

REDCap Alerts & Notifications User Guide

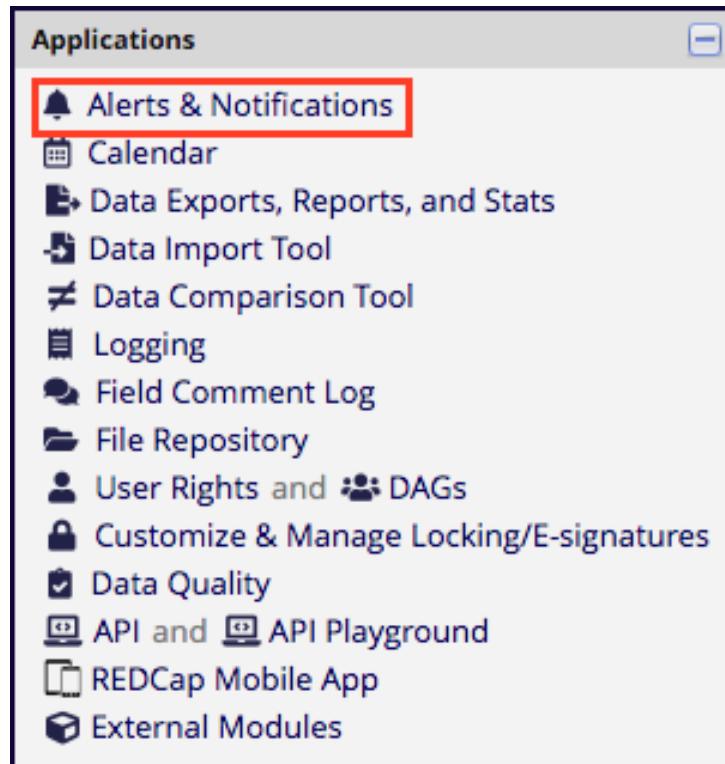
Alerts & Notifications

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.).

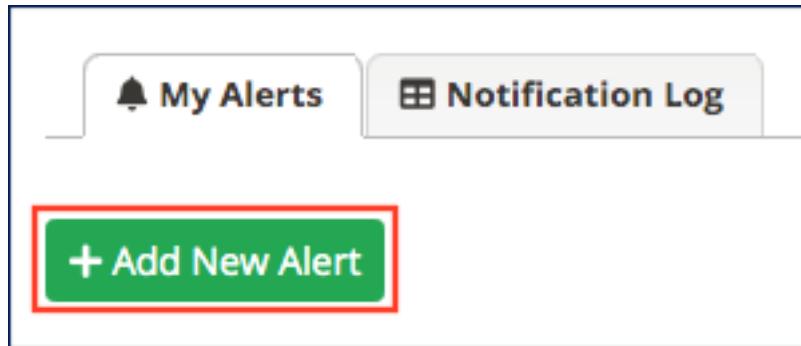
Testing the Alerts & Notifications for your project is **YOUR responsibility**. Please be sure to test thoroughly! The **REDCap** team simply cannot account for every scenario to which an application may be applied.

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

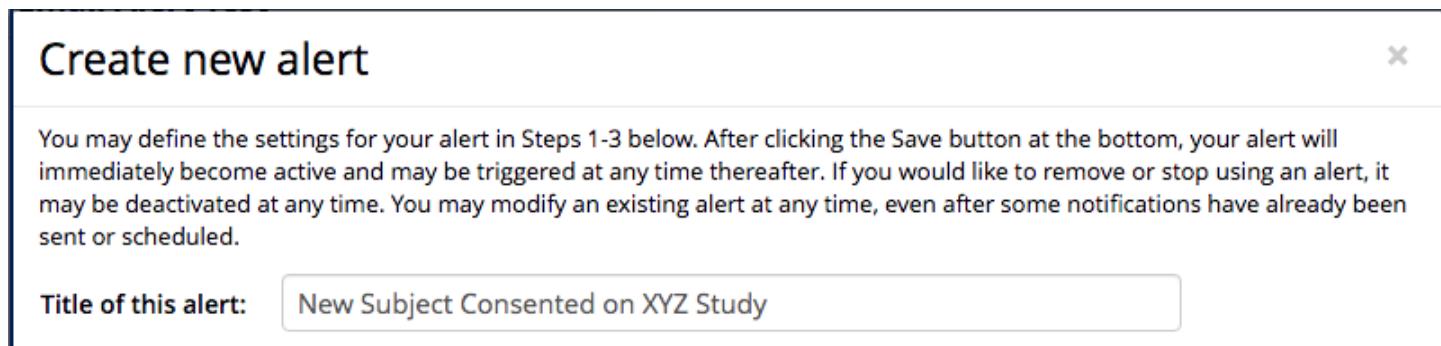
To get started with creating alerts, click the 'Add New Alert' button to view all the settings that must be defined for a given alert.



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:



The screenshot shows a modal dialog box titled "Create new alert". Inside, a paragraph of text explains that users can define alert settings in steps 1-3 and that the alert will become active immediately. Below this, there is a form field labeled "Title of this alert:" with the value "New Subject Consented on XYZ Study".

