# QualityNet | Mailer

# QualityNet Mailer List Administrator User Guide

*Last Updated 11/13/2023*

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

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ServiceCenterSOS@cms.hhs.gov. 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.

2. 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**
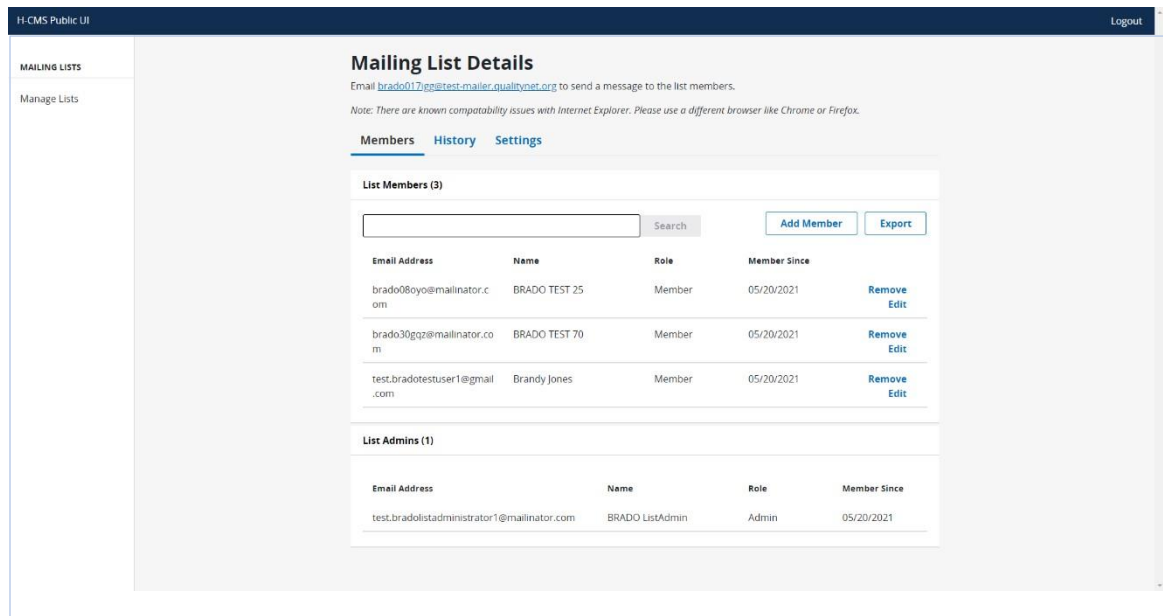


To **add** a list member:

