This guide covers how to send an existing survey to individual respondents.

To learn how to build a survey prior to distribution, please see our separate guide.

An **individualized survey** is a survey that is sent to someone with a unique URL. As a result, responses are not anonymous (but should be kept confidential).

*To begin, go to the project set-up tab*
On the Online Designer tab, click ‘Create.’ A green field will appear under any existing instruments. Click “add instrument here”. You will be prompted to name the new instrument (this can be “program list”, etc. In this guide, we’ll call it a distribution/respondent list.

To distribute your survey to individual email addresses, you’ll need to create a new instrument to capture the names & emails of the people you’ll want to send the survey to.

Remember that the survey you want to share must be enabled to be distributed through email. You can check & edit these survey design by clicking on “Survey Settings” then scrolling down to the “Survey Customizations” section.
Once your new instrument is added, hover your cursor to the left of the name until the four-way arrow appears. **Drag your new instrument to the very top of the list.**

Do not click the “Enable as Survey Button”. Click the name of your instrument to add the fields of your distribution/respondent list.
Click “Add Field”

Add two new text box fields for first & last name.
Add a third text box field for an email address.

**Important:** Remember to validate the field as an email response otherwise REDCap won’t be able to distribute the survey to those contacts.
Next, you’ll want to tell REDCap who you want the survey distributed to. You can do this one-by-one or in bulk. We’ll start with individual entry.

Start by clicking “Add / Edit Records”
Once on the “Add / Edit Records” screen, click the green “Add new record” button.

Click the status button next to the respondent/distribution list instrument you just created.
Enter the contact information of those who you want to distribute your survey to. Mark each form as “complete”

If you have many people you want to send the survey to, consider the bulk upload option.
**Important:** A bulk import can only be done after you create the distribution/respondent list instrument outlined earlier in this guide.
Once you select the data import tool from the left column, download the provided template. Most people select the top option (records in row).
### Bulk Upload

*Continued*

- **Best Practice:** If you have multiple instruments in a project, use a naming convention for variables that distinguishes between instruments. This practice makes bulk-upload and data export clearer & easier.

<table>
<thead>
<tr>
<th>record_id</th>
<th>first_name</th>
<th>last_name</th>
<th>email</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Emily</td>
<td>Traw</td>
<td><a href="mailto:emily.traw@northwestern.edu">emily.traw@northwestern.edu</a></td>
</tr>
<tr>
<td>2</td>
<td>Jack</td>
<td>Johnson</td>
<td><a href="mailto:jj@gmail.com">jj@gmail.com</a></td>
</tr>
<tr>
<td>3</td>
<td>CJ</td>
<td>Denison</td>
<td><a href="mailto:cj@email.com">cj@email.com</a></td>
</tr>
</tbody>
</table>

Because you moved your distribution/respondent list instrument to the top of the list, you will see those fields reflected first.

REDCap will automatically assign a sequential number to each entry. If you want to override this, **enter in a Record ID** (a unique identifier of some kind – usually a subject ID, employee ID, NetID, etc) **then proceed to complete the fields in your respondent list instrument.**

**Note:** You will see columns for the other survey questions in your project. You can leave those blank.

**Be sure to save this spreadsheet in .csv format** (NOT an excel workbook). REDCap can only understand comma separated values (CSV).
Once you entered your contacts into the spreadsheet (and saved as a .csv), go back to REDCap and select ‘choose file’.

After your attach your spreadsheet, click ‘upload file’
Bulk Upload

Continued

**Instructions for Data Review**

The data you uploaded from the file is displayed in the Data Display Table below. Please inspect it carefully to ensure that it is all correct. After reviewing it, click the 'Import Data' button at the bottom of this page to import the data into the project.

<table>
<thead>
<tr>
<th>record_id</th>
<th>first_name</th>
<th>last_name</th>
<th>email</th>
<th>respondent_list_complete</th>
<th>favorite_color</th>
<th>why_favorite_color</th>
<th>nd_favorite</th>
<th>favorite_color</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 (existing record)</td>
<td>Emily</td>
<td>Traw</td>
<td><a href="mailto:emily.traw@northwestern.edu">emily.traw@northwestern.edu</a></td>
<td></td>
<td>red</td>
<td>it's pretty</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>2 (existing record)</td>
<td>Jack</td>
<td>Johnson</td>
<td><a href="mailto:jj@gmail.com">jj@gmail.com</a></td>
<td>(<a href="mailto:emily.traw@northwestern.edu">emily.traw@northwestern.edu</a>)</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 (new record)</td>
<td>CJ</td>
<td>Denison</td>
<td><a href="mailto:cj@email.com">cj@email.com</a></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**KEY for Data Display Table below**
- Black text = New Data
- Gray text = Existing data (will not change)
- Red text = Data that will be overwritten
- Red box = error
- Orange box = warning

**DATA DISPLAY TABLE**

1. REDCap will provide a preview of the data you uploaded. If there are existing or duplicate records, REDCap will indicate any errors, warnings, or overwrites. If the information is incorrect, go back to the spreadsheet and make any relevant corrections.

2. If the information is correct, select 'import data'.
Once your upload is successful, go to the designer tool and select “survey settings” next to the survey you want to distribute. If you haven’t already, you may need to enable this as a survey using the ‘enable’ button if you haven’t done so already.
On the survey settings screen, scroll down to ‘Survey-specific email invitation field’. On the drop down, select email from your respondent list. If you don’t see email listed, go back to the respondent list instrument fields and ensure you validated the question as an email address. Remember to scroll down and select ‘Save Changes’.
In the left column, select ‘Survey Distribution Tools’ and then select ‘Compose Survey Instructions’
On the left side of the pop-up window, you will see options for when to send the email, if/when reminders should be sent, along with the text that the respondents will see when they open your email. Be sure to enter a subject line for your email.

Do not delete the text highlighted in the orange box. This is where REDCap will populate the survey URL. You should also leave the note about the unique URL so respondents don’t forward it on to other people. This will create an error message once more than one person tries to complete the survey from that link.
Bulk Upload
Continued

On the right side of the pop-up window, you will see your distribution/respondent list. Select the people you want to send your survey to.

Click ‘Send Invitations’ at the bottom of the pop-up.
Your respondents will see the email as it appeared in the ‘compose survey instructions’ pop-up box with the survey titled linked to their unique URL.

Before you send out the survey to your respondents, we suggest testing it with 1-2 people.
To test individualized surveys, begin by clicking ‘Add/Edit Records’ in the left column.

Your test recipients will need to be entered as a new record, so click the green ‘Add new record’ button.

Select the button next to the Distribution/Respondent list you created.
Testing Individualized Surveys

Continued

Best Practice: To clearly indicate test entries when it comes time to download your data, enter “test” before the name or other short-text field. However, the email must be a valid email address.

Repeat this process for each person you want to send a test link to.

Once you’ve entered all your test contacts, go to ‘Survey Distribution Tools’ in the left menu.
Testing Individualized Surveys

Continued

In the top dropdown, ensure the correct survey you want to test is selected.

Then click on ‘Compose Survey Instructions’.
Testing Individualized Surveys

Continued

In the left column, be sure to enter “test” alongside your subject line and within the main body of the email.

In the right column, select the email address of the person you want to send the test link to. Then click ‘Send Invitations’.
See our other guides to learn more foundational REDCap and Data Management skills