

## Frequently Asked Question (FAQ) Library

### *How do I prevent identifiers from being included in outgoing emails?*

Protected Email Mode prevents identifying data (*Protected Health Information (PHI)* or *Personally Identifiable Information (PII)*) from being included in outgoing emails. Instead, recipients receive a private link to a REDCap webpage which allows them to view the email's content securely inside REDCap.

Designers have the option to enable this feature in either:

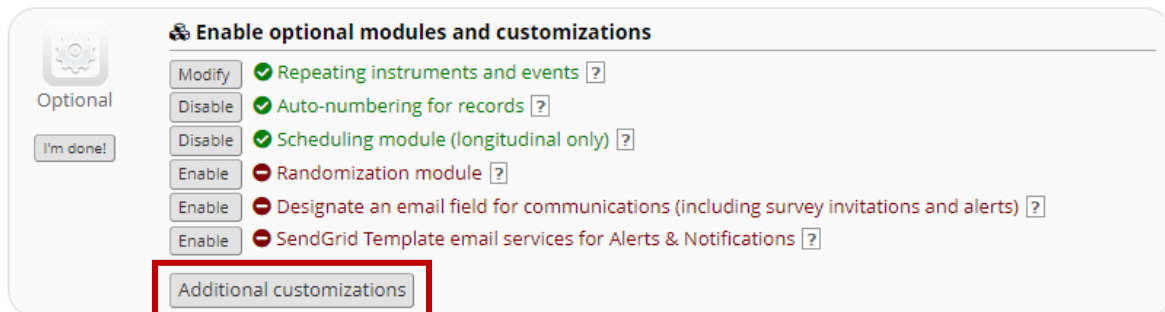
- a. All alerts, survey invitations, and survey confirmation emails or
- b. Only those whose email body is attempting to pipe data from identifier fields.

Once enabled, the email will be sent with a private link to a REDCap webpage to allow the recipient to view the contents of the email securely within REDCap.

To learn more about sending survey links and email through REDCap, refer to [FAQ: AUTOMATIC SURVEY INVITATION](#), [FAQ: ADMINISTER eCONSENT AND](#) [FAQ: ALERTS & NOTIFICATION](#).

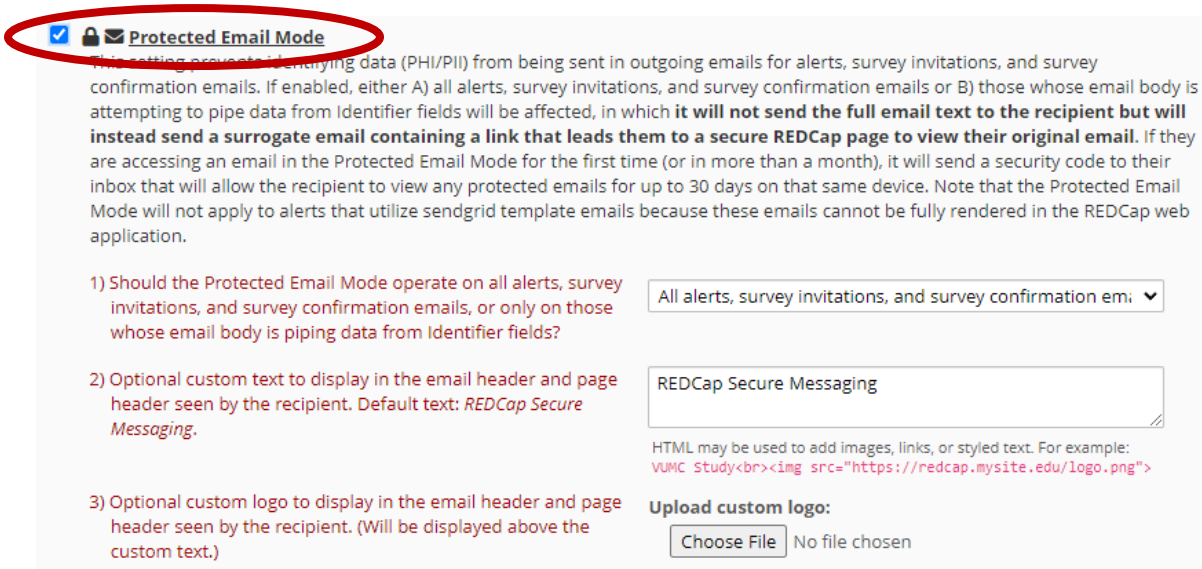
#### **To enable protected email mode:**

1. In the Design mode, navigate to '**Project Setup**' menu. Under *Enable optional modules and customizations*, select '**Additional Customizations**'.



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2. Scroll down to 'Protected Email Mode' and check the box to enable the function.



