

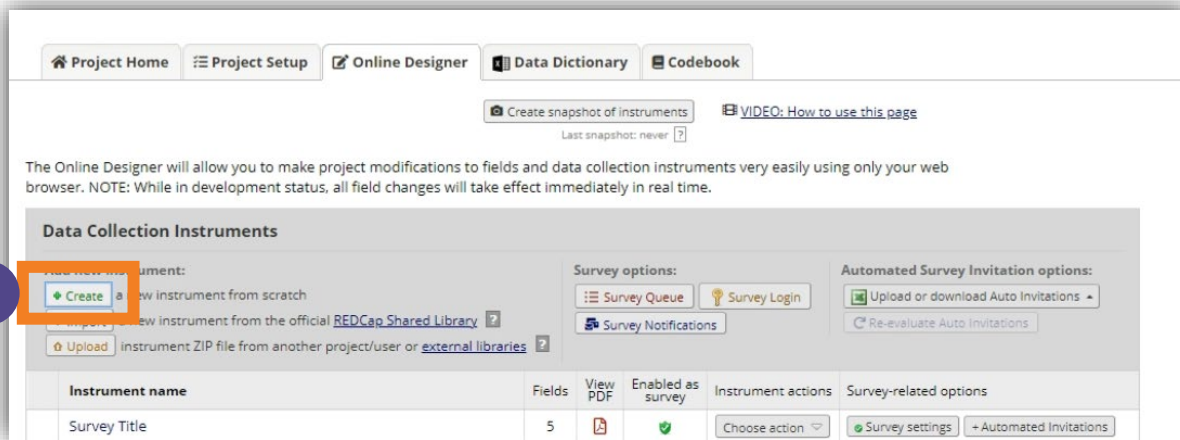
This guide covers how to send an existing survey to individual respondents.

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

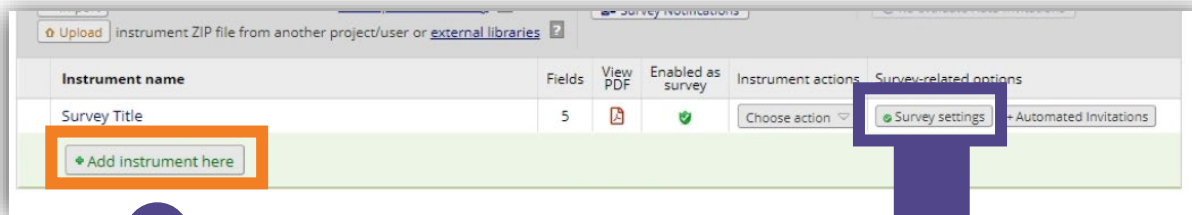
An **individualized survey** is a survey that is sent to someone with a unique URL. As a result, responses are not anonymous (but should be kept confidential).

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.



Project Home Project Setup Online Designer Data Dictionary Codebook

Create snapshot of instruments VIDEO: How to use this page
Last snapshot: never ?

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

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 ?

Survey options:
[Survey Queue](#) [Survey Login](#)
[Survey Notifications](#)

Automated Survey Invitation options:
[Upload or download Auto Invitations](#) -
[Re-evaluate Auto Invitations](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Survey Title	5			Choose action	Survey settings + Automated Invitations
Respondent List	0		Enable	Choose action	



Project Home Project Setup Online Designer Data Dictionary Codebook

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Survey options:
[Survey Queue](#) [Survey Login](#)
[Survey Notifications](#)

Automated Survey Invitation options:
[Upload or download Auto Invitations](#) -
[Re-evaluate Auto Invitations](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Respondent List	1		Enable	Choose action	
Survey Title	4			Choose action	Survey settings + Automated Invitations

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.



Project Home Project Setup Online Designer Data Dictionary Codebook

Create snapshot of instruments VIDEO: How to use this page
Last snapshot: never ?

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the Add Field buttons. You can begin editing an existing field by clicking on the **Edit** icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the **Delete** icon. To reorder the fields, simply **drag and drop** a field to a different position within the form below. NOTE: While in development status, all field changes will take effect immediately in real time.

