

EMAIL ETIQUETTE AND MANAGEMENT

PRACTICE GUIDELINE[®]

DOCUMENT SUMMARY/KEY POINTS

- All staff members have a responsibility to appropriately use and to manage emails and care should be taken to protect the privacy of individuals in accordance the NSW Health Privacy Manual for Health Information The permissible and prohibited use of the internet, email (including participation in chain emails) is set out in NSW Health Policy Directive PD2009_076 *Communications – Use and Management of Misuse of NSW Health Communications Systems* .
- Email is one of the most extensively used forms of communication.
- If communication is **urgent**, call or page the recipient to bring it to their attention. Do not assume that people are always at their desk or access their email immediately. If the matter pertains to informing a business decision, a follow up communication via email may be appropriate to confirm understanding of a situation, resolution of a matter or determination being made.
- Consider communicating face-to-face or via telephone, particularly for sensitive topics.
 1. When email is the preferred method of communication, staff should be mindful of the following; **subject line**. Make the subject line action-focused, where possible.
 2. **Tone**. The tone of a conversation should be as if you were communicating face-to-face. The language and formatting should ensure clarity.
 3. **Attachments**. Avoid sending attachments when the recipient has access to the same server and shared files and/or use web links where appropriate.
 4. **Appropriate distribution**. Ensure only the most suitable individual/s are included in the email. The use of 'cc' and 'bcc' and 'reply all' should be used *only* when appropriate.
 5. Consider if an email response is the most appropriate communication method.
 6. Use an **approved email signature**

Approved by:	SCHN Policy, Procedure & Guideline Committee	
Date Effective:	1 st July 2018	Review Period: 3 years
Team Leader:	Manager	Area/Dept: Executive Services

CHANGE SUMMARY

- No major changes have occurred; links to other policies have been updated.

READ ACKNOWLEDGEMENT

- Training: An eLearning tool is available to help staff to receive, create and manage their emails. Refer to: http://elearning.schn.health.nsw.gov.au/information_technology/microsoft/outlook/
- Local manager to determine which staff, if any, are to read and acknowledge the document or acknowledge the document only.

TABLE OF CONTENTS

Introduction	3
1 What does the email say about you and the organisation?.....	3
2 Consider why you are sending an email	4
3 Ensure the subject line is action-focused.....	4
4 Constructing an Email.....	4
<i>Formatting</i>	<i>4</i>
<i>Language.....</i>	<i>5</i>
5 Attachments.....	5
6 Sending an Email.....	5
7 Is it appropriate for you to reply?	6
8 All-user emails	6
9 Maintaining an effective email system	7
10 Managing your inbox.....	7
11 Importance of knowing how to use the email system.....	7
12 Resources	8

Introduction

Email is generally recognised as the most efficient way of sending and receiving information.

Emails that are produced by employees of NSW Health during work times are **official records**. NSW Ministry of Health Policy Directive PD2009_076 ([Communications: Use of the NSW Health Communications Systems](#)) sets out policy in relation to the **permissible and prohibited** use of the internet, email (including participation in chain emails), telephones and similar NSW Health communication systems. Care should be taken to protect the privacy of individuals. (Refer to [NSW Health Privacy Manual for Health Information or other relevant privacy legislation](#).)

Staff often feel overwhelmed by the number of emails they receive each day. By using email correctly staff can expect to:

- Reduce the amount of time spent dealing with email
- Effectively manage their inboxes and reduce unwanted items
- Improve the quality of emails sent and received
- Gain better responses to emails sent
- Manage confidential and sensitive information appropriately

1 What does the email say about you and the organisation?

Minimise the negative impact that emails can have by:

- Re-reading the email before sending it to check that it is clear and concise. If it is an important email, consider asking a colleague to check it as well.
- Check that you have not written anything that could be misinterpreted.
- Write for your audience
- Never send an email in the 'heat of the moment' or with a negative purpose.
- Peer review email content for accuracy and time
- Ensure that the email correspondence trail doesn't contain any sensitive or confidential content.
- Delete email trail content that is not relevant.
- Check that the email contains all the required information.
- Use the spell check facility and check your grammar – a more casual tone is sometimes appropriate but email should still be as carefully written as other documents.
- Only cc as appropriate

Remember that an email is a formal written document just like a printed letter or memo and forms part of the Hospital's records which may be requested under the *Government Information (Public Access) Act 2009 (NSW)* or for legal proceedings. Emails can be

requested under other legislation such as the *Privacy and Personal Information Protection Act 1998* and the *Health Records and Information Privacy Act 2002*.

Note: If the email is urgent, call or page the recipient to bring it to their attention. Do not assume that people are always at their desk or can access their email immediately.

2 Consider why you are sending an email

Note: When communicating to others, face-to-face or telephone conversations may be more effective than email, particularly for sensitive topics.

- What outcome do you want to achieve through your email?
- Consider the purpose of the email, and be mindful to articulate this in the first paragraph.
- In what context is the email being sent? The context of the email: does it need to be explained in the body of the email?
- If the email requests an action of the recipient, ensure this is included in the subject line.
- Explain why you are forwarding emails

3 Ensure the subject line is action-focused

It is best practice to use an action-focused email subject line. At a glance the recipient knows what action is required and by when. This is particularly helpful when managing other people's email.

