

LPQI Network Initiative
Phase 2, 2017: Quick E-Mail Template Manager

Written by:

Oksana Klimova, AUCD
Director, Web Services

Ben Kaufman, AUCD
Sr. Program Manager,
MCH Technical Assistance

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1. New Module: Quick E-Mail Template Manager

The newly developed module, Quick E-Mail Template Manager, addresses the network’s request to be able to customize the e-mail application templates and match those to each program to be consistent across communications.

Reminder: Templates are located on the “Activities” pages under both the Trainees and Faculty headings on the left sidebar. They are part of the ‘Quick E-Mail’ tool (see screenshots below). **Note:** Programs are now able to include people who are not in the recipient list by using the ‘cc’ function.

The screenshot shows the LPQadmin interface. The left sidebar contains navigation options: Dashboard, Reports, Data Archive, Trainees, Annual Enrollment, Activities, Faculty, Scheduler, and Email Template Manager. The main content area is titled 'Trainee Activities' and displays a table of trainees under the heading 'SELF-REPORT SUBMISSION STATUS | TOTAL TRAINEES: 6'. The table has columns for Annual Trainee ID, Name, Email, Trainee Category (time in program), T1 (completed), T3 (active), and Quick Email Recipients. Below the table is a pagination control showing 'Showing 1 to 6 of 6 entries'. To the right of the table is a 'Quick Email' form with fields for TO: Trainee Recipient(s), CC: (you may include supervisors or others. Multiple email addresses should be separated by commas), Subject Line, and Content. A 'Save' button is located below the table. A blue box highlights the 'or Select Template' dropdown menu in the Quick Email form, which currently shows '--- Select ---'. Below the form are buttons for 'Preview', 'Email', and 'Reset'.

Annual Trainee ID	Name	Email	Trainee Category (time in program)	T1 completed	T3 active	Quick Email Recipients
69179	DoeBlum, JoeNate	blum@email.chop.edu	One-Year	✓	--	<input type="checkbox"/>
77349	AaronsonBrosco, BenjaminJeff	jbrosc@med.miami.edu	One- ▾	✗	--	<input type="checkbox"/>
85098	Lystad, Lendra	kendra.lystad@hsc.utah.edu	One- ▾	✗	--	<input type="checkbox"/>
80907	TolstoiMacias, MariaMichelle	maciasm@musc.edu	One- ▾	✗	--	<input type="checkbox"/>
2110	Bogus, Johnny	oksana.klimova@gmail.com	One-Year	✓	--	<input type="checkbox"/>
80941	Miller, Mary	tyler.reimschisel@vanderbilt.edu	One- ▾	✗	--	<input type="checkbox"/>

Faculty Activities
Home / Faculty Activities

OBSERVATION SUBMISSION STATUS | TOTAL FACULTY: 4

View 15 per page

Faculty Name	Manage Trainees	Trainee #ID	Trainee Name	Email	T2 completed	T3 active	Quick Email Recipients
Blum, Nate	[assign trainee(s)]	2110	Bogus, Johnny	blum@email.c hop.edu	✘	--	<input type="checkbox"/>
	[remove]	69179	DoeBlum, JoeNate	blum@email.c hop.edu	✘	--	<input type="checkbox"/>
Brosco, Jeff	[assign trainee(s)]	80941	Miller, Mary	jbrosco@med. miami.edu	✘	--	<input type="checkbox"/>
	[remove]	80941	Miller, Mary	tyler.reimschis el@vanderbilt. edu	✘	--	<input type="checkbox"/>
Holt, Judith	[assign trainee(s)]	85098	Lystad, Lendra	judith.holt@us u.edu	✘	--	<input type="checkbox"/>
	[remove]	85098	Lystad, Lendra	kendra.lystad @hsc.utah.edu	✘	--	<input type="checkbox"/>
Dong, Michaelle	[assign trainee(s)]			oklimova@auc d.org			<input type="checkbox"/>

Quick Email

This tool is very useful if you want to send some short mails or reminders quickly.

TO: Faculty Recipient(s)

CC: (you may include supervisors or others. Multiple email addresses should be separated by commas.)

CC Email address

Subject Line

Content

or Select Template

--- Select ---

The Quick E-Mail Template Manager is available for Program Directors and Administrators only. It's the last option in the left-hand side navigational menu (see screenshot below).