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.
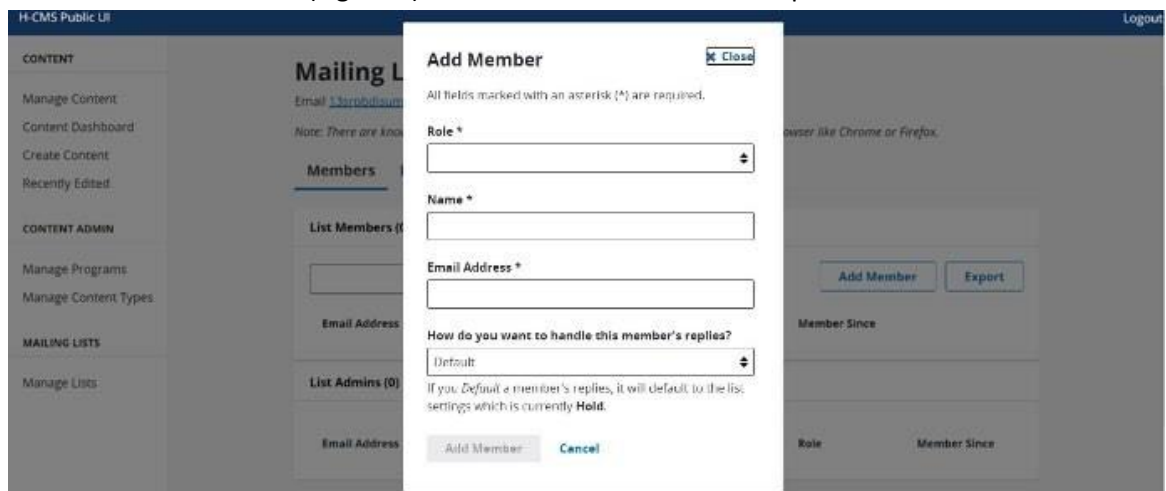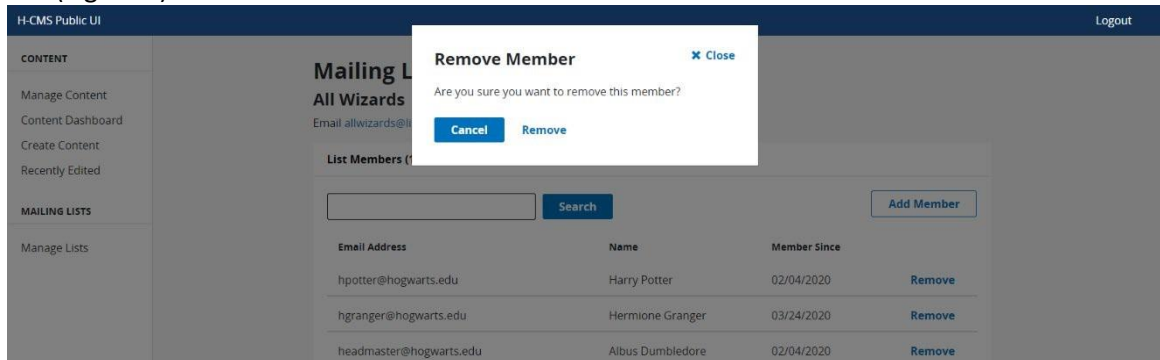


**Figure 3 – Add Member**

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**.

2. Enter the *Role, Name,* and *Email Address* of the user you would like to add as a Poster. Then for the 'How do you want to handle this member's replies' section select **Accept**. Then select **Add Member** (Figure 5). Select **Cancel** to return to the previous screen.
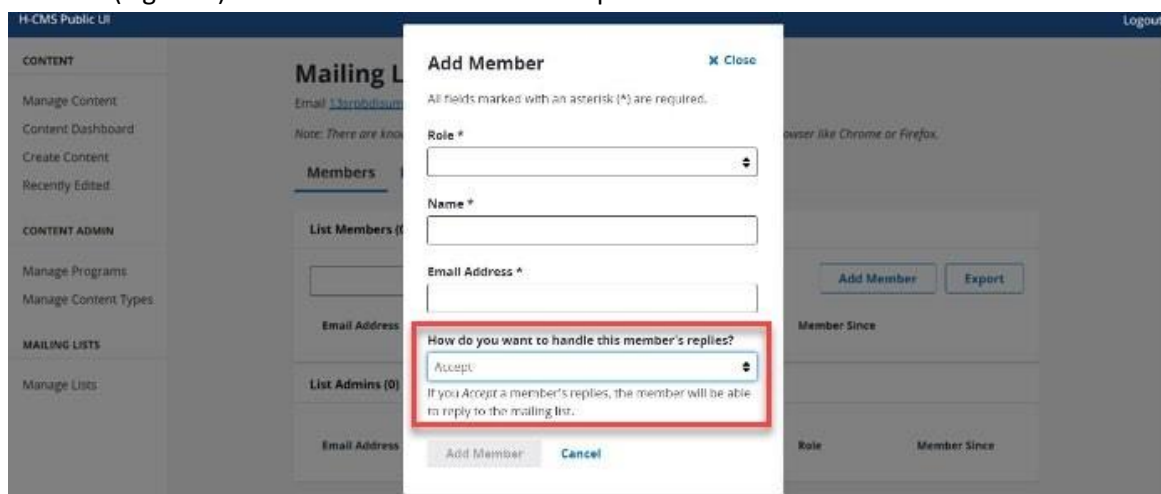


