

# QualityNet | Mailer

## QualityNet Mailer List Administrator User Guide

Last Updated 12/04/2020

Mailing lists are available for end-user subscription at <https://qualitynet.org/listserv-signup>.

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### Getting Started

#### ***SIGNING UP FOR HARP***

To become a *List Administrator*, you must first have a HARP account and can register at <https://harp.qualitynet.org/register/profile-info>. You can find more information by visiting the [HARP Help page](#).

#### ***OBTAINING THE LIST ADMINISTRATOR ROLE***

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

1. Log into HARP at <https://harp.qualitynet.org/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 **Headless Content Management (H-CMS)**, 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

[ESS\\_ADO\\_Support@ventera.com](mailto:ESS_ADO_Support@ventera.com). 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://www.qualitynet.org/admin>, 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.)

List Name	Type	Members	Last Thread	Total Threads	Requests	View
001pbdmodsr	Public	3	10/3/2020 12:15 AM GMT-4	3	Requests	View
007bouncer	Private	5	10/1/2020 08:30 PM GMT-4	18	Requests	View
007qnpdemo	Private	6	9/18/2020 09:02 PM GMT-4	6	Requests	View
11srpbann	Public	8	10/2/2020 06:01 PM GMT-4	4	Requests	View
12srprann	Private	6		N/A	Requests	View
13srpbdis	Public	0		N/A	Requests	View
13srpbdisum	Public	6	10/2/2020 05:42 PM GMT-4	1	Requests	View
13srpbdisum	Public	1		N/A	Requests	View
13srprdisum	Private	1		N/A	Requests	View
13srprdisum	Private	1		N/A	Requests	View

