



(Tue) 25 October 2011

## Memorandum

To: Trialists

Fr: Curt Meinert

Re: E-mail and trials

E-mail! I grew up before the term existed. Now I am buried in e-mail.

I am a "stacker", having never found "folders" useful. E-mails not opened within a day or two of receipt are "lost". The only e-mails I open on receipt are "recalls".

Even simple things, like arranging meetings, can generate dozens of e-mails. Add to those, junk e-mails from pipette manufacturers, rat suppliers, and requests for my bank account number from people in Nigeria, and you know I end up spending time everyday "deleting".

As one who has preached the need for margins to prevent "punch outs" and text in "gutters", you can imagine my despair with e-mails that have no margins.

The basic rule in document production is that a document has to look good to be good. Making e-mails look good is impossible. Even if you fiddle doing that, you have no idea what comes out the other end. You can click on the tool bar without noticeable effects. Paste something into an e-mail and the damn thing is in color with no hope of getting rid of the colors.

Everybody has their list of e-mail peeves. A few of mine are below.

- "Replying all" when only the sender needs a reply
- E-mails with subject lines blank
- The same subject line even though the subject has changed
- Senders requiring notice when an e-mail is opened (none of the sender's business when I open)
- "Urgent" or "High priority" e-mails (I will decide what is urgent or high priority; thank you!)
- E-mails asking for a reply to something sent only hours before
- "Out of office" replies (what do I care if people are "out of office"? They have smart phones don't they?)
- Having to "unsubscribe" to things I never asked for
- "Dear Curtis" e-mails (people should know "Curtis" sends shivers up and down my spine; my Mother called me that when I was in trouble; rarely!)

But, there is no point bitching about e-mails? They are here to stay. So I offer below guidelines apropos to coordinating centers in the e-mail age.

**Guideline 1:** Designate a person in the center to create and maintain a study e-mail directory; create group contact files for "center directors", "coordinators", "study officers", "steering committee", etc, for group mailings

**Guideline 2:** Establish classes of e-mails and levels of internal control and applicable review procedures for issue

*Comment:* Obviously, levels of control and review should increase with importance of e-mails

**Guideline 3:** Establish rules as to who in the coordinating center is copied on e-mails depending on class

**Guideline 4:** Establish protocol for issue of official e-mails

*Comment:* Consider e-mails having force of protocol or for instructing center directors regarding communications with IRBs as "official"; likewise for e-mails addressed to center directors, study officers, or members of a study committee concerning matters of study or study policy. Expose official e-mails to internal reviews and clearances prior to issue.

**Guideline 5:** Create an e-mail address for official e-mails to facilitate location, harvesting, and filing

**Guideline 6:** Maintain a hard copy file of official e-mails

**Guideline 7:** Direct e-mails regarding matters of protocol to center directors with copies to center coordinators

**Guideline 8:** Direct e-mails regarding matters of data collection and data edits to center coordinators with copies to center directors

**Guideline 9:** Sign e-mails

*Comment:* Avoid generic signatures like "Coordinating Center"; frustrating to recipients because of lack of name for contact

**Guideline 10:** Avoid using e-mails for deliberations

*Comment:* E-mails are ill-suited for deliberations. Deliberations require active exchange via face-to-face contact, telephone, or webinar.

**Guideline 11:** If e-mails used for votes, establish time allowed for voting and number of votes required for action

**Guideline 12:** Differentiate between documents that can be distributed via attachment to e-mails and those to be distributed hard copy via US mail or commercial courier

*Comment:* Typically, numbered policy and procedure memoranda, protocol revisions, and study meeting materials are distributed pdf via e-mail; confidential materials, such as treatment effects monitoring reports, are typically distributed hard copy. Electronic distribution of confidential material increases the risk of material being seen by unintended people.

**Guideline 13:** Follow basic e-mail rules

- Read before sending; preferably aloud or by "mouthing"; the brain is good at filling in words
- Spell check
- Make sure there is a subject line
- Review addressees; eliminate unnecessary addressees
- Do not forward confidential e-mails
- If angered by an e-mail, wait at least 24-hours before replying
- If writing in anger, leave the "To" field blank while drafting to avoid errant release
- Set e-mail software for one minute lag between clicking "send" and transmission; generally the lag is sufficient for sender to recognize mistakes, oversights, or for "second thought" and, hence, to "cancel"
- Do not say things your Mother would not approve; all e-mails are discoverable. If you would be embarrassed by an e-mail, if made public, do not send