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.

   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.
Using a Participant List

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](image)

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

   ![PI Email Address:](image)

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

   ![Participant List](image)

   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.
Using a Participant List

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.