

Letter Manager

Overview:

Whenever you select a letter to send, whether a template or a standard ProIRB letter, the Letter Manager screen is displayed. The name of the letter you selected will also appear on the Letter Manager screen, a name given for standard letters by ProIRB or the template name you created. This screen is the means by which you direct ProIRB to whom and how you want the correspondence to be sent. For either standard or template letters, it is important to note that only one letter is produced at a time. Also, some buttons and features available for you to use will appear differently on the Letter Manager screen depending on whether you are using a standard letter or a letter template (see Page 4, Figures 1 and 2). **You must close any other MS Word documents you may have open and be working on before working with letters in ProIRB.**

A discussion of the various parts of the Letter Manager follows. While every attempt has been made to provide accurate instructions, the appearance of screens and dialog boxes and the order in which they appear may vary depending upon the Microsoft Office version and/or email client used.

Letter Date:

Can be changed if you wish a different date to appear on the letter. This is useful in the event you wish to prepare a letter in advance for signature.

On Meeting Date:

If you wish to send a letter confirming an expedited approval of something, but not show the Meeting Date, *highlight* the date and *press Delete* key on keyboard to remove.

Response Required / Date Required / Date to Follow Up:

Depending on what "type" of letter you are sending, ProIRB may assume that you will want the requested material or "response" to the letter you are sending and will display Letter Manager with a check mark after Response Required. NOTE: For any letter, however, you may choose to check or uncheck this box and enter or delete dates. If checked, dates may already be entered for you in the Date Required and Date to Follow Up fields, but you may change these dates to reflect when **you** want to follow up if the response has not yet been received and the last possible date you require the response.

You generally enter a CPA (via the Change in Procedure screen) once you receive the response (requested material). Examples would be recording the receipt of a progress or final report in response to a continuing review letter type, receipt of a check in response to an invoice letter type, receipt of a revised consent form in response to a consent deficiency letter type, etc.

Addressee:

Select each addressee (one at a time) by placing a check mark (e.g., PI) or *highlighting* an individual name, then placing check mark (e.g., IRB Member name). You can look at and edit the name and address information for any of the addresses by *double clicking* on their names in their respective boxes, which brings up the contact information screen.

When you have selected an Addressee, ProIRB will default to placing a check mark in the Mail column of boxes, assuming you wish to print a letter for mailing. If you wish to, instead, send the letter via email, remove the check from the Mail column and place a check in the Email column. If you have opted to use email, ProIRB attaches the letter to the email for sending. If using a template, the attachment is a Word document. If using a standard letter, the attachment is a "snapshot" (or picture) of the letter. A Snapshot Viewer link is included in the email for the person receiving the email to download if he/she doesn't already have this program installed on their computer. You may enter any subject and text into the email, as well. (TROUBLESHOOT: While ProIRB allows you to check both the Mail and Email column and send a letter via both, the fact that you sent an email

will not be recorded to the database. Also, the email may not have been sent directly, but placed instead in your Outlook Outbox and then have to be sent out from there. Future versions of ProIRB will address this issue. Bottom line for now is our strong suggestion that you use Mail and Email one at a time to reduce the variables.)

CC (to right of Addressee area):

If using standard ProIRB letters, you do **not** have the capability to CC (create copy and send) to other Addressees (see Page 4, Figure 1).

If using letter templates, you **do** have the capability to CC (see Page 4, Figure 2). The merge field named <<TextCCs>> in your template will transfer the CC names you select in Letter Manager into your letter.

- Select CC names by *clicking* the **Add or Delete CCs** button and/or *clicking* the appropriate **check box** next to the type of individual. After clicking the Add or Delete CCs button, *highlight* name(s), one by one, in the Available Contacts column, then *click* the **<Add** button to move name into the Currently in CC List column. Do the reverse if you wish to **Delete** a name. (TIP: If you wish to CC **all** your Board Members, simply place a check mark after All IRB Members. If you wish to CC only **some** of your Board Members, click the Add or Delete CCs button to choose any number of names from the list.)
- Notice that if you choose to email an Addressee, ProIRB assumes you also wish to email all your selected CCs and automatically places a check mark in the Email CCs box (the names will be plugged into the Cc line of the email). You may uncheck the Email CCs box, which would then send an email to the Addressee, but a letter to the selected CCs. Within your selected CC names, you cannot mix sending some CCs an email and some a letter.
- Note that a General Letter template type has no information specific to a study and would therefore have the Sponsor, PI, Coordinator, and All Reviewers check boxes ghosted and not available for use on the Letter Manager screen. You may still *select* the All IRB Members check box and/or *click* the **Add or Delete CCs** button and choose anyone you wish to CC from the list of names.

