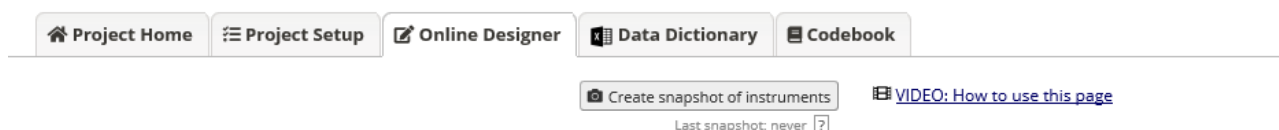


Automated Survey Invitation (ASI) Basics

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.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Demographics	12		Enable	Choose action	
Informed Consent	15			Choose action	Survey settings + Automated Invitations
Caregiver Demographics	11		Enable	Choose action	
Physical Exam	2		Enable	Choose action	Automated Invitations modal: Choose an event below for which to set up or modify automated survey invitations. + Set up Baseline
Anthropometry	14		Enable	Choose action	
Medications	6		Enable	Choose action	
Laboratory Values	6		Enable	Choose action	

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:

Define Conditions for Automated Survey Invitations (ASI)

Info
Survey title: Informed Consent
Event: Baseline

STEP 1: Compose message

From: The Study Group
escobar@email.chop.edu
(select any project user to be the 'Sender')

To: [All participants who meet the conditions defined]

Subject: Completion of e-Consent

Send test email

Paragraph **B** *I* [Link](#) **≡** **≡** **≡** **≡** **↶** **↷**

Please click on the link below to complete the consent process in order to participate in this study.

[survey-link]

If the link above does not work, try copying the link below into your web browser:

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-url] in the text or else the participant will not have a way to take the survey.

You may use HTML formatting in the email message: bold, <u> underline, <i> italics, link, etc.

[How to use Piping in the survey invitation](#)

STEP 2: Conditions

Specify conditions for sending invitations:

When the following survey is completed:
"PROMIS SF v1.0-Depression 8a" - Baseline

AND

When the following logic becomes true:
[baseline_arm_1][sub_age]>=18
(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")
[How do I use special functions?](#)

Test logic with a record: -- select record --

Ensure logic is still true before sending invitation? [?](#)

[How to use 'stop logic' to disable an automated invite](#)

STEP 3: When to send invitations AFTER conditions are met

Send immediately

Send on next Day at time 08:00 H:M

Send the invitation days hours minutes
after the automated survey invitation has been triggered [?](#)

Send at exact date/time: M/D/Y H:M

OPTIONAL: Enable reminders

Re-send invitation as a reminder if participant has not responded by a specified time? (Times below refer to AFTER original invitation time.)

Send every -- select day -- at time H:M

Send every 0 days 2 hours 0 minutes

Send at exact date/time: M/D/Y H:M

- AND -
Recurrence: Send only once

STEP 4: Activated?

Activate these automated invitations? In order for automated survey invitations to be sent using these specified conditions, it must be set to Active. You may make them Not Active (and vice versa) at any point in the future.

Active Not Active

Save Save & Copy to... Cancel

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).

Variable: email_address

Subject Email:

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

Variable Name (utilized in logic, calcs, and exports)

email_address Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#)

Validation? (optional) Email

Automated Survey Invitation (ASI) Basics

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

Enable Designate an email field for sending survey invitations [?](#)

Choose an email field to use for invitations to survey participants:

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
Designate an email field for sending survey invitations for this survey only [?](#)

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.