



# Personalized Survey Greetings



IWK Health

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## ▶ 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](#)



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## 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**.

Project Setup **Online Designer** Data Dictionary [Edit project settings in Control Center](#)

[VIDEO: How to use this page](#)

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.

**Data Collection Instruments**

**Survey options:**

- Survey Queue
- Survey Login
- Survey Notifications

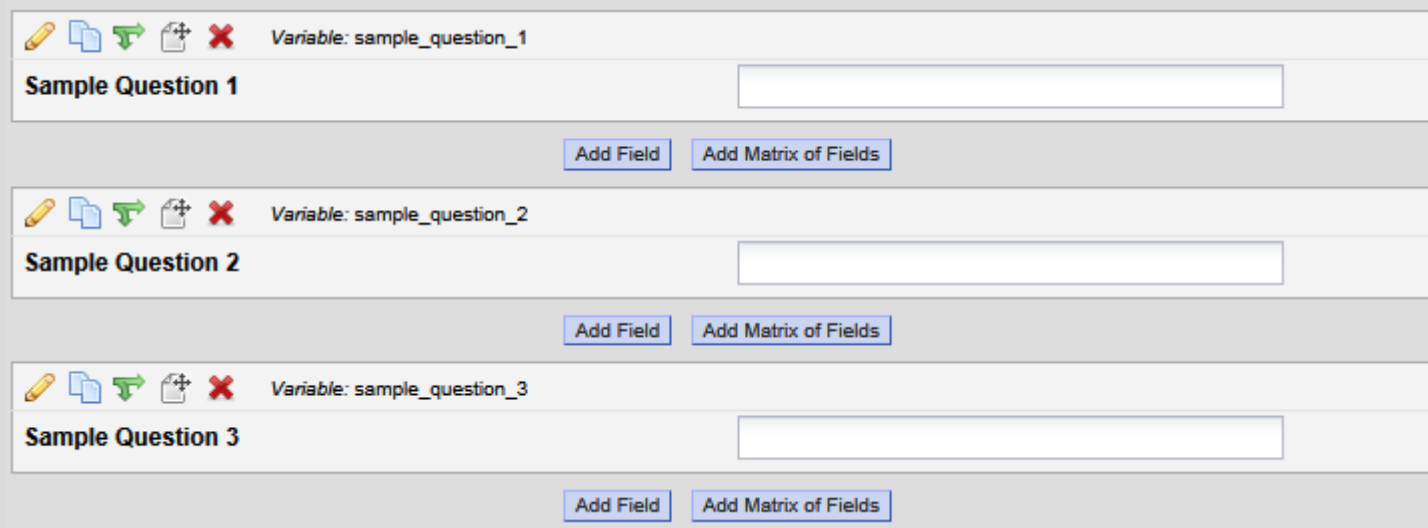
**Add new instrument:**

- Create** a new instrument from scratch
- Import** a new instrument from the official [REDCap Shared Library](#)
- Upload** instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Survey	9			Choose action	Survey settings + Automated Invitations

## 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.



The screenshot displays three identical question entry forms stacked vertically. Each form has a header bar with icons for edit, copy, paste, add, and delete, followed by the text "Variable: sample\_question\_1", "sample\_question\_2", and "sample\_question\_3" respectively. Below the header, each form contains a text input field labeled "Sample Question 1", "Sample Question 2", and "Sample Question 3". At the bottom of each form are two buttons: "Add Field" and "Add Matrix of Fields".

## 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.

     Variable: first_name
<b>First Name</b> <input type="text"/>
<a href="#">Add Field</a> <a href="#">Add Matrix of Fields</a>
     Variable: last_name
<b>Last Name</b> <input type="text"/>
<a href="#">Add Field</a> <a href="#">Add Matrix of Fields</a>
     Variable: institution
<b>Institution</b> <input type="text"/>
<a href="#">Add Field</a> <a href="#">Add Matrix of Fields</a>
     Variable: title
<b>Title</b> <input type="text"/>
<a href="#">Add Field</a> <a href="#">Add Matrix of Fields</a>
     Variable: email
<b>Email Address</b> <input type="text"/>

## STEP 4: ADD email validation

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

### Edit Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type:

**Field Label** [How to use Piping](#)

Email Address

**Field Annotation** (optional) [Learn about Action Tags](#)

@HIDDEN-SURVEY

Explanatory notes - not displayed on any page ?

**Variable Name** (utilized during data export)

email  Enable auto naming of variable based upon its Field Label?

**Validation?** (optional)

**Required?\***  No  Yes  
\* Prompt if field is blank

**Identifier?**  No  Yes  
Does the field contain identifying information (e.g., name, SSN, address)?


**Custom Alignment**

Align the position of the field on the page

**Field Note** (optional)

Small reminder text displayed underneath field





# STEP 5: FINALIZE SURVEY

 Variable: participant\_id \* This field will NOT be displayed on the survey page.

