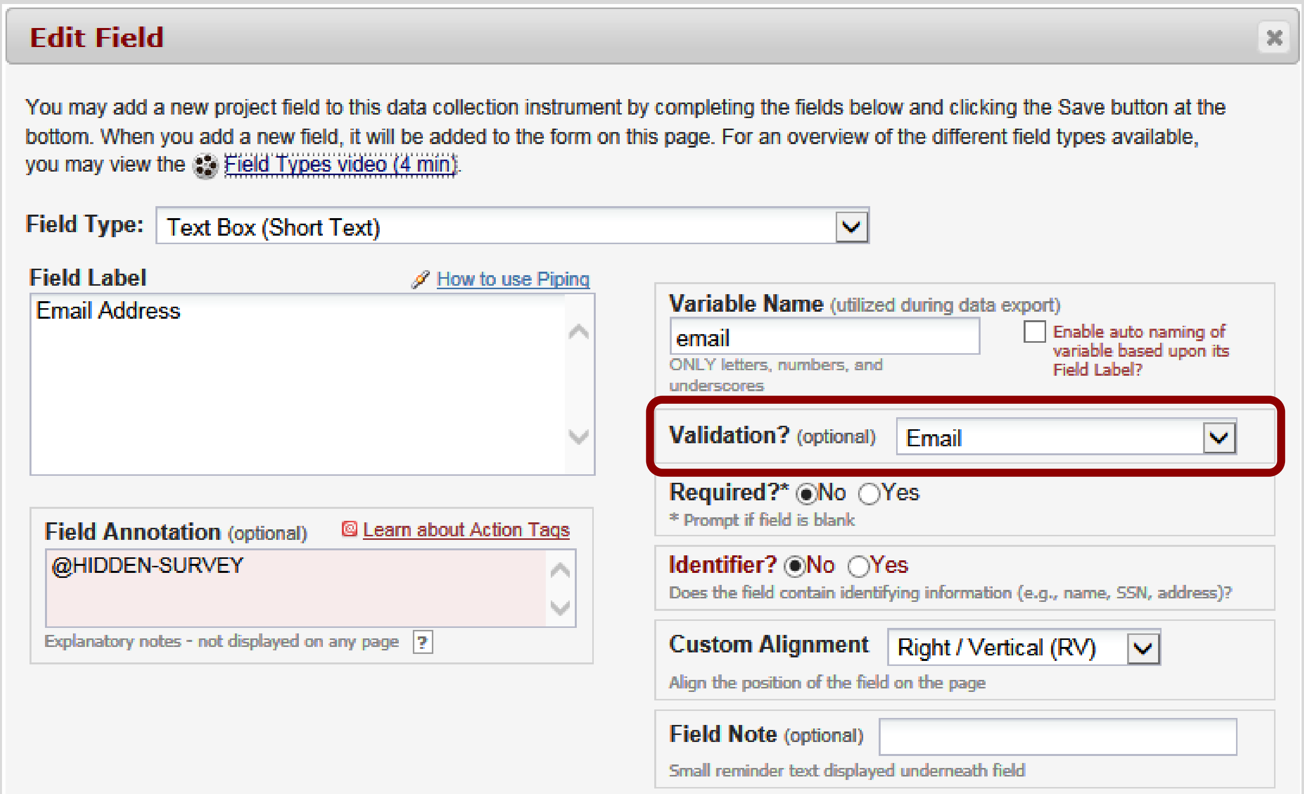
STEP 3: ADD YOUR NON-SURVEY FIELDS

Add your non-survey fields to the survey instrument. These are the fields your participants **should not see** on the survey.