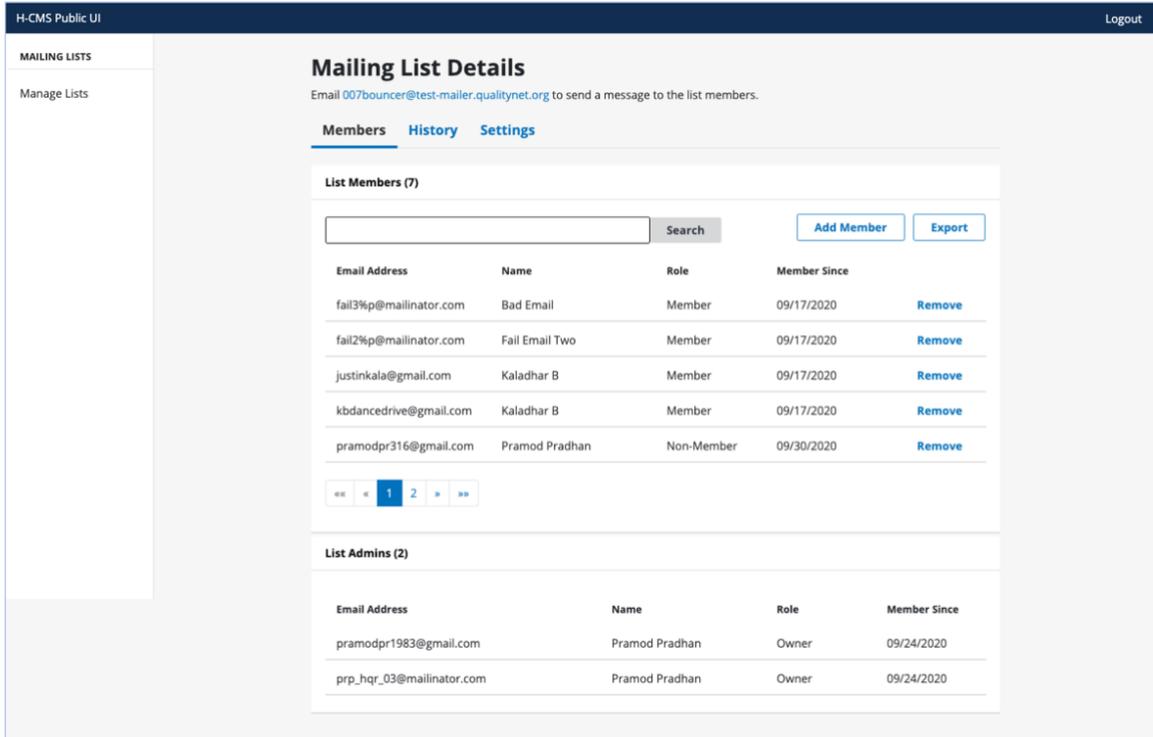
Figure 1 – Manage Lists

3. Select **View** 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*.



The screenshot shows the 'Mailing List Details' page for a list with ID 007bouncer@test-mailer.qualitytynet.org. The page has a sidebar with 'MAILING LISTS' and 'Manage Lists'. The main content area has tabs for 'Members', 'History', and 'Settings'. Under 'List Members (7)', there is a search bar and 'Add Member' and 'Export' buttons. A table lists 7 members with columns for Email Address, Name, Role, and Member Since, each with a 'Remove' link. Below this is a 'List Admins (2)' table with columns for Email Address, Name, Role, and Member Since, listing two administrators.

Email Address	Name	Role	Member Since	
fail3%p@mailinator.com	Bad Email	Member	09/17/2020	<a href="#">Remove</a>
fail2%p@mailinator.com	Fail Email Two	Member	09/17/2020	<a href="#">Remove</a>
justinkala@gmail.com	Kaladhar B	Member	09/17/2020	<a href="#">Remove</a>
kbdancedrive@gmail.com	Kaladhar B	Member	09/17/2020	<a href="#">Remove</a>
pramodpr316@gmail.com	Pramod Pradhan	Non-Member	09/30/2020	<a href="#">Remove</a>

Email Address	Name	Role	Member Since
pramodpr1983@gmail.com	Pramod Pradhan	Owner	09/24/2020
prp_hqr_03@mailinator.com	Pramod Pradhan	Owner	09/24/2020

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.

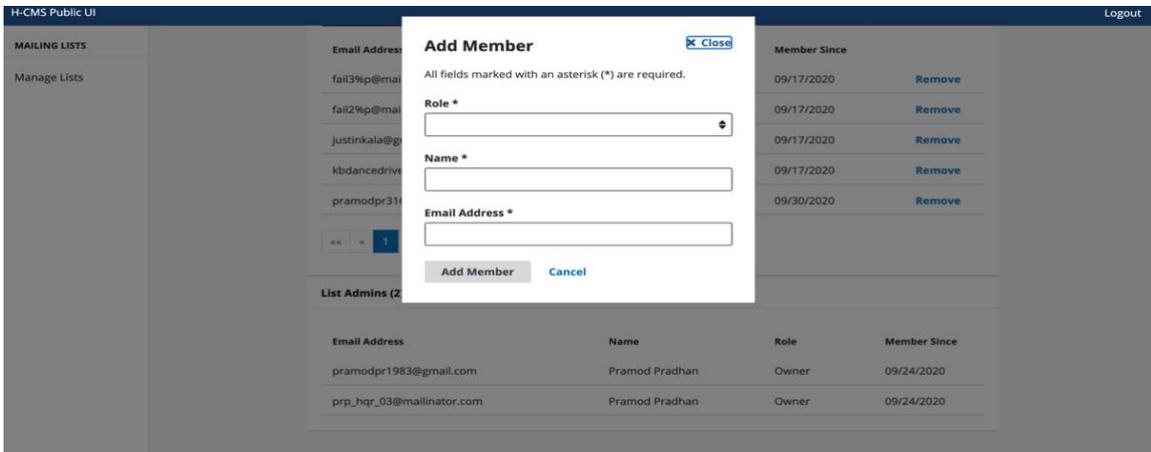


Figure 3 – Add Member

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).