← → ↻ | aucd.org/nirs/db/LPQI/AdminEmailTemplateManager.cfm?CFID=55817705&CFTOKEN=43326511

☆ Suggested Sites ☆ Web Slice Gallery

LPQIadmin ---AAA-Test Center, UCEDD/LEND, FY 2017 (July 1, 2016-June 30, 2017)

Quick Email Template Manager
Home / Quick Email Template Manager

Emails to Trainees

- Trainees Invitation to Submit Data for T1 Data Point
- Trainees Invitation to Submit Data for T3 Data Point
- Trainees Reminder to Submit Data for T1 Data Point
- Trainees Reminder to Submit Data for T3 Data Point

Emails to Faculty

- Faculty Invitation to Submit Observation for T2 Data Point
- Faculty Invitation to Submit Observation for T3 Data Point
- Faculty Reminder to Submit Observation for T2 Data Point
- Faculty Reminder to Submit Observation for T3 Data Point

There are two groups of templates: (1) for Trainees, and (2) for Faculty. Each group contains four templates: two invitations and two reminders. Each template has the same set of fields that can be customized:

Subject (subject line of email template)

From (e-mail "from address")

E-mail body text (content of email template)

- Introduction
- Footer
- Signature

2. E-Mail Template Manager: Two Parts

Each template will have two parts:

- Modify Quick E-Mail Template
- View Delivery Report

Both options can be accessed by clicking on the arrow on the left, next to the template header (see screenshot below):

LPQIadmin ---AAA-Test Center, UCEDD/LEND, FY 2017 (July 1, 2016-June 30, 2017)

Dashboard

Reports

Data Archive

Trainees

Faculty

Scheduler

Email Template Manager

Quick Email Template Manager

Home / Quick Email Template Manager

Emails to Trainees

⌵	Trainees Invitation to Submit Data for T1 Data Point
	MODIFY Quick Email Template
	VIEW Delivery Report
⌵	Trainees Invitation to Submit Data for T3 Data Point
⌵	Trainees Reminder to Submit Data for T1 Data Point
⌵	Trainees Reminder to Submit Data for T3 Data Point

3. E-Mail Template Manager: Modify E-Mail Template

The screenshot shows the 'Quick Email Template Manager' interface. The breadcrumb trail is 'Home / Quick Email Template Manager / Modify Email Template'. The page title is 'MODIFY EMAIL TEMPLATE'. The form fields are as follows:

- Subject:** Invitation to complete Pre-Training LEND Core Competency Self-Report
- From:** Douglas Blocker
Value from field FROM will be added to LPQI@aucd.org email address in the recipient's inbox. Example: If you enter 'John Smith', the 'From' address will be similar to: On Behalf of John Smith <LPQI@aucd.org>
- Body Text:** Hello [FirstName],
- Introduction:** Each year we seek to improve our training program by tracking how much our trainees report learning about core concepts such as family centered care and interdisciplinary teams. As part of this quality improvement process, we are asking you to complete a "Pre-Training LEND Core Competency Assessment." This process should take less than five minutes.
[personalized link to trainee portal]
- Footer:** Your responses are completely confidential. The data will be de-identified, aggregated and only used for program-level evaluation. Please note that we will also ask you to complete these same measures one more time at the end of your training year.
- Signature:** Thank you, [DirectorOfProgram] [CenterName]

At the bottom, there are two buttons: 'SAVE CHANGES' and '* ROLL BACK TO DEFAULT TEMPLATE'.

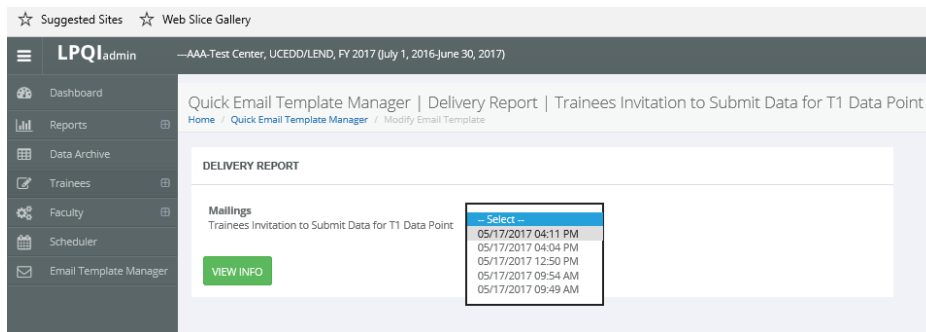
Custom changes can be canceled by clicking the “Roll Back to Default Template” button. Doing so will restore default, generic text and **all customized changes will not be saved.** i

Trainee and Faculty templates contain two fields that are dynamically generated (i.e. by the system) for each e-mail recipient and those cannot be customized:

- Personalized greeting (“Hello, [trainee or faculty name]”)
- Personalized link to trainee portal (for trainees)