**Figure 5 – Add Poster**

The user will be added as a *Poster* and can begin posting to the list.
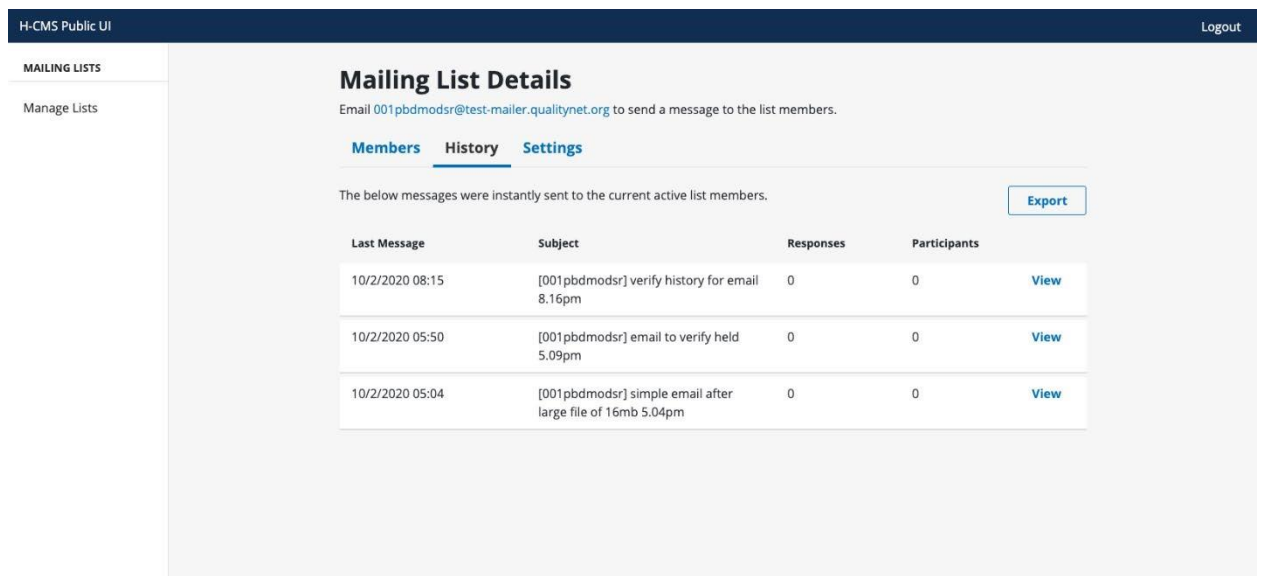
## ADDING ADDITIONAL LIST ADMINISTRATORS

To add additional List Administrators, notify the QNP Team and have new admin request the List Administrator role in HARP. To **add** a list administrator:

1. Email ServiceCenterSOS@cms.hhs.gov with the person's Name, Email Address, and HARP ID.

2. The new List Admin should follow steps described in the *Getting Started* section of this document.

## 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:

1. Select **Mailing Lists** to go to *Mailing List Details*. Then select the **History** (Figure 6) 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.*