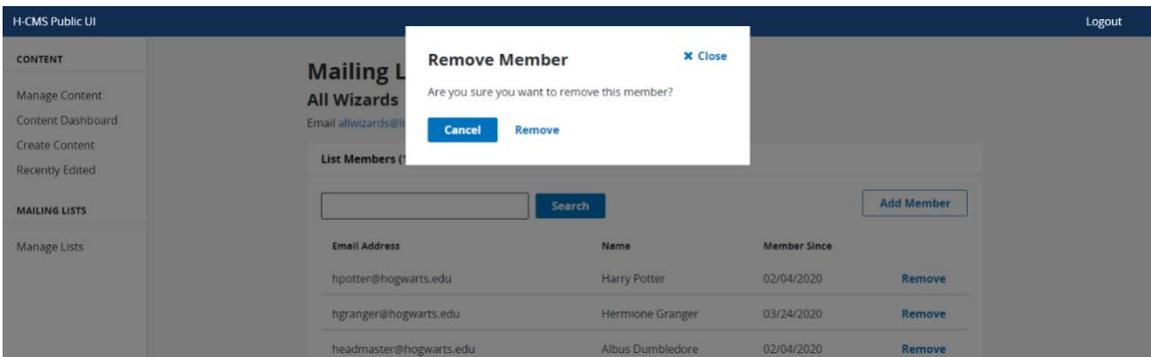


Figure 4 – Remove Member

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

### 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 5) 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*.

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MAILING LISTS  
Manage Lists

### Mailing List Details

Email 001pbdmodsr@test-mailer.qualitynet.org to send a message to the list members.

**Members** **History** **Settings**

The below messages were instantly sent to the current active list members. [Export](#)

Last Message	Subject	Responses	Participants	
10/2/2020 08:15	[001pbdmodsr] verify history for email 8.16pm	0	0	<a href="#">View</a>
10/2/2020 05:50	[001pbdmodsr] email to verify held 5.09pm	0	0	<a href="#">View</a>
10/2/2020 05:04	[001pbdmodsr] simple email after large file of 16mb 5.04pm	0	0	<a href="#">View</a>

Figure 5 – Mailing List History Tab

2. Select **View** for an individual message to access more detailed history of the message (Figure 6), 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).

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MAILING LISTS  
Manage Lists

