QualityNet | Mailer

QualityNet Mailer List Administrator User Guide

Last Updated 2/5/2024

Mailing lists are available for end-user subscription at https://qualitynet.cms.gov/listserv-signup.

Getting Started

SIGNING UP FOR HARP

To become a *List Administrator*, you must first have a HARP account and can register at https://harp.cms.gov/register/profile-info. You can find more information by visiting the HARP Help page.

OBTAINING THE LIST ADMINISTRATION ROLE

Once you have a HARP account, you can create your *List Administrator* by following these steps:

- 1. Log into *HARP* at https://harp.cms.gov/login/login and select **User Roles** in the top-right navigation.
- 2. From the *User Roles* screen, select **Request a Role**.
- 3. From the Select a Program screen, select the QualityNet Workspace, then Next.
- 4. From the Select an Organization screen, select QualityNet Mailer, then Next.
- 5. From the Select Roles screen, select the QualityNet List Administrator role, then Submit.

You will receive an email notification when your role request has been approved or rejected by the list's Security Official.

REQUESTING A LIST

After your *List Administrator* role request has been submitted, you are ready to create new lists and notifications or transfer existing ones by completing the *HCQIS Email List Request form*, available from the New List Request/Fulfillment Process page of Confluence. Then submit the completed form to

<u>ServiceCenterSOS@cms.hhs.gov.</u> The QualityNet Mailer team will notify you once the list has been created.

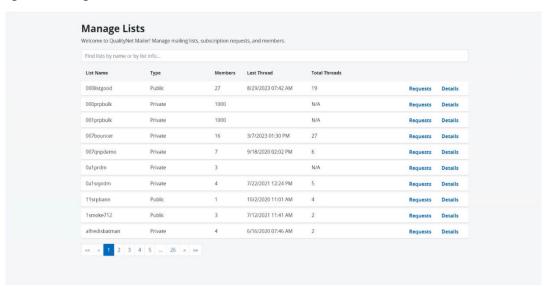
Managing Lists

NAVIGATING THE MANAGE LISTS PAGE

Once you've been granted the List Administrator role:

- 1. Log into the list management pages of QualityNet at https://qualitynet.cms.gov/admin/login, using your HARP user ID and password.
- The Manage Lists page (Figure 1) displays mailing lists—both Public and Private—for which you
 are an approved List Administrator. (Public lists are those to which anyone may subscribe;
 Private lists require the List Administrator's approval for a subscriber to be added to the mailing
 list.
 - a. You can use the search box at the top of the page to search by List Name, List ID, or List Description to only display the lists that match your search criteria. To view all lists again, simply clear out the search box.

Figure 1 - Manage Lists



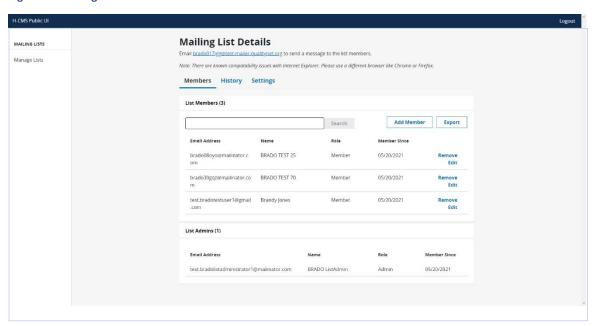
- 3. Select **Details** to access the *Mailing List Details* page, where you'll be able to manually add or remove a list member.
- 4. Select **Requests** to view *Pending Requests* for list membership, email confirmations, and held messages. There, you'll be able to select **Approve** or **Reject** for these pending requests.

Mailing List Details

ADDING AND REMOVING MEMBERS

The Mailing List Details page (Figure 2) displays the List Members (their email address, name, and subscription date) and List Administrators. It also includes the email address for sending email notifications to List Members and tabs to access History and Settings.

