REDCap Auto-Notification DET (Data Entry Trigger) Plugin – How To Guide

1. Add the Auto-Notification Bookmark to your project.
   • From Project Setup tab, select **Add or edit bookmarks**
     
     ![Add or edit bookmarks button]

     **Set up project bookmarks (optional)**
     You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

     ![Bookmark set up](example-image)

     • Give the Bookmark a name under **Link Label** and paste the following URL into **Link URL/Destination** [https://redcap.musc.edu/plugins/autonotify](https://redcap.musc.edu/plugins/autonotify)
     • Make sure to check the box to **Append project ID to URL**

     ![Bookmark table](example-table)

     ![Add bookmark](example-add)

     • Click **Add** and you will see the Bookmark has been added to your project and is listed under **Project Bookmarks**.
2. Click on your new Bookmark (listed under **Project Bookmarks**) to open and configure your Auto-Notification triggers:

![AutoNotify interface]

Delete trigger
Define condition to evaluate on save
Test condition with existing record
Add another trigger condition. Multiple triggers share the same email settings, but have different titles and will be tracked independently
Click for help
Set who should be notified. You can include multiple emails (comma-separated)
You can execute other DETs before or after this by entering the urls here.

3. **IMPORTANT NOTE:** Once all DETs and email preferences have been configured on the Auto-Notification Bookmark screen, the URL listed under the Data Entry Trigger section of your project **MUST BE UPDATED** in order for the plugin to work.

4. Navigate to Project Setup > Additional Customizations > Data Entry Trigger
   - Update the URL listed under the Data Entry Trigger section to include `det/` just after autonotify/
   - For example, [https://redcap.musc.edu/plugins/autonotify/?a](https://redcap.musc.edu/plugins/autonotify/?a) should be updated to: [https://redcap.musc.edu/plugins/autonotify/det/?a](https://redcap.musc.edu/plugins/autonotify/det/?a)
   - The `/det` update listed above **MUST be completed** ANY TIME a change is made to the Auto-Notification plugin including adding/modifying triggers and/or modifying the email notification section.
5. Testing is YOUR responsibility
   Be sure to test thoroughly! This is a plug-in created by REDCap users and shared on
   the REDCap Consortium Wiki – making sure triggers work for your specific project
   is your responsibility.

6. You can utilize the Logging feature listed under Applications to confirm that an
   Auto-Notification was triggered (see below)

7. How many times will a trigger fire?
   The rules will match only one time per RECORD + EVENT + TRIGGER NAME.
   - Pretend you have a project with many instruments. You have two questions
     about suicidality that you want to monitor and they are on different
     instruments.

     If you create a single trigger like \([q10]=4\) OR \([q20]=3\). In this case, if EITHER
     of these criteria were met, the rule would fire and send an email. So, if on the
     first survey they marked ‘4’ for Q10, it would fire. But, if they came back later
     and took another survey and marked ‘3’ for q20 it WOULD NOT FIRE AGAIN,
     since that rule had already fired for this record. If you want to have
     separate emails for each question, you should define two different triggers.

     Now, imagine your project is longitudinal and the survey is given each week.
     The trigger will fire a NEW email for each event. So, if it already fired for
     baseline and the user comes back 1 month later and answers Q10=4 it will
     fire again.
   - The plugin uses the log entries to keep track of which rules/records/events
     have triggered an alert.

     - If you change the name of a rule and resave a positive record, it will fire a
       new alert.
8. Emails
   Below is a sample of what the email notification looks like

   ![Email Screenshot]

   a. Because the RECORD_ID is included in the email, you **SHOULD NOT USE THIS PLUG IN FOR PROJECTS WHERE THE RECORD_ID IS PHI!**

9. Provide Feedback – **THIS IS IMPORTANT**
   a. The Auto-Notification plugin is NOT part of the standard REDCap support package. Therefore REDCap upgrades *may* impact this functionality; there is potential for a REDCap upgrade to break the Auto-Notification configuration for project(s).
   b. Therefore we ask that you please send an email to redcap@musc.edu alerting us to the fact that you have an active research project and that is utilizing the Auto-Notification Plugin.