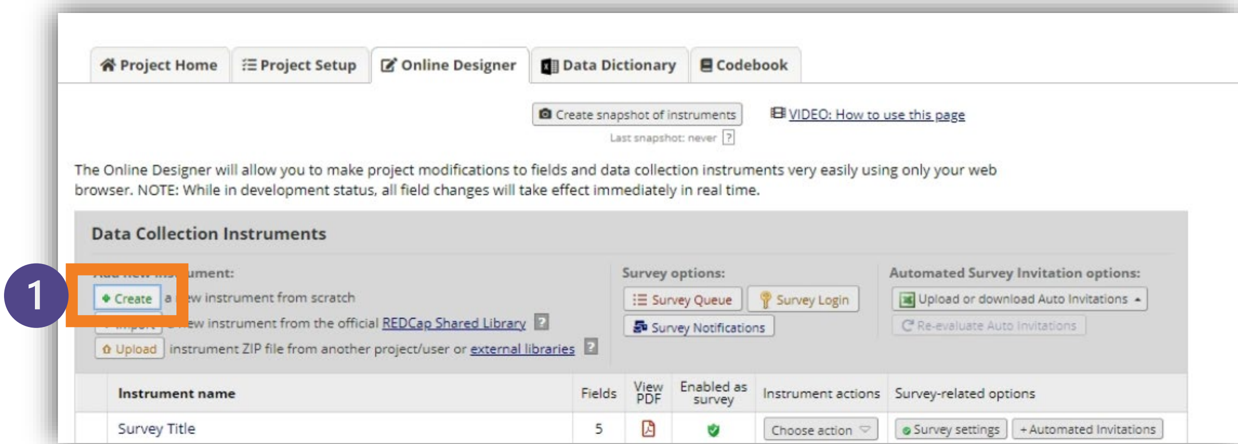
This guide covers how to send an existing survey to individual respondents.

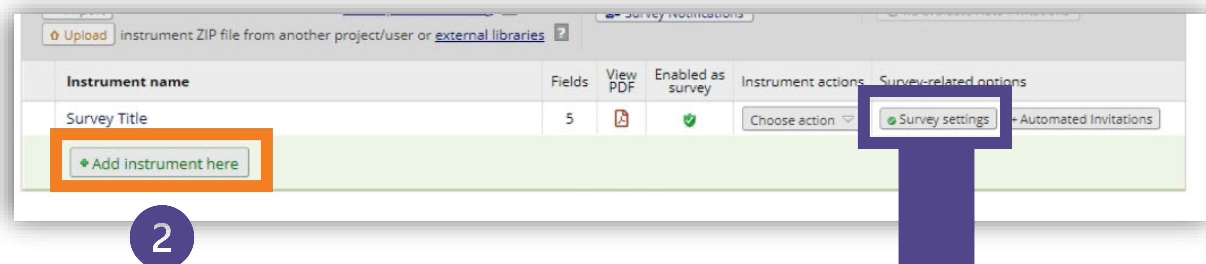
To learn how to build a survey prior to distribution, please see our separate guide.

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

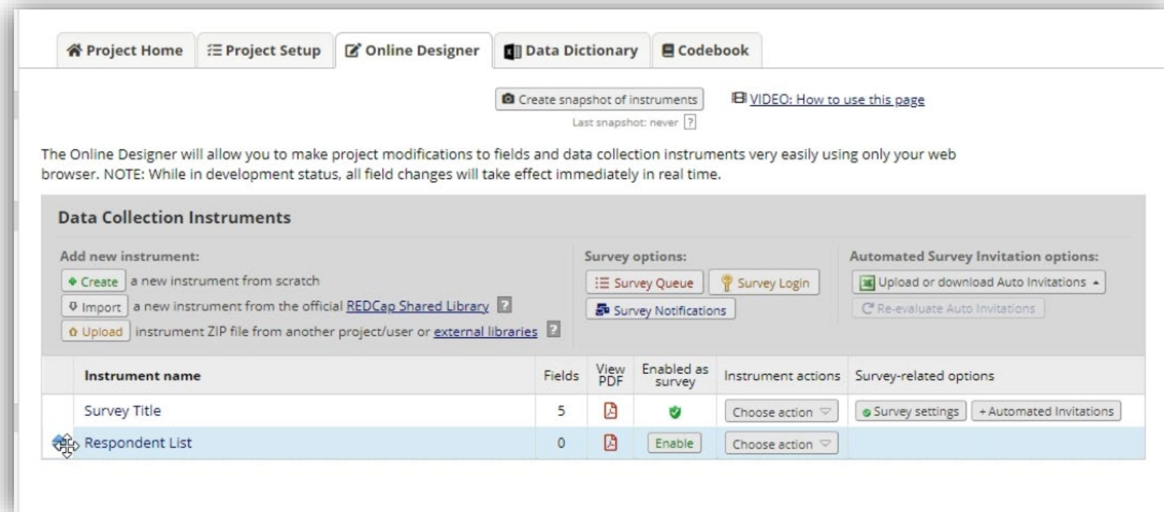
To distribute your survey to individual email addresses, you'll need to create a new instrument to capture the names & emails of the people you'll want to send the survey to.

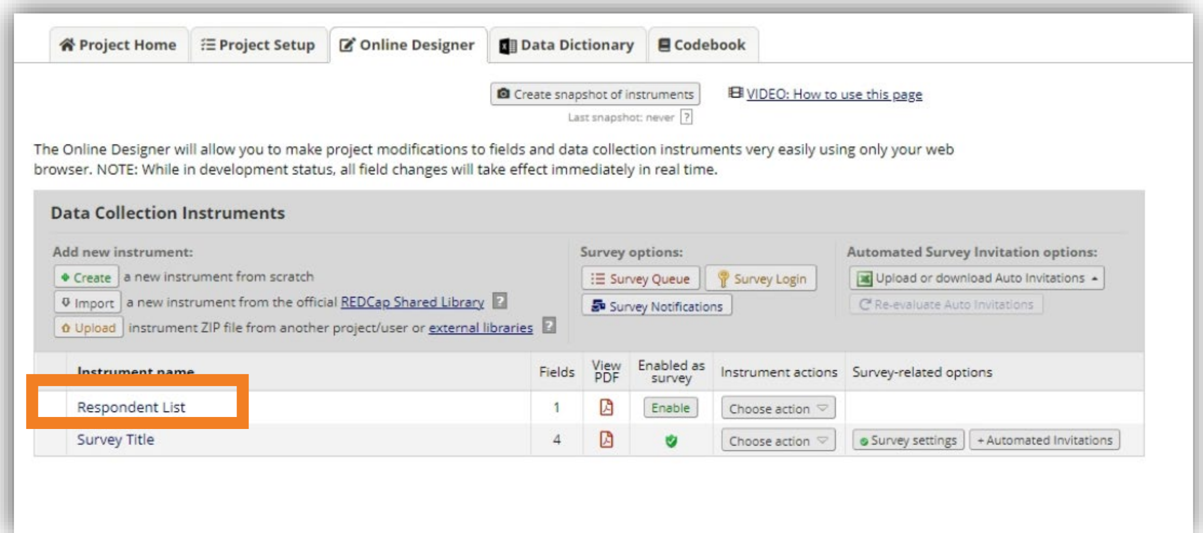




On the Online Designer tab, click 'Create.' A green field will appear under any existing instruments. Click "add instrument here". You will be prompted to name the new instrument (this can be "program list", etc. In this guide, we'll call it a distribution/respondent list.