Learn how to use [Smart Variables](#) [Piping](#) [Action Tags](#) [Field Embedding](#) [Special Functions](#)

[Return to list of instruments](#)

Current instrument: **Respondent List** [Preview instrument](#)

Variable: record_id
Record 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](#)

Click "Add Field"

Project Home Project Setup Online Designer Data Dictionary Codebook

Create snapshot of instruments VIDEO: How to use this page
Last snapshot: never ?

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the Add Field buttons. You can begin editing an existing field by clicking on the **Edit** icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the **Delete** icon. To reorder the fields, simply **drag and drop** a field to a different position within the form below. NOTE: While in development status, all field changes will take effect immediately in real time.

Learn how to use [Smart Variables](#) [Piping](#) [Action Tags](#) [Field Embedding](#) [Special Functions](#)

[Return to list of instruments](#)

Current instrument: **Respondent List** [Preview instrument](#)

Variable: record_id
Record 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

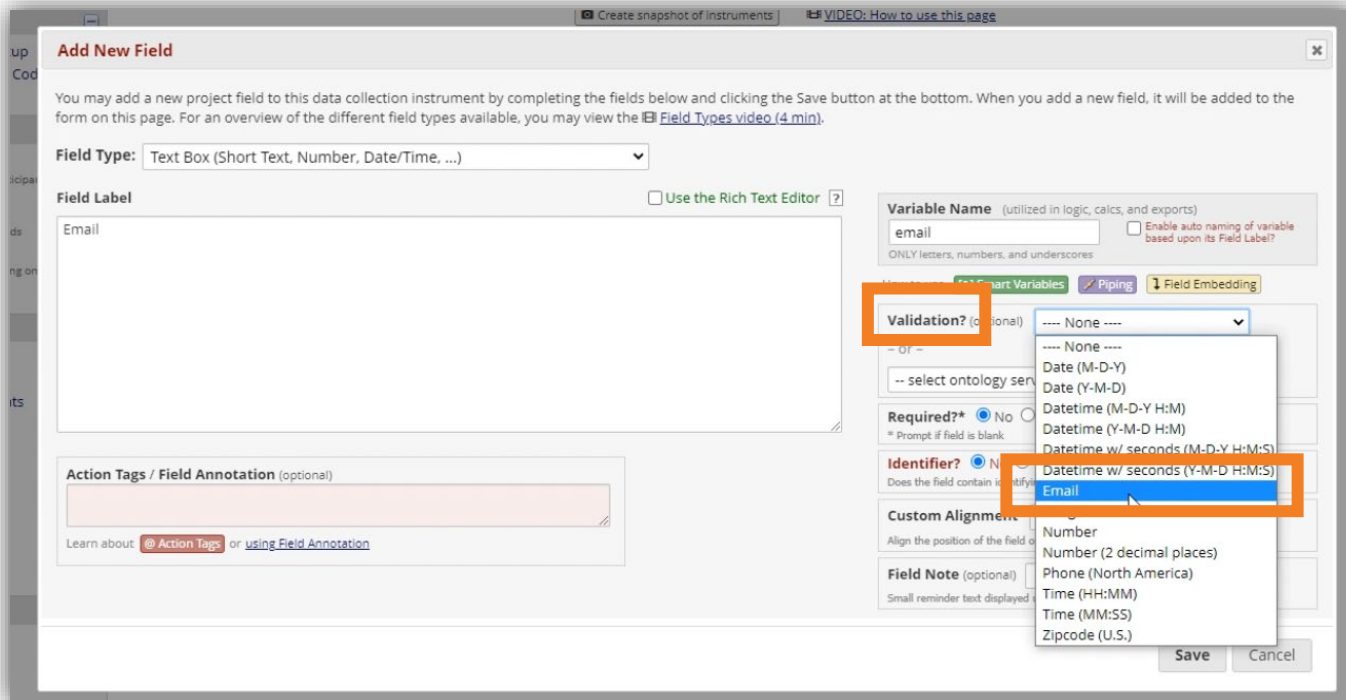
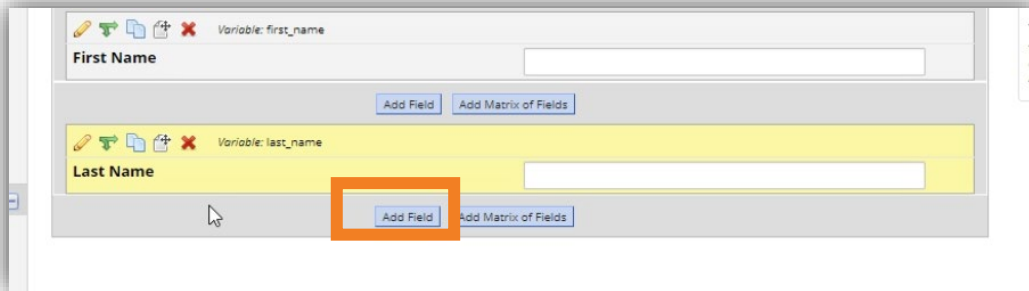
[Add Field](#) [Add Matrix of Fields](#)

