

**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.

Protocol Notification Configuration					
Category	Notification	Default	Custom	Disable	
Protocol	<a href="#">IRB Approval Notice</a>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Protocol	<a href="#">Protocol Activation Notice</a>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Protocol	<a href="#">Protocol Closure Notice</a>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Protocol	<a href="#">Protocol Termination Notice</a>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Subject	<a href="#">Subject Registration Notice</a>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Financial	<a href="#">Subject Visit Billing Slip</a>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

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

Category	Notification	Default	Custom	Disable	
Protocol	<a href="#">IRB Approval Notice</a>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

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.


Protocol Notification Configuration					
Category	Notification	Default	Custom	Disable	
Protocol	<a href="#">IRB Approval Notice</a>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Not Configured

- Click the **Notification** hyperlink and then click **[Update]**.
- The upper portion of the page is used to define the notification recipients. Recipients may be identified by email addresses or protocol staff role.


**Hard-coded email addresses can be entered as recipients if needed**

**Notifications should be configured to send to certain staff roles, for easier ongoing maintenance of your OnCore environment**

- 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.

- 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>
- 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).

★ PC Console

Protocol No.: CAR0775      Library: Cardiology      PI: Allen, Heather, C      Sponsor: American Association of Neurological Surgeons

Protocol Target Accrual: 27      Accrual To Date: 12      Protocol Status: OPEN TO ACCRUAL

Research Center Total Accrual Goal (Upper): 55      IRB Expiration: 06/02/2017

Select Protocol [Type here to search]

Protocol Status [CLOSED TO ACCRUAL] Notice Custom

Reply To [Not Configured]

To oncore\_support@researchcenter.org

Cc

Additional Recipients Add

Role Scope	Staff Role	Recipient Type	
Protocol	Principal Investigator	To	Remove
Protocol	Regulatory Coordinator	Cc	Remove

Subject

Text

This study is closed to accrual. No additional subject screenings should be performed. Please contact the Clinical Research Central Office at (707) 555-1212 with any questions.

Enabled?

Include Participating Affiliates

Submit Clear Close

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.