**Figure 6 – Mailing List History Tab**

2. Select **View** for an individual message to access more detailed history of the message (Figure 7), 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).
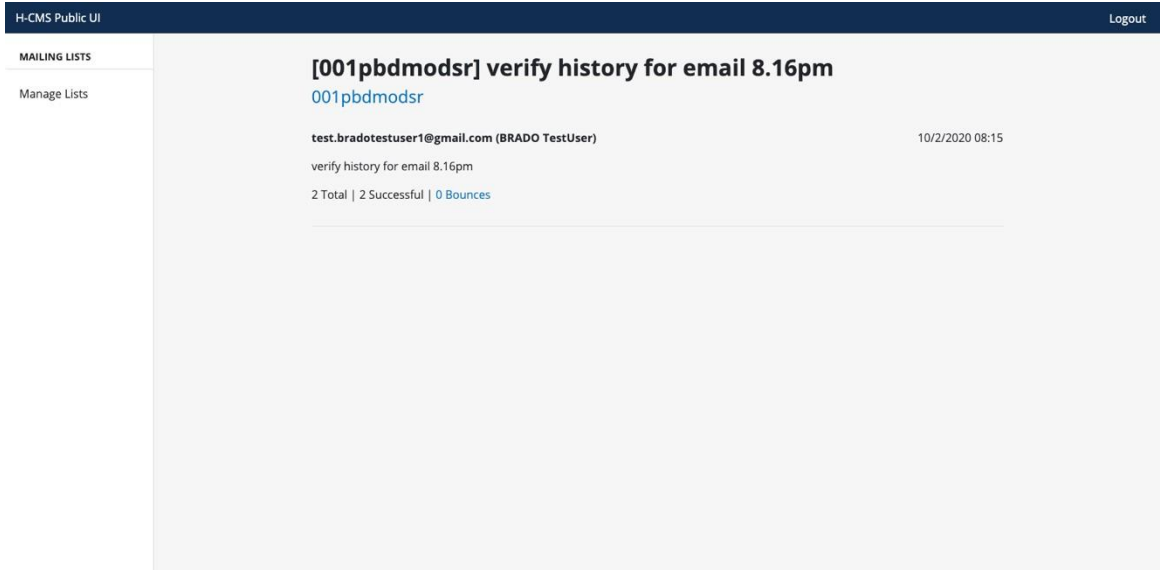
**Figure 7 – Bounced Email Details**

## 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 8) for the appropriate Private mailing list. You will be directed to the *Pending Requests* page.
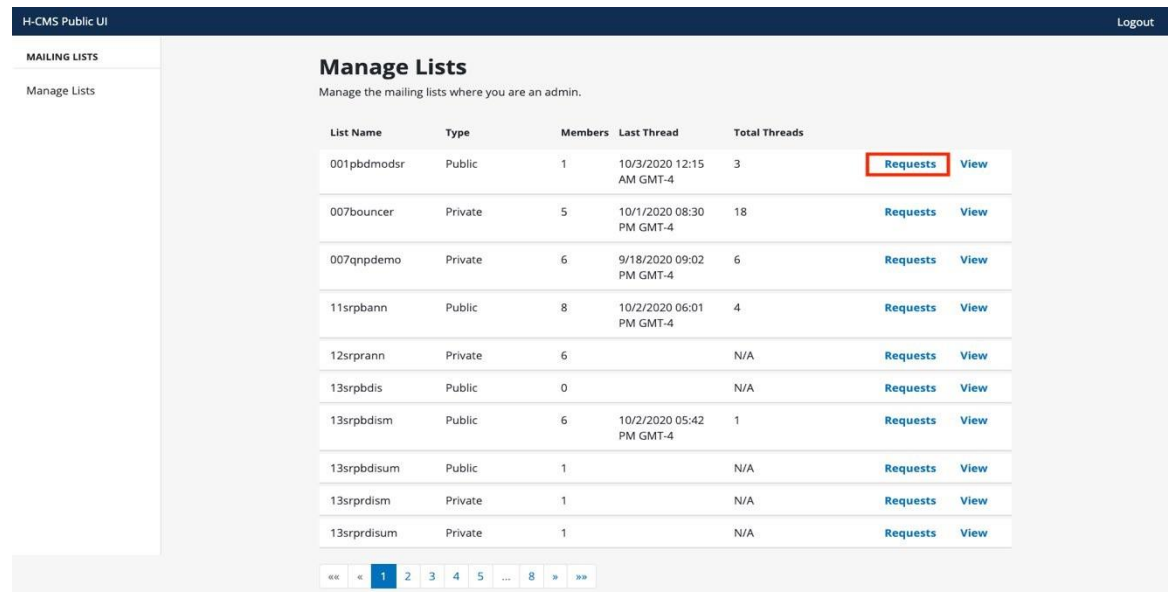