Variable: last_name
Last Name

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

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.



The screenshot shows the REDCap Online Designer interface. On the left sidebar, the 'Add / Edit Records' option is highlighted with an orange box. The main content area displays the 'Respondent List' instrument. It includes a 'Record ID' field with a note that it cannot be deleted or moved. Below it are fields for 'First Name', 'Last Name', and 'Email', each with 'Add Field' and 'Add Matrix of Fields' buttons. The interface also features a top navigation bar with 'Project Home', 'Project Setup', 'Online Designer', 'Data Dictionary', and 'Codebook' tabs. A 'Return to list of instruments' button is visible below the instrument title.

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"



Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, click the button below.

NOTICE: This project is currently In Development status. **Real data should NOT be entered** until the project has been moved to Production status.

Total records: 1

Choose an existing Record ID -- select record --

+ Add new record

Data Search

Choose a field to search (excludes multiple choice fields) All fields

Search query Begin typing to search the project data, then click an item in the list to navigate to that record.

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

NEW Record ID 2

Data Collection Instrument	Status
Respondent List	
Survey Title (survey)	

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



Sandbox PID 5983

Actions: Modify instrument Download PDF of instrument(s) VIDEO: Basic data entry

Respondent List

Adding new Record ID 2

Record ID	2
First Name	<input type="text" value="Emily"/>
Last Name	<input type="text" value="Traw"/>
Email	<input type="text" value="emily.traw@northwestern.edu"/>

Form Status

Complete?	<input type="text" value="Complete"/>
-----------	---------------------------------------

Save & Exit Form Save & ...

-- Cancel --

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

REDCap®

Logged in as ejt0440 | Log out

My Projects

REDCap Messenger

Project Home and Design

Project Home · Project Setup

Designer · Dictionary · Codebook

Project status: Development

Data Collection

Survey Distribution Tools

Record Status Dashboard

Add / Edit Records

Record ID 2

Applications

Alerts & Notifications

Calendar

Data Import Tool

Logging

Field Comment Log

File Repository

User Rights and DAGs

Data Quality

REDCap Mobile App

Sandbox PID 5983

Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

Choose action for record

Record ID 2 successfully added

Record ID 2

Data Collection Instrument	Status
Respondent List	
Survey Title (survey)	

Legend for status icons:

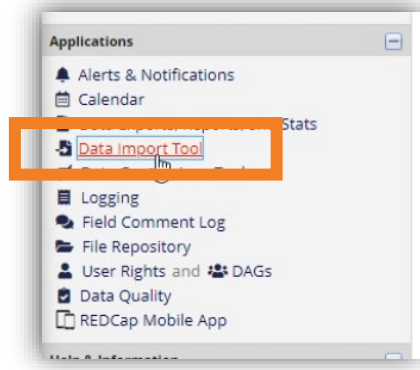
- Incomplete
- Incomplete (no data saved)
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response

