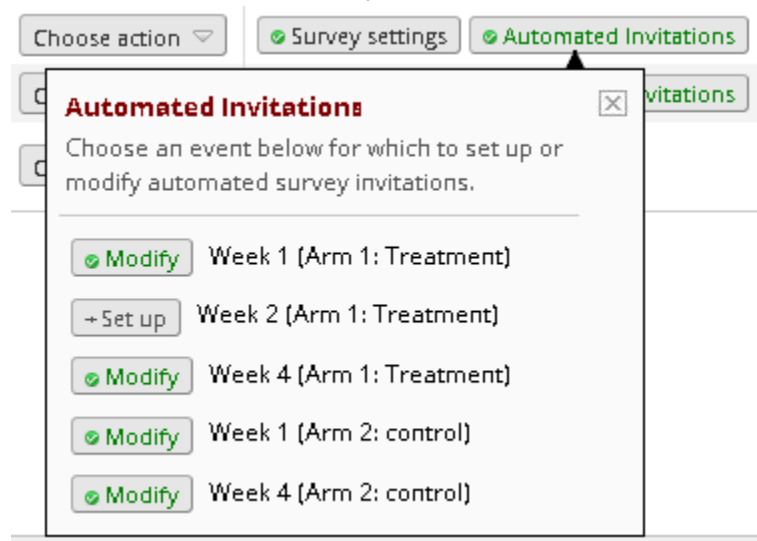


Instructions for Re-establishing Automated Invitations Following Lifespan's REDCap Upgrade

Step 1: Please note: You will be required to perform these steps for each instrument along with each event where Automated Invitations are utilized. Enter your project. Click Edit Instruments. If your project is in Production mode, click Project Setup tab, Online Designer to access your instruments.

Step 2: For instruments where Automated Invitations have been enabled, click on Automated Invitations. Next click Modify.



Step 3: Click in the box below the "Compose" tab. Your mouse cursor should be blinking in the box. (You may or may not have text in this box).

Define Conditions for Automated Survey Invitations

Instructions: In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. [Tell me more](#)

Info
Survey title: Participant Morale Questionnaire
Event: Week 4 (Arm 1: Treatment)

STEP 1: Compose message

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

To: **[All participants who meet the conditions defined]**

Subject:

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-ur] 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, <i> italic, <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:
 "Internal Check for MMM Testing" - Week 4 (Arm 1: Treatment)

AND

When the following logic becomes true:

 (e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][gender] = '1')

[How do I use special functions?](#)

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

Ensure logic is still true before sending invitation? ?

STEP 3: When to send invitations AFTER conditions are met

Send immediately

Send on next: -- select day -- at time: H:M

Send after lapse of time: days hours minutes

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 Day at time 07:00 H:M

Send every days hours minutes

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

- AND -

Step 4: Click anywhere on the screen

Define Conditions for Automated Survey Invitations

Instructions: In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. [Tell me more](#)

Info
Survey title: Participant Morale Questionnaire
Event: Week 4 (Arm 1: Treatment)

STEP 1: Compose message

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

To: **[All participants who meet the conditions defined]**

Subject:

Please take this 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:

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-ur] 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, <i> italic, <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:
 "Internal Check for MMM Testing" - Week 4 (Arm 1: Treatment)

AND

When the following logic becomes true:

 (e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][gender] = '1')

[How do I use special functions?](#)

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

Ensure logic is still true before sending invitation? ?

STEP 3: When to send invitations AFTER conditions are met

Send immediately

Send on next: -- select day -- at time: H:M

Send after lapse of time: days hours minutes

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.)