Figure 2 - Mailing List Details



To add a list member:

- 1. Select Add Member.
- 2. Enter the *Role, Name,* and *Email Address* of the user you would like to add as a *List Member,* then select **Add Member** (Figure 3). Select **Cancel** to return to the previous screen.

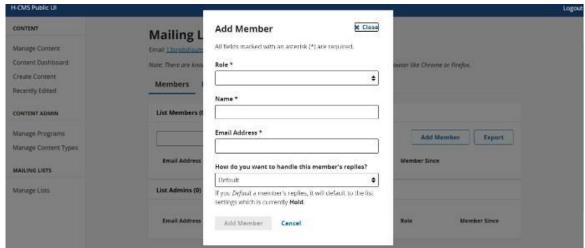
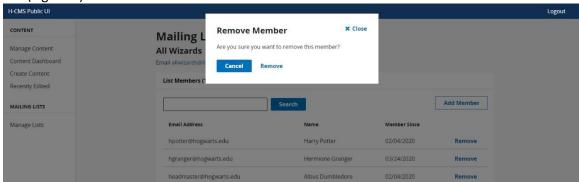


Figure 3 - Add Member

The user will be added as a List Member and will begin receiving email notifications from the Mailing List.

To remove a List Member:

- 1. Select the **Remove** link for the desired member.
- 2. Confirm the removal by selecting **Remove**, or select **Cancel** to return to the previous screen (Figure 4).



The user will be removed as List Member and will no longer receive email notifications from the Mailing List.

ENABLING MEMBER REPLIES AND POSTS

Only a List Administrator can give a member access to post to your list, and the member added as a Poster, will only have permissions to post to that specific list.

To add a Member as a Poster:

- 1. Select Add Member.
- Enter the Role, Name, and Email Address of the user you would like to add as a Poster. Then for the Member Reply Settings section select Accept. Then select Add Member (Figure 5). Select Cancel to return to the previous screen.

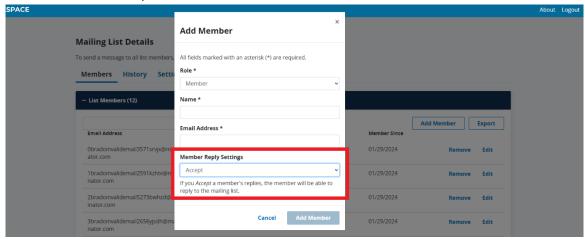


Figure 5 - Add Poster

The user will be added as a *Poster* and can begin posting to the list.

NEW ADDING ADDITIONAL LIST ADMINISTRATORS

To add additional List Administrators:

- Select Add Member.
- 2. In the Add Member pop-up, set *Role* to **Admin** (Figure 6) and then enter the HARP ID for the new List Admin and click **Verify HARP ID**. Select **Cancel** to return to the previous screen.
- 3. Once the HARP ID has been verified, click on **Add Admin** to add the new List Admin, or select **Cancel** to return to the previous screen.
- 4. Ensure that the new List Admin is also a member of the List and that their *Member Reply Settings* is set to **Accept.**
- 5. If the new List Administrator does not have the *QuailityNet Mailer List Administrator* role, they must submit a request through HARP (see the *Getting Started* section above for steps).

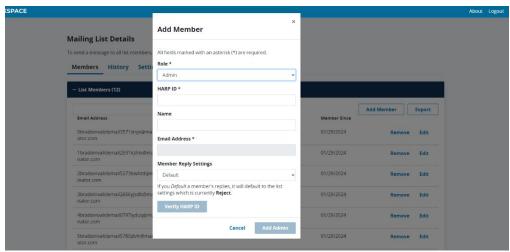


Figure 6 - Add List Administrator

NEW REMOVING LIST ADMINISTRATORS

To remove a List Administrator, please have a current List Administrator send a message to the QNP Mailer Team via ServiceCenterSOS@cms.hhs.gov or #help-qualitynetmailer on Slack. Please include the person's name and list(s) that they need to be removed from.