### [001pbdmodsr] verify history for email 8.16pm

001pbdmodsr

test.bradotestuser1@gmail.com (BRADO TestUser) 10/2/2020 08:15

verify history for email 8.16pm

2 Total | 2 Successful | 0 Bounces

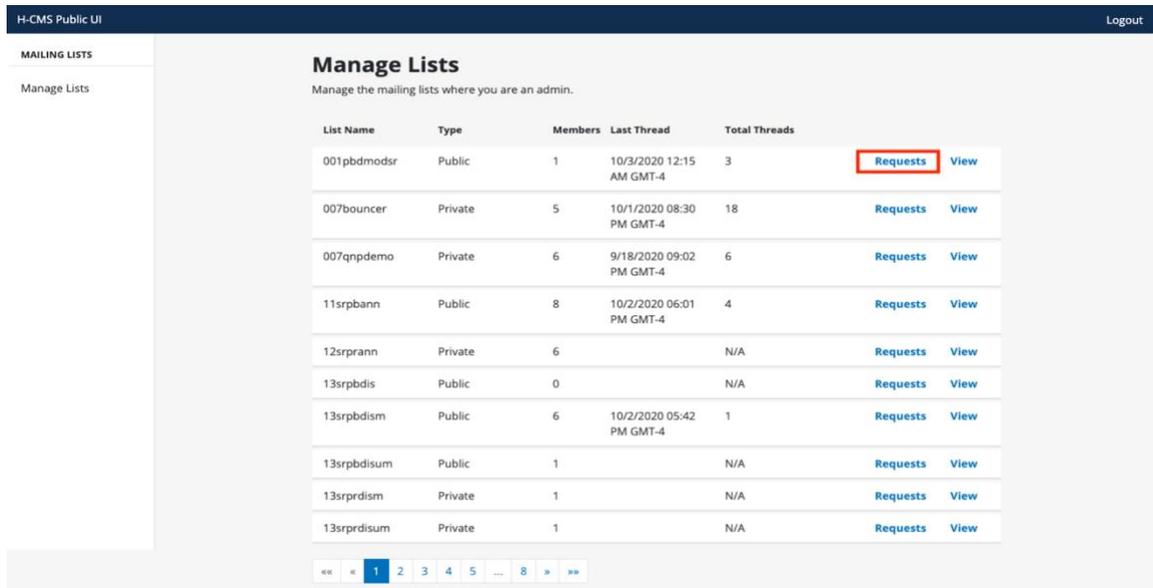
Figure 6 – Bounced Email Details

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

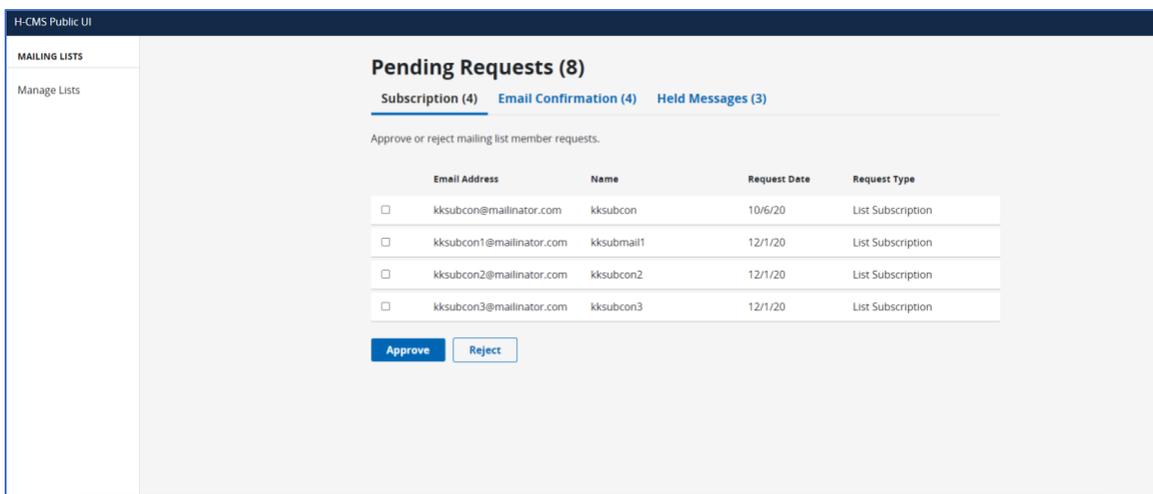


The screenshot shows the 'Manage Lists' interface. On the left is a sidebar with 'MAILING LISTS' and 'Manage Lists'. The main content area is titled 'Manage Lists' and contains a table of mailing lists. The table has columns for List Name, Type, Members, Last Thread, and Total Threads. For each list, there are 'Requests' and 'View' links. The 'Requests' link for the first list, '001pbmodsr', is highlighted with a red box.

List Name	Type	Members	Last Thread	Total Threads	Requests	View
001pbmodsr	Public	1	10/3/2020 12:15 AM GMT-4	3	Requests	View
007bouncer	Private	5	10/1/2020 08:30 PM GMT-4	18	Requests	View
007qnpdemo	Private	6	9/18/2020 09:02 PM GMT-4	6	Requests	View
11srpbann	Public	8	10/2/2020 06:01 PM GMT-4	4	Requests	View
12srprann	Private	6		N/A	Requests	View
13srpbdis	Public	0		N/A	Requests	View
13srpbdisum	Public	6	10/2/2020 05:42 PM GMT-4	1	Requests	View
13srpbdisum	Public	1		N/A	Requests	View
13srprdisum	Private	1		N/A	Requests	View
13srprdisum	Private	1		N/A	Requests	View

Figure 7 – Manage Lists Requests Link

2. From the **Subscription** tab, carefully review the list of requests for a list's membership (Figure 8). 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.



