



## **Indian Health Service**

Office of Information Technology  
Albuquerque, New Mexico

# Standard Operating Procedure for **IHS-Wide E-Mail Announcements**

**IOAT-SOP-09-01**

Version 2.0  
February 2010

## Record of Changes

Version No.	Date	Name	Description	Section
1.0	December 2008	Serco	First published version. Reviewed, edited, and converted to 508-compliant PDF.	All.
2.0	February 2010	H.L. Roosild	Reformatted to current OIT SOP template (including approval block). Also, removed Change Notification Request form (per D. Thompson), since it is not applicable to this document and was causing confusion; and added explanation about the different forms. This version also underwent annual review.	All.

## Approval

This Standard Operating Procedure (SOP) has been approved for distribution and implementation. These new procedures are effective immediately and will be enforced. Representatives of management will be authorized to conduct periodic quality checks and audits to assure compliance with these procedures.

Requests for corrections or changes to any procedures should be sent to the IHS Chief Information Officer (CIO). Exceptions or exemptions to any of these procedures must be submitted in writing to the IHS CIO for approval or disapproval.

Approved by:

*/Theresa Cullen /*

January 30, 2009

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**Date**

**Date of last annual review: 2/22/2010**

**Reviewed by:**

**D. Thompson**  
**C. Gepford**

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# 1. Introduction

## 1.1 Purpose

This Standard Operating Procedure (SOP) establishes the procedures for processing a request for a general IHS-wide e-mail announcement.

This SOP does not cover notifications related to changes to the IHS network or IT systems that need to be approved before implementation by the OIT Change Control Board (CCB). Those notifications and procedures are described in DITO-SOP-09-02, *OIT Change Management*.

## 1.2 Scope & Applicability

This SOP applies to all IHS OIT employees and contractors. Each must adhere to its contents and procedures for requesting, preparing, and distributing IHS-wide e-mail announcements.

## 1.3 Roles & Responsibilities

Role	Responsibility
Help Desk Manager	Reviews final messages and delivers to the Deputy Chief Information Officer for final approval prior to release; posts attachments to the Intranet, as required, for inclusion in an IHS-wide e-mail announcement.
OIT Help Desk	Responds to all IHS-wide e-mail announcement requests as the primary responder.
Deputy Chief Information Officer (DCIO)	Approves all IHS-wide e-mail announcements that originate in OIT.
OIT Division Directors	Review and approve all announcements originating within their divisions and provide emergency approval for announcements after normal Help Desk working hours.
Requester	Member of OIT staff who drafts the original IHS-wide message and submits the request.
Responder	The person who receives and processes the request.
Web Services Division	Serves as a backup for posting attachments to the Intranet for inclusion in an announcement when the Help Desk Manager is unavailable.

## 1.4 Request Types

Request Type	Description	Request will be sent ...
Standard	Most IHS-wide announcements are sent as standard announcements.	Within 1 work-day of receipt
Delayed	The requestor wants the announcement to be sent on a specific date.	As requested
Expedited	The requester had no forewarning and the announcement is time-sensitive in nature.	Within 2 hours of receipt
Emergency	Impacts safety of IHS employees.	As soon as possible

## 1.5 Announcement Request Form

A request for an IHS-wide e-mail announcement is submitted by filling out the *IHS-Wide E-Mail Announcement Request* form and e-mailing it to the OIT Help Desk. This electronic form, which contains detailed instructions about submitting a request, can be found on the IHS Intranet at:

[http://home.ihs.gov/ITSC-CIO/oit\\_tfs/index.cfm?module=tfs\\_forms](http://home.ihs.gov/ITSC-CIO/oit_tfs/index.cfm?module=tfs_forms)

An example of the form is shown on page 8 of this document.

See *Requesting an Announcement* below for more information about the process for submitting a request.

## 1.6 Contact Information

If you have any questions or comments regarding this document, please contact the OIT Help Desk at IHS:

**Phone:** 505.248.4371 or 888.830.7280

**Fax:** 505.248.4363

**Web:** <http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm>

**Email:** [support@ihs.gov](mailto:support@ihs.gov)

## 2. Procedures

### 2.1 Requesting an Announcement

The requester submits a draft message either in an e-mail (set to **Plain Text** view) or preferably using the Announcement Request form (see above).