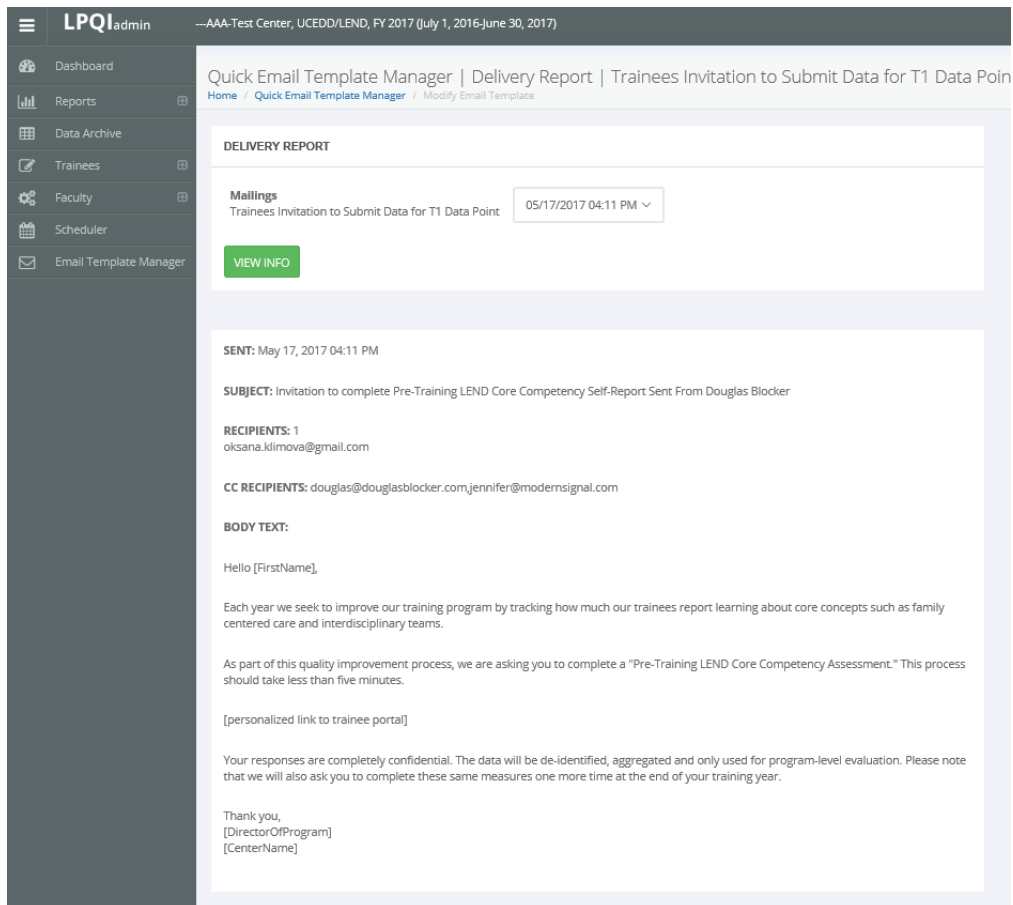
4. E-Mail Template Manager: Delivery Report

Clicking “View Delivery Report” for each template will bring you to the Delivery Report landing page; there, you can select a specific e-mail to review delivery statistics for it.



The screenshot shows the LPQIadmin interface. The left sidebar contains navigation options: Dashboard, Reports, Data Archive, Trainees, Faculty, Scheduler, and Email Template Manager. The main content area is titled "DELIVERY REPORT" and shows a "Mallings" section for "Trainees Invitation to Submit Data for T1 Data Point". A dropdown menu is open, displaying a list of dates and times: "-- Select --", "05/17/2017 04:11 PM", "05/17/2017 04:04 PM", "05/17/2017 12:50 PM", "05/17/2017 09:54 AM", and "05/17/2017 09:49 AM". A green "VIEW INFO" button is located below the list.

By clicking the “View Info” button, you will expand screen to access the delivery data. Note: Dynamically generated fields will be displayed in square brackets.



The screenshot shows the LPQIadmin interface with the "DELIVERY REPORT" page expanded. The "Mallings" section now displays a dropdown menu with the selected date and time: "05/17/2017 04:11 PM". Below this, the "VIEW INFO" button has been clicked, and the email details are displayed. The details include:

- SENT:** May 17, 2017 04:11 PM
- SUBJECT:** Invitation to complete Pre-Training LEND Core Competency Self-Report Sent From Douglas Blocker
- RECIPIENTS:** 1
oksana.klimova@gmail.com
- CC RECIPIENTS:** douglas@douglasblocker.com,jennifer@modernsignal.com
- BODY TEXT:**
 - Hello [FirstName],
 - Each year we seek to improve our training program by tracking how much our trainees report learning about core concepts such as family centered care and interdisciplinary teams.
 - As part of this quality improvement process, we are asking you to complete a "Pre-Training LEND Core Competency Assessment." This process should take less than five minutes.
 - [personalized link to trainee portal]
 - Your responses are completely confidential. The data will be de-identified, aggregated and only used for program-level evaluation. Please note that we will also ask you to complete these same measures one more time at the end of your training year.
 - Thank you,
[DirectorOfProgram]
[CenterName]