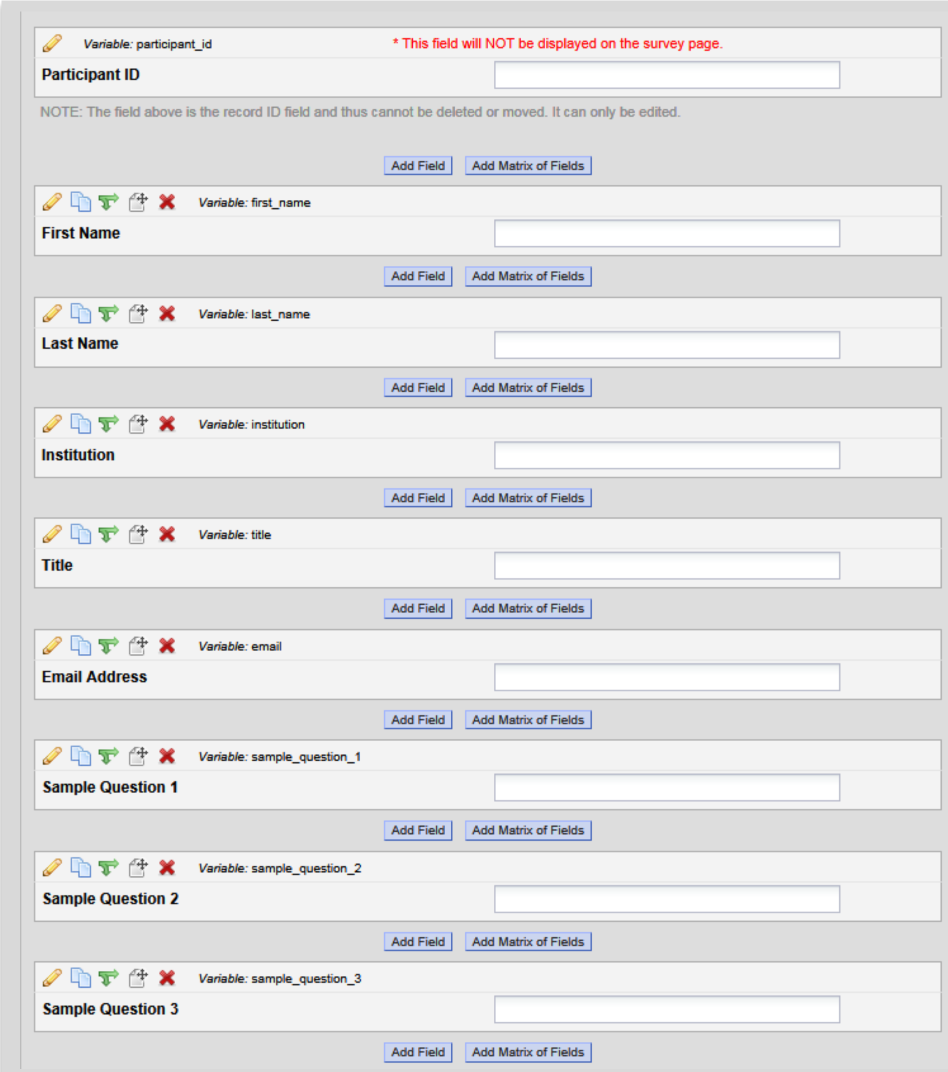


STEP 4: ADD email validation

For the Email Address field, set the **Validation type of “Email”** from the drop-down selection box.