The screenshot shows the 'Pending Requests (8)' page. It has tabs for 'Subscription (4)', 'Email Confirmation (4)', and 'Held Messages (3)'. Below the tabs is a table of pending subscription requests. Each row has a checkbox, an email address, a name, a request date, and a request type. At the bottom of the table are 'Approve' and 'Reject' buttons.

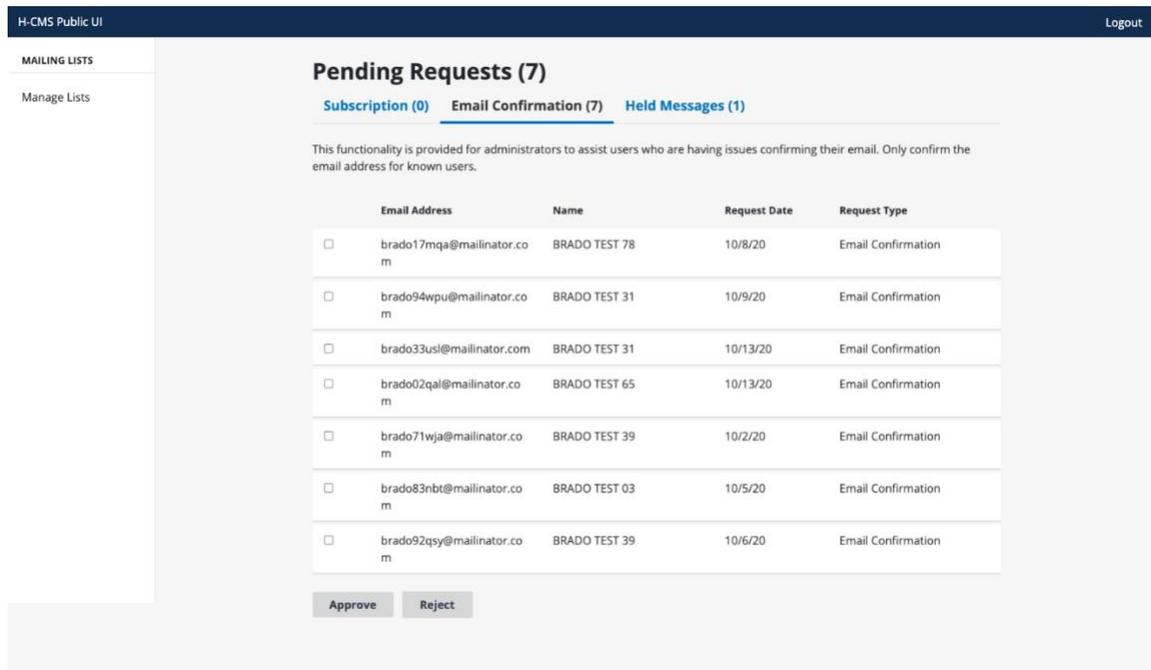
	Email Address	Name	Request Date	Request Type
<input type="checkbox"/>	kksubcon@mailinator.com	kksubcon	10/6/20	List Subscription
<input type="checkbox"/>	kksubcon1@mailinator.com	kksubmail1	12/1/20	List Subscription
<input type="checkbox"/>	kksubcon2@mailinator.com	kksubcon2	12/1/20	List Subscription
<input type="checkbox"/>	kksubcon3@mailinator.com	kksubcon3	12/1/20	List Subscription

Figure 8 – 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 fulfillment 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 9), carefully review the email addresses and potential subscribers' names.



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MAILING LISTS  
Manage Lists

### Pending Requests (7)

[Subscription \(0\)](#) [Email Confirmation \(7\)](#) [Held Messages \(1\)](#)

This functionality is provided for administrators to assist users who are having issues confirming their email. Only confirm the email address for known users.

