POLICY AND PROCEDURES

OFFICE OF COMMUNICATIONS

Email Best Practices

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PURPOSE

This MAPP describes the responsibilities of CDER staff for adhering to proper email best practices. This MAPP applies specifically to CDER internal emails.

BACKGROUND

Electronic mail (email) is a frequently used and preferred communication tool. Used properly, email improves productivity and allows CDER staff to work more efficiently. Improper use of email can create more work or lead to confusion.

POLICY

CDER email is to be used as a tool to carry out the goals, mission, and daily tasks of CDER. CDER staff will write emails that are professional, effective, and efficient.

CDER email will not be used to promote any partisan politics, for individual profit, or for any illegal activities. All CDER email is subject to Freedom of Information Act (FOIA) requests.

CDER email should not be used to communicate to larger CDER audiences (i.e., FDA-CDER-wide) when another communication vehicle (e.g., *CDER Connection* newsletter, FDA Notices, or an Outlook distribution list for a particular group) is available for an effective, efficient, and/or targeted communication.

This policy serves as a guideline for communicating via email so that both those sending and receiving emails achieve the maximum benefit.

This policy establishes effective, uniform, and consistent email practices for CDER staff and standardizes procedures for email correspondence.

RESPONSIBILITIES

It is the responsibility of the CDER employee to use CDER's email appropriately and professionally.

It is the responsibility of the supervisor in each organization throughout CDER to ensure staff members are held accountable for proper email communications.

For email settings and best practices guidelines to assist staff members with using email appropriately and professionally, see Attachments 1 – 3.

PROCEDURES

General Principles – Communicating by email is most effective when staff members prepare emails adhering to email best practices. The attachment, "Email Best Practices," provides valuable information for CDER staff to adhere to in their daily email communications. Additional guidance is provided in the attachments, "Email Dos and Don'ts" and "Automatic Email Settings."

All-Hands Emails – Only authorized CDER staff may disseminate emails Center-wide. Do not reply to an "All-Hands" email unless directed to do so. Never "Reply to All."

Acronyms – If not commonly known, acronyms should be spelled out the first time they appear within an email.

Automatic Email Settings – CDER staff should use Outlook's features to create Out of Office automatic replies and should include contact information for other staff members who may be able to assist during periods of absence. Instructions on how to set an Out of Office message, as well as other useful features, are included in the Attachment, "Automatic Email Settings."

REFERENCES

1. Office of Special Counsel, 1993. The Hatch Act.

2. FDA, Staff Manual Guide 3298.2 Distribution of All-Hands Electronic Mail (9/1999).

3. FDA, Staff Manual Guide 3140.1 FDA Policy on Use of Government Electronic Equipment and Systems (1/1999).

4. FDA, 2010, Center for Drug Evaluation and Research, MAPP 4151.8 Equal Voice: Discipline and Organizational Component.

5. FDA, 2011, Center for Drug Evaluation and Research, Email Etiquette Dos and Don'ts.

6. FDA, 2012, Center for Drug Evaluation and Research, Options for Sharing Information All-Hands.

7. FDA, 2011, Center for Drug Evaluation and Research, How to Manage Your Email.

8. FDA, 2012, FDAeMail Tips.

9. HHS, 2011, Personally Identifiable Information (PII) Training Guide.

DEFINITIONS

Email: An electronic message sent from an individual to one or more recipients across the Internet or other computer network

All-Hands email: An email that is sent to all CDER staff via the 'FDA-CDER-wide' distribution list

EFFECTIVE DATE

This MAPP is effective May 27, 2013.

ATTACHMENT 1: Automatic Email Settings

Outlook 2003

To set the Out of Office message:

1. From Outlook, click on "Tools" in the upper left corner
2. Click on "Out of Office Assistant"
3. Click on "I am currently Out of the Office"
4. Type a message in the text box
5. Click "OK"

To set the email signature:

1. From Outlook, click on "Tools" in the upper left corner
2. Click on "Options"
3. Click on "Mail Format"
4. Click on "Signatures" (toward the bottom)
5. The "Create Signature" window will appear
6. Click on "New"
7. Create signature
8. Click "OK"

Outlook 2010

To set the Out of Office message:

1. From Outlook, click on "File" in the upper left corner
2. Click on "Info" and choose "Automatic Replies" (Out of Office)
3. Select the "Send Automatic Replies" check box
4. If you want to specify a set time and date range, select the "Only send during this time range" check box. Then set the "Start time" and "End time." [Note: If you select the "Only send during this time range" option, the "Automatic Replies (Out of Office)" feature will run until the date and time set for the End Time is reached. Otherwise, the "Automatic Replies (Out of Office)" will continue to run until you repeat step 1 and select the "Do not send automatic replies" option.
5. In the "Inside my organization" tab, type the message that you want to send within your organization.
6. In the "Outside my organization" tab, type the message that you want to send outside your organization.
   a. You may check the box, "Auto-reply to people outside my organization."
   b. You may select "My Contacts only" or "Anyone outside my organization."
7. Click "OK"

To set the email signature:

1. From Outlook, click on "File" in the upper left corner
2. Select "Options," select "Mail," then select "Signatures" under "Create or Modify signatures for messages."
3. If this is a new signature, select "New" under "Select signature to edit." Type a name for this signature then click OK.
4. Type the text you want displayed as your signature in "Edit Signature."
5. Click "OK"

Another option is to create a new message, choose the Signature icon on top, click Signatures and follow the prompts.