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

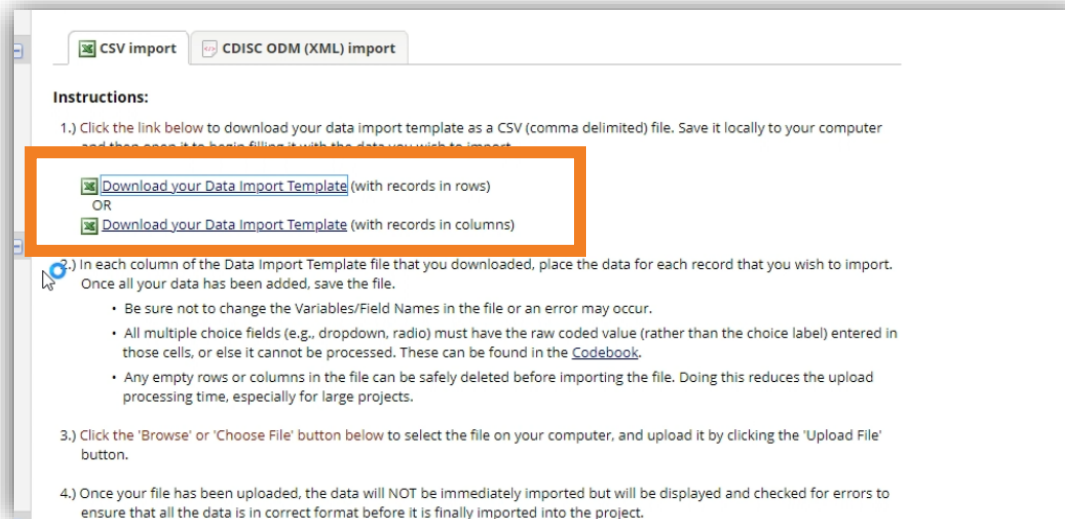


Bulk Upload

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

Continued

A	B	C	D	E	F	G	H	
record_id	first_name	last_name	email	response	favorite_c	why_favo	nd_favorit	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

Continued

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

After you attach your spreadsheet, click 'upload file'

The screenshot shows the REDCap Bulk Upload interface. At the top, there are two tabs: "CSV import" (selected) and "CDISC ODM (XML) import". Below the tabs, there are "Instructions:" and a list of four steps. Step 1 is highlighted with a green box. Below the instructions, there are several configuration options: "Record format" (set to "Rows"), "Format for date and datetime values" (set to "MM/DD/YYYY or YYYY-MM-DD"), "Allow blank values to overwrite existing saved values?" (set to "No, ignore blank values in the file (default)"), "Name the imported records automatically (force record auto-numbering)" (set to "No, use the record name provided"), and "Choose the delimiter for the uploaded file" (set to "Comma (,)"). At the bottom, there is a section titled "Upload your CSV file:" which is highlighted with an orange box. This section contains a "Choose File" button (with "No file chosen" text) and an "Upload File" button.

This is a close-up of the "Upload your CSV file:" section from the screenshot above. It shows a green box containing the text "Upload your CSV file:". Below this text is a "Choose File" button with the text "No file chosen" to its right. Below the "Choose File" button is a green "Upload File" button. To the left of the "Choose File" button is a blue circle with the number "1", and to the left of the "Upload File" button is a blue circle with the number "2". A large grey arrow points from the top-left of the main screenshot towards this close-up.



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 this data into the project.

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

record_id	first_name	last_name	email	respondent_list_complete	favorite_color	why_favorite_color	nd_favorite	favorite_colors
1 (existing record)	Emily	Traw	emily.traw@northwestern.edu		red	it's pretty	2	1
2 (existing record)	Jack (Emily)	Johnson (Traw)	jj@gmail.com (emily.traw@northwestern.edu)	2				0
3 (new record)	CJ	Denison	cj@email.com					0

Do you wish to import the new data (displayed above) into the project?
(Click the button below to import the data.)

