Customise emails relating to Human Ethics applications

The Correspondence function in the Human Ethics Admin Workbench is linked to an application's status change and will open automatically where required as a prompt to initiate an appropriate email. The content of the email and the email recipients may then be customised prior to sending. **Note:** use the **Correspondence** link (located in the Application Management section of the Available Pages menu) to view a history of the correspondence sent.

The correspondence email screen that displays in response to a change of status (e.g.: approval by HEAG and revisions required) is divided into three sections:

- **Subject** - displays the Ethics Application ID of the current application, which may be customised if required
  
  ![Subject Image]

- **Recipients** - allows you to specify the recipients for the correspondence
  
  ![Recipients Image]

- **Content** - displays a standard email message applicable to the change of status, which may be customised if required
  
  ![Content Image]

**Customising email subject**

By default, the subject will display the ID number of the selected ethics application. However you may wish to alter this to include additional information prior to sending.

To customise the subject, click in the field and add the required information.

**Customising email recipients**

By default, the recipient list will contain the Responsible Researcher recorded against the selected application. However you may wish to include additional recipients or delete any existing recipients prior to sending.

**To add a recipient**

1. Click on the **Add New Recipient** button in the Recipients table. A blank field will display under the recipients already listed in the table.

2. Click on the **search** icon to search for a recipient in the list of values. The Search and Select: Correspondence Recipient screen will display.

3. Enter the name of the person you wish to search for in the blank field. Leave the field blank to retrieve all available values. **Note:** the list of values contains all named researchers (who have an email address recorded against the application), all persons identified as Administrator, Alternate Administrator and Chair of the Responsible HEAG as well as the HESC Administrator.
4  Click on the Go button.
Values matching your search will display in a Results table below.

<table>
<thead>
<tr>
<th>Select</th>
<th>Quick Select</th>
<th>Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Ester, Ms Polly Anna</td>
<td>HEAG Administrator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cattle, Dr Brandon Z</td>
<td>Responsible Researcher</td>
</tr>
</tbody>
</table>

5  Click on the corresponding Quick Select icon to add the appropriate person to the recipient list.
The person name, email address and role on the application will display in the Recipient table on the Correspondence screen.

To delete a recipient
1  Tick the checkbox located in the Select column for the recipient(s) you wish to delete.

2  Click on the Delete Recipient(s) button.
A confirmation message will display advising that the recipient(s) has been deleted.

Customising email content
The message text contained in the email comprises sections both editable and non-editable by the HEAG Administrator. The non-editable sections, and their content, will vary depending on the individual email generated.

- Non-editable content - has been set by the system administrator and will draw on standard text as well as certain fields from the application (e.g.: responsible HEAG, project title, researchers, ethics ID, etc). The text in the non-editable fields is displayed as a light grey colour and cannot be selected or altered.
● **Editable content** - may either be a blank field that you can enter appropriate text directly in to, or may contain standard information that you may alter (e.g.: signature block of the HEAG or HESC Chair).

**Notes on editable content fields:**
The free text editable content fields allow a maximum of 4000 characters. Some emails (e.g.: Revisions Required) include more than one blank field to allow for large amounts of free text.

The editable content fields are plain text only and do not support special characters. If inserting text copied from a Word document you must check the formatting of the text before sending the email to ensure that no strange characters have been included as part of the copying action.

### Sending an email

Once you have specified the email recipients and/or altered the text the email is ready to send. **Note:** click on the **Cancel & Return** button if you wish to return to the Status Management screen without sending the email message.

**To send your email**

1. Click on the **Send Email** button located at either the top or bottom of the email screen. A confirmation message will display advising that the message has been saved and sent.

2. Click on the **Cancel & Return** button to return to the Status Management screen.

### Viewing correspondence

You may view a history of the system generated correspondence associated with the selected application (e.g.: submission acknowledgement email, committee review response, etc) via the **Correspondence** link (located in the Application Management section of the Available Pages menu).

**To view correspondence details**

1. Retrieve the appropriate ethics application and navigate to the Application Summary screen.
2. Click on the **Correspondence** link located in the Application Management section. The Correspondence screen will display.

3. Click on the **Show** link to view details of the email recipients.
4 Click on the **View Message** icon to view the content of the correspondence. The Correspondence Sent Message Content screen will display.

![Correspondence Sent Message Content](image)

5 Click on the **Return to Summary** button to close the screen and return to the Correspondence Summary screen. **Note:** click on the **Printable Page** button if you would like to generate a printer friendly version of the ethics application.