The request e-mail (or form) should:

- Be written exactly as you want it to be distributed.
- Include a descriptive subject line.
- Include the name, division, phone number, and e-mail address of the person responsible for the content and any follow-up questions. This person's contact information will also be listed at the end of the message.
- Embed any applicable URLs or links directly within the message.

Additionally, keep in mind the following guidelines:

- Do not include any attachments. If attachments are needed, provide a URL for it.
- If the message is an expedited or emergency request:
  - Copy (CC) the Division Director and DCIO in the e-mail request.
  - Insert the word **Expedited** or **Emergency** at the beginning of the **Subject** line in the e-mail requesting the announcement.

The requester should e-mail the request in accordance with the table below.

Request Type	Time of request	Send request to...	Follow-up call to...
Standard	Any	OIT Help Desk	Not necessary
Expedited or Emergency	During OIT Help Desk Hours: Mon–Fri 6:00AM to 6:00PM MT, excluding holidays	OIT Help Desk <i>and</i> Cc: Division Director and DCIO	OIT Help Desk
Expedited or Emergency	Outside of Help Desk Hours	<ul style="list-style-type: none"> <li>• Division Director and designee</li> <li>• DCIO</li> <li>• OIT Help Desk</li> </ul>	Division Director or designee <i>or</i> DCIO

If the announcement relates to a technical issue, the requester should send a supplemental e-mail to the applicable technical group(s) (e.g., ISCs or ISSOs). This e-mail should provide additional technical details that are not appropriate for the wider audience of an IHS-wide e-mail announcement.

## 2.2 Responding to a Standard Request

Upon receipt of a standard request, the Help Desk analyst will review the request. The Help Desk analyst will contact the requester within 4 work-hours of the initial request if:

- Additional information is required.
- The request does not meet the criteria for an IHS-wide e-mail announcement.
- There are any other concerns.

## 2.3 Responding to an Expedited or Emergency Request

Upon receipt of an expedited or emergency request, the responder will check the type of the request (expedited or emergency) and the time of the request to determine the appropriate responder, as described in the table below.

Time of Request	Responsible Responder
During OIT Help Desk Hours: Mon–Fri, 6:00AM to 6:00PM MT, excluding holidays	<ul style="list-style-type: none"> <li>• Primary – Help Desk</li> <li>• Secondary – Help Desk Manager</li> </ul>
After Help Desk Working Hours	<ul style="list-style-type: none"> <li>• Primary – Division Director or designee</li> <li>• Secondary – DCIO</li> </ul>

At this point, the processing becomes time-dependent:

- **Within 30 minutes** – Upon receipt of the request, the primary responder sends a **Reply All** e-mail acknowledging the request and taking responsibility for processing it.
- **After 30 minutes** – If a primary responder does not reply within 30 minutes, the secondary responder sends a **Reply All** e-mail acknowledging the request and taking responsibility for processing it.
- **After 60 minutes** (*Emergency messages only*) – If no one has replied after 60 minutes, the backup responder sends a **Reply All** e-mail acknowledging the request and taking responsibility for processing it.

## 2.4 Reviewing a Request

Upon receipt of a request, the Help Desk analyst will:

1. Open a HEAT service ticket.
2. Review the request form to ensure it has been filled out correctly and completely.
3. If an attachment is included with the request, the analyst should explain to the requester that attachments may not be included in IHS-wide announcements due to their impact (size and volume) to the e-mail server.

The requester can then do one of the following:

- Reformat the information such that it can be included in the e-mail's text.
  - Post the attachment to the Intranet, and provide a link to the document for inclusion in the announcement.
  - Have the OIT Help Desk post the attachment temporarily to the Intranet for purposes of sending a link in the announcement.
4. Review the message for clarity.