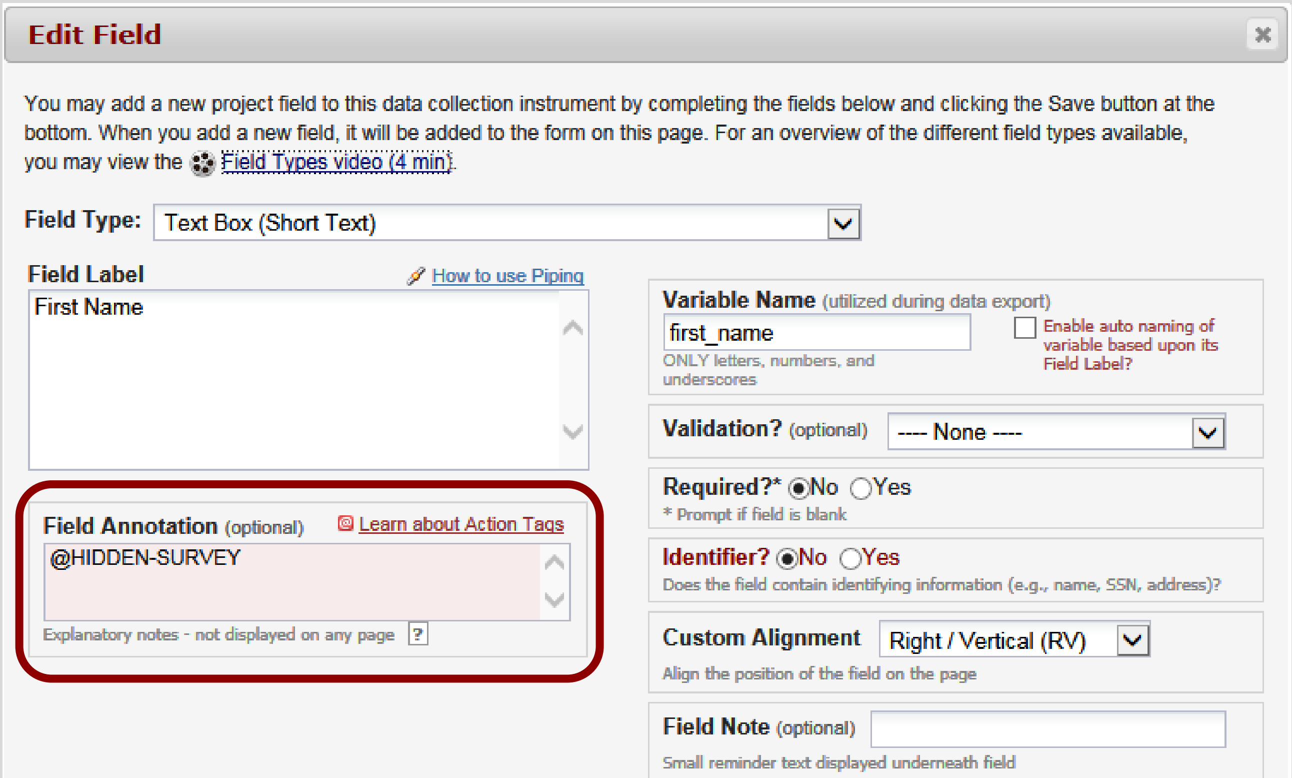
STEP 5: FINALIZE SURVEY



The survey instrument should now have **both** survey and non-survey questions.

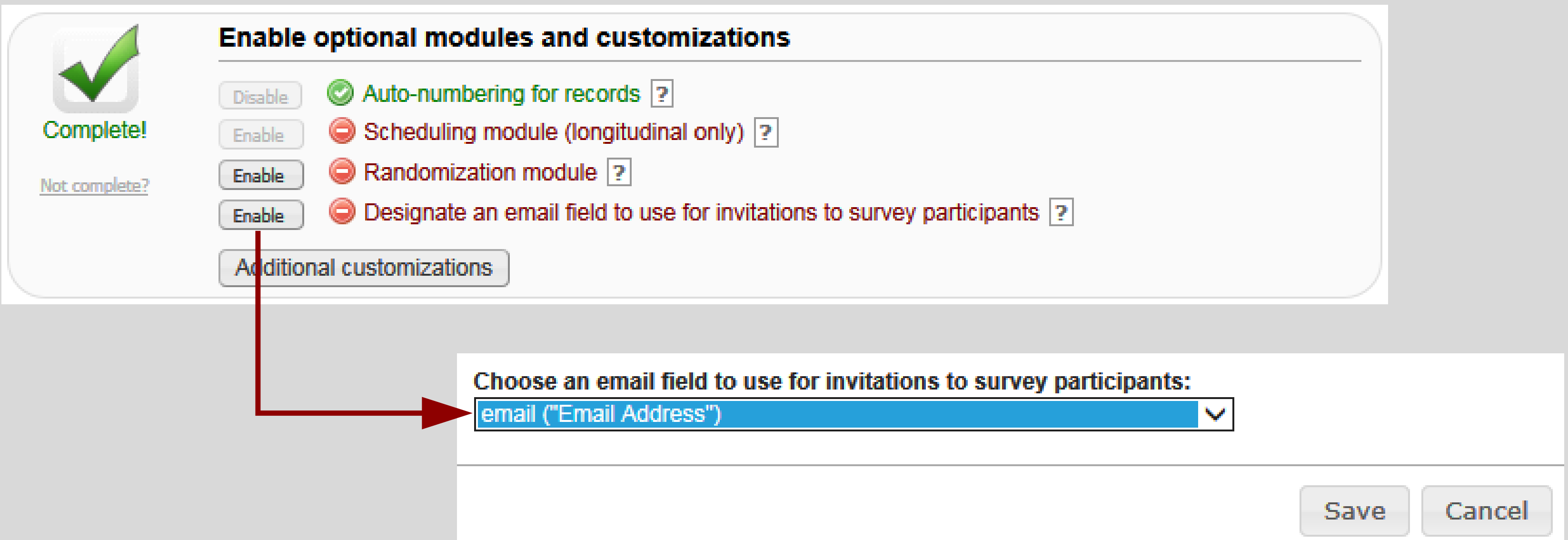
STEP 6: ADD ACTION TAGS TO NON-SURVEY FIELDS

