



Using a REDCap Email Field to Text Surveys

Information compiled by the Biostatistics Core Rhode Island Hospital, Lifespan

Currently, Lifespan's version of REDCap does not offer an easy solution for texting surveys to participants (in place of emailing surveys).

A workaround is possible under the following conditions...

- 1) A few additional data elements will need to be collected that will allow cell phone number to be converted to an email address.
- 2) In project Setup, Designate an email field to use for invitations to survey participants must be enabled.
- 3) Utilization of Compose survey invitation in patient record to send survey.

Please note, this process is **INDIVIDUALIZED, MANUAL** and is more susceptible to human error!

1) Step A:

- In your instrument, add a Text Box field to collect cell phone number.
- Validate field as MRN (10 digits) not as a phone.
- Add a field note advising users to not include the number 1 before their phone number.

Edit Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date/Time, ...)

Field Label [How to use Piping](#)
Cell Number

Action Tags / Field Annotation (optional)
[Learn about Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized during data export)
cell_number Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

Validation? (optional) MRN (10 digits)
– or –

Enable searching within a biomedical ontology ?
-- choose ontology to search --

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV)
Align the position of the field on the page

Field Note (optional) ex: 5551114444 don't include the
Small reminder text displayed underneath field

Save **Cancel**



1) Step B:

- Add a Multiple Choice field to collect cell phone carrier email extension.
- Several websites exist that may provide this information including...

<https://freecarrierlookup.com>

Edit Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Multiple Choice - Radio Buttons (Single Answer) ▼

Field Label [How to use Piping](#)

Cell Carrier

Verizon: [vtext.com](#)
AT&T: [mms.att.net](#)
Sprint: [messaging.sprintpcs.com](#)
T-Mobile: [tmomail.net](#)

Choices (one choice per line) [Copy existing choices](#)

0, vtext.com
1, mms.att.net
2, messaging.sprintpcs.com
3, tmomail.net

[How do I manually code the choices?](#)

Action Tags / Field Annotation (optional)

[Learn about Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized during data export)

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

ONLY letters, numbers, and underscores

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment Right / Vertical (RV) ▼
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

Save **Cancel**

1) Step C:

- Add a Text Box field to collect text email.
- Validate field as an email.
- Use piping to pipe data from Cell Number and Cell Carrier fields i.e. [cell_number]@[cell_carrier].
- User will need to copy and paste piped text email into empty field during data entry.

Edit Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [📺 Field Types video \(4 min\)](#).

Field Type: Text Box (Short Text, Number, Date/Time, ...) ▼

Field Label [🔗 How to use Piping](#)

Text Email
 [cell_number]@[cell_carrier]

Action Tags / Field Annotation (optional)

[📌 Learn about Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized during data export)
text_email Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

Validation? (optional) Email ▼
– or –

Enable searching within a biomedical ontology ?
-- choose ontology to search -- ▼

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

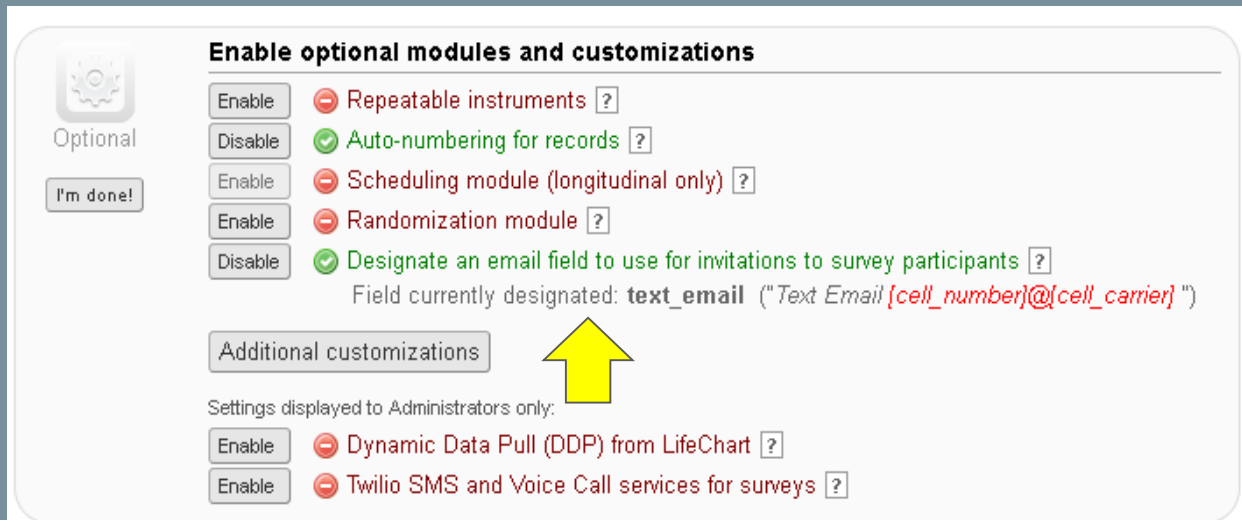
Custom Alignment Right / Vertical (RV) ▼
Align the position of the field on the page

