Email Use Checklist Objectives

## The purpose of the checklist is to be used as a coaching tool, to promote critical thinking around emails sent to patients.

* **Recipients are appropriate.**
	1. [ ] There is a valid reason this message is not going through the Patient Portal.

*Note: Valid reasons include (a) Patient Portal has not yet rolled out at specific RHM; (b) the Patient Portal temporarily cannot send group messages; and, (c) recipients not a part of the Patient Portal—in this case, be sure to invite the recipient to join the Patient Portal within the email.*

* 1. [ ] You confirmed that the audience is appropriate for this message.
	2. [ ] The addressee list is current, and has been reviewed to remove inappropriate recipients—e.g. deceased patients, family members of deceased patients, etc.
	3. [ ] The addressee list has been updated to remove those recipients who have opted out.
* **Email meets marketing/brand standards**—if needed, contact Marketing/Communications for a copy of the standards.
* **Emails are compliant with laws, regulations, and the Trinity Health Code of Conduct.**
	1. The content is appropriate:
		1. [ ] If the content of the email is fund-raising solicitation, there should be an opt-out in the email.
		2. [ ] If the email content includes any contests or similar incentives offered to the recipients, legal has approved the program.
	2. [ ] If the email content implies or describes a medical or health condition, the email is being sent securely or through the patient portal.
* **A quality assurance plan is in place.**
	1. [ ] The email is formatted appropriately, i.e. all recipients listed as a BCC, where only their email address is shown to them.
	2. [ ] A subject-matter expert has approved this message.
	3. [ ] This email is sent from the appropriate person.
	4. [ ] If a mail merge or similar function will be used, it has been tested for accuracy.
	5. [ ] You have validated that the email address is current and accurate.
* **A patient feedback mechanism is established and clear to recipient.**
	1. [ ] There is a contact person published in the email and available, if the patient/recipient has questions.
* **Your supervisor has signed off on this email communication.**