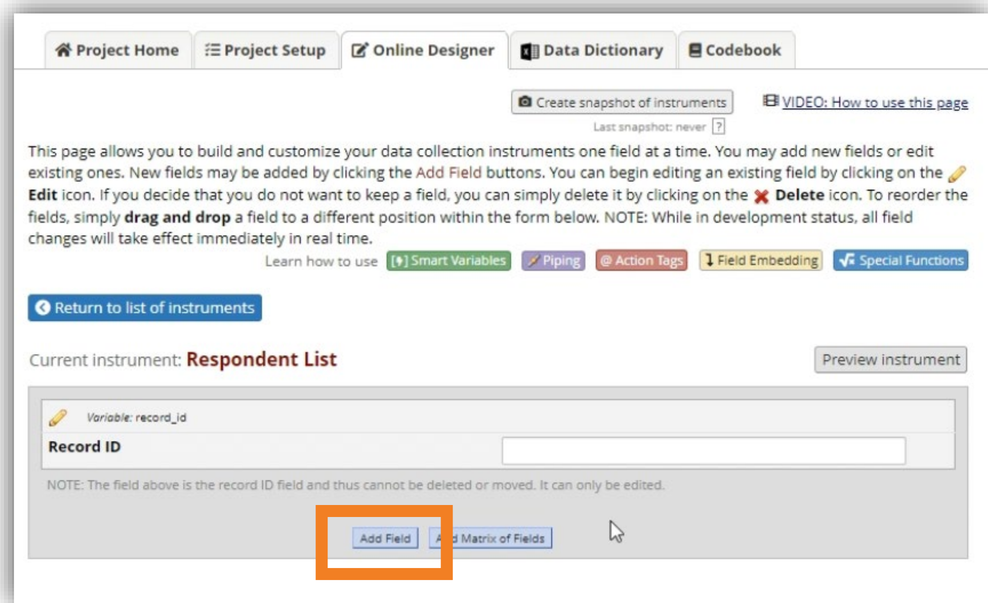
Remember that the survey you want to share must be enabled to be distributed through email. You can check & edit these survey design by clicking on "Survey Settings" then scrolling down to the "Survey Customizations" section.



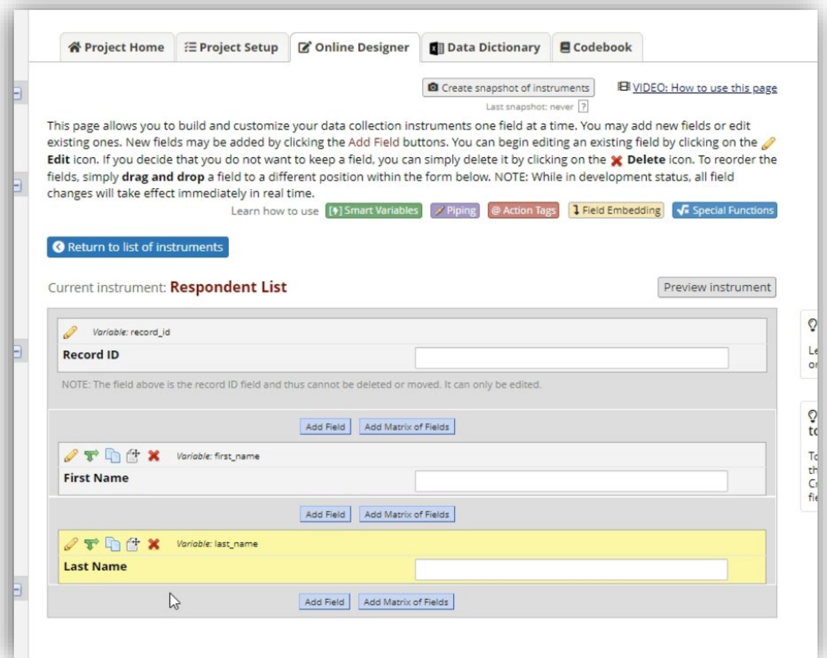


Once your new instrument is added, hover your cursor to the left of the name until the four-way arrow appears. **Drag your new instrument to the very top of the list.**

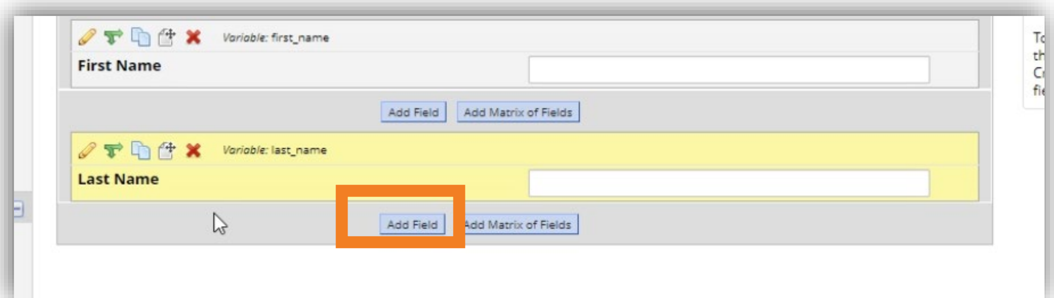
Do not click the “Enable as Survey Button”. Click the name of your instrument to add the fields of your distribution/respondent list.

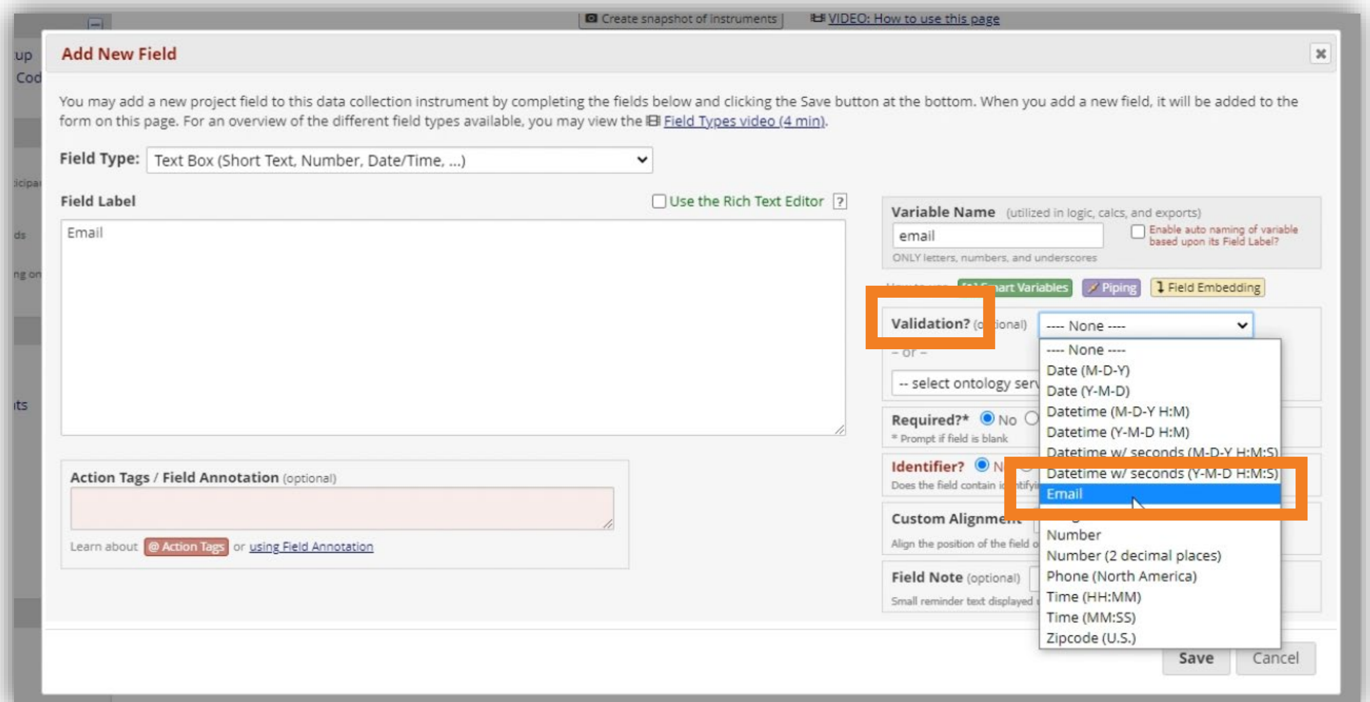


Click "Add Field"