**Figure 8 – Manage Lists Requests Link**

2. From the **Subscription** tab, carefully review the list of requests for a list's membership (Figure 9). Select all of the pending subscription requests you wish to confirm, the 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 9 – 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 10), 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.
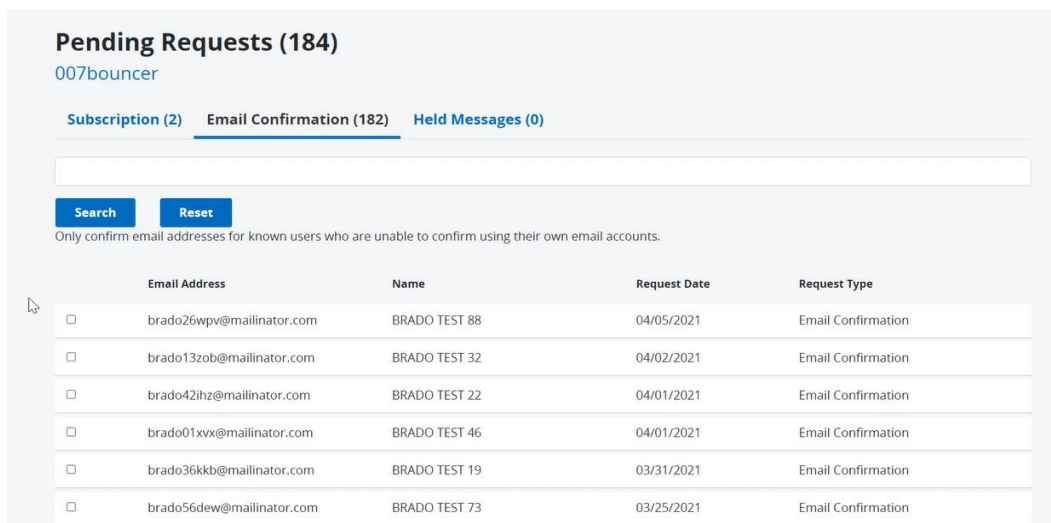