Field Note (optional) ex: 5551114444@vtext.com
Small reminder text displayed underneath field

Save **Cancel**

2) Step A:

- In Project Setup tab, Enable **Designate an email field to use for invitations to survey participants.**
- Select your newly created text_email variable.



Enable optional modules and customizations

Optional

I'm done!

Enable	Repeatable instruments ?
Disable	Auto-numbering for records ?
Enable	Scheduling module (longitudinal only) ?
Enable	Randomization module ?
Disable	Designate an email field to use for invitations to survey participants ?

Field currently designated: **text_email** ("Text Email [cell_number]@[cell_carrier]")

Additional customizations

Settings displayed to Administrators only:

Enable	Dynamic Data Pull (DDP) from LifeChart ?
Enable	Twilio SMS and Voice Call services for surveys ?

3) Step A:

- In Record Status Dashboard, select patient, open the instrument containing your new variables and complete.

COPY

PLEASE NOTE:

- Will need to copy 777777777@vtext.com and paste into field.
- It is encouraged to have a field to collect real email address as well.

Email

+ Adding new Study ID 1

Study ID	1
Cell Number	<input type="text" value="777777777"/> <small>ex: 5551114444 don't include the 1</small>
Cell Carrier	<input checked="" type="radio"/> vtext.com <input type="radio"/> mms.att.net <input type="radio"/> messaging.sprintpcs.com <input type="radio"/> tmomail.net <small>reset</small>
https://freecarrierlookup.com/	
Text Email 777777777@vtext.com	<input type="text" value="777777777@vtext.com"/> <small>ex: 5551114444@vtext.com</small>
Actual Email Address	<input type="text" value="REDCap@lifespan.org"/>
Form Status	
Complete?	<input type="text" value="Complete"/>
Lock this record for this form? <small>If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it.</small>	<input type="checkbox"/> Lock

3) Step B:

- In Record Status Dashboard, select patient and the survey you would like to send via text.
- Under Survey options, select Open Survey.
- Survey will open in a new tab.

Demographics

Invitation status:

Editing existing Study ID 1

Study ID 1

Contact Information

First Name

Last Name

Street, City, State, ZIP

Phone number Include Area Code

Survey options

- Open survey
- Compose survey invitation
- Survey Access Code and QR Code

Expand

3) Step C:

- In opened survey, copy URL.
- Return to project (can close survey tab if you wish).

Basic Demography Form

https://redcap.lifespan.org/redcap/surveys/?s=a7nzokMotu

Copy URL

Basic Demography Form

Please complete the survey below.

Thank you!

Contact Information

1) **First Name**

2) **Last Name**

3) **Street, City, State, ZIP**

4) **Phone number**
Include Area Code

5) **Date of birth** Today Y-M-D

6) **Age (years)**

3) Step D:

- Return to patient record, revisit Survey options and now select Compose survey invitation.

Demographics

Invitation status:

Editing existing Study ID 1

Study ID 1

Contact Information

First Name

Last Name

Street, City, State, ZIP

Phone number Include Area Code

Expand

Survey options

- Open survey
- Compose survey invitation
- Survey Access Code and QR Code

3) Step E:

- Review content of Survey Invitation including selecting recipient "To:" (in Compose Message).
- In the Compose tab, paste the link you previously copied from the survey. You can add text beforehand such as "Please click HERE."

Send Survey Invitation to Participant "1"

Info
Survey title: Basic Demography Form

When should this email be sent?

Immediately

At specified time: M/D/Y H:M
The time must be for the time zone America/New_York, in which the current time is 03/13/2019 08:26.

Enable reminders

Re-send invitation as a reminder if participant has not responded by a specified time?

Compose message

From: REDCAPSUPPORT@Lifespan.org

To: 777777777@vtext.com (from Email field)
Or provide another email:

Subject:

Compose **Preview** [Send test email](#)

Please click HERE: <https://redcap.lifespan.org/redcap/surveys/?s=a7nzokMotu>

NOTE: The survey link will be automatically included in the email message.
You may use HTML formatting in the email message: bold, <u> underline, <i> italics, link, etc.