VIEWING MAILING LIST HISTORY

List Administrators can access the history of a mailing list to see details that include date of last message, the number of responses and participants, and more detailed information such as an emails success and bounce rate. To view a Mailing List's history:

- Select Mailing Lists to go to Mailing List Details. Then select the History (Figure 7) tab to view the
 email message for your list that were sent to the current active list members. This is represented
 by columns for Last Message (the date and time the last message was sent) and the Subject of
 the specific email message. In addition, the page contains columns for Responses and the
 number of Participants.
 - a. You can use the search box at the top of the page to search by a partial or complete **Email Subject** and/or **Sender's Email Address** to quickly find a message in the list.

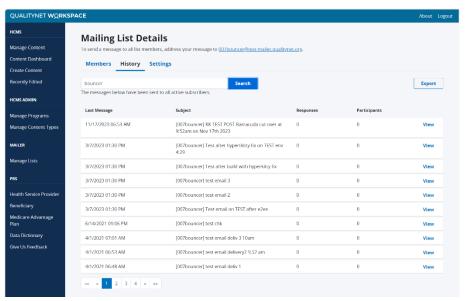


Figure 7 - Mailing List History Tab

2. Select **View** for an individual message to access more detailed history of the message (Figure 8), including a count for *Total* (all messages sent), *Successful* (all messages that were successfully delivered to member inboxes), and *Bounces* (all messages that were unable to be delivered).

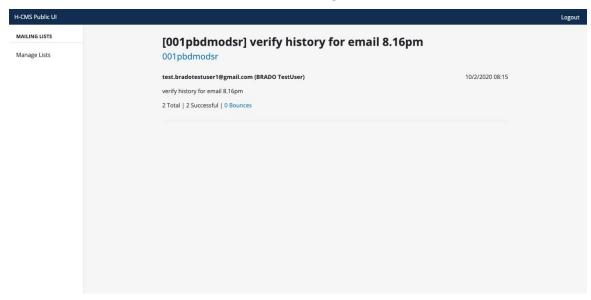


Figure 8 – Bounced Email Details

NEW CHANGING LIST SETTINGS

To change settings for your list(s):

- 1. Select the **Settings** tab to view the list settings for your list.
- 2. Click on **Edit List** to open a dialog box (Figure 9), allowing you to edit the current list settings:
 - a. **List Name**: This is the name of the list that is displayed on the QualityNet list sign-up page.

- b. **List Description**: This is the description that is displayed on the QualityNet list sign-up page.
- c. From Field: This is the text displayed as the "From" address when the sender is masked.
- d. **List Tag**: This identifies which section a list will be displayed in on the QualityNet list sign-up page.
- e. **Set messages from members to:** This field determines if a list member can post without List Admin approval (Accept), can post with List Admin approval (Hold), or cannot post (Reject).
- f. **Set messages from non-members to:** This field determines if a non-member can post without List Admin approval (Accept), can post with List Admin approval (Hold), or cannot post (Reject).
- g. **List Type:** This field determines if list membership is open to anyone who signs-up on the QualityNet list sign-up page (Public) or if membership must be approved by a List Admin (Private).
- h. **Mask sender email address:** This field indicates whether the List Admin's email address will be displayed (unmasked) or NOT displayed (masked) when sending out list notifications.
- i. **Send welcome message?**: This field indicates if subscribers will receive a generic welcome message upon sign-up.
- j. **Send goodbye message:** This field indicates if subscribers will receive a generic goodbye message when they unsubscribe.
- 3. Once you are done with your changes, click **Save**. Select **Cancel** to return to the previous screen.