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

Continued

The screenshot shows the REDCap interface for a project named 'Sandbox' (PID 5983). The left sidebar contains a navigation menu with categories: 'Project Home and Design', 'Data Collection', and 'Applications'. The 'Project Home and Design' category is expanded, showing options like 'Project Home', 'Project Setup', 'Designer', 'Dictionary', and 'Codebook'. The 'Data Collection' category is also expanded, showing options like 'Survey Distribution Tools', 'Record Status Dashboard', and 'Add / Edit Records'. The 'Applications' category is expanded, showing options like 'Alerts & Notifications', 'Calendar', 'Data Exports, Reports, and Stats', 'Data Import Tool', 'Data Comparison Tool', 'Logging', and 'Field Comment Log'. The main content area shows the 'Data Collection Instruments' section. It includes a 'Create snapshot of instruments' button, a 'VIDEO: How to use this page' link, and a note about the Online Designer. Below this is a 'Data Collection Instruments' table with columns: 'Instrument name', 'Fields', 'View PDF', 'Enabled as survey', 'Instrument actions', and 'Survey options'. The table lists four instruments: 'Respondent List', 'Survey Title', 'Survey 2', and 'Survey 3'. The 'Survey Title' row is highlighted in blue, and the 'Survey settings' button in the 'Instrument actions' column is highlighted with a blue circle and the number '2'. The 'Survey options' column for 'Survey Title' shows 'Survey settings' and '+ Automated Invitations' buttons.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey options
Respondent List	4		Enable	Choose action	
Survey Title	4		Enable	Choose action Survey settings + Automated Invitations	
Survey 2	0		Enable	Choose action	
Survey 3	0		Enable	Choose action	

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

The screenshot shows a survey configuration interface. A dropdown menu is open for the 'Survey-specific email invitation field' section, showing options: '-- select a field --', 'Respondent List', and 'email "Email"'. Below this, there are two other settings: 'For 'Required' fields, display the red 'must provide value' text on the survey page?' with a 'Yes' dropdown, and 'Allow survey respondents to view aggregate survey results after completing the survey?' with a 'Disabled' dropdown.



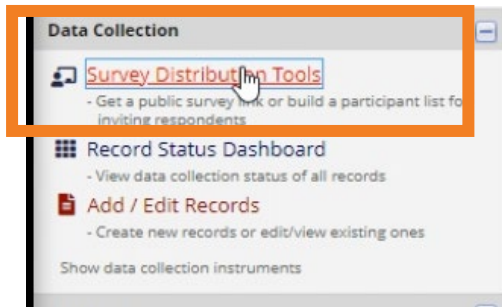
Save Changes

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

Continued



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



The image shows the 'Participant List' interface. At the top, there are tabs for 'Public Survey Link', 'Participant List', and 'Survey Invitation Log'. Below the tabs is a paragraph of text explaining the 'Participant List' feature. A table below the text shows a list of participants. The 'Compose Survey Invitations' button is highlighted with an orange box. The table has columns for Email, Record, Participant Identifier, Responded?, Invitation Scheduled?, Invitation Sent?, Link, and Survey Access Code and QR Code.

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). [More details](#)

Participant List belonging to "Survey Title"

Displaying 1 - 3 of 3 + Add participants ✉ **Compose Survey Invitations** 📄 Export list

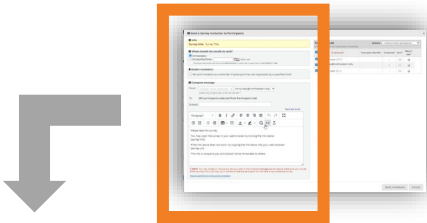
Please note that the survey-specific email invitation field has been enabled for this survey.

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
cj@email.com	3	Disabled	<input type="radio"/>	-	<input type="checkbox"/>	<input type="checkbox"/>	
emily.traw@northwestern.edu	1	Disabled	<input type="radio"/>	-	<input type="checkbox"/>	<input type="checkbox"/>	
jj@gmail.com	2	Disabled	<input type="radio"/>	-	<input type="checkbox"/>	<input type="checkbox"/>	



Bulk Upload

Continued



Send a Survey Invitation to Participants

Info
Survey title: Survey Title

When should the emails be sent?
 Immediately
 At specified time: M/D/Y H:M
The time must be for the time zone US/Central, in which the current time is 10/18/2021 11:39.

