Add Participants En Masse

There are two primary methods to add multiple participants with unique identifiers: The Data Import Tool or the Participant list.

Data Import Tool

The Data Import Tool is a quick way to add multiple participants at once. It is possible to initially assign a Record ID and customized unique identifiers.

1. Navigate to the Data Import Tool and download the "Data Import Template (with records in rows)" CSV file.
2. The template contains field variables as column headers and is empty of data. In the example, the record id, email_var, and participant_id variables appear at the beginning because the template format is driven by survey field order.
3. Enter in participant emails, customized unique identifiers, and assign participants a record id in numerical order, starting with 1, or else REDCap will potentially throw an error.
4. Save the CSV file, choose the file, and upload. REDCap has upload options, but in this example, they were left at default.
5. REDCap will review the imported data and show any errors before the data is committed*. Click "Import Data" to commit the imported data.*
6. Navigate to the record dashboard and notice the new records that have been created, along with the secondary unique identifying value (if the option was turned on). Choose any record and notice the e-mail and participant ID was automatically populated. Navigate to the participant list and notice the participants that were added. Surveys are now ready to be sent.
7. Content addition: How to bulk add participants again after initial import.

Participant List

Adding Participants with customized unique identifiers to the Participant List is a more manually involved process. Unlike the Data Import Tool method, the Participant List requires a participant response to assign a Record ID. *Reminder: The Participant Identifier that is located on the Participant List should NOT be enabled.*

1. Navigate to "Survey Distribution Tools" and click on the "Participant List Tab."
2. Click "Add participants" and enter in an email list of participants, with each participant separated by a line. If the project has multiple surveys, the participant list won't populate for additional surveys until a participant submits a response.
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4. Notice how a Record ID for each participant was NOT instantiated. *When adding participants using the participants list, a Record ID is created ONLY when a participant submits a survey response*.
5. After a participant submits a response, navigate to their respective first survey record, and manually enter the pertaining e-mail and the customized unique identifier. *Only a user with the given permissions can complete this step.* The reason why a participant's e-mail is entered again is to supply the email field within a survey the participant email for piping purposes. Surveys are now ready to be sent.
6. Note: Additional participants can be added at any time.