Closing and Signatory:

The wording appearing in the Default line is the wording you created via Main Menu / Administration / Letter Closings for each Letter Name type. The same default wording appears in the For this Letter line (until and unless you change it as discussed below). Ignore the drop down arrows in each line. This wording will be transferred to the letter, whether standard or template. NOTE: If you created a template with a "fixed" closing instead of inserting merge fields, the fixed closing will always appear on the letter.

If for some reason you want to use a different closing for this particular letter, you may override the default closing through the Letter Manager. To do so:

- *Click* the **Change Closing** button. Enter your changes in the screen that displays; then *click* **Save Data**.
- The wording changes now appearing in the For this Letter line is the closing that will be transferred to this **specific** letter.
- This closing or "override" will remain in effect until you indicate you wish the default closing to be restored.
- To restore the default closing, *click* the **Reset to Default** button. The wording in the For this Letter line changes back to the same as in the Default line.
- TROUBLESHOOT: You may at some point in time decide to change a letter closing via Administration / Letter Closings. Even though this new closing appears correctly in the Default line, you must click the Reset to Default button for the changes to become effective and correctly transfer to a letter.

Add Comments to Letter:

At times, you may wish to enter some additional information for only this letter that is not normally included in your standard or template letter(s). If using a standard letter, *click* the **Add Comments to Letter** button (see Page 4, Figure 1); *type* the information in the screen that displays, and *click* **Save Data**. What you typed will be inserted into that specific letter (you cannot change the insert location, which may vary depending upon type of letter). These comments will also be included if you then choose another Addressee to send letter to, as long as you remain working in Letter Manager (the comments are not remembered or saved when you exit Letter

Manager).

If using a template, the same function is available by *clicking* the **Modify (This Letter Only)** button (see Page 4, Figure 2). Note that the screen that displays is titled TempTemplate.dot-Microsoft Word. This means that you will be adding comments for this "temporary" template letter only and not changing your underlying "permanent" template for future letters. Unlike using a standard letter, you have full control in locating where in the TempTemplate to *type* the additional information. You may also *insert* additional merge fields for this particular letter. After making your changes, *click* the **Save** icon or *click Yes* to "Do you want to save the changes you made to TempTemplate.dot?" (if you instead used the **X** in upper right corner to close out).

Preview:

Once you have used the Letter Manager to prepare a letter for sending such as selecting the Addressee, entering any comments, indicating whether a response is required, etc. you can view the letter's appearance before printing or emailing by *clicking the Preview* button. Always close out of the preview screen by *clicking the bottom X* in the upper right corner of screen. Items to consider and for your information:

- **IMPORTANT:** Although you can print the letter from the preview screen, ProIRB will not record to the database that a letter was created unless you close out of the preview screen, and then print the letter by *clicking* the **Send/Print** button on the Letter Manager screen. (NOTE: If using a standard letter, the only option you have to print from the preview screen is to *click File / Print*.)
- If using a template, clicking the Preview button also prompts ProIRB to open MS Word. The print icon is available to use.
TROUBLESHOOT: The following dialog boxes **may or may not appear**. If a box appears after clicking the Preview button stating, "Do you want to save the changes you made to TempTemplate.dot", simply *click YES*. If a box appears after clicking the print icon stating, "Do you want to save the changes you made to "name of letter.doc"", simply *click YES*. The name given our standard letter for that "type" of letter may be what appears in the title bar of the preview screen and in the dialog box, rather than the name you gave that template. This will not affect your letter in any way and does not mean that this letter was recorded to the database (you are still in Preview). **The appearance of these dialog boxes indicates you still had MS Word open before starting to use ProIRB. Close Word, exit ProIRB, and then reopen ProIRB to continue.**
- Remember that choosing Email sends a letter as an attachment. You would have to open the attachment to preview the letter (NOTE: As with any other time you Preview, do not send the Email at this time). A better suggestion is to first choose Mail instead of Email, Preview the letter, then return and select Email for actually sending it via the Send/Print button on Letter Manager screen. This ensures that a record of a letter being sent via Email is recorded to the database.

