

# Using a Participant List

**NOTE:** This document assumes that surveys have already been created and enabled in REDCap.

Participant lists are used in conjunction with the distribution of surveys in REDCap. A participant list can be created that includes a list of email addresses, along with optional Participant Identifiers, and can be used to send out a customized email to anyone on the list. It also enables tracking of who has responded to a survey.

There are two ways to create a participant list in REDCap.

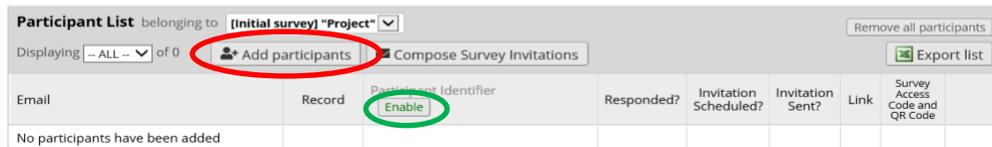
1. Use the **Add participants** button on the **Participant List** tab under **Survey Distribution Tools** on the left under **Data Collection**.



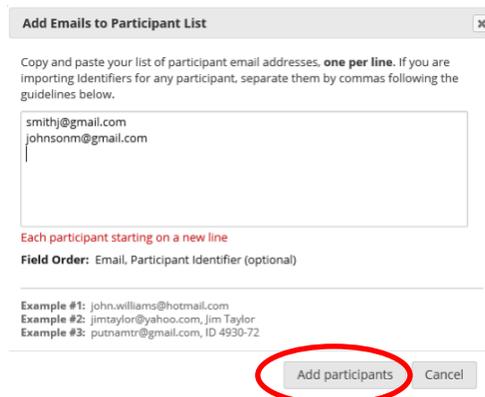
## Survey Distribution Tools

- Public Survey Link
- Participant List**
- Survey Invitation Log

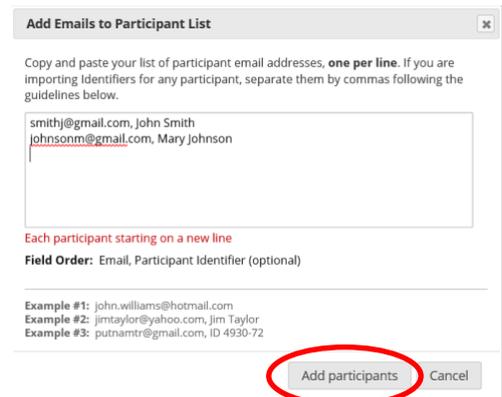
The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)



- a. In the **Add Emails to Participant List** window, add email addresses one to a line. If Participant Identifiers are used, first click on the **Enable** button then add the identifiers, such as a name, on the same line as the email address separated by a comma. Click on the **Add participants** button.



OR



# Using a Participant List

Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
johnsonm@gmail.com		Mary Johnson	<input type="radio"/>	-	<input type="checkbox"/>	<input type="checkbox"/>	
smithj@gmail.com		John Smith	<input type="radio"/>	-	<input type="checkbox"/>	<input type="checkbox"/>	

2. Enable the **Designate an email field for sending survey invitations** option under **Enable optional modules and customizations** on the **Project Setup** tab.

a. From the dropdown box, select an email field to use for the survey invitations.

Designate an email field for sending survey invitations

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

-- select a field --

Project

pi\_email "PI Email Address:"

You can capture email addresses for sending invitations to your survey participants by designating a field in

b. Enter the email address in the form where the designated email field resides

PI Email Address:

c. The email address will automatically be added the **Participant List**

Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
escobar@email.chop.edu	1		<input type="radio"/>	-	<input type="checkbox"/>	<input type="checkbox"/>	

Survey invitations can then be sent using the **Compose Survey Invitations** button on the **Participant List** or using the **+Automated Invitations** button for the survey to be sent on the **Data Collection Instruments** list.

Survey options:  Survey Queue  Survey Login  Survey Notifications  Upload or download Auto Invitations

Add new instrument:

- a new instrument from scratch
- a new instrument from the official REDCap Shared Library
- instrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Project	22		<input checked="" type="checkbox"/>	Choose action	<input type="checkbox"/> Survey settings <input type="button" value="+ Automated Invitations"/>

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## Considerations when choosing a method

- Using the Add Participants method, respondents will need to **complete the first survey in the project** before you can compose invitations for subsequent surveys. The Designated Email Field feature allows you to send **any survey in the project to any participant at any time**.
- The Add Participants method allows for **anonymity** if desired. The Designated Email Field will always link the email address to the survey response(s).
- If the **survey confirmation email** option is enabled, the email will automatically go to the Designated Email Field – this will not work with the Add Participants method. This is especially important for electronic consent confirmation emails.