**Figure 10 – Pending Requests Email Confirmation Tab**

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:
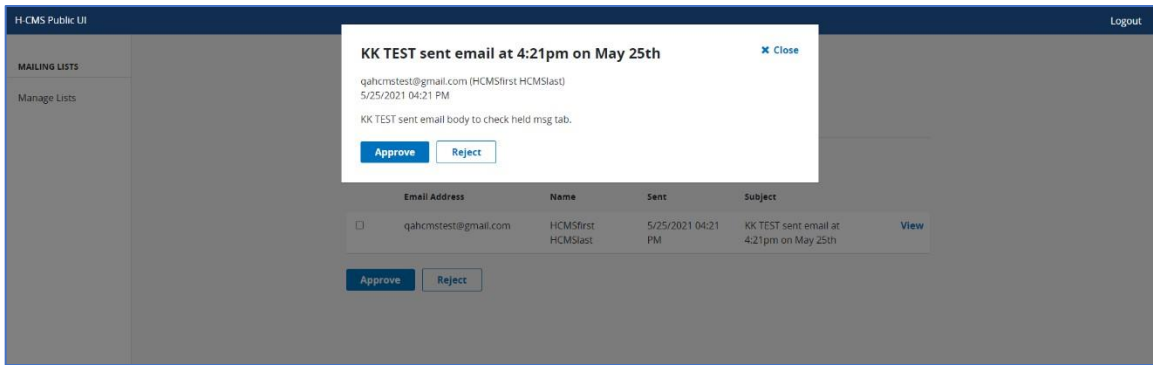
1. For bulk approval, select all corresponding checkboxes and then select **Approve** or **Reject** (Figure 11).
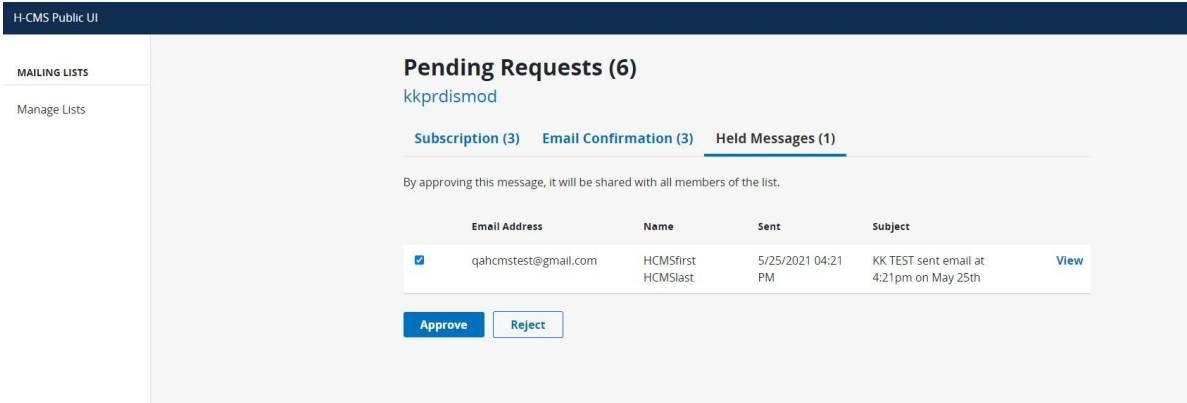
2. For individual approval, select **View** for the thread you want to review and then select either **Reject** or **Approve** based on your approval decision (Figure 12). Select **Cancel** to return to the previous screen.

**Figure 12 – 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 13).



**Figure 13 – 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 14).



**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 15 – Exported History in CSV file**

## EXPORTING DATA

1. Select **Manage Lists** to access the Mailing List Details page. Then select the **Members** tab (Figure 16) 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 16 – Members Tab**