If it is not clear, the Help Desk analyst will contact the requester via e-mail or phone to suggest improvements to the message content or to let him or her know which specific parts of the message need to be clarified. Then:

- If significant changes are made and agreed to over the phone, the analyst will send the requester a follow-up e-mail describing the changes. This is to minimize misunderstandings that might result in the final announcement not being satisfactory to the requester.
- If unable to reach a consensus with the requester on the message content, the analyst should contact the Help Desk Manager.
- If the required information needed by OIT personnel or approval of the revised announcement is not provided quickly (within 1-2 hours), the responder should follow up with the requester by e-mail or with a phone call. If still not received, notify the Help Desk Manager.

## 2.5 Preparing the Announcement

Once the details of the announcement have been agreed to, the responding analyst will:

1. Prepare the message, using the following guidelines:
  - **Subject** – Include a descriptive Subject line if one hasn't been provided by the submitter. Begin the subject line with a common header as appropriate; e.g.:  
**IT Problem Alert**  
**Event**  
**Security Alert** (etc.)

- **Header** – Include the following text at the very beginning of each notice:  
\*\*\* Please do not reply to this e-mail. OIT Announcements are sent from an unattended mailbox \*\*\*
  - **Body** – Edit the message for grammar, spelling, and format. However, content may be changed only after first obtaining the requester's approval.
  - **Footer** – Add the following to the bottom of the message, if the message text does not direct customers to contact the OIT Help Desk:
    - Name of the point-of-contact (POC) and the POC's organization
    - POC's phone number
    - POC's e-mail address
2. Verify that the paragraphs, bolding, and other formatting appear properly in the body of the text, using the **Plain Text** view setting and not **HTML**.
  3. If the requester cannot post an attachment to the Intranet, have the Help Desk Manager post the file for reference in the message.

<p><b>NOTE:</b> If the Help Desk Manager is not available and the message is an expedited or emergency request, ask the Web Services Manager for assistance.</p>
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4. Add any URLs or links to referenced documents directly into the body of the message text.
5. Review the announcement for clarity and use of technical terminology.  
If you feel that the message will be unclear to the average customer, contact the Help Desk Manager. The manager will instruct you whether or not to proceed.
6. Perform a final proofreading, and run spell check.
7. Send the formatted announcement to the Help Desk Manager for review and approval.

## 2.6 Final Review and Approval

After receiving a reviewed and formatted announcement, the Help Desk Manager will:

1. Review the announcement for clarity and grammar/spelling correctness.
2. Run spell check.
3. Forward the announcement to the DCIO for approval. The DCIO will then approve or disapprove the message for release.

4. Notify the responding Help Desk analyst when the announcement is ready to be sent.

## 2.7 Sending the Announcement

After receiving notification that the announcement is ready to be sent, the responding analyst will:

1. Send the announcement from the **OIT Email Announcements** account.

<p><b>NOTE:</b> The expiration date is automatically set 14 days after an e-mail is sent from the <b>OIT Email Announcements</b> account. This setting will remove the message, if left unread for 14 days, from a recipient's inbox.</p>
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2. Close the Help Desk ticket, unless the announcement concerns a critical problem with an OCIO IT system. (See the next section.)

## 2.8 Following Up on Critical Problem Announcements

If the IHS-wide e-mail announcement was sent for a *critical problem* with an OIT system, the Help Desk analyst will:

1. Track the status of the critical problem.
2. If a follow-up announcement isn't submitted within one hour of the problem being resolved, contact the original announcement requester via e-mail or phone for an update.
3. If a follow-up announcement isn't submitted within one hour of requesting an update from the original announcement submitter, escalate it to the Help Desk Manager.

### 3. Appendix: Sample Announcement Request Form

To access the actual form, go to:

[http://home.ihs.gov/ITSC-CIO/oit\\_tfs/index.cfm?module=tfs\\_forms](http://home.ihs.gov/ITSC-CIO/oit_tfs/index.cfm?module=tfs_forms)

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#### IHS-Wide Email Announcement Request

IHS-wide e-mail announcements may be requested for messages that:

- Pertain to programs or functions of IHS
- Contain information needed by a **wide range** of IHS employees.

#### Exceptions:

- Information technology (IT) or telecommunications change announcement requests should be submitted by completing the *Change Announcement Request* form. See DITO-SOP-09-02, *OIT Change Management*, for complete information.