	Email Address	Name	Request Date	Request Type
<input type="checkbox"/>	brado17mqa@mailinator.com	BRADO TEST 78	10/8/20	Email Confirmation
<input type="checkbox"/>	brado94wpu@mailinator.com	BRADO TEST 31	10/9/20	Email Confirmation
<input type="checkbox"/>	brado33usi@mailinator.com	BRADO TEST 31	10/13/20	Email Confirmation
<input type="checkbox"/>	brado02qal@mailinator.com	BRADO TEST 65	10/13/20	Email Confirmation
<input type="checkbox"/>	brado71wja@mailinator.com	BRADO TEST 39	10/2/20	Email Confirmation
<input type="checkbox"/>	brado83nbt@mailinator.com	BRADO TEST 03	10/5/20	Email Confirmation
<input type="checkbox"/>	brado92qsy@mailinator.com	BRADO TEST 39	10/6/20	Email Confirmation

Figure 9 – 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 10).

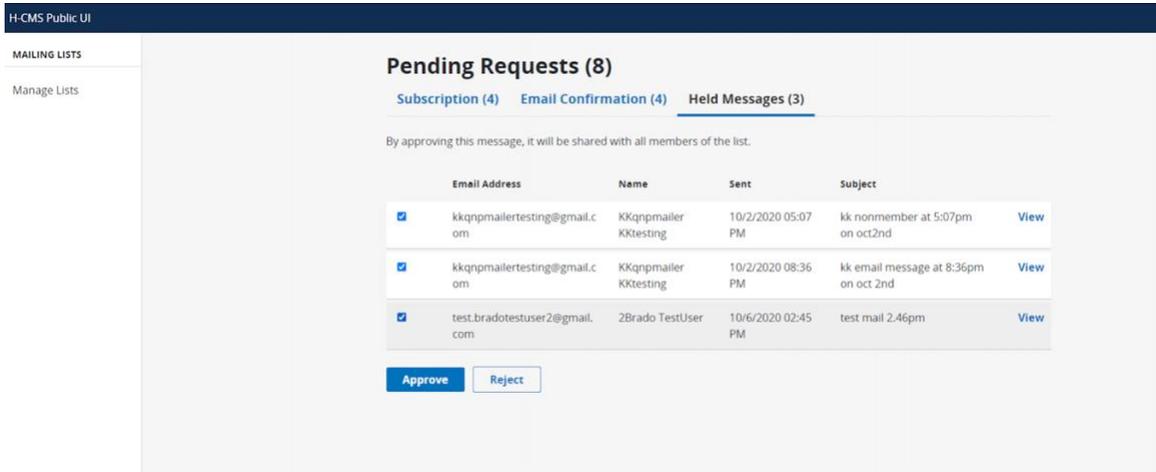


Figure 10 – Pending Requests Held Messages Tab

- 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 11). Select **Cancel** to return to the previous screen.