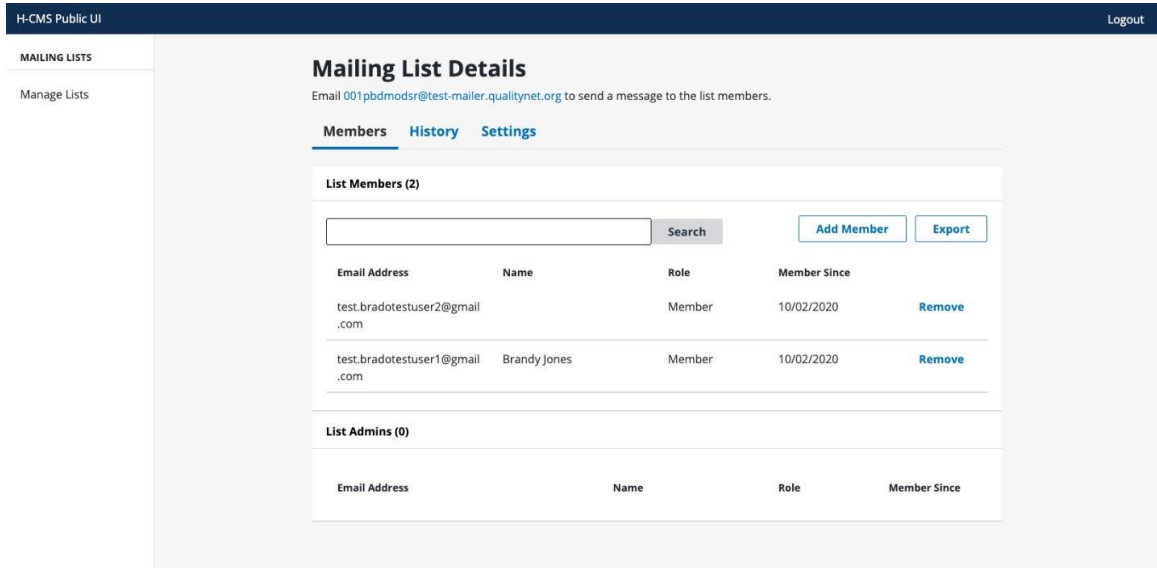2. Select the **Export** button (next to the **Add Member** button). Upon selecting the **Export** button, the system will generate a .csv file and render the contents of the **Members** tab within the file. The contents of the file will contain the following core details represented in column format – *Name, Email, Role, Member Since* (Figure 17).
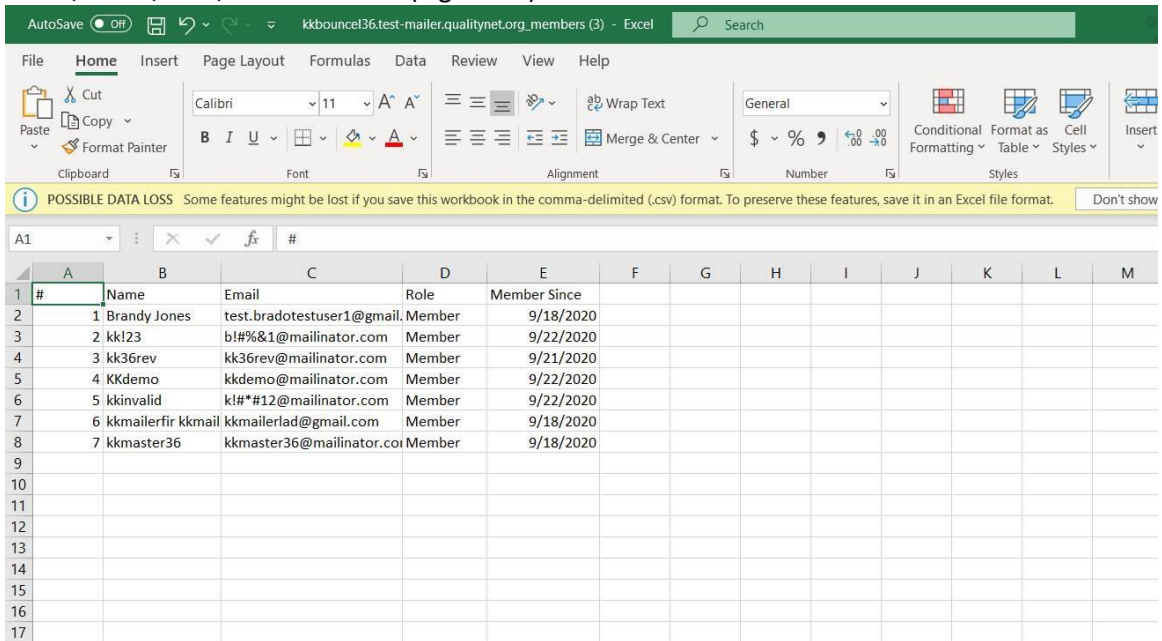


