

## REDCap Alerts & Notifications User Guide

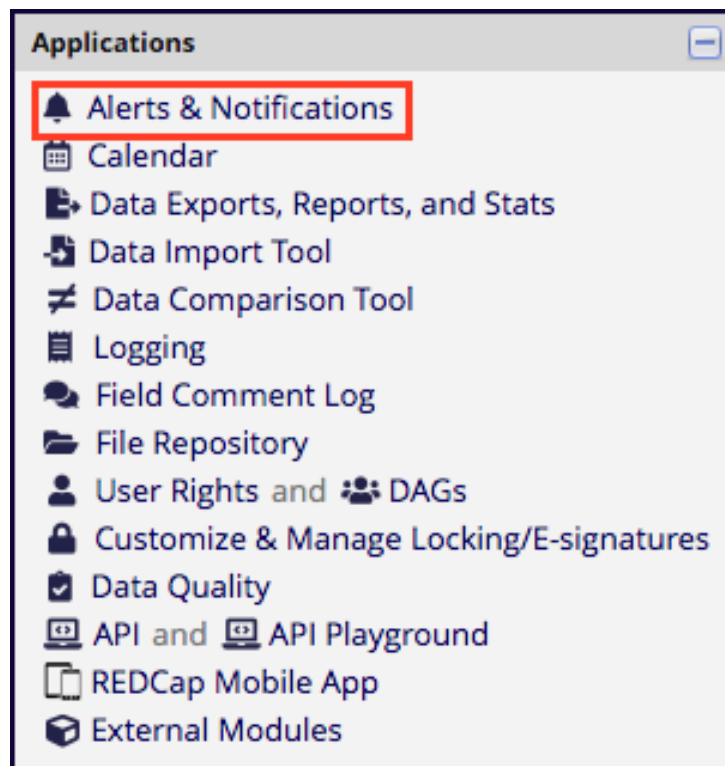
### Alerts & Notifications

The **Alerts & Notifications** feature allows you to construct alerts and send customized email notifications. These notifications may be sent to one or more recipients and can be triggered or scheduled when a form/survey is saved and/or based on conditional logic whenever data is saved or imported. When adding/editing an alert, you will need to 1) set how the alert gets triggered, 2) define when the notification should be sent (including how many times), and 3) specify the recipient, sender, message text, and other settings for the notification. For the message, you may utilize customized options such as rich text, the piping of field variables (including Smart Variables), and uploading multiple file attachments.

While similar in many respects to Automated Survey Invitations, Alerts & Notifications allow for greater complexity and have more capabilities. For example, alerts apply to both data entry forms and surveys, and they also allow for more options regarding who can be the recipient of a notification (project users, survey participants, etc.).

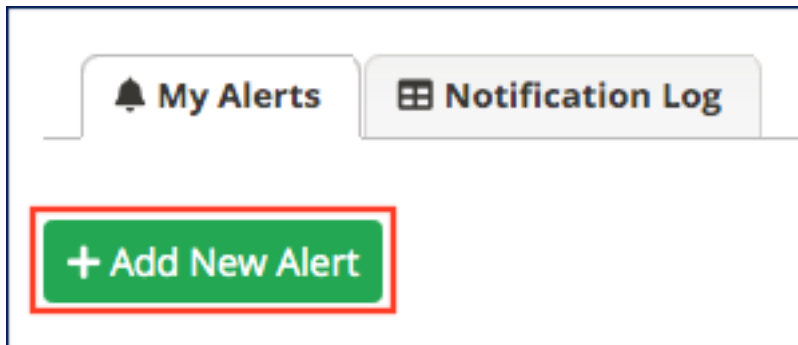
Testing the Alerts & Notifications for your project is **YOUR responsibility**. Please be sure to test thoroughly! The REDCap team simply cannot account for every scenario to which an application may be applied.

**Alerts & Notifications** link is located in the left-hand tool bar under Applications. This is where creation and management of the Alerts & Notifications are done.



## Creating a New Alert

To get started with creating alerts, click the 'Add New Alert' button to view all the settings that must be defined for a given alert.



There are 6 sections:

- Title of this alert
- Step 1: Triggering the Alert
- Step 2: Set the Alert Schedule
- Step 3: Message Settings
- Message Attachments
- Optional Automatic Alert Expiration

1. Enter the title of the alert:

### Create new alert ×

You may define the settings for your alert in Steps 1-3 below. After clicking the Save button at the bottom, your alert will immediately become active and may be triggered at any time thereafter. If you would like to remove or stop using an alert, it may be deactivated at any time. You may modify an existing alert at any time, even after some notifications have already been sent or scheduled.

**Title of this alert:**

- Specify the trigger for the alert. There are 3 options to trigger the alert:
  - When a record is saved on a specific form/survey
  - When a record is saved on a specific form/survey with conditional logic
  - Using conditional logic during import or data entry

**STEP 1: Triggering the Alert**

How will this alert be triggered?