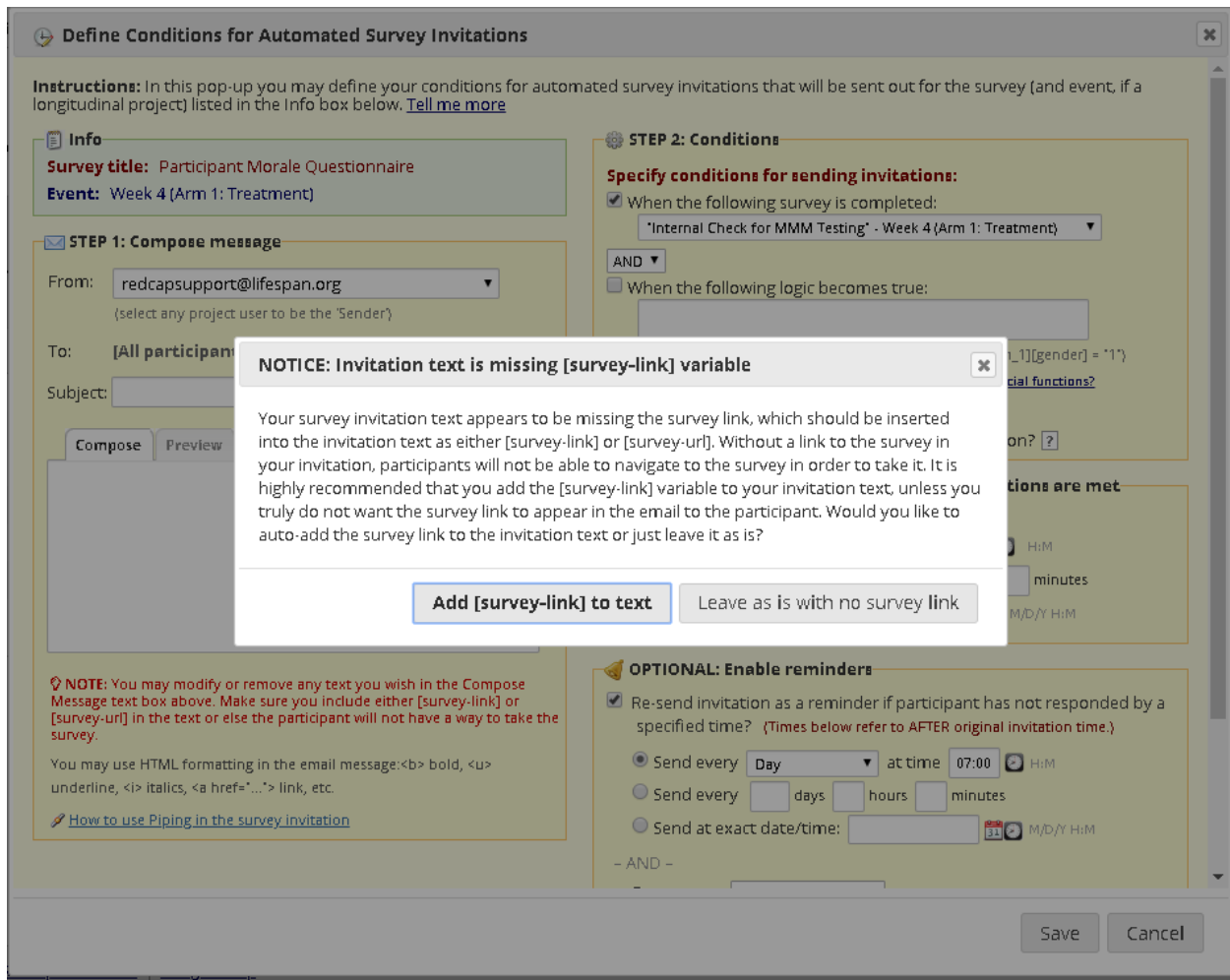
Send every Day at time 07:00 H:M

Send every days hours minutes

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

- AND -

outside of the “Compose” box. A pop-up box will appear stating “NOTICE: Invitation text is missing [survey-link] variable”. Click **Add [survey-link] to text** and then click Save in the bottom right-hand corner.



Step 5: Repeat process for all instruments and events where Automated Invitations are utilized.

Step 6: Optional Step: In the panel to the left under Data Collection, click Survey Distribution Tools -> Survey Invitation Log -> View Future invitations to ensure survey distribution is scheduled as expected. See screenshot below.






Survey Distribution Tools

[Public Survey Link](#)

[Participant List](#)

[Survey Invitation Log](#)

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. For each invitation it displays the participant email, participant identifier (if exists), survey name, and the date/time in which the invitation was (or will be) sent. You may even view the invitation email itself by clicking the icon in the 'View Email' column. Please note that all times below correspond to the time zone "America/New_York", in which the current time is 07/16/2019 1:29pm.

|  Survey Invitation Log (in ascending order by time sent) | | | | | | | | | |
|---|---|---|-------------------|--|---|--|-----------------------|--|--------------------------|
| Displaying <input type="text" value="1 - 2"/> of 2 | | View past invitations | | Begin time: <input type="text" value="07/16/2019 13:29"/> End time: <input type="text"/> (M/D/Y H:M) | | Display <input type="text" value="All invitation types"/> and <input type="text" value="All response statuses"/> | | Display <input type="text" value="All surveys"/> | |
| | | View future invitations | | Display <input type="text" value="All records"/> | | <input checked="" type="checkbox"/> Display invitation reminders? | | <input type="button" value="Apply filters"/> Reset | |
| | | | | | | <input type="button" value="Download log (as seen below)"/> | | <input checked="" type="button" value="Delete all selected"/> | |
| <input type="button" value="↓"/> Invitation send time | View Invite | Participant Email | Record | Participant Identifier | Survey | Survey Link | Responded? | Errors (if any) | <input type="checkbox"/> |
| 🕒 07/17/2019 7:00am ✎ ✖ 📧 (1) |  | example@gmail.com | 3 | | Demographics Week 0 (Arm 1: Treatment) |  | <input type="radio"/> | | <input type="checkbox"/> |
| 🕒 07/17/2019 7:00am ✎ ✖ 📧 (1) |  | example@gmail.com | 3 | | Participant Morale Questionnaire Week 1 (Arm 1: Treatment) |  | <input type="radio"/> | | <input type="checkbox"/> |