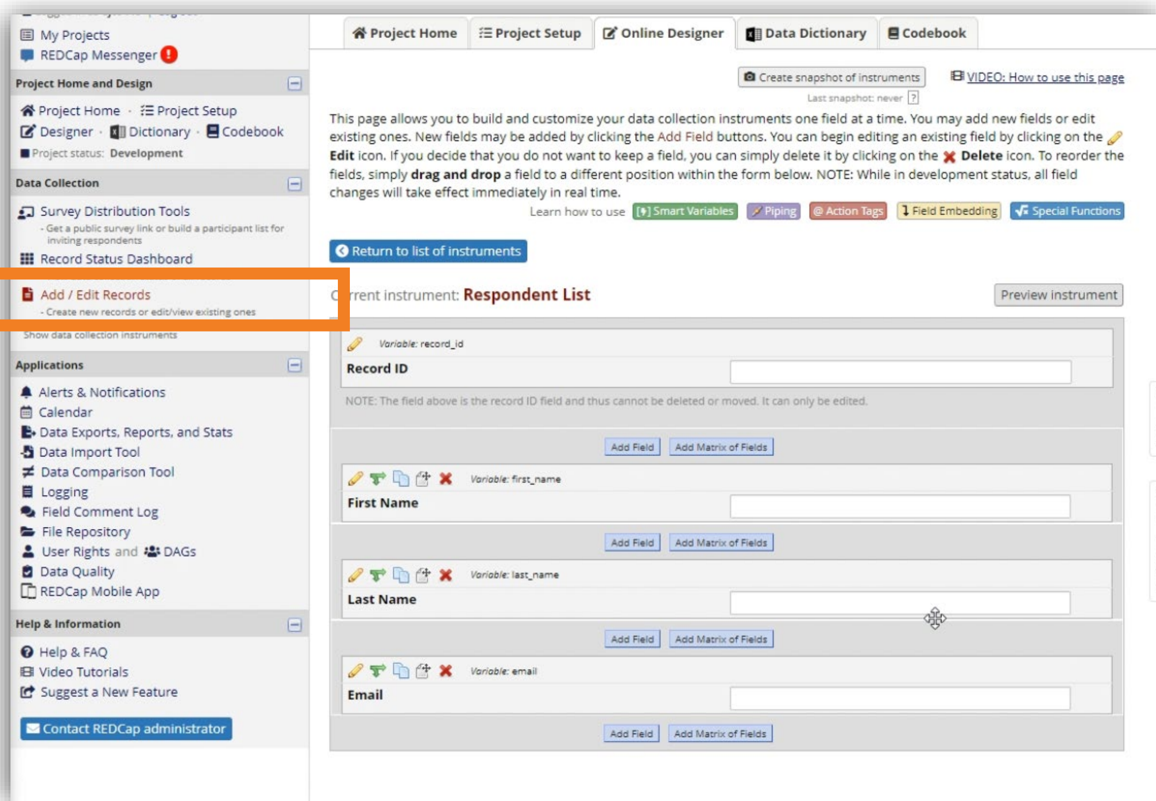
Add two new text box fields for first & last name.





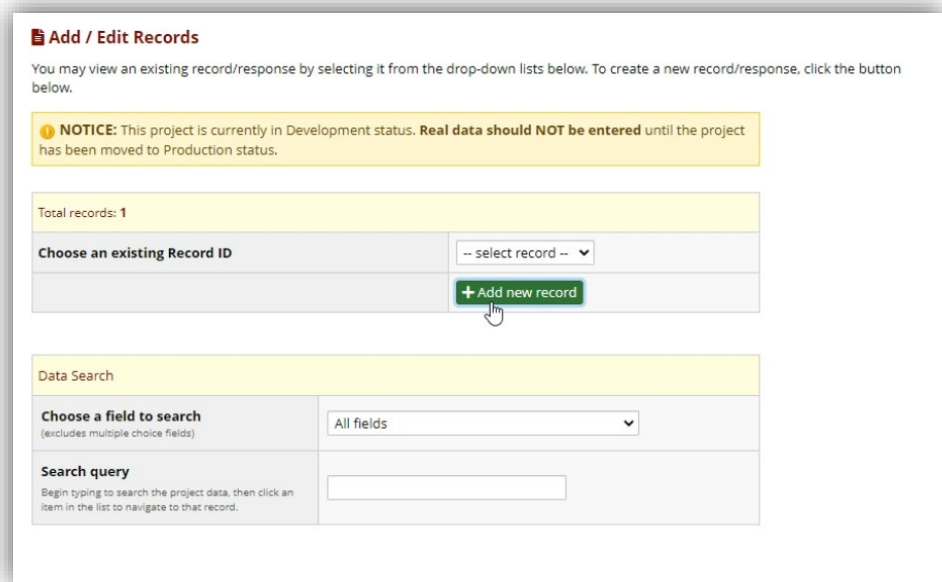
Add a third text box field for an email address.

Important: Remember to validate the field as an email response otherwise REDCap won't be able to distribute the survey to those contacts.



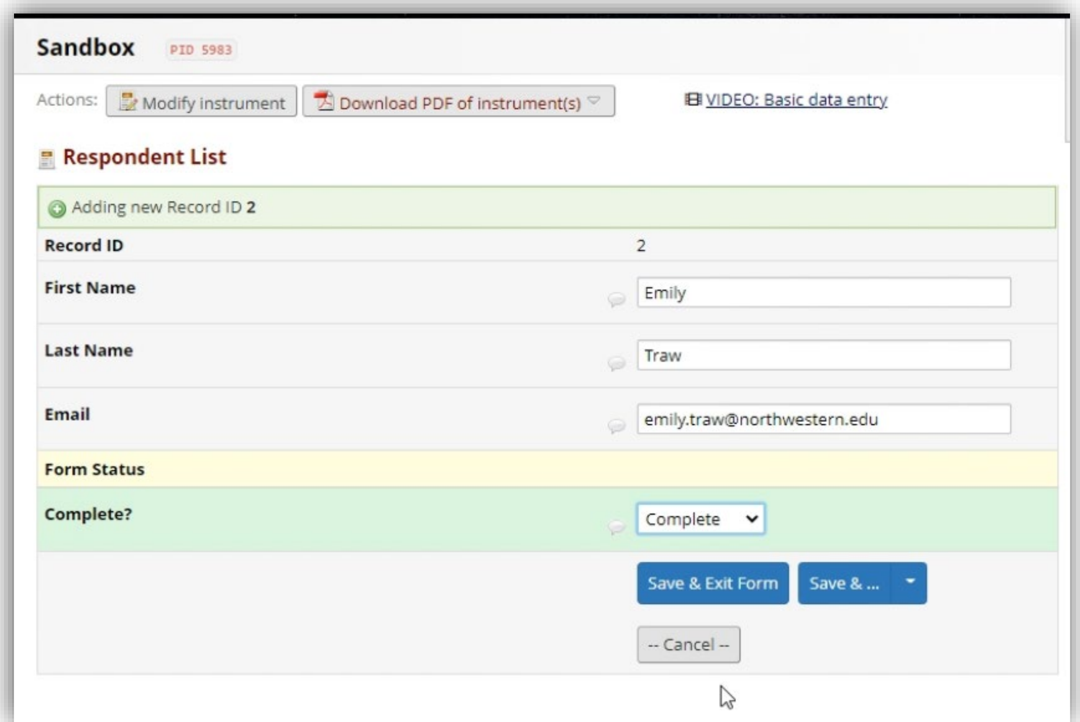
Next, you'll want to tell REDCap who you want the survey distributed to. You can do this one-by-one or in bulk. We'll start with individual entry.

Start by clicking "Add / Edit Records"