For every non-survey field, add the **Action Tag @HIDDEN-SURVEY** in the **Field Annotation** box.

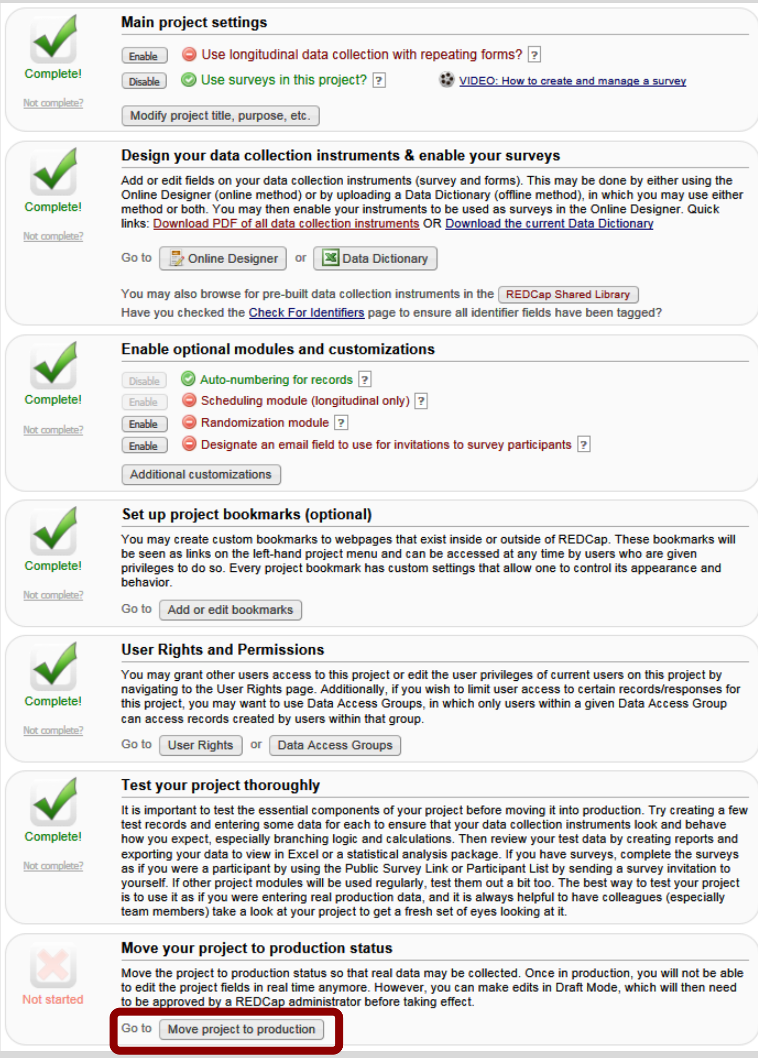


STEP 7: designate the email field

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.



