Auto-Notification Plugin

CCTS Biostatistics Core

October 2023

The Auto-Notification plugin is a REDCap plugin that uses Data Entry Trigger (DET) functionality to send email notifications when records meet certain predefined conditions, allowing staff to quickly respond to time-sensitive data entry.

For example, the plugin can be used to notify project staff whenever a new participant is enrolled and randomized to a certain treatment group.

Set Up Auto-Notification

The plugin can be set up by any project user with access to Project Design and Setup.

Create a Bookmark

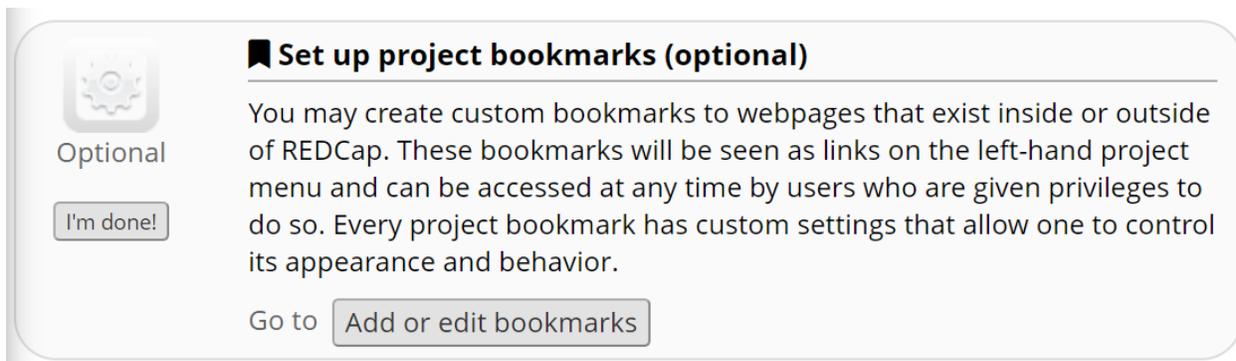Create a bookmark by selecting `Add or edit bookmarks` on the Project Setup tab.

Figure 1: Add or Edit Bookmarks

Add the Auto-Notification Bookmark to your project.

1. Give the bookmark a name and select users.
2. Enter the following URL in the `Link URL/Destination` box: https://www.redcap.ihrp.uic.edu/plugins/autonotify/index.php
3. Choose `Simple Link` as the link type.
4. Check `Append project ID to URL`.
5. Click `Add`.

Link #	Link Label	Link URL / Destination	Link Type	User Access	Opens new window	Append record info to URL	Append project ID to URL	Delete
Add	My Bookmark Enter the label for the link as it is seen on the left-hand menu	https://www.redcap.ihrp.uic.ed Enter the web address (URL) for the link (e.g., http://www.mysite.com/mypage.html)	Simple Link ▼	● All users ○ Selected users ○ Selected DAGs	☐	☐	☑	

Figure 2: Add the Auto-Notification Bookmark

Configure Notifications

Choose variables and values that will trigger a notification.

1. Open the Online Designer.
2. Click on name of the relevant instrument.
3. Click the edit button to view a question's variable name and response choices. Make note of the values that will be part of the DET.

Set up conditional logic and the email notification.

1. Open the new bookmark by clicking on its name under Project Bookmarks in the left menu.
2. Define conditional logic (e.g., [age] < 18) to specify when notifications will be sent.
3. Configure the notification email with from and to email addresses, the email subject, and the message.
4. Leave the Pre- and Post-AutoNotification DET Triggers section blank unless needed.
5. Click Save Configuration.

AutoNotify: a DET-based Notification Plugin

This configuration has not been saved

Trigger 1:   ✖

ⓘ **TITLE:**   Under 18

CONDITIONAL
ⓘ **LOGIC:**   [age] < 18

                                                                                                    Expand

ⓘ **EVALUATE:**   ○ Once per Record   ● Once per Record/Event

ⓘ **TEST LOGIC:**   Test logic using record_id: 4 ▾   [Test]   ✓ True

ⓘ **TRIGGER STATUS:** ● Enabled   ○ Disabled

⊕ Add another trigger

Configure Notification Email

This notification email will include a link to the record and will therefore include the value of the record_id field. For this reasons, this first field **SHOULD NOT INCLUDE PHI**. It is recommended to use an auto-numbering first field as best practice and include PHI as a secondary identifier.

ⓘ **To:**   test@uic.edu

ⓘ **FROM:**   test@uic.edu

ⓘ **SUBJECT:**   SECURE: Notification

ⓘ **MESSAGE:**

Figure 3: DET Configuration

The notification email will include a link to the record and will therefore include the value of the `study_id` field. For this reason, this first field should **NOT** include PHI such as medical record number.

As a best practice, you are advised to allow an auto-numbering first field and include PHI as a secondary identifier.

Test

Test thoroughly.

1. Under Data Collection, click Add/Edit Records. Add a test record that meets the criteria you specified in the conditional logic for the notification.
2. An email will be sent to the address specified during configuration.

Note that the DET is only applied to new records. Records entered before the creation of the DET will not trigger a notification email, even if the condition is met.