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

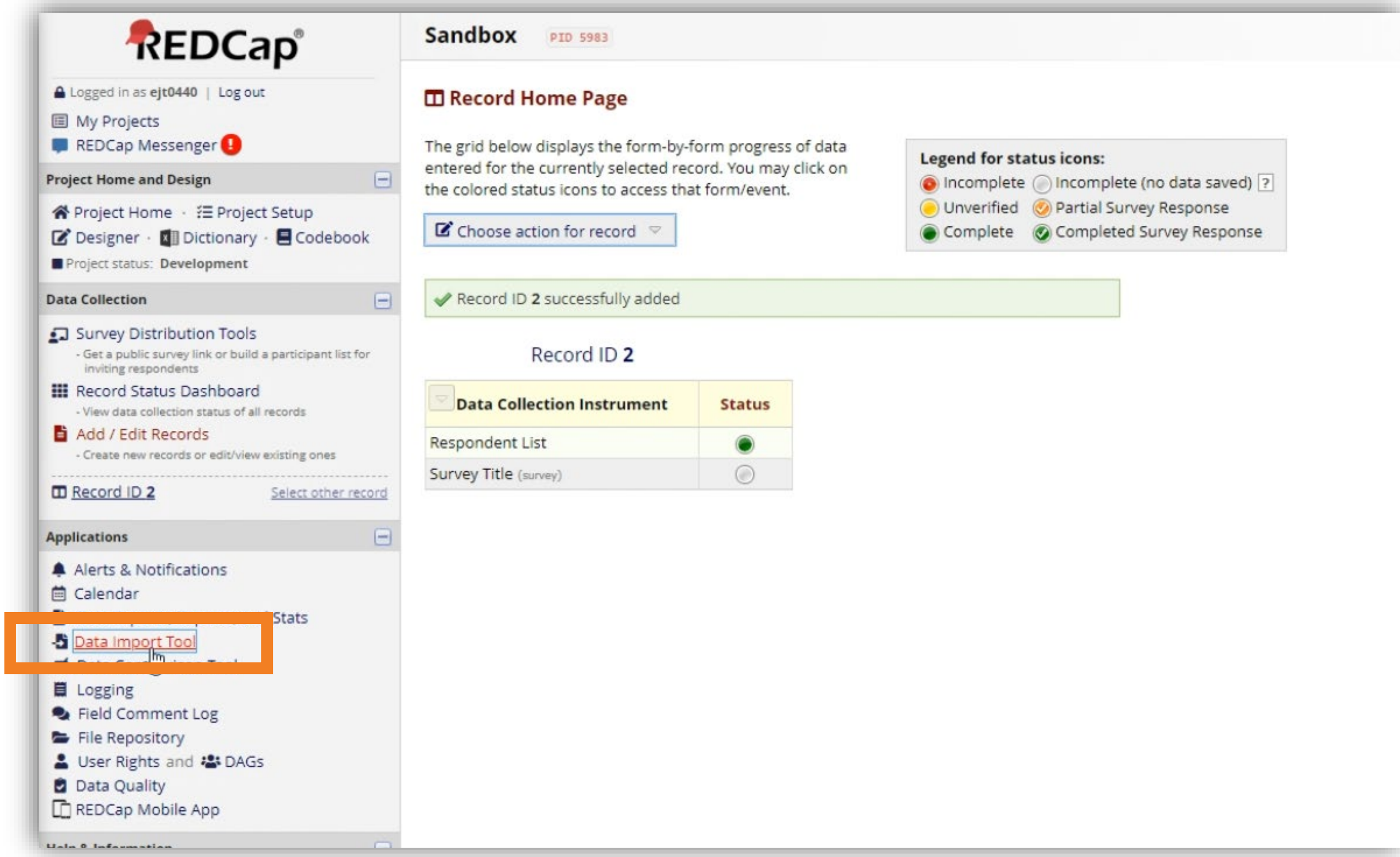
Click the status button next to the respondent/distribution list instrument you just created.



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.

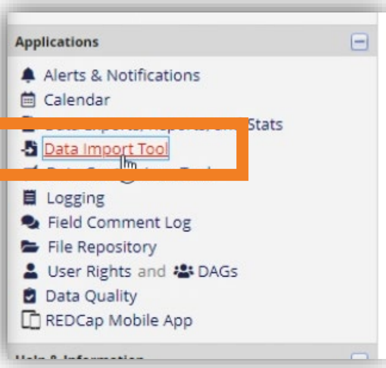
Bulk Upload



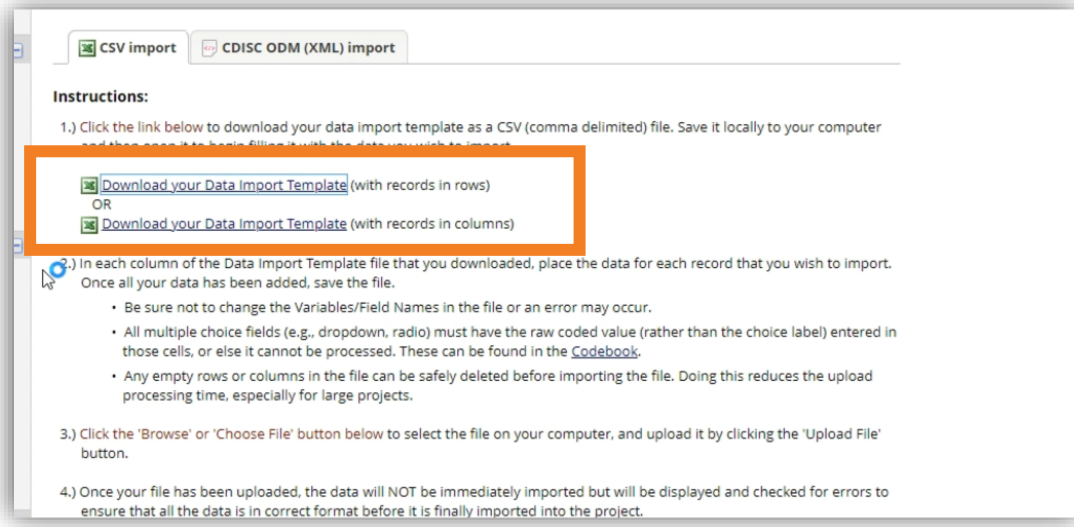
Important: A bulk import can only be done *after* you create the distribution/respondent list instrument outlined earlier in this guide.

Bulk Upload

Continued



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

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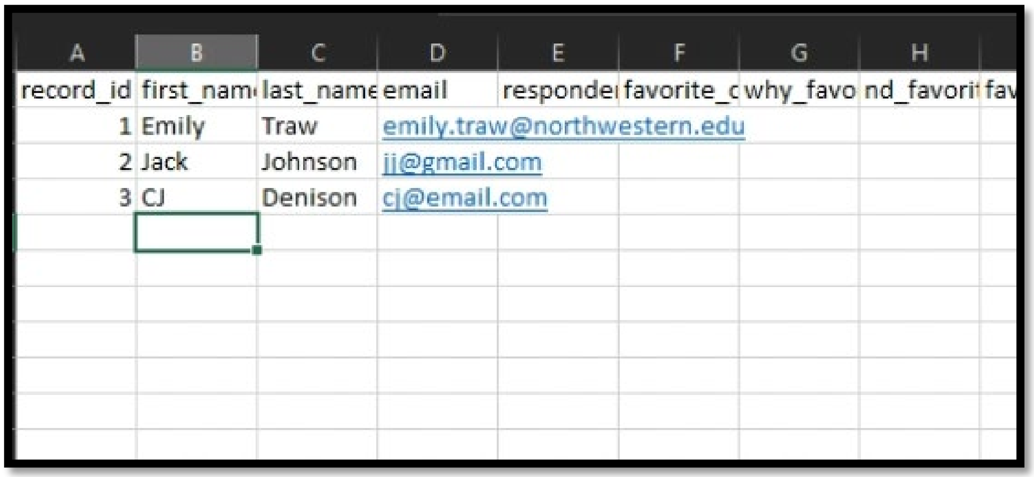

A	B	C	D	E	F	G	H	
record_id	first_nam	last_name	email	responde	favorite_c	why_favo	nd_favori	fav
1	Emily	Traw	emily.traw@northwestern.edu					
2	Jack	Johnson	jj@gmail.com					
3	CJ	Denison	cj@email.com					

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.

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).