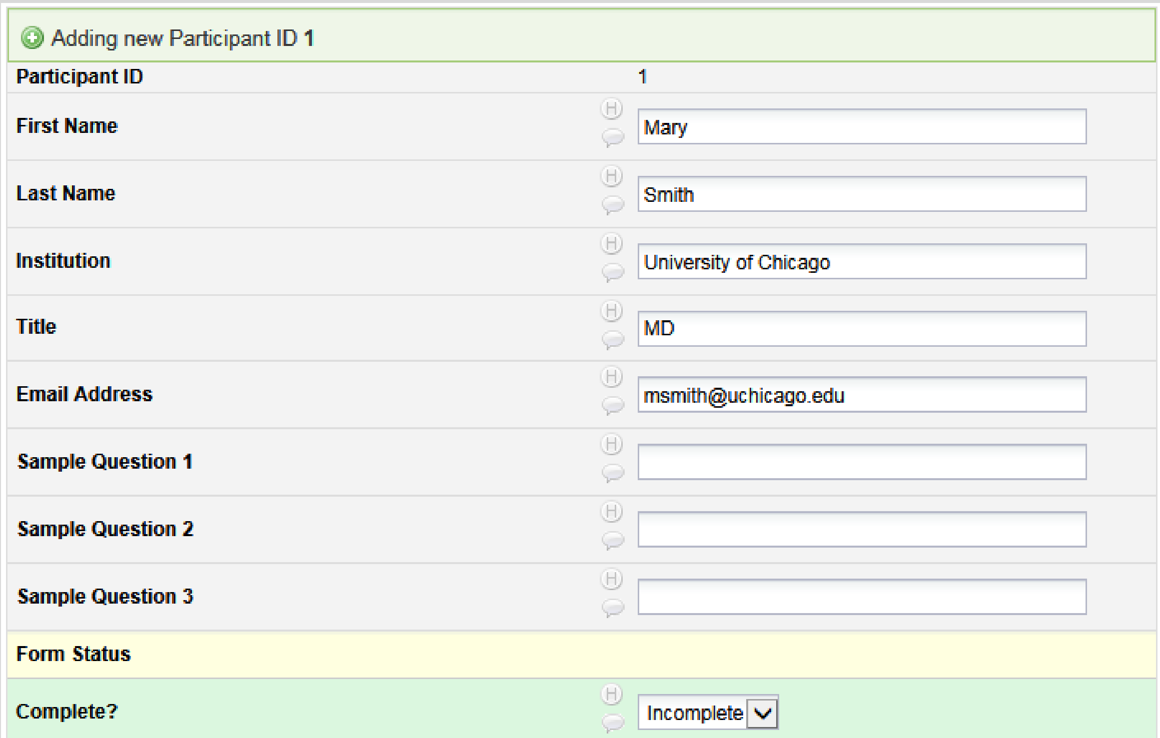
STEP 8: MOVE PROJECT TO PRODUCTION



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

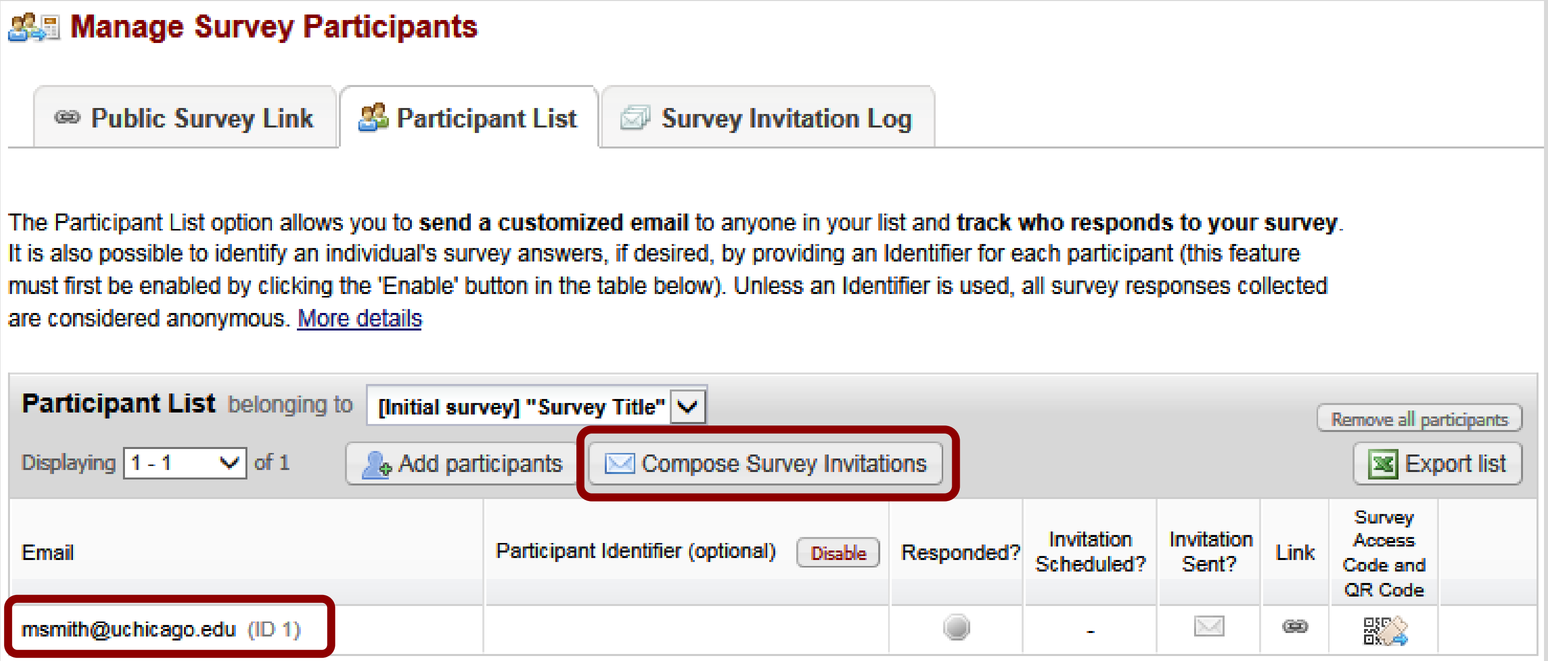
STEP 9: Add the participant information