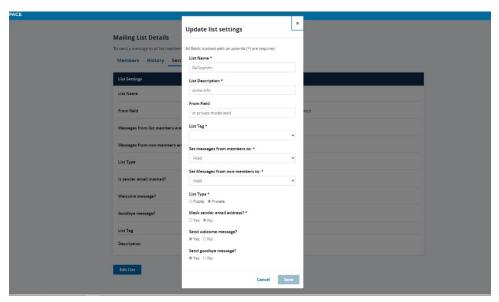


Figure 9 - Change List Settings

Pending Requests

APPROVING SUBSCRIPTION REQUESTS

If you are a List Administrator for a Private mailing list, you will need to review, then approve or reject list Subscription requests, as follows:

1. Go to the *Manage Lists* page and select **Requests** (Figure 10) for the appropriate Private mailing list. You will be directed to the *Pending Requests* page.

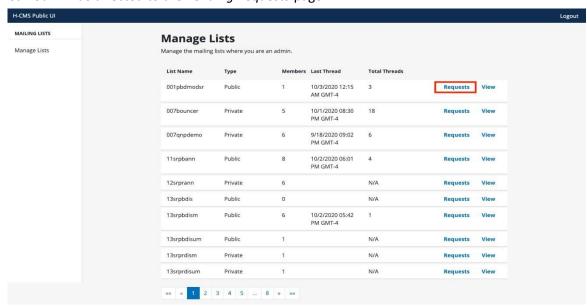
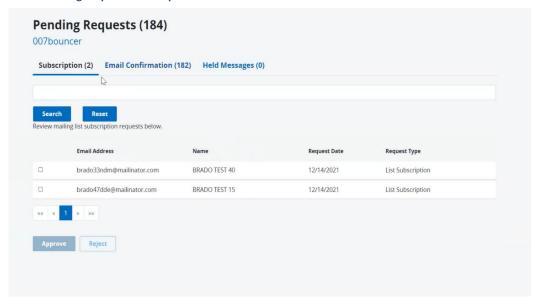


Figure 10 - Manage Lists Requests Link

- From the Subscription tab, carefully review the list of requests for a list's membership (Figure 11). Select all of the pending subscription requests you wish to confirm, then select Approve. Similarly, select all of the pending requests you wish to deny for list membership and select Reject. The user will receive an email notification upon being approved or rejected for the mailing list.
 - a. If there are many pages of Subscription requests, you can use the search box at the top of the page to search by **Email Address** or **Name** to narrow down the results.

Figure 11 – Pending Requests Subscription Tab



APPROVING EMAIL CONFIRMATION REQUESTS

List administrators are not required to verify the email address of potential subscribers. However, if a user reports an issue in confirming his/her own email address (via the automated subscription fulfilment process) or that he/she has not received a Welcome email, you can manually verify subscriber's email address as follows:

- 1. From the **Email Confirmation** tab of *the Pending Request* page (Figure 12), carefully review the email addresses and potential subscribers' names.
 - a If there are many pages of Email Confirmation requests, you can use the search box at the top of the page to search by **Email Address** or **Name** to narrow down the results.

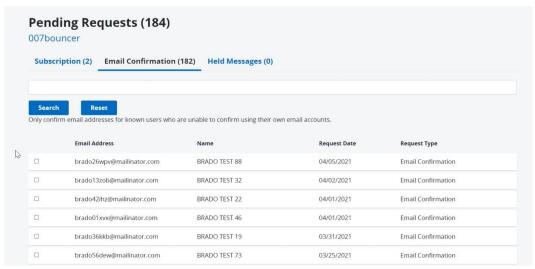


Figure 12 - Pending Requests Email Confirmation Tab

2. Select all of the Email Addresses (and associated subscribers) you wish to affirm for list membership, the select **Approve**. Similarly, select Email Addresses (and associated subscribers) you wish to deny for list membership and select **Reject**. The user will receive an email notification upon being approved or rejected for the mailing list.