Bulk Upload

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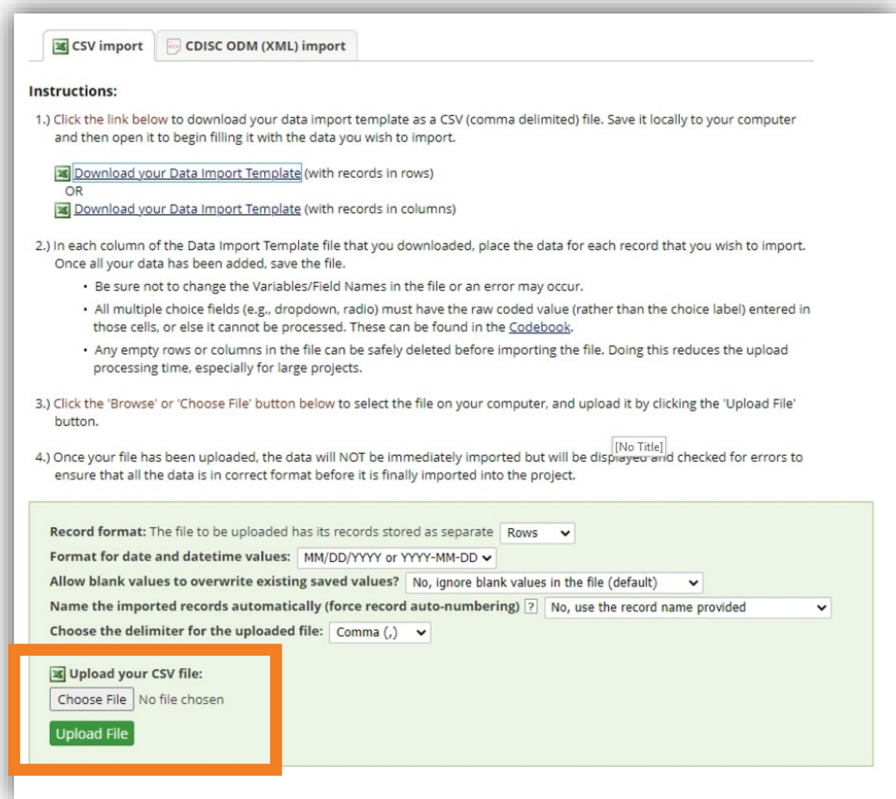
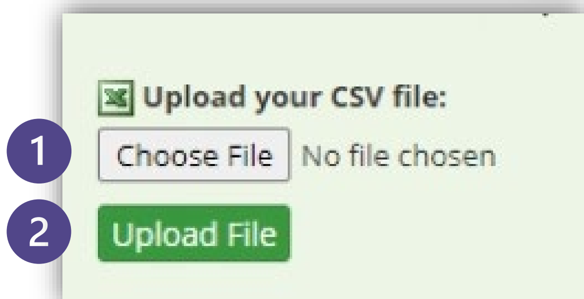
Once you entered your contacts into the spreadsheet (and saved as a .csv), go back to REDCap and select ‘choose file’.

After your attach your spreadsheet, click ‘upload file’





Bulk Upload

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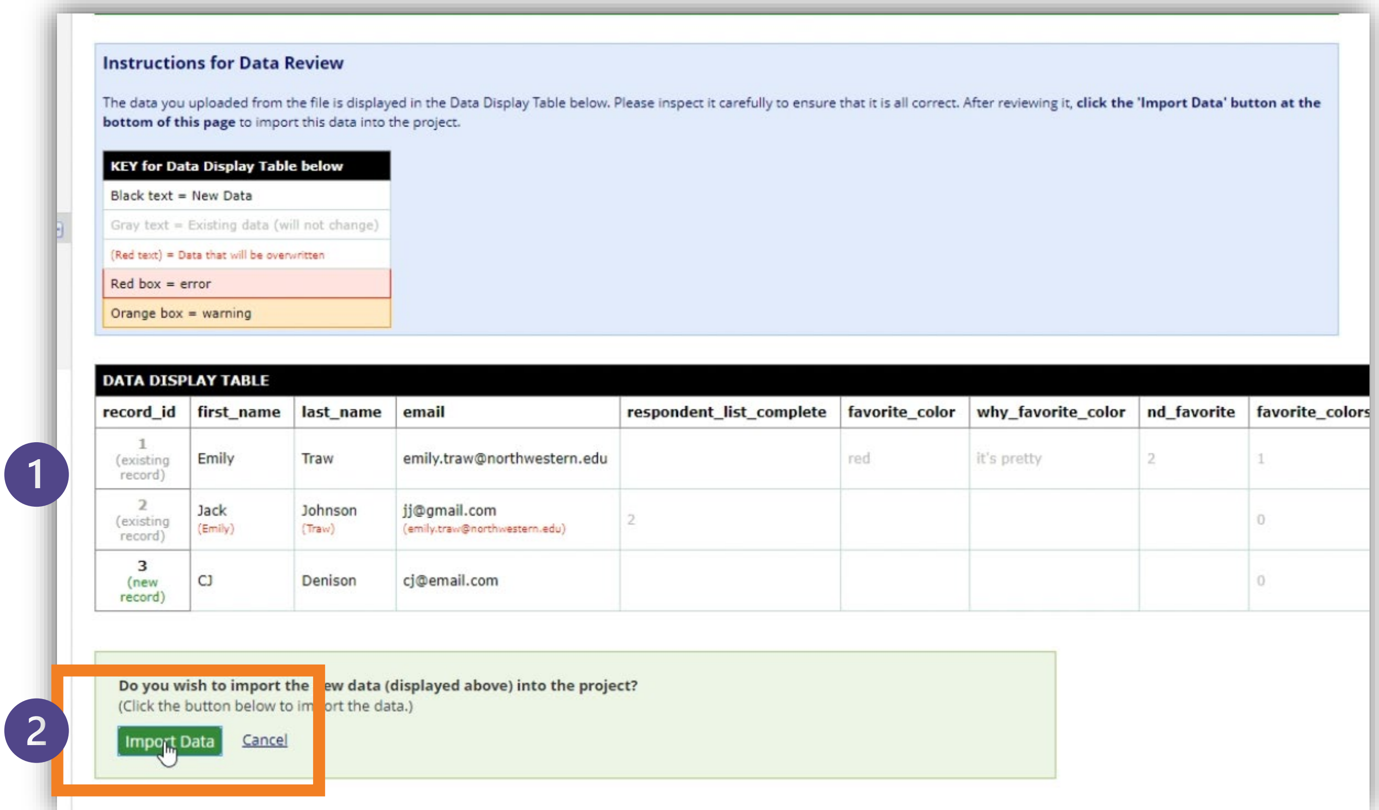

REDCap will provide a preview of the data you uploaded. If there are existing or duplicate records, REDCap will indicate any errors, warnings, or overwrites. If the information is incorrect, go back to the spreadsheet and make any relevant corrections.

If the information is correct, select 'import data'.