Subject lines should include the following:

1. The **purpose** of the email. That is:
 - **Action required** = A physical action is required e.g. filling in a form
 - **For information** = There is no action required
 - **Response required** = Action is required in the form of a response
2. A clear **description** of the emails subject. For example:
 - Action Required: Questionnaire on staff morale
3. Any **timescale** if necessary. Example:
 - Action Required: Questionnaire on staff morale by 7th June

4 Constructing an Email

Note: An email needs to convey the tone of a conversation as if you were communicating face-to-face. The language and formatting should ensure clarity.

Formatting

- Make the *purpose of your email clear in the first paragraph*.

- Consider if you need to explain the context of the email or provide any history on the issue you are referring to.
- Use bold and underlining to emphasise key points.
- Use paragraphs, bullets and numbering to structure the email. *Note: These features only work if email is in HTML format. Settings may be changed from default to HTML.*
- Use an electronic signature with contact information, based on your position location (CHW, SCH or Network, for example).
Refer to “**Email Signature Creator**” at:
http://chw.schn.health.nsw.gov.au/ou/trainers/resources/email_signature_creator/
- Do not create your own email signature or add additional graphics to the corporate signature.

Language

- An email should be brief and to the point without being curt or rude.
- Language should be simple, clear and succinct
- Use appropriate language for the audience and to their level of understanding of the context of the email.
- Consider the language and how the style and tone may come across to the recipient.
- Only use capital letters where needed – overuse of capital letters is considered abrupt, and implies that the writer is “yelling”.
- Keep abbreviations to a minimum.
- Use appropriate greetings and sign off to set the tone

5 Attachments

Note: Avoid sending attachments when the recipient has access to the same server and shared files; use web links where appropriate.

Where attachments are to be sent:

- Use links to the intranet or shared drives wherever possible.
- Reduce the size of documents using the zip application.

If an email has been received with an attachment and is to be forwarded, consider:

- Pasting relevant sections of the attachment text into the message.
- Removing attachments from emails that are being forwarded.

6 Sending an Email

Ensure the most suitable individual/s are included in the email. The use of ‘cc’ and ‘bcc’ should be used only when appropriate.

When sending an email, use the following functions appropriately:

- **To** – individuals who are required to take action.
- **CC** – individuals who are copied for information only; and there is no action required of them. If the information is important to those who are copied make sure they are aware of this.
- **bcc** – should be used sparingly, and without malicious intent.

7 Is it appropriate for you to reply?

Sometimes email is not the best way to communicate and you should consider phoning or talking face-to-face. This is particularly important if you receive an email which is unclear in its purpose, contains sensitive or complex information or contains criticism. ***Escalating an disagreement via email is never appropriate.***

Evaluate the requirements of the email and, where necessary, respond immediately.

If this is not possible, consider the following options:

- Delegate the email to another member of your team.
- Diarise time to action the email if you cannot take action immediately.
- Delete the email or file it appropriately, immediately or once actioned.

Ensure that you minimise the time you spend checking your emails and only handle each email once.

Consider carefully whether to use the Reply All function. This can be frustrating for all involved by duplicating information and unnecessarily filling other people's inboxes.

8 All-user emails

- An all-user email may only be sent with approval from a Director using the correct template, fonts and colours.
- All-user emails are limited to essential or urgent information only which cannot be served by communication through other mediums such as targeting a specific recipient group, the front page of the intranet, Chief Executive Update, local site-based newsletters or via department heads.
- Other avenues to convey information, such as the examples above, should be explored before approaching a Director for all-user email approval.
- Avoid sending an all user as a reminder of a previous all user. Use other communication options as above
- Determine if the all-user needs to be site specific or for the whole Network

9 Maintaining an effective email system

- Hints for **email storage**:
 - Structure mail folders by areas of work, rather than by date or sender.
 - Subfolders can help you manage information around core areas of work.
 - Numbers can help to order the structure.
 - Regularly review both file structure and content and discard anything irrelevant.
 - Inbox review – perform at set intervals during the day.
 - Ensure an appropriate archiving system is set up and maintained regularly.
http://chw.schn.health.nsw.gov.au/ou/its/resources/disk_space_and_file_management.php
 - Detailed storage review – perform quarterly.
 - If two people are accessing emails it can be complicated. Clarify roles and responsibilities and ensure both parties are using the same system.

10 Managing your inbox

Use reminders for future action:

- Waiting for;
- Calendar;
- Flags with follow-up reminders.

Processing your emails is key to managing your inbox. Manage actioned emails appropriately, saving them for future reference where necessary.

11 Importance of knowing how to use the email system

There are lots of technical tools that can be used to support best practice. Some of the more common tools to manage emails are:

- Managing folders to file emails;
- Create a signature;
- Using flags for follow-up;
- Using 'out of office' messages when you are unable to access your emails regularly, not just when you go on holiday. The message should include the period for which you are unavailable and information as to who to contact if the query is urgent. Remember that the information included will be sent to anyone who emails you, so keep it professional.
- Using colours to highlight important incoming emails;
- Voting buttons to gain consensus;

- Expiry dates on emails.

12 Resources

The IT Services Application and Training support unit have developed online training and resources to help staff to receive, create and manage their email. To access these resources refer to: http://elearning.schn.health.nsw.gov.au/information_technology/microsoft/outlook/

Copyright notice and disclaimer:

The use of this document outside Sydney Children's Hospitals Network (SCHN), or its reproduction in whole or in part, is subject to acknowledgement that it is the property of SCHN. SCHN has done everything practicable to make this document accurate, up-to-date and in accordance with accepted legislation and standards at the date of publication. SCHN is not responsible for consequences arising from the use of this document outside SCHN. A current version of this document is only available electronically from the Hospitals. If this document is printed, it is only valid to the date of printing.