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

Compose message

From:
(select any project user to be the 'Sender')

To: **[All participants selected from Participant List]**

Subject:

[Send test email](#)

Paragraph
B I

NOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-uri] in the text or else the participant will not have a way to take the survey.
[How to use Piping in the survey invitation](#)

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.

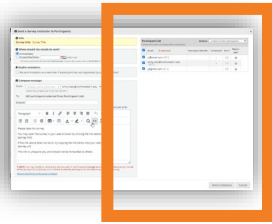


Do not delete the text highlighted in the orange box. This is where REDCap will populate the survey URL. You should also leave the note about the unique URL so respondents don't forward it on to other people. This will create an error message once more than one person tries to complete the survey from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



Bulk Upload

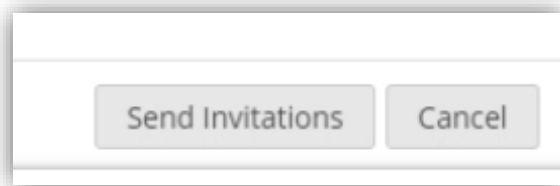
Continued



Participant List Actions: -- check/uncheck participants --

(those who have not responded completely)

<input checked="" type="checkbox"/>	Email (3 selected)	Participant Identifier	Scheduled?	Sent?	Responded?
<input checked="" type="checkbox"/>	cj@email.com (ID 3)		-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	emily.traw@northwestern.edu (ID 1)		-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	jj@gmail.com (ID 2)		-	<input checked="" type="checkbox"/>	<input type="checkbox"/>



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.

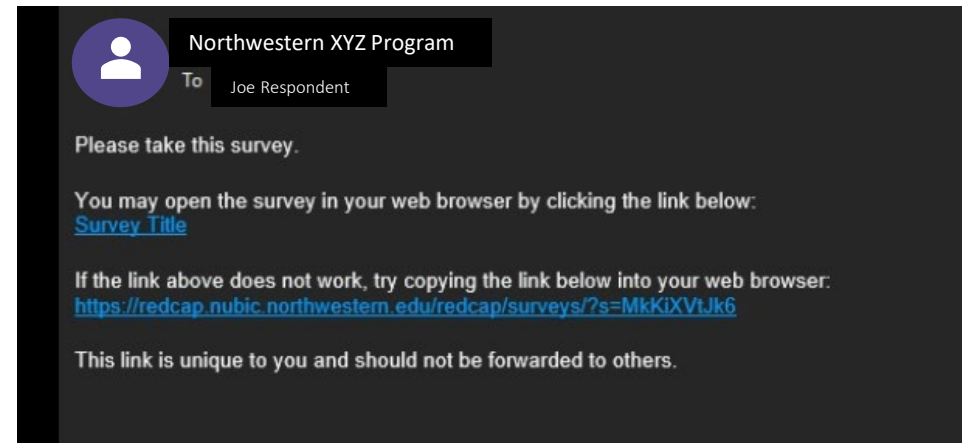


Bulk Upload

Continued

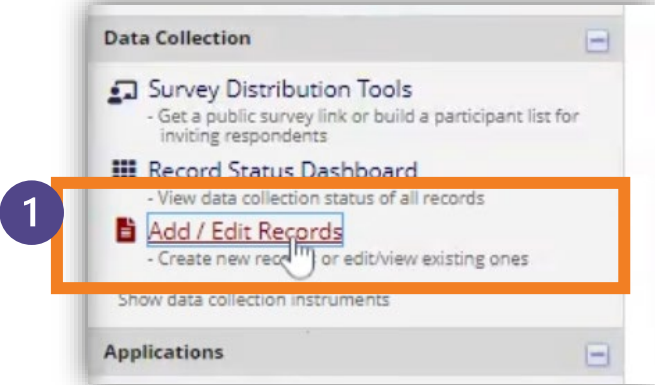
Your respondents will see the email as it appeared in the 'compose survey instructions' pop-up box with the survey titled linked to their unique URL.