Bulk Upload

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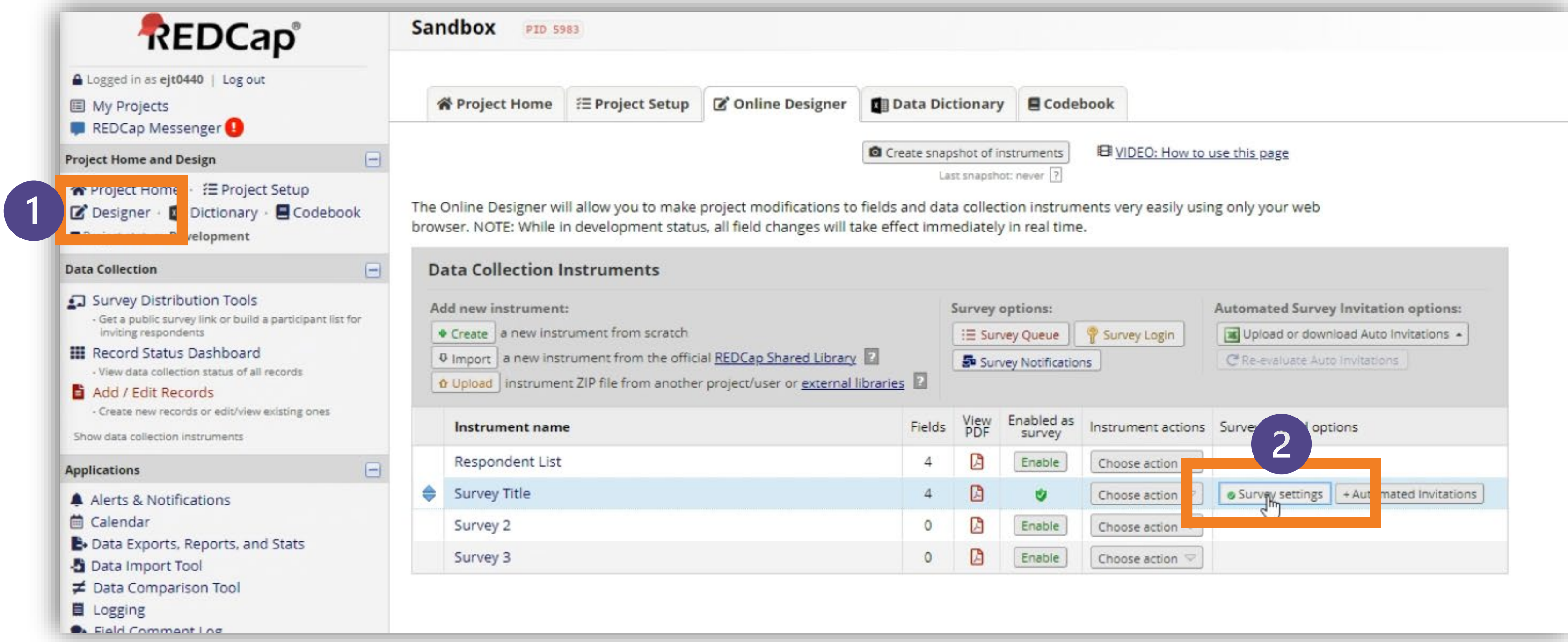
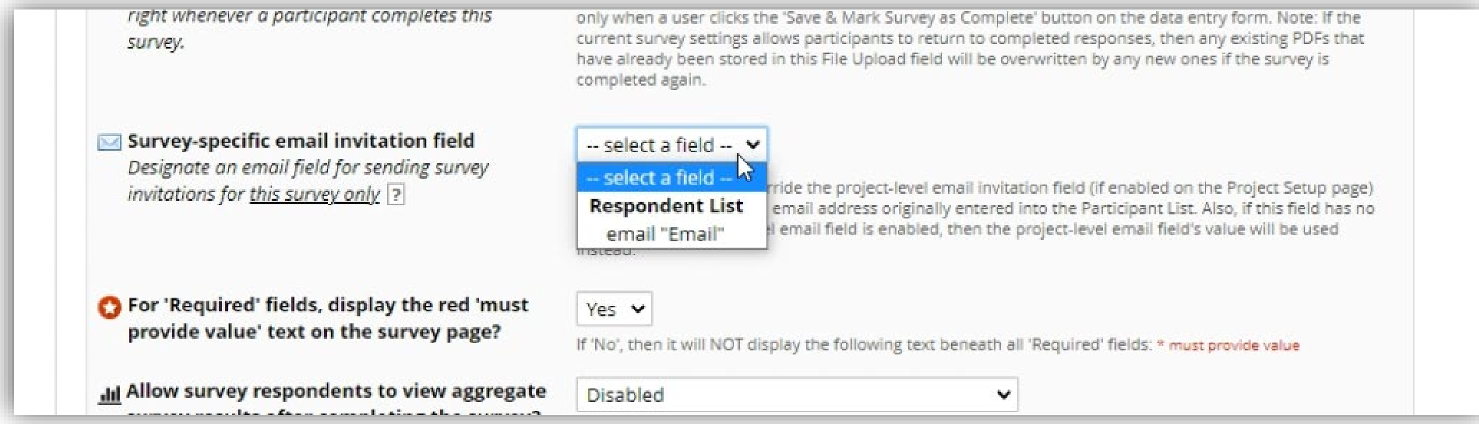
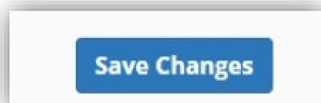


Once your upload is successful, go to the designer tool and select “survey settings” next to the survey you want to distribute. If you haven’t already, you may need to enable this as a survey using the ‘enable’ button if you haven’t done so already.

Bulk Upload

Continued





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'

Bulk Upload

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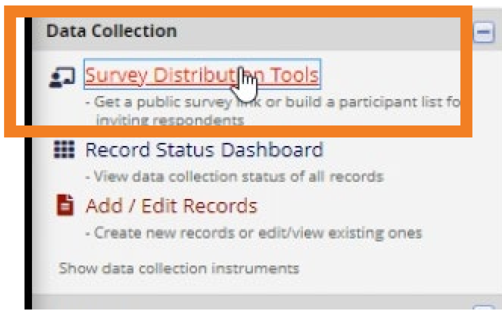

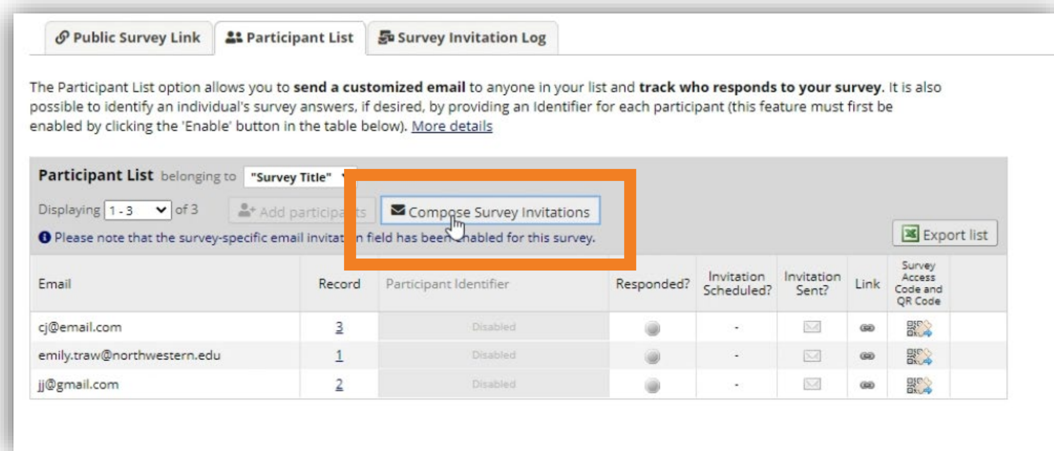

In the left column, select ‘Survey Distribution Tools’ and then select ‘Compose Survey Instructions’

Bulk Upload

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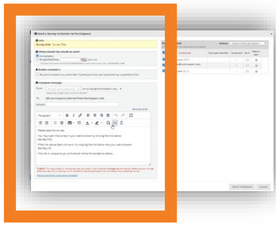

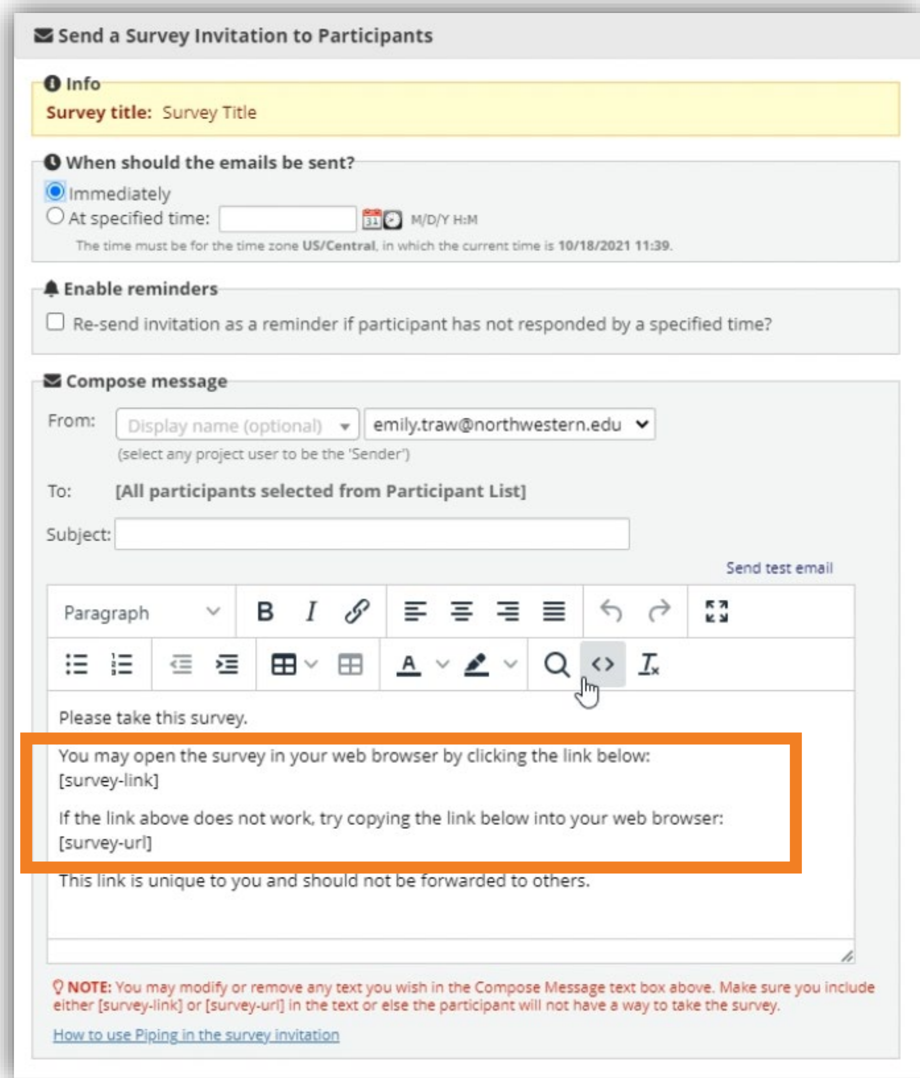

On the left side of the pop-up window, you will see options for when to send the email, if/when reminders should be sent, along with the text that the respondents will see when they open your email. Be sure to enter a subject line for your email.

