How to use Automated Invitations

You can set up your survey invitations to be sent automatically by using Automated Invitations. Instead of adding your survey participants through the Participant List, the automated invitations can be scheduled to be sent automatically based upon specific conditions. To use this feature, you must first designate an email field to use for invitations to survey participants.

### Designate an email field to use for invitations to survey participants

To use this feature, navigate to Project Setup and click Enable next to “Designate an email field to use for invitations to survey participants”.

![Enable optional modules and customizations](image)

Choose an email field to use for your survey invitations and then click Save.

![Choose an email field to use for invitations to survey participants](image)

**Note:** If you enable this feature, your survey responses will not be anonymous since the participant’s email address can be viewed on the data collection form.

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Navigate to Online Designer and click on the automated invitations icon.

Step 1: Compose Message

**From:** Use the drop down and select an email address  
**To:** This will automatically include all participants who meet your criteria.  
**Subject:** Enter an optional subject  
**Message:** Enter an optional message.  
*Note: you may use piping and/or HTML in your survey invitations!*

Step 2: Conditions – Specify the conditions for sending the invitations

You may select “When the following survey is completed” and then use the drop down and select a survey. If you would like to add additional logic as to when the next survey should be displayed, use the Boolean operator box and select AND/OR and then check the box next to “When the following logic becomes true” and then add your logic in the text box. For an example, you may want your second survey to start after your first survey is completed AND the participant’s age is greater than 12. To do this, I would add my variable for the participant’s age field in square brackets and then the greater than sign and the number in quotations. `[age] > 12`.

If you would like REDCap to check the logic in real time prior to sending the message, click the box next to “Ensure logic is still true before sending invitation”. REDCap will re-evaluate the logic against the record’s data values whenever the record values are changed AFTER the invitation has been scheduled but BEFORE it has been sent to the respondent. If the logic is no longer true, the invitation will not be sent.

Step 3: When to send invitations AFTER conditions are met

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Choose to send immediately, send on the next X day at the X time, send after X amount of days, hours and or minutes or send at the exact same date/time.

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**Optional: Enable Reminders**

Check the box if you would like the survey invitation to be sent as a reminder if the participant hasn’t answered in a specific amount of time. You may specify to send the reminder every day, every weekday, on a specific day, every x amount of day, hours and/or minutes or send the reminders at a specific date and time. You will also need to specify how many reminders should be sent. The limit is 5.

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**Step 4: Activate**

Once you are ready, click Active and then click Save.