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

<table>
<thead>
<tr>
<th>Field</th>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>first_name</td>
<td>For identifying the respondent</td>
</tr>
<tr>
<td>Last Name</td>
<td>last_name</td>
<td>For identifying the respondent</td>
</tr>
<tr>
<td>Institution</td>
<td>institution</td>
<td>For identifying the institution</td>
</tr>
<tr>
<td>Title</td>
<td>title</td>
<td>For identifying the title</td>
</tr>
<tr>
<td>Email Address</td>
<td>email</td>
<td>For contact purposes</td>
</tr>
</tbody>
</table>
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.
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.
1. Complete the rest of the **project settings** (user rights, testing, bookmarks, etc).

2. Request the project move to **production** by the REDCap Administrator.
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**).

![Adding new Participant ID 1](image-url)

<table>
<thead>
<tr>
<th>Participant ID</th>
<th>Mary</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Smith</td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Institution</td>
<td>University of Chicago</td>
</tr>
<tr>
<td>Title</td>
<td>MD</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:msmith@uchicago.edu">msmith@uchicago.edu</a></td>
</tr>
<tr>
<td>Sample Question 1</td>
<td></td>
</tr>
<tr>
<td>Sample Question 2</td>
<td></td>
</tr>
<tr>
<td>Sample Question 3</td>
<td></td>
</tr>
<tr>
<td>Form Status</td>
<td>Incomplete</td>
</tr>
<tr>
<td>Complete?</td>
<td></td>
</tr>
</tbody>
</table>
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**.

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**Manage Survey Participants**

- Public Survey Link
- Participant List
- Survey Invitation Log

The Participant List option allows you to send a customized email to anyone in your list and track who responds to your survey. It is also possible to identify an individual's survey answers, if desired, by providing an identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Unless an identifier is used, all survey responses collected are considered anonymous. [More details]

**Participant List** belonging to [Initial survey] "Survey Title" [ ]

Displaying 1 - 1 of 1 [Add participants] [Compose Survey Invitations]

<table>
<thead>
<tr>
<th>Email</th>
<th>Participant Identifier (optional)</th>
<th>Responded?</th>
<th>Invitation Scheduled?</th>
<th>Invitation Sent?</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:msmith@uchicago.edu">msmith@uchicago.edu</a> (ID 1)</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>
**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.

Example:
```
Hello [first_name],

Below is a link to our most recent survey.
Thank you.
```

![Send a Survey Invitation to Participants](image)
1. View the **Survey Invitation Log**.
2. Click on the **View Invite** icon.

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**Manage Survey Participants**

- Public Survey Link
- Participant List
- **Survey Invitation Log**

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 even 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/Chicago", in which the current time is 05/11/2016 11:43am.

<table>
<thead>
<tr>
<th>Invitation send time</th>
<th>Participant Email</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><strong>05/11/2016 11:42am</strong></td>
<td><a href="mailto:msmith@uchicago.edu">msmith@uchicago.edu</a></td>
<td></td>
<td>Survey Title</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Verify email message greeting was correctly personalized using **piped data** from the field that contained the personalized information.
FOR FURTHER help

- [https://cb2.uahs.arizona.edu/services-tools/surveys-clinical-databases-redcap](https://cb2.uahs.arizona.edu/services-tools/surveys-clinical-databases-redcap)
- dionisiasaner@email.arizona.edu

COMP contact only