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**).



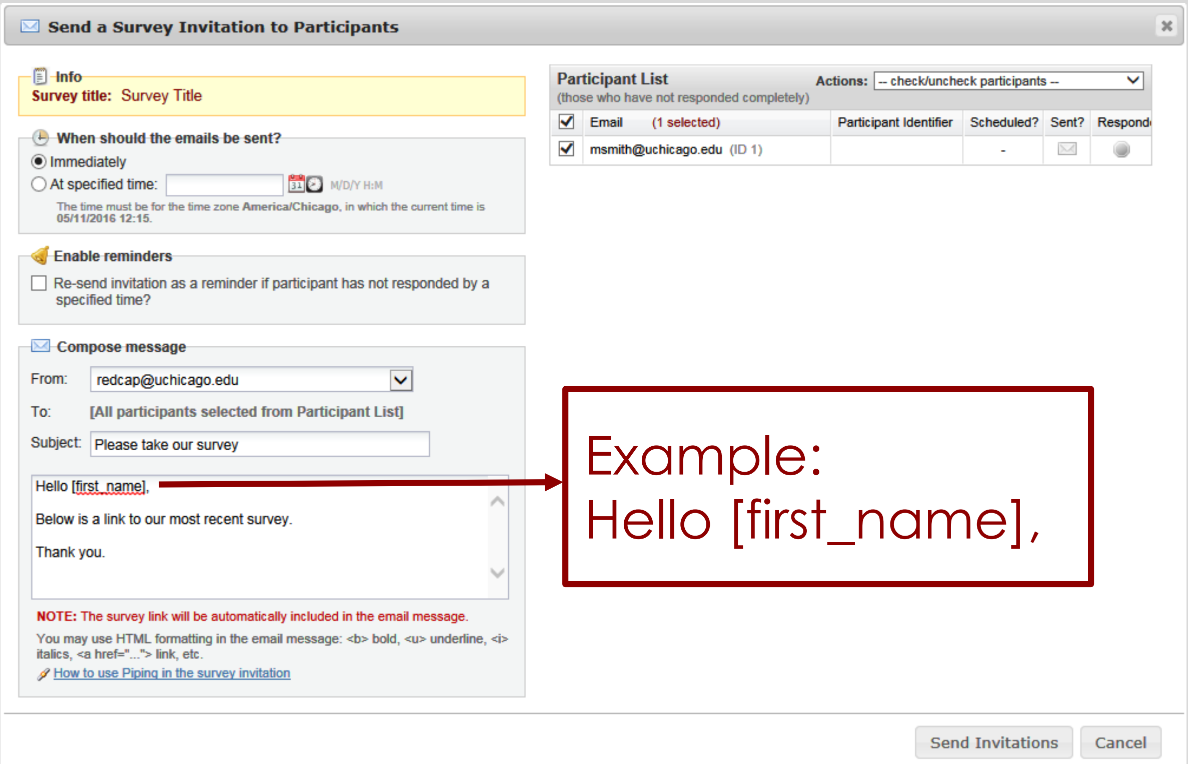
STEP 10: VERIFY EMAIL ADDRESSES

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**.