APPROVING HELD MESSAGE REQUESTS

If a List Administrator has messages set up to be held for approval, they will need to access the **Held Messages** tab to review and approve. Held messages can be approved in bulk or one at a time:

1. For bulk approval, select all corresponding checkboxes and then select **Approve** or **Reject** (Figure 13).

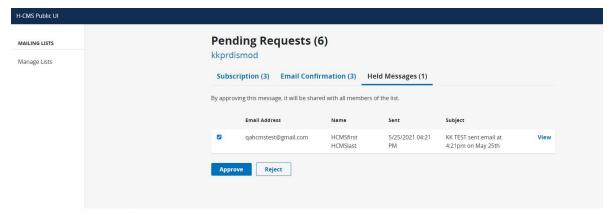
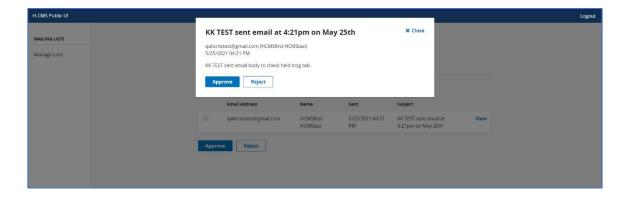


Figure 13 – Bulk Approval

2. For individual approval, select **View** for the thread you want to review and then select either **Reject** or **Approve** based on your approval decision (Figure 14). Select **Cancel** to return to the previous screen.

Figure 14 – Individual Message Approval



Notifications

SENDING NOTIFICATIONS TO YOUR LIST

Only List Administrators can send Notifications to their Subscribers within a list. If a Subscriber were to obtain the email address of the list and send a Notification, it will not be transmitted to the rest of the Subscribers.

1. To access the email address for your List, simply navigate to the *Mailing List Details* page to view the email address at the top of the page (Figure 15).

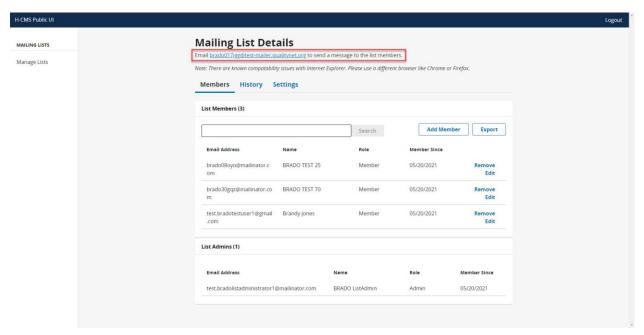


Figure 15 - Mailing List Email Address

2. To send a Notification to a list or lists, List Administrators simply need to email the notification list email address using their regular email account (Outlook, etc.) by opening their email browser, entering the Notification email address, creating the email message, and then sending the email.

The QualityNet Mailer "masks" Notifications from List Admins, which means that your private email address will not be shown in the "From" field and instead is replaced with the name of the Notification list that was selected.

Since you are using your regular email interface (Outlook, etc.), you may add any combination of wording, images, footers and headers (html or plain text) to your message based on your personal preferences.

Exporting Data

List Administrators can export mailing list history or subscriber information to create reports.

EXPORTING MAILING LIST DATA

1. Select **Manage Lists** to go to the *Mailing List Details* page. Then select the **History** tab to view *Mailing List* history. In addition to viewing the history a list, you can export the history data into a .csv file (Figure 16).

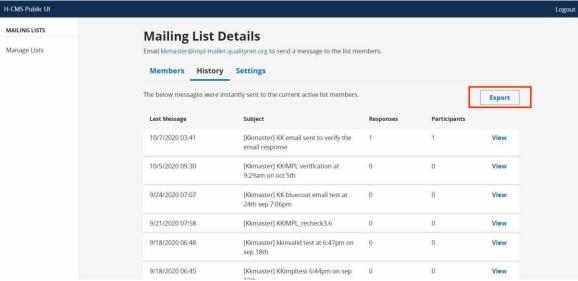


Figure 14 - Mailing List Details History Tab

2. Selecting the **Export** button will generate a .csv file with the contents of the **History** tab. The contents of the file will contain the following details – *Date/Time, Subject, Sender Email, Sender Name, Total Success, Bounces, and Bounce Emails*.