When a record is saved on a specific form/survey\*  
 When a record is saved on a specific form/survey with conditional logic\*  
 Using conditional logic during a data import or data entry

Trigger the alert...

when  is saved with any form status (excludes data imports)

while the following logic is true:

[consent]='1'

(e.g., [age] > 30 and [sex] = "1") [How to use 'stop logic' to disable a scheduled alert](#)

✓ Valid

Ensure logic is still true before sending notification? ?

\* The alert will not be re-triggered if the form/survey is saved again, unless it is set to send "Every time" in Step 2 below.

- Set the Alert Schedule by defining when the alert/notification should be sent (including how many times).

**STEP 2: Set the Alert Schedule**

When to send the alert?

Send immediately  
 Send on next  at time  H:M  
 Send after lapse of time:  days  hours  minutes  
 Send at exact date/time:

Send it how many times?

Just once  
 Every time the form/survey in Step 1 is saved (excludes data imports)  
 Multiple times: Send every  days after initially being sent

- Specify the recipient, sender, message text, and other settings for the notification. For the message, you may utilize customized options such as rich text, the piping of field variables (including Smart Variables), and uploading multiple file attachments.

**STEP 3: Message Settings**

**Email From:**  \* must provide value

**Email To:**  \* must provide value  
+ [Show more options](#) Or manually enter emails:

**Subject:**  \* must provide value

**Message:**  \* must provide value

**Prevent piping of data for Identifier fields** ?

Paragraph **B** *I*

A **A**   *I*<sub>x</sub>

Record [participant\_id] has consented to study. Review consent here: [survey-url:prescreening\_survey]

After review please complete the Subject Consent Verification survey here: [survey-url:subject\_consent\_verification]

In the subject or message, you may use Piping and Smart Variables

Example: Hi [first\_name]! Please complete this survey: [survey-link:followup\_survey]

Add attachments

- Optional Automatic Alert Expiration: you can require that the alert will be auto-deactivated at a specified time.

**Optional**

**Alert expiration:**

This alert will be auto-deactivated at the specified date/time above. Note: This will cause any already-scheduled notifications not to be sent after the expiration time.

Save
Cancel

Click "Save" to save the settings of the alert.

Here is an example email alert:

In the Alert box there are options to edit the alert, copy the alert and deactivate the alert.

## Notification Log

To view the alert activity, click on the “Notification Log” tab or click on “view list” in the Activity box:

The screenshot shows the REDCap interface with the "Notification Log" tab selected. The "Add New Alert" button is highlighted in green. Below the alert configuration, the activity box shows "3 records were alerted" with a "view list" link circled in red. A pop-up box indicates "3 alerts sent for Alert #1" and provides a link to "View sent alerts in Notification Log".

**Notification Log**  
(in ascending order by time sent)

View past notifications → Begin time:  End time: 06/06/2019 10:48 (M/D/Y H:M)

View future notifications

Display: All alerts

Display: All records

Apply filters Reset

Displaying 1 - 2 of 2

Notification send time	Alert	View Notification	Record	Recipient	Subject
06/06/2019 10:33am	#1		<a href="#">10</a> - Initial Data (Arm 1: Arm 1)	jjohnston@ufl.edu	Study XYZ New Subject Consented
06/06/2019 10:34am	#1		<a href="#">11</a> - Initial Data (Arm 1: Arm 1)	jjohnston@ufl.edu	Study XYZ New Subject Consented

## Add Additional Alerts

The screenshot shows the REDCap interface with the "Add New Alert" button highlighted in green and a red arrow pointing to it. The "Notification Log" tab is also visible. The alert configuration and email preview are shown below.

## Longitudinal Project Alerts

When having a longitudinal project, the way we will access the data will be slightly different.

- You can choose the **Event** and/or **Arm** associated with the instrument/survey to trigger when the alert is sent:

*Example: [event\_1\_arm\_1][field]*

Title of this alert:

**STEP 1: Triggering the Alert**

How will this alert be triggered?

- When a record is saved on a specific form/survey\*
- When a record is saved on a specific form/survey with conditional logic\*
- Using conditional logic during a data import or data entry

Trigger the alert...

when  -- choose an instrument/survey --

while  [Any event]

"Prescreening Survey" [Any event]

"Participant Info Survey" [Any event]

"Subject Consent Verification" [Any event]

"Participant Morale Questionnaire" [Any event]

"Completion Data" [Any event]

Initial Data (Arm 1: Arm 1)

"Prescreening Survey" (Initial Data (Arm 1: Arm 1))

"Participant Info Survey" (Initial Data (Arm 1: Arm 1))

\* The alert will be triggered when the record is saved on the specified instrument/survey. End "Every time" in Step 2 below.