BlackBerry

To set the Out of Office message from your BlackBerry:

1. Open your Outlook email from your BlackBerry.
2. Click the applications button (the button with dots to the left of your mouse button). If your Blackberry does not have a mouse button, use the track wheel on the side of the Blackberry.
3. Scroll down and select "Options"
4. Select "Email Preferences"
5. Select "Use Out of Office Reply"
6. A text box should appear. (Some Blackberry models may display "No." Click on the "No" to select "Yes." Select "Yes" and then click to choose.)
7. Edit any message that appears in the text box to reflect your current message.
8. After editing and constructing the message, click the applications button, and select 'Save."

ATTACHMENT 2: Email Dos and Don'ts

As a rule --

<u>Do:</u>

Make subject lines clear and specific. This helps readers know quickly what the email is about. If it is an actionable item with a deadline, include that in the subject line. If you tag onto an older email, update the subject line so it reflects the new subject matter – and delete any subject matter that is no longer needed to keep the email clean and succinct. Never send a message with the subject line left blank. Extend the same courtesy when issuing calendar invitations, which should include a clear subject line and any available details on the meeting or event.

Make the email easy to read. Use font sizes of at least 10 pts. A font size of 12 pts is commonly used for business. Standard fonts in black are preferred. Keep the email as short and focused as possible. If an email must be long, consider breaking it up into sections with headers or bullets.

Be conscious of sensitive information and Personally Identifiable Information (PII). Some PII cannot be included in email. For additional information, refer to the "Personally Identifiable Information (PII) Training Guide" listed in the References section.

<u>Don't:</u>

Forward jokes and chain letters. Excessive jokes and chain letters fill up mailboxes. Use your personal email account if you feel a need to share such email – and send them to your friends' personal email accounts not government email accounts. These emails use up valuable system resources, distract people from their work, and sometimes can propagate malicious emails and viruses.

Send large attachments whenever possible. Avoid sending files or graphics larger than 1MB that can clog up recipients' mailboxes and slow down the FDA email system. Rather than attaching documents or files to the email, use a link to point to the file on the intranet. For example, if you and the people you are communicating with all have access to resources like a network share or a collaboration tool like eRoom or SharePoint, use those to host your attachment.

Use unnecessary graphics or colors in your email. It is fine to highlight certain parts of an email for emphasis, but don't overdo it. Using too many different fonts and colors makes the email hard to read. Don't overuse non-standard fonts, small fonts, or background images. Avoid using email background colors or templates, which use more storage space and often make reading difficult.

Use a "read receipt" for every message you send. This may become annoying or offensive to others.

ATTACHMENT 3: Email Best Practices

Remember that email is not private. Choose your words carefully because email never goes away. Keep this in mind, especially when the topic is sensitive, emotional, or controversial. Email is considered property of the organization and can be forwarded and retrieved even after it has been deleted. Your internal and external emails can show up in the press and/or be subpoenaed in investigations.

Be careful with Carbon Copy (cc), Reply to All, and using the high priority option. The To: field is for those you want a response from. The Cc: field is for those you want to keep in the loop. Only include someone on the Cc: field if the person is involved with the topic. Next, only reply to all if it is essential that all recipients see the response. This includes the messages to say, "Thanks!" and "Please don't reply to all." Finally, only mark your message as high priority when it truly is.

Respond to emails promptly and reply with complete responses. If you're answering someone's questions, consider numbering or bulleting your responses to make your email easy to follow. Answer all questions fully to avoid a lot of back and forth emails. If you cannot reply in full in a timely manner, let the sender know when he or she can expect a full reply. Ensure you follow-up or delegate the response to someone else if you can't reply. If the answer(s) is too complex for email, schedule a meeting with the individual(s).

Review and reply to the most recent email. Review all new emails before firing off responses. This helps keep the email communication in a logical sequence. It also allows you to keep only the last email that includes everyone's comments, rather than having to keep each individual response.

Proof the email. Proof the email for spelling and other errors, and check to make sure links are working before you hit the Send button. Consider activating the automatic spell-check option for your emails. Check that your message is as clear, complete, and professional as possible to avoid misunderstandings or other problems. Check that you have included the appropriate people on the email. Ensure all attachments are attached.

Be aware of your virtual tone. Remember that the recipient of your email can't see or hear you. Check that your tone won't be perceived as aggressive or offensive. Avoid writing with all capitals or an unusually large font size, as it may be perceived that you are shouting at the email recipient.

Don't hide behind email. Sometimes personal contact is better than email for certain topics. If you are discussing sensitive information or find that you are emailing back and forth for too long, a telephone or in-person conversation is better. Some matters are complex or sensitive and require direct in-person discussions for the most effective results.

Don't respond to an email if you are angry or frustrated. It's better to cool down and think things through first. Consider calling or visiting with the person to discuss the matter rather than sending back a reply that you'll regret later. Once the email is sent it cannot easily be taken back. Remember, if you are communicating with the public, you are representing FDA. Your email may be the recipients only "face" to the Agency.

Include an auto signature. Include your full name, title, office, and contact information at the bottom of your email. A concise auto signature is helpful and makes it easier for the recipient to respond. Avoid graphic or attached signatures as they consume valuable storage space and can make

your message look like it has a potentially important attachment. Limit use of information (quotes/phrases) below the signature line.

Set an Out-of-Office message when you are unavailable. Alert others to your absence with an automatic note so they aren't waiting for a response from you. Include information on when you will return and the name of someone who may be able to provide assistance in your absence. Remember to remove the automatic notification when you return to the office.

Consider other communications vehicles. Using email too frequently, when not necessary, or sending an email to a large or inappropriate audience is not effective or efficient.