**Participant ID**





NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

[Add Field](#) [Add Matrix of Fields](#)

    Variable: first\_name





**First Name**

[Add Field](#) [Add Matrix of Fields](#)

    Variable: last\_name





**Last Name**

[Add Field](#) [Add Matrix of Fields](#)

    Variable: institution





**Institution**

[Add Field](#) [Add Matrix of Fields](#)

    Variable: title





**Title**

[Add Field](#) [Add Matrix of Fields](#)

    Variable: email





**Email Address**

[Add Field](#) [Add Matrix of Fields](#)

    Variable: sample\_question\_1





**Sample Question 1**

[Add Field](#) [Add Matrix of Fields](#)

    Variable: sample\_question\_2

**Sample Question 2**

[Add Field](#) [Add Matrix of Fields](#)

    Variable: sample\_question\_3

**Sample Question 3**

[Add Field](#) [Add Matrix of Fields](#)

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.

### Edit Field ✕

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

**Field Type:** Text Box (Short Text) ▼

**Field Label** [How to use Piping](#)

First Name

**Field Annotation** (optional) [@ Learn about Action Tags](#)

@HIDDEN-SURVEY

Explanatory notes - not displayed on any page [?](#)

**Variable Name** (utilized during data export)

first\_name  Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

**Validation?** (optional) --- None --- ▼

**Required?\***  No  Yes  
\* Prompt if field is blank

**Identifier?**  No  Yes  
Does the field contain identifying information (e.g., name, SSN, address)?

**Custom Alignment** Right / Vertical (RV) ▼  
Align the position of the field on the page

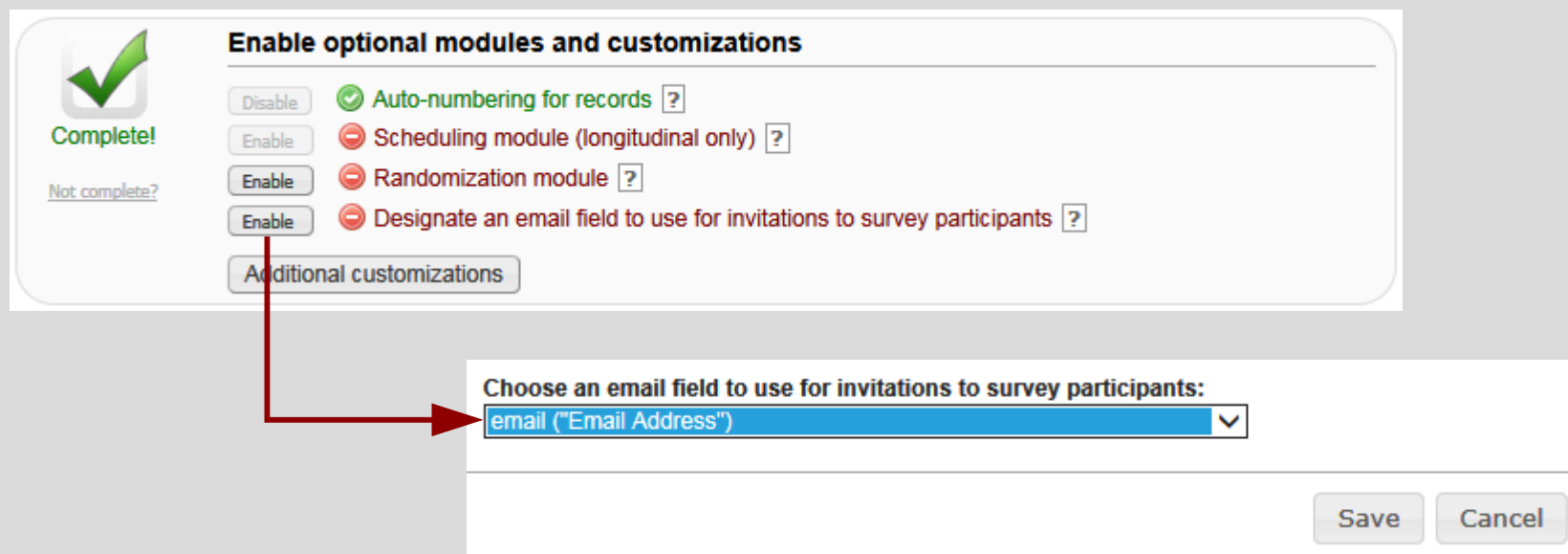
**Field Note** (optional)

Small reminder text displayed underneath field



## 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.



**Enable optional modules and customizations**

Complete!   
 Not complete?

Disable  Auto-numbering for records ?   
 Enable  Scheduling module (longitudinal only) ?   
 Enable  Randomization module ?   
 Enable  Designate an email field to use for invitations to survey participants ?

