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.**