Send Invitation Cancel

3) Step F:

- In the Preview tab, you will see the text you added in the Compose tab.

PLEASE NOTE:

- Text in Preview tab cannot be edited.
- Due to character restrictions, the text below your custom text will be cut off.



Send Survey Invitation to Participant "1"

Info
Survey title: Basic Demography Form

When should this email be sent?

Immediately

At specified time: M/D/Y H:M
The time must be for the time zone America/New_York, in which the current time is 03/13/2019 08:26.

Enable reminders

Re-send invitation as a reminder if participant has not responded by a specified time?

Compose message

From: REDCAPSUPPORT@Lifespan.org

To: 777777777@vtext.com (from Email field)
Or provide another email:

Subject:

Compose **Preview** [Send test email](#)

Please click [HERE](https://redcap.lifespan.org/redcap/surveys/?s=a7nzokMotu): <https://redcap.lifespan.org/redcap/surveys/?s=a7nzokMotu>

You may open the survey in your web browser by clicking the link below:
[SURVEY TITLE](#)

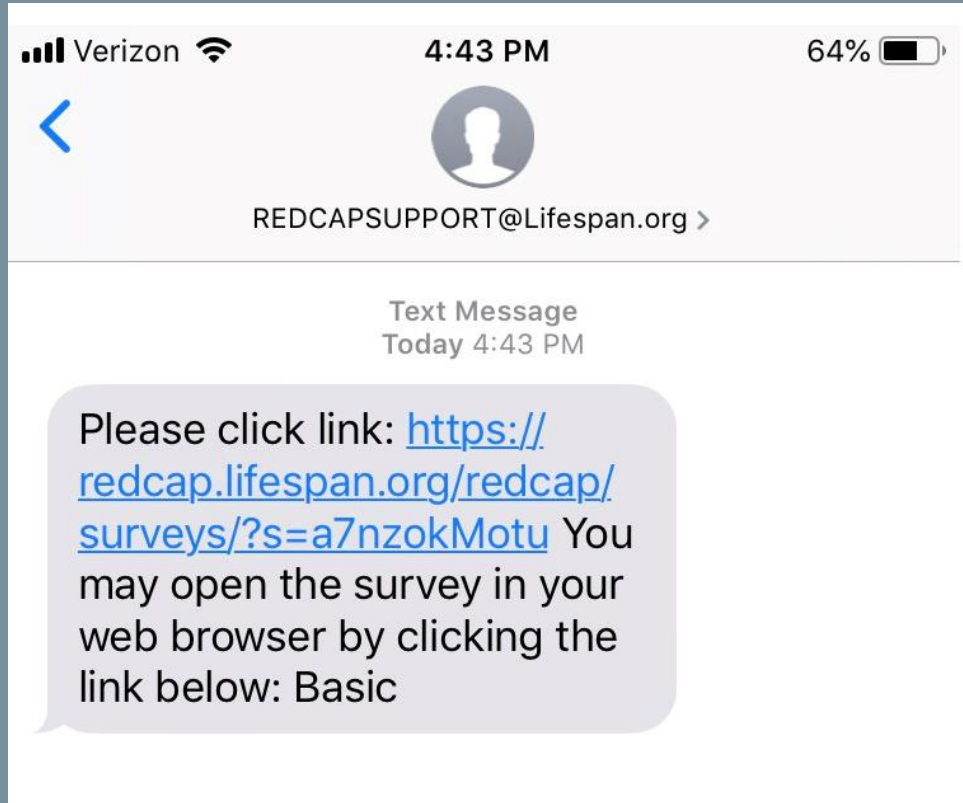
If the link above does not work, try copying the link below into your web browser:
[https://redcap.lifespan.org/redcap/surveys/?s=a7nzokMotu](#)

NOTE: The survey link will be automatically included in the email message.

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

3) Step G:

- Here's an example of the text the user will receive.
- Note: the text from the Compose tab was cut off.



Final Thoughts...

- This process is **INDIVIDUALIZED**, **MANUAL** and is more susceptible to human error!
- It is recommended to continue to collect patient's real email address (validated as email).
- It is important to understand that Steps 3B and 3C are crucial due to the character restrictions that cut off the survey link from appearing in the text if you were to begin from Step 3D (Compose survey invitation).
- Scheduled and sent survey invitations can be reviewed under Manage Survey Participants -> Survey Invitation Log.
- **TEST, TEST, TEST!!** Before implementing in practice, test using personal and colleague cell phone numbers!