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

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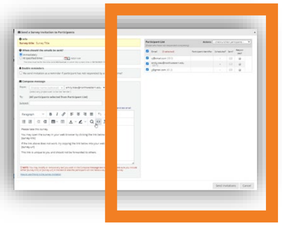
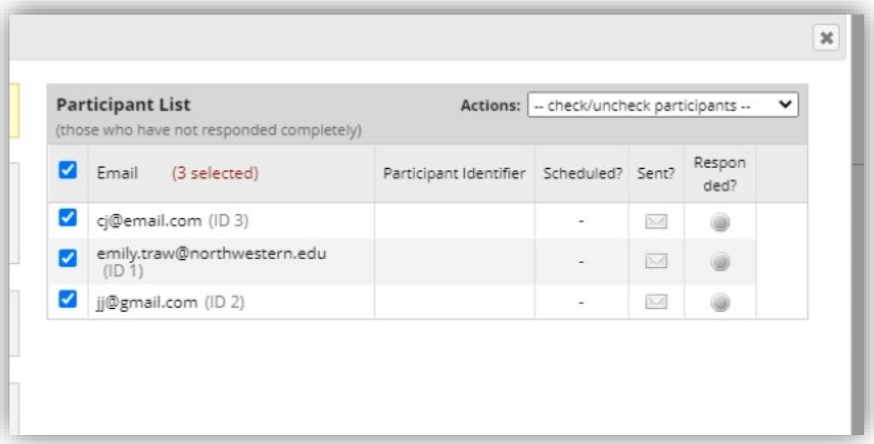
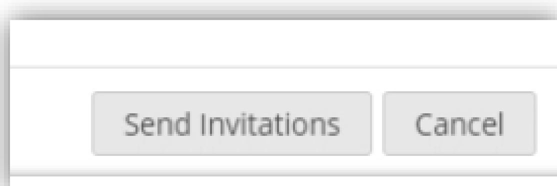






On the right side of the pop-up window, you will see your distribution/respondent list. Select the people you want to send your survey to.

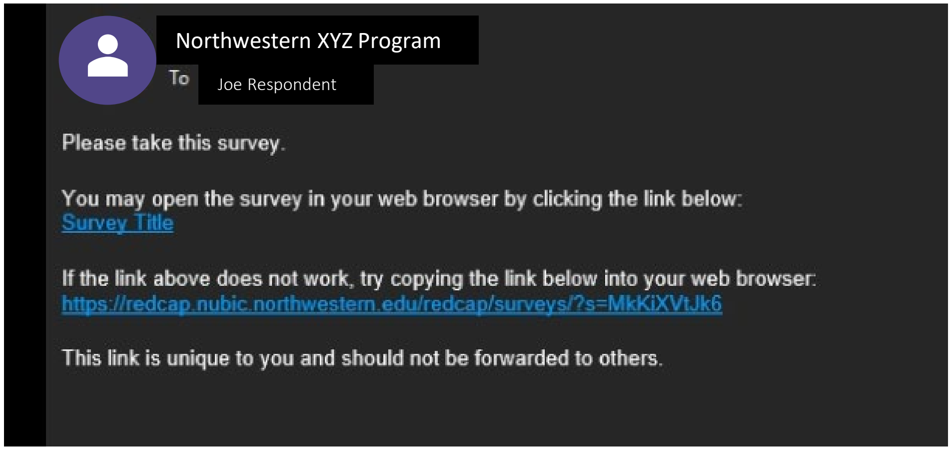
Click 'Send Invitations' at the bottom of the pop-up.

Bulk Upload

Continued

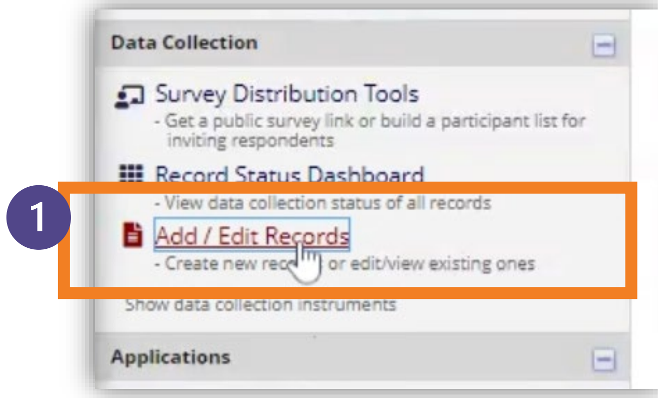
Your respondents will see the email as it appeared in the ‘compose survey instructions’ pop-up box with the survey titled linked to their unique URL.

Before you send out the survey to your respondents, we suggest testing it with 1-2 people.

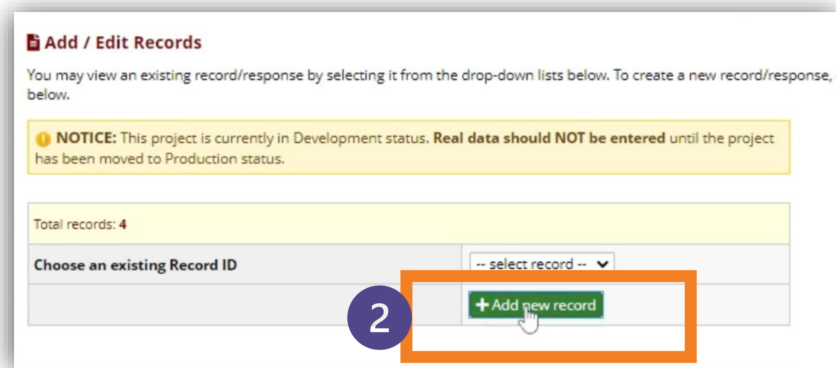


Testing Individualized Surveys

Continued



To test individualized surveys, begin by clicking ‘Add/Edit Records’ in the left column

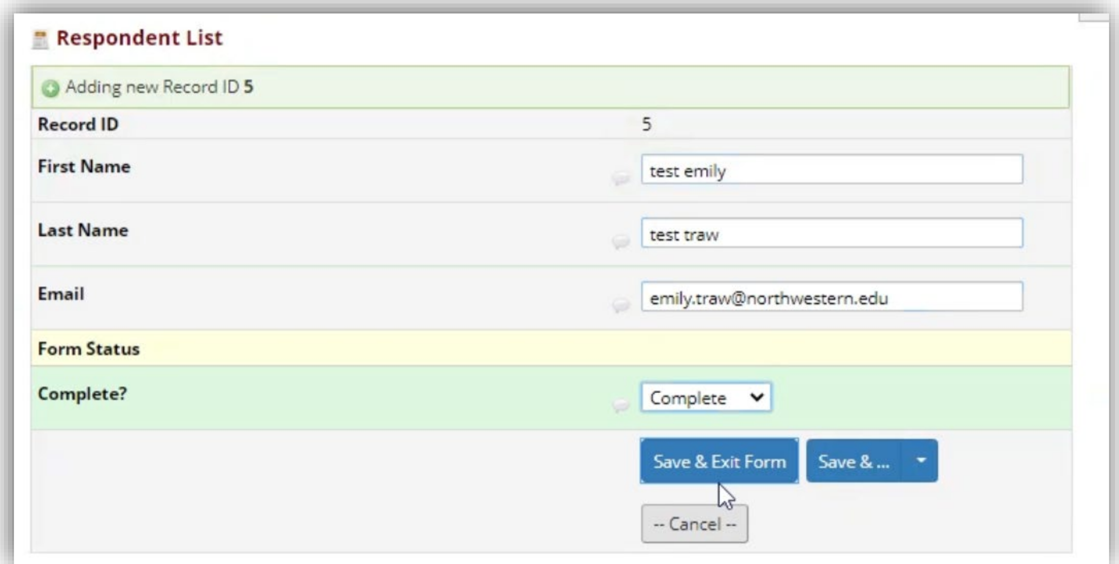


Your test recipients will need to be entered as a new record, so click the green ‘Add new record’ button

Select the button next to the Distribution/Respondent list you created

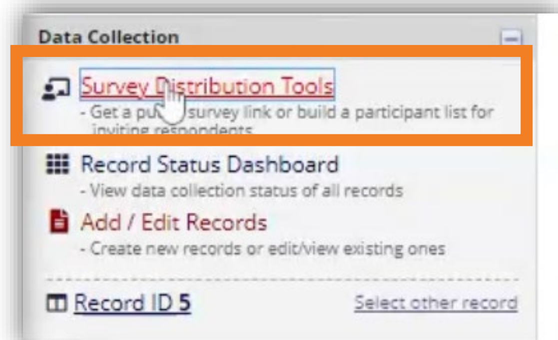
Testing Individualized Surveys

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.