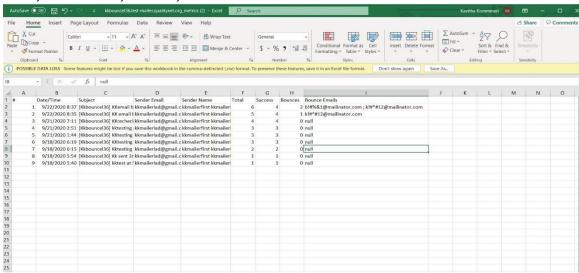


Figure 16 - Exported History in CSV file

EXPORTING DATA

1. Select **Manage Lists** to access the Mailing List Details page. Then select the **Members** tab (Figure 17) to view the information associated with the Subscribers for your list. You have the option to export the Subscriber details into a .csv file.

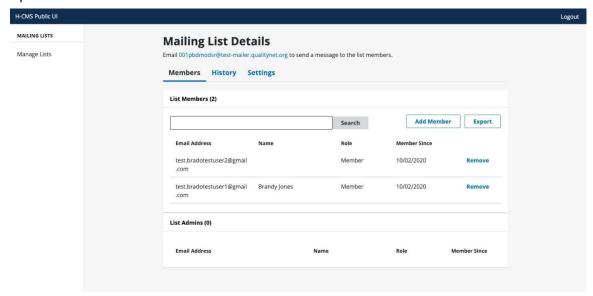


Figure 17 - Members Tab

2. Select the **Export** button (next to the **Add Member** button). Upon selecting the **Export** button, the system will generate a .csv file and render the contents of the **Members** tab within the file. The contents of the file will contain the following core details represented in column format – *Name, Email, Role, Member Since* (Figure 18).

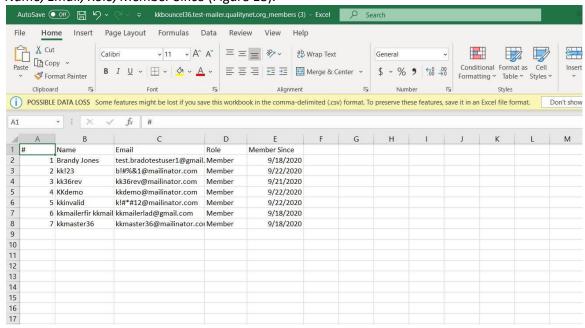


Figure 18 – Exported Members Report in a CSV file

Appendix

WHITELISTING THE DOMAIN

- 1. To ensure list email delivery, please whitelist the domain: mailer.qualitynet.org by adding the domain to your contact list. This will ensure all messages are properly received.
- 2. If you are having trouble receiving messages, check your spam or junk folder, and if the problem persists, contact your IT Support.

SUBSCRIBING TO A LIST

1. Access https://qualitynet.cms.gov/listserv-signup

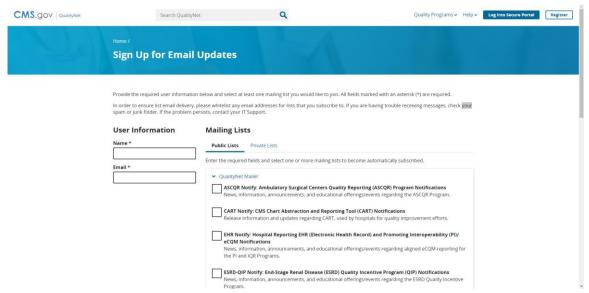


Figure 19 - QualityNet Sign Up Page

2. Fill out your name and email address in the *User Information* section.

Choose one or more lists and select the **Submit** button.