**After you complete this form online, please save it to your computer or network directory; then submit following the instructions described in Part III of this form.**

#### PART I - Requestor's Identification

**Requestor's Name:**                      **Division:**

**Phone Number:** (    )                      -                      **E-mail address:**

#### PART II - Division Director Approval

Prior to submitting announcements to the OIT Help Desk, the requestor must obtain approval of the announcement from their Division Director or of that person's designee.

**Approving Official's Name:**

**Date of Approval:**

**PART III - Announcement Request**

<b>Request Type</b>	<b>Description</b>	<b>Announcement will be sent ...</b>	<b>Requestor must ...</b>
<input type="checkbox"/> <b>Standard</b>	Most common	Upon receipt, the announcement will be sent the following business day.	Send this request form to the OIT Help Desk
<input type="checkbox"/> <b>Delayed</b>	Requestor wants announcement to be sent on a specific date.	<b>Date to be Sent:</b> <mm/dd/yyyy>	Send this request form to the OIT Help Desk
<input type="checkbox"/> <b>Expedited</b>	Announcement is time sensitive in nature.	Within 2 hours of receipt.	<ol style="list-style-type: none"> <li>1. Send this request form to the OIT Help Desk</li> <li>2. Call the OIT Help Desk to alert them to the request.</li> </ol>
<input type="checkbox"/> <b>Emergency</b>	Announcement involves an imminent and potentially dangerous staff safety issue.	As soon as possible.	<ol style="list-style-type: none"> <li>3. Send this request form to the OIT Help Desk</li> <li>4. Call the OIT Help Desk to alert them to the request.</li> </ol>

## PART IV - Announcement to be Issued:

**Message type:** <choose the most appropriate>

**Message Text:** Write the message exactly as it should be distributed in the box below. The box will expand to accommodate your message's length. The formatting must be kept simple (e.g., no special fonts, tabs, tables, italics or bold fonts) since it will be cut-and-pasted into the announcement email.

**Attachments:** Attachments **CANNOT** be included in IHS-wide announcements because they may negatively impact the performance of the network. Information you want to convey must be included in the body of the message, or referenced with a web link (URL).

**Subject:** <Subject should be brief but descriptive.>

<Type the text exactly as you want it to appear in the message. You may also cut-and-paste your message from another document into this box.>

For further information on this message contact: <Name of person to contact>, , <Phone number>, <Email address> .

## PART V - Helpful Hints

- **Select a message type in your request.** The OIT Help Desk will use it at the beginning of the subject line to make it easier for readers to quickly recognize types of messages. The exception is "Other" in which a message type will not be specified.

Message Type	Use when ...
Emergency	Announcing an imminent and potentially dangerous staff safety issue.
Event	Inviting staff to attend or participate in training, workshops, blood drives, etc.
Facilities	Alerting staff to power outages and construction activities that may impact them.
IT Notice	Providing information about an information technology or telecommunications change, planned outage, or critical problem.
Policies	Announcing changes or issuing reminders about Agency policies.
Security	Providing guidance concerning Agency security, Homeland Security levels, and other security related news.
Cancellation	Alerting staff to the cancellation of a previously announced event or activity (e.g., an IT upgrade).
Correction	Correcting the information provided in a previous IHS-wide announcement.

Message Type	Use when ...
Other	<p>An announcement does not fit one of the above message types. This message type list will be expanded to include other message types observed to be sent on a regular basis.</p> <p>Please note that the responder to your request, will not insert the word "Other" before your subject line text.</p>

- **Know your audience.** IHS-wide announcements by their nature are sent to a wide audience. It is very important that the message be written clearly. This is especially important if the message is technical in nature. Avoid the use of acronyms or terms in your message that may not be understood by everyone in IHS.
- **Make it easy to scan.** People receive a lot of email and quite often don't read an entire email. Make it easier for your readers by using short sentences, short paragraphs, and headers to make the key points stand out.
- **Get to the point quickly.** Briefly state the key facts in the first paragraph such as "what", "when", and if appropriate answer the question "How does this affect me?" Then provide additional details in the following paragraphs. For instance, newspaper articles generally provide a synopsis in the first paragraph followed by additional details. Do the same with your message.