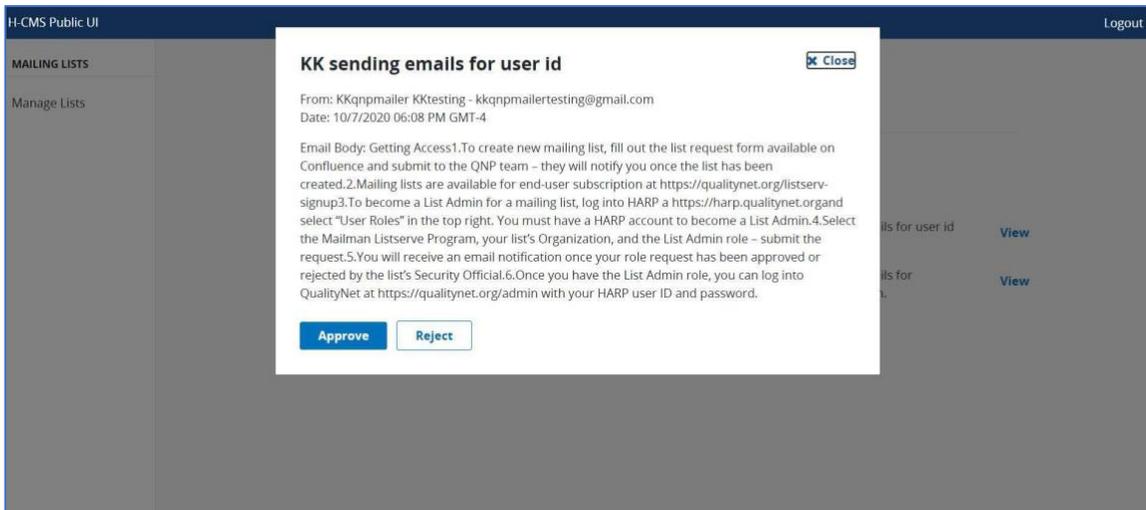


Figure 11 – Individual Message Approval

## 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 12).

The screenshot displays the 'Mailing List Details' page. At the top, the email address 'Email 001pbmodsr@test-mailer.qualitynet.org to send a message to the list members.' is highlighted with a red box. Below this, there are three tabs: 'Members', 'History', and 'Settings'. The 'Members' tab is selected, showing a search bar and two buttons: 'Add Member' and 'Export'. Below the search bar is a table of 'List Members (3)'. The table has columns for 'Email Address', 'Name', 'Role', and 'Member Since'. The members listed are: test.bradotestuser2@gmail.com (Member, 10/02/2020), brado23@mailinator.com (Member, 10/02/2020), and test.bradotestuser1@gmail.com (Member, 10/02/2020). Below the members table is a section for 'List Admins (1)'. The table has columns for 'Email Address', 'Name', 'Role', and 'Member Since'. The admin listed is: test.bradotestuser1@gmail.com (Owner, 10/02/2020).

Figure 12 – 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 13).

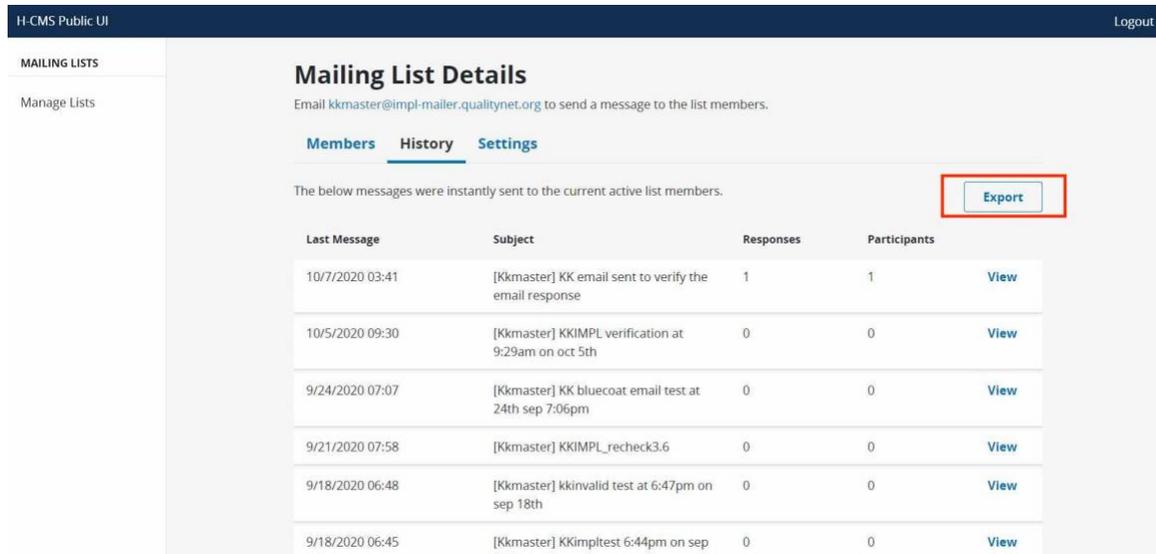


Figure 13 – Mailing List Details History Tab

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*.