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: New Subject Consented on XYZ Study

2. 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 "Prescreening Survey" 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.

3. 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: MM/DD/YYYY HH:MM [31](#)

Send it how many times?

Just once

Every time the form/survey in Step 1 is saved (excludes data imports)

Multiple times: Send every 0 days after initially being sent



4. 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: Study XYZ New Subject Consented * must provide value

Message:

* must provide value

Prevent piping of data for Identifier fields ?

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

5. 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.

The screenshot shows the REDCap Alert configuration interface. At the top, there are tabs for "My Alerts" and "Notification Log". Below these are buttons for "+ Add New Alert", "Show deactivated alerts" (unchecked), and a search bar. The main area displays "Alert #1: Study XYZ New Subject Consent". This alert triggers if logic is TRUE every time the instrument "Prescreening Survey" is saved and has any form status: [consent]='1'. It has two options: "Send immediately" and "Repeated sending (when triggered)". To the right, a preview window shows an email message with the following details:

Email	Preview ▾
From:	j.johnston@ufl.edu
To:	j.johnston@ufl.edu
Subject:	Study XYZ New Subject Consented
Message:	Record [participant_id] has consented to st...

Here is an example email alert:

The email alert is titled "Study XYZ New Subject Consented". It is sent from j.johnston@ufl.edu on Thu 6/6/2019 10:34 AM. The recipient is Johnston,Jeryl A. The message content is:

To: Johnston,Jeryl A;

Record 11 has consented to study. Review consent here: https://redcapstage.ctsi.ufl.edu/stage_b/surveys/?s=UocMxNSfgR

After review please complete the Subject Consent Verification survey here: https://redcapstage.ctsi.ufl.edu/stage_b/surveys/?s=4wr8puHp9g

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

The screenshot shows the REDCap Alert configuration interface again. The "Edit" button is circled in red. A dropdown menu labeled "Options" is open, with "Copy alert" and "Deactivate alert" also circled in red. The rest of the interface is similar to the previous screenshot, showing the alert details and preview.

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 (highlighted with a red box). A modal window for "Alert #1: Study XYZ New Subject Consent" is open. The "Activity" section contains a link "View list" (circled in red), which is highlighted in the screenshot. To the right, a "Preview" window shows an email message with the following details:

Email

From: j.johnston@ufl.edu
To: j.johnston@ufl.edu
Subject: Study XYZ New Subject Consented
Message: Record [participant_id] has consented to st...

The screenshot shows the "Notification Log" table. The "View past notifications" button is highlighted with a red arrow. The table displays two records sent at different times, both triggered by Alert #1.

Notification send time	Alert	View Notification	Record	Recipient	Subject
06/06/2019 10:33am	#1		10 - Initial Data (Arm 1: Arm 1)	j.johnston@ufl.edu	Study XYZ New Subject Consented
06/06/2019 10:34am	#1		11 - Initial Data (Arm 1: Arm 1)	j.johnston@ufl.edu	Study XYZ New Subject Consented

Add Additional Alerts

The screenshot shows the REDCap interface with the "+ Add New Alert" button highlighted with a red box and an arrow pointing to it. The "Notification Log" tab is also highlighted with a red box.

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: Project XYZ Longitudinal New Subject Consent

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 --
 [Any event]

while "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))
 "Subject Consent Verification" (Initial Data (Arm 1: Arm 1))
 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))

My form status (excludes data imports)

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

End "Every time" in Step 2 below.

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 1)) 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

x j.johnston@ufl.edu

[+ Show more options](#)

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

Subject:

* must provide value

XYZ Study Longitudinal New Subject Consent

Message:

* must provide value

Paragraph [B](#) [I](#) [🔗](#) [≡](#) [A](#) [A](#) [H](#) [I_x](#)

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

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 Subject Consent

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

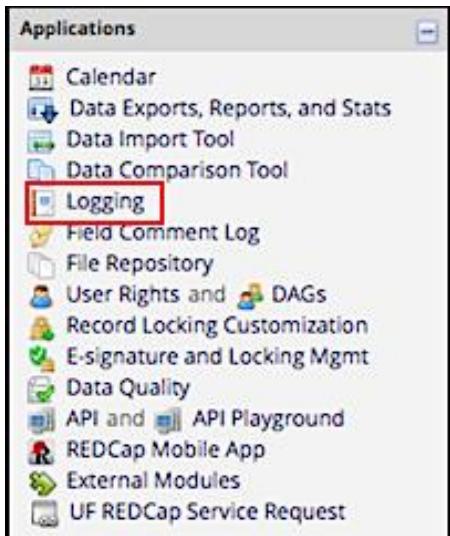
Activity: 1 record was alerted ([view list](#)) Last sent: 06/06/2019 11:08am

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.



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: https://redcapstage.ctsi.ufl.edu/stage_b/surveys/?s=Ta3UpZXJ68 '
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: https://redcapstage.ctsi.ufl.edu/stage_b/surveys/?s=Ta3UpZXJ68 ' After review please complete the Subject Consent Verification survey here: https://redcapstage.ctsi.ufl.edu/stage_b/surveys/?s=gCsLeKoSx '