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

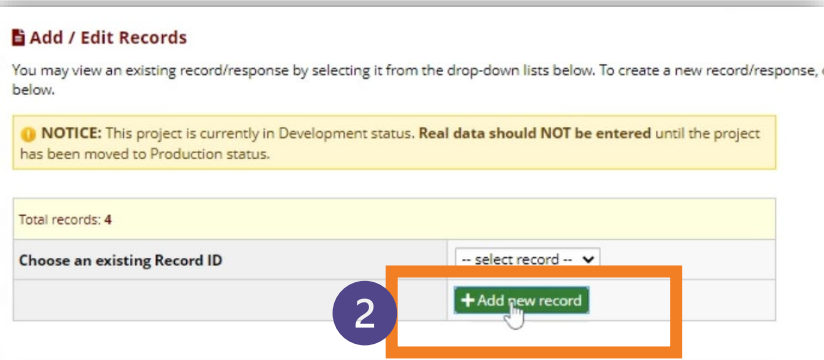


Testing Individualized Surveys

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

Respondent List

Adding new Record ID 5

Record ID: 5

First Name: test emily

Last Name: test traw

Email: emily.traw@northwestern.edu

Form Status

Complete? Complete

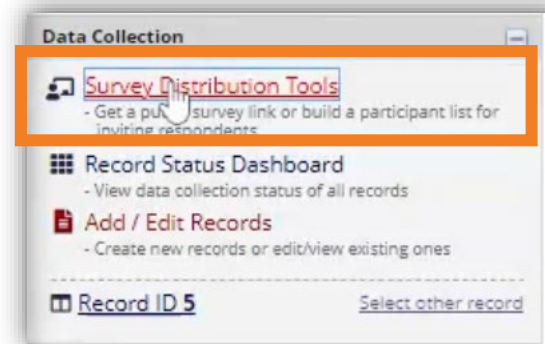
Save & Exit Form Save & ...

-- Cancel --

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

Survey Distribution Tools

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). [More details](#)

Participant List belonging to "Survey Title" ▼

Displaying 1 - 5 of 5 | Add participants | **Compose Survey Invitations** | Export list

Please note that the survey-specific email invitation field has been enabled for this survey.

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Access Code and QR Code
cj@email.com	3	Disabled	●	-	✉	🔗	📄
1) emily.traw@northwestern.edu	1	Disabled	●	-	✉	🔗	📄
2) emily.traw@northwestern.edu	4	Disabled	●	-	✉	🔗	📄
3) emily.traw@northwestern.edu	5	Disabled	●	-	✉	🔗	📄
jj@gmail.com	2	Disabled	●	-	✉	🔗	📄

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

1

Participant List belonging to "Survey Title" ▼

Displaying 1 - 5 of 5 | Add participants | **Compose Survey Invitations**

Please note that the survey-specific email invitation field has been enabled for this survey.

Then click on 'Compose Survey Instructions'.

2

Participant List belonging to "Survey Title" ▼

Displaying 1 - 5 of 5 | Add participants | **Compose Survey Invitations**

Please note that the survey-specific email invitation field has been enabled for this survey.



Testing Individualized Surveys

Continued

The screenshot shows a web interface for sending survey invitations. It is divided into two main columns.

Left Column: Send a Survey Invitation to Participants

- Info:** Survey title: Survey Title
- When should the emails be sent?**
 - Immediately
 - At specified time: [] M/D/Y H:M
- Enable reminders:**
 - Re-send invitation as a reminder if participant has not responded by a specified time?
- Compose message:**
 - From:** Display name (optional) | emily.traw@northwestern.edu
 - To:** [All participants selected from Participant List]
 - Subject:** test
 - Body:** test survey.
You may open the survey in your web browser by clicking the link below:
[survey-link]
If the link above does not work, try copying the link below into your web browser.

Right Column: Participant List

Actions: -- check/uncheck participants --

(those who have not responded completely)

<input type="checkbox"/>	Email (1 selected)	Participant Identifier	Scheduled?	Sent?	Responded?
<input type="checkbox"/>	cj@email.com (ID 3)		-		
<input type="checkbox"/>	2) [REDACTED] (ID 4)		-		
<input checked="" type="checkbox"/>	3) emily.traw@northwestern.edu (ID 5)		-		
<input type="checkbox"/>	jj@gmail.com (ID 2)		-		

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

