Automated Survey Invitations (ASIs) are survey invitations that are automatically scheduled when certain conditions are true. Creating an Automated Survey Invitation requires composing an email message, specifying the conditions that will trigger an email to be scheduled, and specifying when to schedule the triggered email (i.e., the timing of the invitation). ASIs automatically send invitations to participants based upon specific conditions, such as the completion of another survey in the project or having entered certain data values into the participant record.

Automated survey invitations can be set up for any survey in a REDCap project. This is done on the Online Designer page. If the REDCap project is longitudinal, you must also choose the event when setting up the ASI.

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.
Automated Survey Invitation (ASI) Basics

In the example above, an Automated Survey Invitation will be set up for the *Informed Consent* survey for the Baseline event. Clicking +Set up to the left of word *Baseline* in the *Automated Invitations* pop up window displays the following:

**STEP 1: Compose message**

In this section, you will create a customized email that will go out to the participants. It is very important to keep the [survey-link] and [survey-url] text intact since this is the unique link to the survey to be completed. All other text can be changed and piping can be used in the subject line and/or body of the email.

**STEP 2: Conditions**

In this section, you will define the conditions under which the invitation/email will be sent. There are two criteria that can be defined. The first is the completion of a previous survey and the second is if pre-defined logic becomes true. You may use either of these or both to trigger the survey invitation. In the pop up window above, the invitation will be sent if the
Automated Survey Invitation (ASI) Basics

PROMIS SF v1.0-Depression 8a survey is completed and the participant is 18 years of age or older.

STEP 3: When to send invitations AFTER conditions are met

When setting the time at which the invitations will be sent, the invitation can be sent immediately after the conditions are met or at a relative or fixed time after they are met. In the pop up window above, the invitations are sent the next day at 8:00am. This means that after the subject has both completed the PROMIS survey and noted that they are age 18 or older (i.e. the defined conditions are true), then the email invitation for the consent will be sent at 8am the next day.

OPTIONAL: Enable reminders

If the survey is not completed at the time the invitation is sent, there is an option to send reminder emails along with the number of times the reminder should be sent. The same email messages will be sent. In this example, only one reminder is sent 2 hours after the first email invitation was sent.

STEP 4: Activated?

In order to send an Automated Survey Invitation, it must be set to Active. This can be changed to Not Active any time.

Setting Up Email Addresses to be Used with ASIs

In order to use Automated Survey Invitations, you must create a text field and choose “email” validation in order to collect the subject’s email address (i.e. where they will receive their survey invitations).
Automated Survey Invitation (ASI) Basics

Then, on the *Project Setup* tab, **Enable** the following option:

![Enable](image)

**OR** on the *Online Designer* tab, under the *Survey settings* button for the survey being sent, a **Survey-specific email invitation field** can be defined which will override the project-level email invitation field (above).

![Survey-specific email invitation field](image)

Note: This option will override the project-level email invitation field (if enabled on the Project Setup page) and will also override any email address originally entered into the Participant List. Also, if this field has no value and the project-level email field is enabled, then the project-level email field’s value will be used instead.