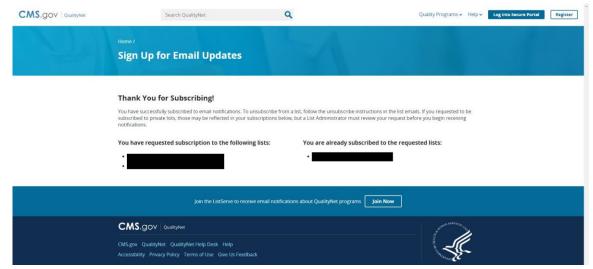


Figure 20 – Thank You for Subscribing Page

3. You will receive a confirmation email and will need to reply to that email to confirm your subscription.

If it is a private list, it will require approval from one of the List Admins.

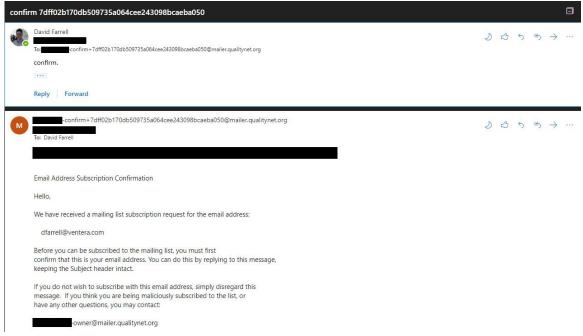


Figure 21 - Confirmation Email and Reply

3. You may receive a welcome email depending on the individual list settings.

UNSUBSCRIBING FROM A LIST

There are instructions to unsubscribe that are included in all messages sent from Mailer. These instructions appear at the bottom of every email sent through Mailer.

Tip: certain email clients (such as Outlook) will append the unsubscribe instructions as a text file (Example: "AT00001.txt").



Figure 22 - Unsubscribe Message from Mailer

- 1. Send your unsubscribe request to your list's address with the subject "Unsubscribe."
- 2. After you send your request, you will receive a confirmation email.

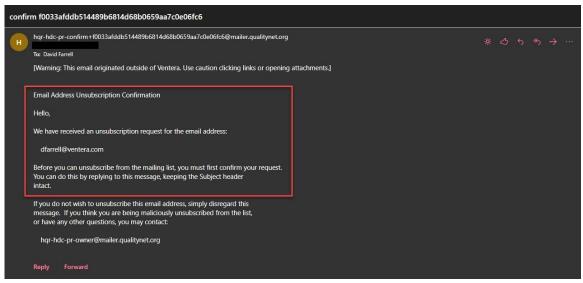


Figure 23 - Confirmation Request from Mailer

- 4. Reply to the email to confirm your request, keeping the subject ("Unsubscribe") unchanged.
- 5. After you confirm the request, you will receive a final unsubscribe confirmation.

ABOUT BOUNCES

What is a bounced email?

A bounced email, or bounce, is any email message returned to the sender's email after being unrecognized and rejected by the recipient's email server.

If you are a QualityNet Mailer List Admin, you will receive email notifications when an email address is unrecognized, and a message has bounced.

Why do bounces occur in QualityNet Mailer?

Bounces happen in all email-based systems. The occur for various reasons and are classified as either:

- Soft Bounces happen when the email is too large, the recipient's mailbox is full, or their account is temporarily suspended.
- Hard Bounces happen when the recipient's email address is not valid, contains a typo, or the domain doesn't exist.

What are bounce scores in QualityNet Mailer?

Every member has a bounce score, which starts at zero, and increases by 0.5 for soft bounces and 1 for hard bounces. A member's bounce score will only increase once per day, so no matter the number of soft or hard bounces, their score will only increase by 0.5 or 1 point each day. If the system cannot determine whether it's a soft or hard bounce, it will be counted as hard.

What are bounce thresholds in QualityNet Mailer?

Each list has a threshold for bounces, limiting the number of bounces throughout a designated number of days a member can trigger before their account is disabled.

The default threshold is a bounce score of 5 over the course of 7 days.

Can I change the bounce threshold for my lists?