Additional customizations

Choose an email field to use for invitations to survey participants:

email ("Email Address")

Save Cancel

# STEP 8: MOVE PROJECT TO PRODUCTION

**Main project settings**

Complete!  Enable  Use longitudinal data collection with repeating forms? [?](#)

Disable  Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

Not complete?

**Design your data collection instruments & enable your surveys**

Complete! Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method), in which you may use either method or both. You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all data collection instruments](#) OR [Download the current Data Dictionary](#)

Not complete? Go to  or

You may also browse for pre-built data collection instruments in the  Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

**Enable optional modules and customizations**

Complete!  Disable  Auto-numbering for records? [?](#)

Enable  Scheduling module (longitudinal only)? [?](#)

Not complete?  Enable  Randomization module? [?](#)

Enable  Designate an email field to use for invitations to survey participants? [?](#)

**Set up project bookmarks (optional)**

Complete! You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

Not complete? Go to

**User Rights and Permissions**

Complete! You may grant other users access to this project or edit the user privileges of current users on this project by navigating to the User Rights page. Additionally, if you wish to limit user access to certain records/responses for this project, you may want to use Data Access Groups, in which only users within a given Data Access Group can access records created by users within that group.

Not complete? Go to  or

**Test your project thoroughly**

Complete! It is important to test the essential components of your project before moving it into production. Try creating a few test records and entering some data for each to ensure that your data collection instruments look and behave how you expect, especially branching logic and calculations. Then review your test data by creating reports and exporting your data to view in Excel or a statistical analysis package. If you have surveys, complete the surveys as if you were a participant by using the Public Survey Link or Participant List by sending a survey invitation to yourself. If other project modules will be used regularly, test them out a bit too. The best way to test your project is to use it as if you were entering real production data, and it is always helpful to have colleagues (especially team members) take a look at your project to get a fresh set of eyes looking at it.

Not complete?

**Move your project to production status**

Not started! Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will then need to be approved by a REDCap administrator before taking effect.

Go to

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**).


Adding new Participant ID 1	
Participant ID	1
First Name	<input type="text" value="Mary"/>
Last Name	<input type="text" value="Smith"/>
Institution	<input type="text" value="University of Chicago"/>
Title	<input type="text" value="MD"/>
Email Address	<input type="text" value="msmith@uchicago.edu"/>
Sample Question 1	<input type="text"/>
Sample Question 2	<input type="text"/>
Sample Question 3	<input type="text"/>
Form Status	
Complete?	<input type="text" value="Incomplete"/> <input type="button" value="v"/>



## 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**.

### 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" ▼





Remove all participants

Displaying 1 - 1 of 1

 Add participants

 Compose Survey Invitations

 Export list

Email	Participant Identifier (optional) <span>Disable</span>	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
<b>msmith@uchicago.edu (ID 1)</b>			-			

## 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**.

**Send a Survey Invitation to Participants**

**Info**  
Survey title: Survey Title

**When should the emails be sent?**  
 Immediately  
 At specified time: [Time Picker] M/D/Y H:M  
The time must be for the time zone America/Chicago, in which the current time is 05/11/2016 12:15.

**Enable reminders**  
 Re-send invitation as a reminder if participant has not responded by a specified time?

**Compose message**  
From: redcap@uchicago.edu  
To: [All participants selected from Participant List]  
Subject: Please take our survey

Hello [first\_name].  
Below is a link to our most recent survey.  
Thank you.

**NOTE:** The survey link will be automatically included in the email message.  
You may use HTML formatting in the email message: <b> bold, <u> underline, <i> italics, <a href="..."> link, etc.  
[How to use Piping in the survey invitation](#)

**Participant List** (those who have not responded completely)  
Actions: -- check/uncheck participants --

<input checked="" type="checkbox"/>	Email (1 selected)	Participant Identifier	Scheduled?	Sent?	Respond
<input checked="" type="checkbox"/>	msmith@uchicago.edu (ID 1)		-	<input type="checkbox"/>	<input type="checkbox"/>


Send Invitations Cancel


Example:  
Hello [first\_name],


# STEP 12: VIEW SURVEY INVITATION LOG

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


## 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.

 **Survey Invitation Log**  
(in ascending order by time sent)

Displaying 1 - 1 of 1

[View past invitations](#) [View future invitations](#)





Begin time:  End time:  (M/D/Y H:M)

Display All invitation types and All response statuses

Display All surveys

Display invitation reminders?

[Apply filters](#) [Reset](#) [Download log \(as seen below\)](#)

Invitation send time	 View Invite	Participant Email	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)
 05/11/2016 11:42am		msmith@chicago.edu		Survey Title		<input type="radio"/>	

## 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 **jacevedo** ([Julissa Acevedo](#))

To: **msmith@uchicago.edu** **jmontgomery (John Montgomery)**

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.

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