**MANAGE NOTIFICATIONS**

**Description:** Notifications are emails that are triggered by various actions in the system. Some are triggered manually by clicking a link (e.g. IRB Approval Notice), some are triggered when you perform a specific action (e.g. Document an Informed Consent), and others are triggered by a scheduled batch process that periodically checks for new information to send (e.g. Invoicing Notification).

Notifications are enabled or disabled by default. At the University of Florida, most notifications are disabled but these settings can be overridden at the protocol level. Notifications can be customized for each protocol to determine which notifications are sent and to whom (staff role or staff email) they are sent.

**CUSTOMIZE A NOTIFICATION**

1. Navigate to **Menu > Protocols > PC Console**.
2. **Find your study** using the **Select Protocol** search field.
3. Using the vertical menu bar, navigate to **Notifications**.

Manual notifications are listed at the top of the page, followed by a list of automatic notifications. The **Category** column indicates whether the notification relates to the Protocol, Subject, or Financials.

<table>
<thead>
<tr>
<th>Protocol</th>
<th>Notification</th>
<th>Default</th>
<th>Custom</th>
<th>Disable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protocol</td>
<td>IRB Approval Notice</td>
<td>✔</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Protocol</td>
<td>Protocol Activation Notice</td>
<td>✔</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Protocol</td>
<td>Protocol Closure Notice</td>
<td>✔</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Protocol</td>
<td>Protocol Termination Notice</td>
<td>✔</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Subject</td>
<td>Subject Registration Notice</td>
<td>✔</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Financial</td>
<td>Subject Visit Billing Slip</td>
<td>✔</td>
<td></td>
<td>✔</td>
</tr>
</tbody>
</table>

To the right of each notification are three radio buttons:

- **Default**: uses the notification settings from the protocol’s library
- **Disable**: prevents the notification from being sent for the protocol
- **Custom**: overrides the library settings with protocol-specific settings

4. Click **Custom** for the **Notification** you wish to customize.
5. The words “**Not Configured**” appear in red to the right of the radio buttons to let you know that the custom override settings have not yet been configured.
6. Click the Notification hyperlink and then click [Update].

7. The upper portion of the page is used to define the notification recipients. Recipients may be identified by email addresses or protocol staff role.

8. Use the Reply To, To, and Cc fields at the top to enter specific email addresses you want the notification to go to.
   - The Reply To field is required.
   - Multiple email addresses can be added to the To and Cc fields, but they must be separated by semicolons.
   - Select the CC Sending User to include the email address of the user whose action in the system triggered the notification.

   **IMPORTANT:** For subject-related notifications, a non-UFL.EDU email cannot be used because the notifications may contain patient health information.

9. The Additional Recipients section is used to send the notification to protocol staff based on their assigned role. For each additional recipient role, click [Add] and choose the following from the dropdowns:
   - **Role Scope:** Protocol
   - **Staff Role:** <select the role that you want added>
   - **Recipient Type:** <select either To or Cc for this role>

10. Click Save. Repeat steps 8-9 until all desired additional staff roles are added.

   **IMPORTANT:** When adding additional recipients, Role Scope must be set to Protocol in order to limit the notification to staff members assigned to the selected protocol. When the Role Scope is “All”, the notification will be sent to all staff with the selected Staff Role on any protocol.
11. Enter the **Subject** of the notification email. For most notifications, the protocol number will automatically be included in the subject line.

12. Enter the body **Text** of the notification email. For many notifications, there is predefined text automatically included in the body of the email (e.g. protocol number).

13. Ensure that the **Enabled?** checkbox is selected.

14. Select the **Include Participating Affiliates** checkbox if you want affiliate institutions with an email address specified in their organization record to be sent the notification.

15. Click **[Submit]**, then click **[Close]**.

16. Click **[Preview]** to see the standard text and OnCore fields that will be included in this notification.

A standard email Subject Line and Message Text will be generated by OnCore; anything entered here will be appended to the default text.