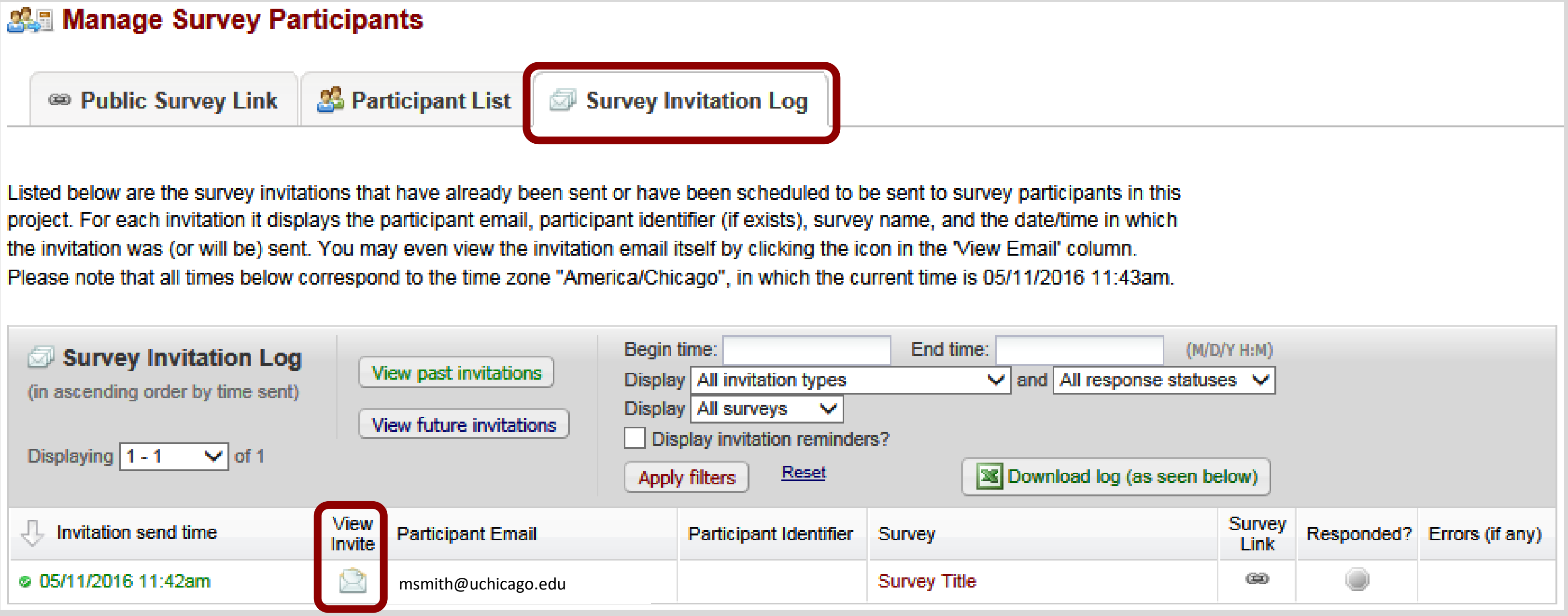
STEP 11: COMPOSE SURVEY INVITATION

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**.



STEP 12: VIEW SURVEY INVITATION LOG

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 .

Viewing Survey Invitation

Displayed below is the survey invitation message as it was sent to the survey participant. Included is the time the invitation was sent, the sender, the email address (or phone number) of the survey participant, and the invitation's subject and message.

Time sent: **05/11/2016 12:24pm**

From: Sent manually via Participant List by **jmontgomery (John Montgomery)**

To: **msmith@uchicago.edu**

Subject: **Please take our survey.**

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

If the link above does not work, try copying the link below into your web browser:
https://redcap.uchicago.edu/surveys/?s=tYSfDsbu7Z

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

FOR FURTHER help

website

- https://cb2.uahs.arizona.edu/services-tools/surveys-clinical-databases-redcap

COMP contact only

- dionisiasaner@email.arizona.edu