**Figure 17 – Exported Members Report in a CSV file**

# 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 18 - 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 19 – 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.
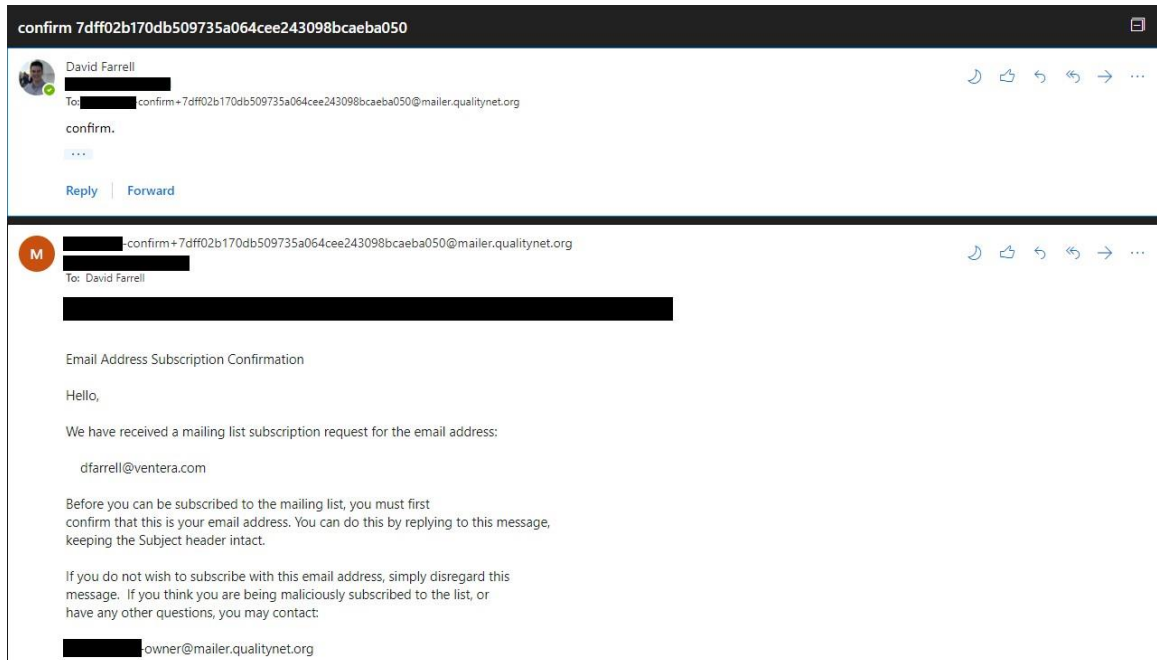
**Figure 20 - Confirmation Email and Reply**

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 21 – 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.
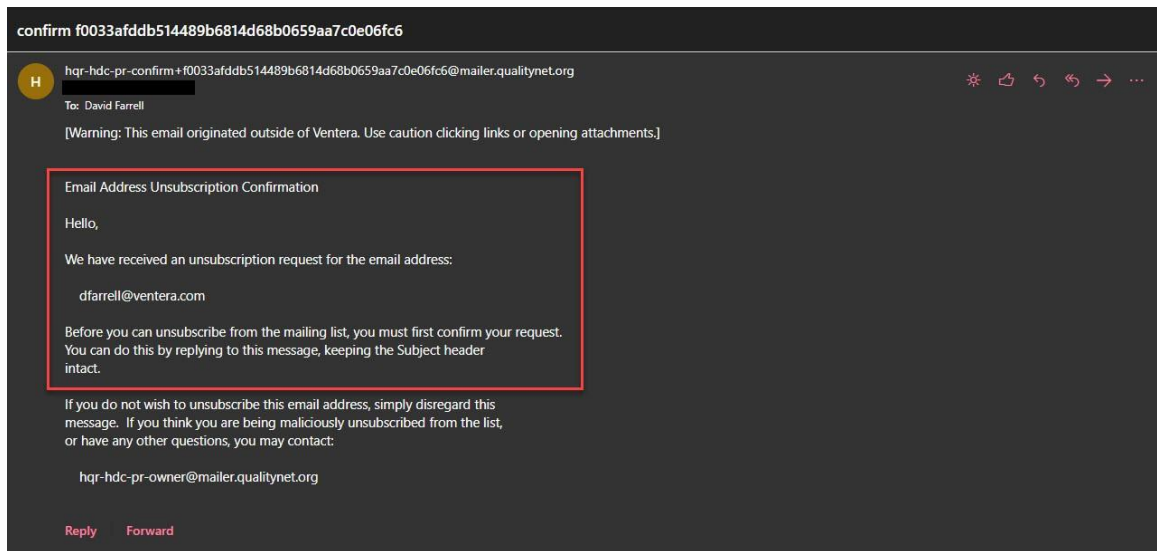
**Figure 22 - Confirmation Request from Mailer**

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).