Yes, the bounce threshold is unique to each specific list, and the List Administrator can request an increase or decrease to best accommodate their publishing frequency. Please contact ServiceCenterSOS@cms.hhs.gov to request any changes.

What happens when a subscriber's bounce score exceeds the bounce threshold?

After a subscriber's bounce score has crossed the bounce threshold, their subscription will be disabled but they remain members of the list. If an email address is bouncing enough for the account to become disabled, it is likely they will not be receiving other notifications from QualityNet mailer, either. However, List Administrators receive notifications and can notify members of bounces and disabled accounts. If a subscriber has any concerns that they might be suspended, they should contact their List Administrator, or if they cannot find the List Administrator's contact information, they should contact Service Center Help Desk at ServiceCenterSOS@cms.hhs.gov or (866) 288-8914.

Once confirmed as suspended, a subscriber can unsubscribe and resubscribe to the list to rejoin. Still, it's essential that they follow the whitelisting protocol first and ensure they have addressed any issues from their email server that may be causing the bounces.

What steps can I perform to try and eliminate bounces from happening in the first place? There are three steps a subscriber can do to help eliminate bounces. Before you begin these steps, always first verify whether the QualityNet Mailer notification is in your spam or junk folder.

Step 1: Subscriber whitelists the QualityNet Mailer domain

The first step towards eliminating unnecessary bounces is to ensure all subscribers have whitelisted the QualityNet Mailer domain: mailer.qualitynet.org. This can be done by adding the domain name to the email provider's contacts/address book/safe senders list. Depending on the email provider, there are different steps, but it generally requires adding the domain and marking it either as a safe sender or not as spam. Please check with your email service provider for additional details.

Step 2: Verify whitelisting at the email server level

The second step is for the subscriber to verify with their IT Department that mailer.qualitynet.org is whitelisted by their email server.

Step 3: Verify the domain is not blacklisted

The final step is for the subscriber to verify with their IT Department that the mailer qualitynet.org is not blacklisted by their email server.

What if I verify each of the Bounce verification steps, and I am still not receiving notifications?

If a subscriber has confirmed each of the three (3) steps identified for whitelisting and verification and is still encountering bounced notification issues, please contact Service Center Help Desk at ServiceCenterSOS@cms.hhs.gov or (866) 288-8914.

As a List Administrator, what actions should I consider taking if I receive a bounce notification for one of my subscribers?

The List Administrator should notify the subscriber and confirm they have followed the three steps described above. If the domain is whitelisted and not blacklisted, please contact Service Center Help Desk at ServiceCenterSOS@cms.hhs.gov or (866) 288-8914 for more assistance.

FREQUENTLY ASKED QUESTIONS (FAQ)

What is the difference between Notification and Discussion lists?

- Notification lists are intended to a one-way communication and distribution list to send news, meeting invites, surveys, and other information to large groups of subscribers
- Discussion lists allow list members to comment and share information with their groups.

Should my membership be Public or Private?

- If there is no sensitive information being shared, you're in compliance with your organization's security policies, and you do not need to review and approve member subscription requests, select a public list.
- If the list needs more oversight, security, or the List Administrator just prefers to closely manage their subscribers, select a private list to approve all member subscription requests.

What is sender masking?

 We default our settings to mask the sender, which means we mask the email address of the list administrator who sends a message. This setting can be changed to display your email address, if preferred.

What is the difference between member and non-member settings?

- Members are subscribers to your list who either are active or suspended.
- Non-members are people who have posted to you list but are not subscribed. These posts could
 come from legitimate users who have posted to the list without subscribing or they may be
 spammers. To protect from spam, all posts from anyone who isn't subscribed are indicated as
 being from non-members.

What is the difference between Accept, Hold, and Reject replies?

 Accept replies means that all messages sent to the list are released without approval (used for discussion lists).

- Hold replies mean that all replies are held for approval before being sent out to all list members (used for discussion lists).
- Reject replies means that all replies are automatically rejected (used for notification lists).