Send/Print:

Whether you chose Mail to print a letter for mailing or Email to which a letter is attached, the letter will only be recorded to the database (via the Follow Up Manager) if you *click* the **Send/Print** button from the Letter Manager screen. The Follow Up Manager is accessed from the Main Menu. After clicking the Send/Print button, a letter is printed for the Addressee and each selected individual CC, if any. The letter is only recorded to the database (Follow Up Manager) once per letter, however. Multiple entries are not made for subsequent Addressees or CCs. Greater detail is available in the Follow Up Manager tutorial.

Print Envelope(s):

When you *click* the **Print Envelope(s)** button on the Letter Manager screen and have selected to CC other individuals, you are prompted by ProIRB to insert an envelope before printing each one. If you are using an envelope feeder, then simply *click Yes* to each time you are prompted.

OTHER TUTORIAL REFERENCES:

Standard ProIRB Letters
Letter Templates
Follow Up Manager

Letter Manager

ProIRB[®] Letter Manager Compiled Institution

Letter Invoice for IRB Services

Study# 03.0003
On Meeting Date 3/19/2003
Letter Date 2/25/2003

Response Required **Date Required** 3/11/2003 **Date to Follow Up** 3/6/2003

Addressee		E-MAIL	Mail
Sponsor <input type="checkbox"/>	Any Company	<input type="checkbox"/>	<input type="checkbox"/>
PI <input type="checkbox"/>	Last Name--3404, James R MD	<input type="checkbox"/>	<input type="checkbox"/>
Coordinator <input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Reviewers <input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
IRB Members <input type="checkbox"/>	Last Name--4013, David E. PhD, CIP Last Name--4014, Joan RN Last Name--4015, George MMD	<input type="checkbox"/>	<input type="checkbox"/>
Other Contact <input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

CC: **Email CCs**

Add or Delete CCs

Add Comments to Letter

Closing and Signatory

For this Letter Respectfully yours, Sally IRB Coordinator Reset to Default Change Closing

Default Respectfully yours, Sally IRB Coordinator

Modify (This Letter Only) [Preview](#) [Send/Print](#) [Print Envelope\(s\)](#) [Return](#)

Figure 1: If Using a Standard Letter

Letter Manager

ProIRB[®] Letter Manager Compiled Institution

Letter **Initial Review Invoice** Study# 03.0003

On Meeting Date 3/19/2003

Response Required Date Required 3/11/2003 Date to Follow Up 3/6/2003 Letter Date 2/25/2003

Addressee		E-MAIL	Mail		
Sponsor	Any Company	<input type="checkbox"/>	<input type="checkbox"/>	Sponsor	<input type="checkbox"/>
PI	Last Name--3404, James R MD	<input type="checkbox"/>	<input type="checkbox"/>	PI	<input type="checkbox"/>
Coordinator		<input type="checkbox"/>	<input type="checkbox"/>	Coordinator	<input type="checkbox"/>
Reviewers		<input type="checkbox"/>	<input type="checkbox"/>	All Reviewers	<input type="checkbox"/>
IRB Members	Last Name--4013, David E. PhD, CIP Last Name--4014, Joan RN Last Name--4016, George VMD	<input type="checkbox"/>	<input type="checkbox"/>	All IRB Members	<input type="checkbox"/>
Other Contact		<input type="checkbox"/>	<input type="checkbox"/>	Add or Delete CCs	

CC: Email CCs

Closing and Signatory

For this Letter Respectfully yours, Sally IRB Coordinator Reset to Default Change Closing

Default Respectfully yours, Sally IRB Coordinator

Figure 2: If Using a Letter Template