**Protected Email Mode**

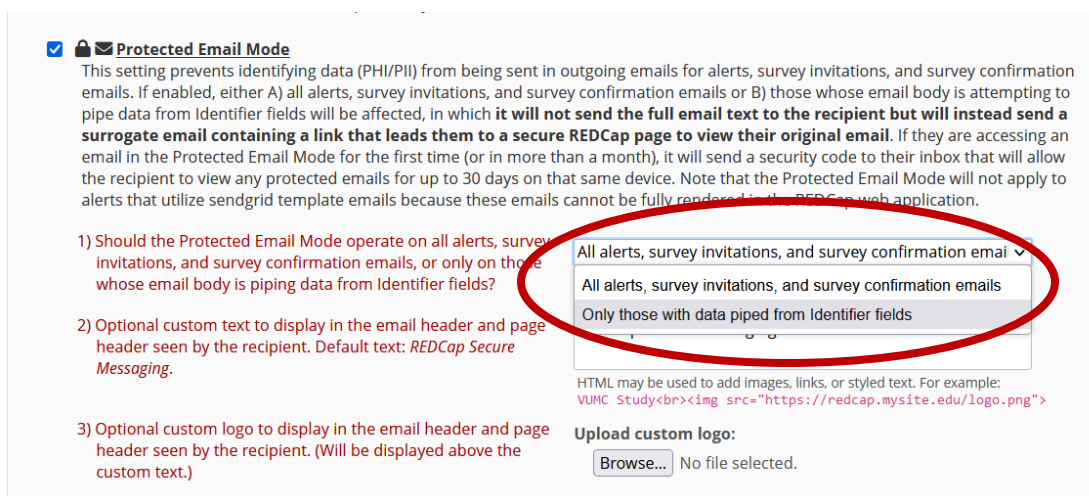
This setting prevents identifying data (PHI/PII) from being sent in outgoing emails for alerts, survey invitations, and survey confirmation emails. If enabled, either A) all alerts, survey invitations, and survey confirmation emails or B) those whose email body is attempting to pipe data from Identifier fields will be affected, in which **it will not send the full email text to the recipient but will instead send a surrogate email containing a link that leads them to a secure REDCap page to view their original email**. If they are accessing an email in the Protected Email Mode for the first time (or in more than a month), it will send a security code to their inbox that will allow the recipient to view any protected emails for up to 30 days on that same device. Note that the Protected Email Mode will not apply to alerts that utilize sendgrid template emails because these emails cannot be fully rendered in the REDCap web application.

1) Should the Protected Email Mode operate on all alerts, survey invitations, and survey confirmation emails, or only on those whose email body is piping data from Identifier fields?

2) Optional custom text to display in the email header and page header seen by the recipient. Default text: *REDCap Secure Messaging*.

3) Optional custom logo to display in the email header and page header seen by the recipient. (Will be displayed above the custom text.)  No file chosen

3. Choose whether to enable protection on all alerts, survey invitations, and survey confirmation emails OR only those with data piped from identifier fields.



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4. You may also add custom text and logo to the email header. Once completed, save your selections.

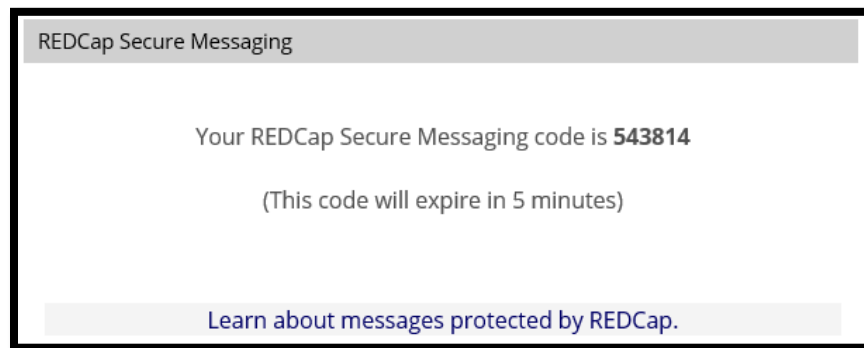
 **REDCap** @ Yale   
Research Electronic Data Capture

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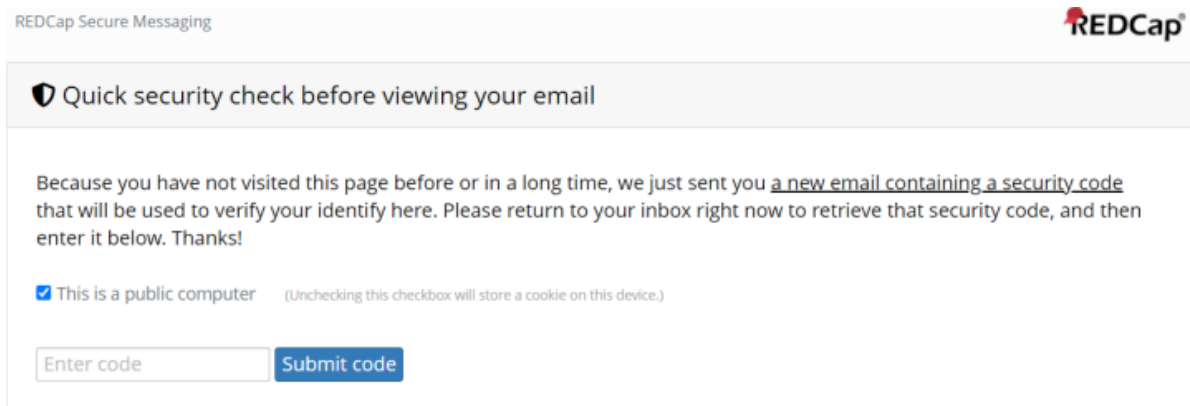
5. Once enabled, email messages will result in two email communications to the intended recipient:
- Email communication #1** contains a link to a secure REDCap webpage.



- Email communication #2** includes the security code.



- When the recipient clicks on '**Read the message**' from email communication #1, they will be directed to a REDCap website which will require that they enter their security code from email communication #2.



The screenshot shows the REDCap Secure Messaging verification page. The header reads "REDCap Secure Messaging" and the REDCap logo is in the top right corner. Below the header is a section titled "Quick security check before viewing your email". The main text reads: "Because you have not visited this page before or in a long time, we just sent you [a new email containing a security code](#) that will be used to verify your identify here. Please return to your inbox right now to retrieve that security code, and then enter it below. Thanks!". Below this text is a checkbox labeled "This is a public computer" with the text "(Unchecking this checkbox will store a cookie on this device.)" next to it. At the bottom of the form, there is an input field labeled "Enter code" and a blue button labeled "Submit code".