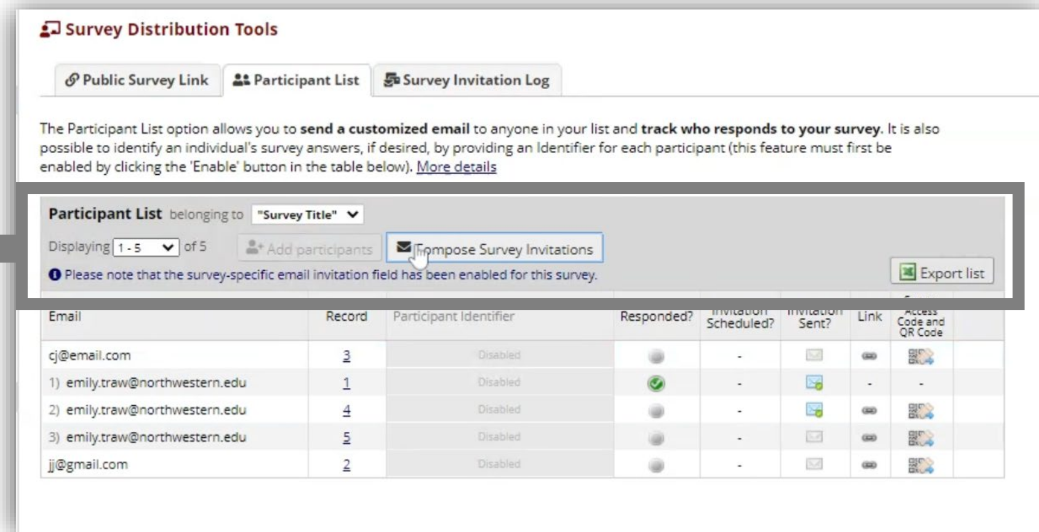
Repeat this process for each person you want to send a test link to.



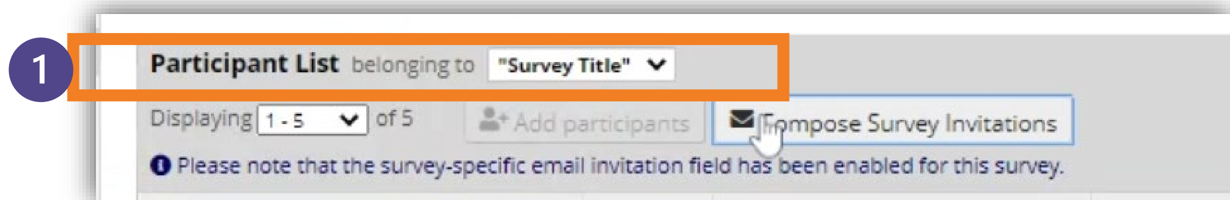
Once you've entered all your test contacts, go to 'Survey Distribution Tools' in the left menu.

Testing Individualized Surveys

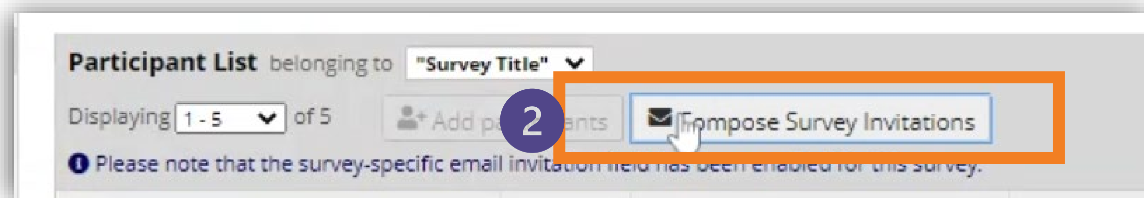
Continued



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



Then click on 'Compose Survey Instructions'.



Testing Individualized Surveys

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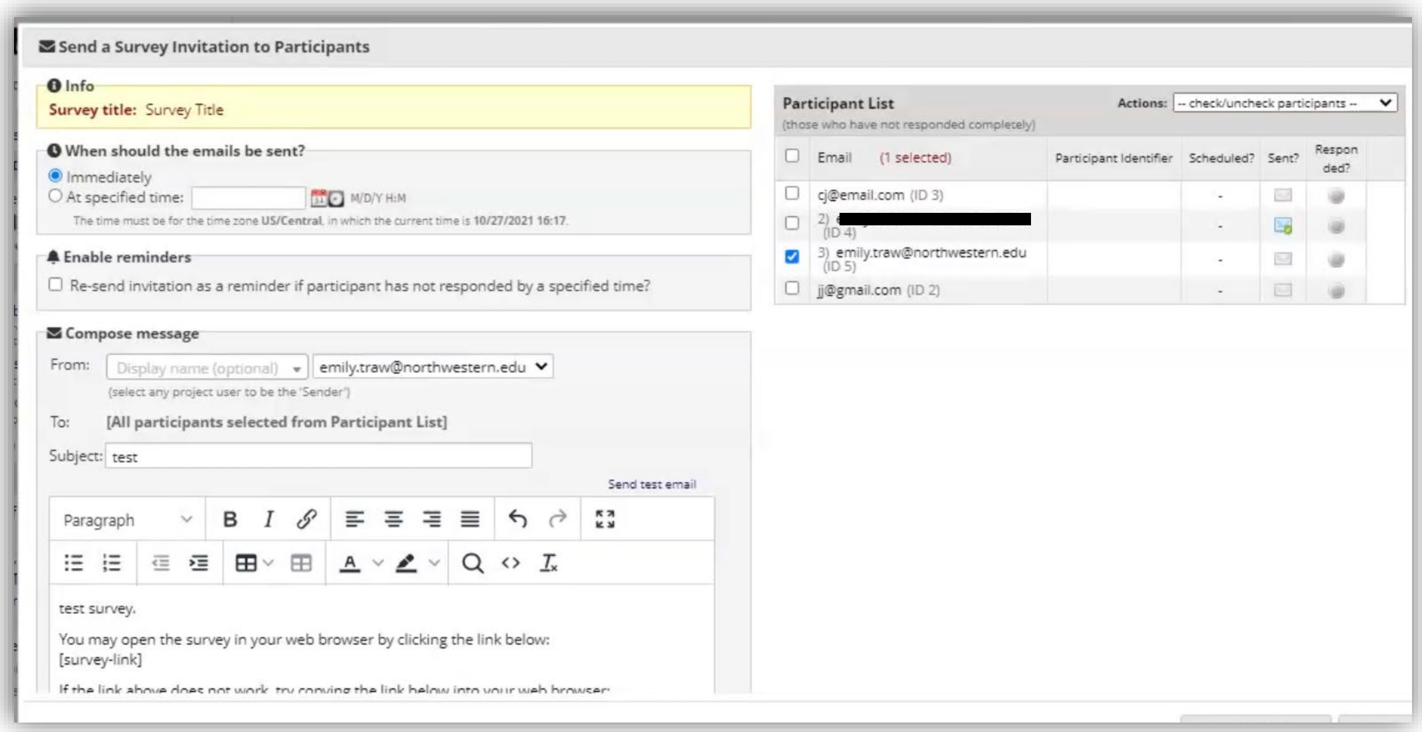

In the left column, be sure to enter “test” alongside your subject line and within the main body of the email.

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

Northwestern University
NUCATS
Clinical and Translational Sciences Institute