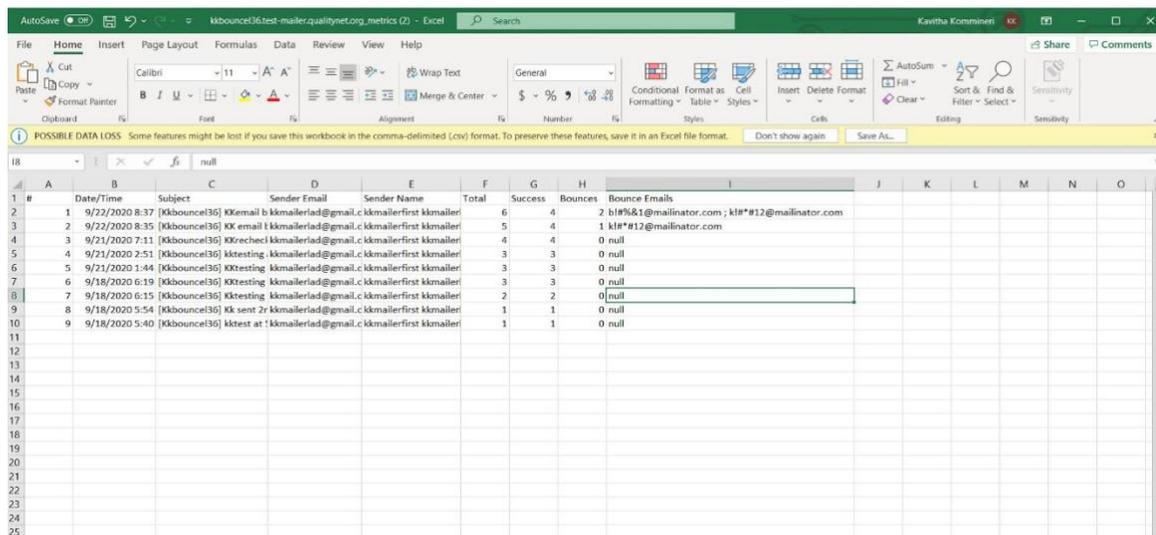


Figure 14 – Exported History in CSV file

## EXPORTING DATA

1. Select **Manage Lists** to access the Mailing List Details page. Then select the **Members** tab (Figure 15) to view the information associated with the Subscribers for your list. You have the option to export the Subscriber details into a .csv file.

The screenshot shows the 'Mailing List Details' page for a list with 2 members. The 'Members' tab is selected. The table below shows the details of the members:

Email Address	Name	Role	Member Since	
test.bradotestuser2@gmail.com		Member	10/02/2020	Remove
test.bradotestuser1@gmail.com	Brandy Jones	Member	10/02/2020	Remove

Below the members table, there is a section for 'List Admins (0)' with a similar table structure.

Figure 15 – 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 16).

The screenshot shows an Excel spreadsheet with the following data:

#	Name	Email	Role	Member Since
1	Brandy Jones	test.bradotestuser1@gmail.com	Member	9/18/2020
2	kk123	bl%&1@mailinator.com	Member	9/22/2020
3	kk36rev	kk36rev@mailinator.com	Member	9/21/2020
4	KKdemo	kkdemo@mailinator.com	Member	9/22/2020
5	kkinvalid	kl!#*#12@mailinator.com	Member	9/22/2020
6	kkmailerfir kkmail	kkmailerlad@gmail.com	Member	9/18/2020
7	kkmaster36	kkmaster36@mailinator.com	Member	9/18/2020

Figure 16 – Exported Members Report in a CSV file