Week 1 (Arm 1: Arm 1)

"Participant Morale Questionnaire" (Week 1 (Arm 1: Arm 1))

Completion Data (Arm 1: Arm 1)

"Completion Data" (Completion Data (Arm 1: Arm 1))

Initial Data (Arm 2: Arm 2)

"Prescreening Survey" (Initial Data (Arm 2: Arm 2))

"Participant Info Survey" (Initial Data (Arm 2: Arm 2))

at time   H:M

days  hours  minutes

### STEP 1: Triggering the Alert

- How will this alert be triggered?
- When a record is saved on a specific form/survey\*
  - When a record is saved on a specific form/survey with conditional logic\*
  - Using conditional logic during a data import or data entry

Trigger the alert...

when "Prescreening Survey" (Initial Data (Arm 1: Arm) is saved with any form status (excludes data imports)

while the following logic is true:

[initial\_data\_arm\_1][consent]='1'

(e.g., [enrollment\_arm\_1][age] > 30 and [enrollment\_arm\_1][sex] = "1")

[How to use 'stop logic' to disable a scheduled alert](#)

✓ Valid

Ensure logic is still true before sending notification? [?](#)

\* The alert will not be re-triggered if the form/survey is saved again, unless it is set to send "Every time" in Step 2 below.

### STEP 3: Message Settings

Email From:

\* must provide value

j.johnston@ufl.edu

Email To:

\* must provide value

+ [Show more options](#)

x j.johnston@ufl.edu

Or manually enter emails: jane@example.com; john@mymail.org

Subject:

\* must provide value

XYZ Study Longitudinal New Subject Consent

Message:

\* must provide value

Prevent piping of data for Identifier fields [?](#)

Paragraph **B** *I* [Link](#) [List](#) [List](#) [List](#) [List](#) [Undo](#) [Redo](#) [Fullscreen](#)  
[List](#) [List](#) [List](#) [List](#) [Table](#) [Text](#) [Text](#) [Image](#) [Code](#) [Text](#)

Record [initial\_data\_arm\_1][participant\_id] has consented to study.  
 Please review here: [initial\_data\_arm\_1][survey-url:prescreening\_survey]

In the subject or message, you may use [Piping](#) and [Smart Variables](#)

Example: Hi [first\_name]! Please complete this survey: [survey-link:followup\_survey]

[Add attachments](#)



**Alert #2: Project XYZ Longitudinal New Subjec...** [Edit](#) [Options](#)

🔔 If the following logic is TRUE when the instrument "Prescreening Survey (Initial Data (Arm 1: Arm 1))" is saved and has any form status:  
`[initial_data_arm_1][consent]='1'`

➡ Send immediately  
 Send one time

**Activity:** 📧 1 record was alerted ([view list](#)) ✓ Last sent: 06/06/2019 11:08am

**Email** [Preview](#)

From: j.johnston@ufl.edu  
 To: j.johnston@ufl.edu  
 Subject: XYZ Study Longitudinal New Subject Consent  
 Message: Record [initial\_data\_arm\_1][participant\_id] h...

## Logging

In the left menu, on REDCap, there is the Logging option. This option allows the user to check information related to sent alerts.

**Applications**

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging**
- Field Comment Log
- File Repository
- User Rights and DAGs
- Record Locking Customization
- E-signature and Locking Mgmt
- Data Quality
- API and API Playground
- REDCap Mobile App
- External Modules
- UF REDCap Service Request

Time / Date	Username	Action	List of Data Changes OR Fields Exported
06/06/2019 12:25pm	[survey respondent]	Updated Response 15 (Initial Data - Arm 1: Arm 1)	participant_info_survey_complete = '2'
06/06/2019 12:25pm	[survey respondent]	Sent alert Record 15 (Initial Data - Arm 1: Arm 1)	Alert #2, From: 'j.johnston@ufl.edu', To: 'j.johnston@ufl.edu', Subject: 'XYZ Study Longitudinal New Subject Consent', Message: 'Record 15 has consented to study. Please review here: <a href="https://redcapstage.ctsi.ufl.edu/stage_b/surveys/?s=Ta3UpZXJ68">https://redcapstage.ctsi.ufl.edu/stage_b/surveys/?s=Ta3UpZXJ68</a> '
06/06/2019 12:25pm	[survey respondent]	Sent alert Record 15 (Initial Data - Arm 1: Arm 1)	Alert #1, From: 'j.johnston@ufl.edu', To: 'j.johnston@ufl.edu', Subject: 'Study XYZ New Subject Consented', Message: 'Record 15 has consented to study. Review consent here: <a href="https://redcapstage.ctsi.ufl.edu/stage_b/surveys/?s=Ta3UpZXJ68">https://redcapstage.ctsi.ufl.edu/stage_b/surveys/?s=Ta3UpZXJ68</a> After review please complete the Subject Consent Verification survey here: <a href="https://redcapstage.ctsi.ufl.edu/stage_b/surveys/?s=gCsLeKoSSx">https://redcapstage.ctsi.ufl.edu/stage_b/surveys/?s=gCsLeKoSSx</a> '