Policy Act Regs Procedures

Active Email guidelines for Customer Service

Follow these guidelines when sending and receiving email to/from external stakeholders (injured workers, employers, authorized representatives, service providers etc.).

Remember - Not all emails need to be tagged to file. Determine if there is a business need to keep the email first.

Quick reference - Key standards on when and how to use email

When to use email

Our customers expect us to be available when they need information or have questions to help them in their recovery and return to work. Speaking with our customers is the best way to communicate. Verbal discussions and interactions are key in maintaining relationships and being collaborative. However, there are times when an email can be used in follow up to a conversation or to relay simple information, including:

- upcoming appointments, travel details, and return to work plans,
- obtaining hours worked or income for payments,
- confirming or relaying work restrictions, contact names, phone numbers or addresses,
- sending letters, including decisions after they have been discussed.

How to use email

Technical requirements

- Confirm you have the correct email address: send a test email while speaking with the recipient and have them reply. Periodically confirm the email address has not changed.
- Ensure your ‘out of office’ message is updated.
- Send emails to file using the ‘tag’ function when the email thread is final, not after each reply. Provide the claim number and category. Include the original message and your response.
- Do not copy emails into file notes.
- Always delete emails after they have been scanned to file.

Standard requirements

- **Response time to emails:** Emails should be acknowledged within **1 business day**. A complete response should be provided within **5 business days**
- If a claim owner receives multiple emails from someone in a short period of time, a separate response is not required for each email (see the How to use Email - detailed

information, Standard Requirements section below for how to proceed).

- The subject line should be limited to the recipient's first name, last initial, and claim number (e.g., John D., claim #123 4567).
- Limit email threads to one topic and only send the email to relevant parties.
- Sensitive information, like medical updates or medical opinions, should not be included in the body of the email.
- **ALL** requests for psychological information must be referred to Access to Information to be reviewed and processed (refer to Procedure 20.1).
- Your signature block should <u>only</u> include the following:
  Jane Doe, Case Manager
  Workers' Compensation Board – Alberta
  Phone: 780-498-XXXX
  Fax: 780-498-XXXX
  Email: jane.doe@wcb.ab.ca
  Pronouns: eg., she, her, hers (if you wish to include)

Professional requirements

Emails should be written using the same professional standards WCB requires for letters:

- Use collaborative and inclusive language to convey that we work together (e.g., *"Together we decided* " or *"We discussed and agreed"*). Use inclusive, neutral, and bias-free terms.
- Ensure your message is confident and clear. Write in a way your customer will understand. Use only relevant information and frame things positively (e.g., instead of *"Don't forget"* say *"Remember to"*). Be sensitive to how a reader may interpret words (e.g., *"evidence"* may sound more intimidating than *"information"*).
- Use your active voice (e.g., instead of saying *"The decision was approved by the Board"* , say *"We decided"*).
- Be professional and conversational. Write the way you speak and use personal pronouns (e.g., you, us, we, our).

When not to use email

- **Entitlement decisions** - Entitlement decisions should be communicated verbally (minimum two attempts) and followed up with an appropriate letter. **While working from home during COVID 19, all letters are being converted to PDF and sent by email.**
- **Biweekly updates** - emails should not replace biweekly update discussions with the worker or employer.
- **Providing health information (e.g., medical, chiropractic, physiotherapy or psychological)** - emails should not relay a diagnosis, a medical opinion or findings from test results/treatment. This information should be related in a letter.
- **Providing psychological, psychiatric or psychosocial information** - Personal information about the worker and third parties is removed from psychiatric and psychological reports (e.g., a detailed life history) before being disclosed. Therefore, ALL requests for psychological information must be referred to Access to Information to be reviewed and processed (refer to Procedure 20.1). This does not include information for travel or appointment dates.
- **Preliminary discussions** - discussions involving opinions or that go back and forth before relaying a decision.

How to use email - detailed information

Technical requirements

- **Emails and file notes** – emails should not be copied into file notes. Claim owners should determine if the information from the email can be documented into a file note or if they should scan the email to file. Remember, if the email is scanned to file it should be deleted from your inbox.
- **Confirm the recipient's email address** - confirm the email address and recipient by sending a test email while speaking to the recipient with a subject line "test email" and have the recipient reply, using a specific word or their claim number to confirm the email address is correct. Periodically confirm the email address has not changed.
- **Use your out of office automatic reply** – turn on your out of office automatic reply when you will be away from the office. Include the dates you will be absent, who else can be contacted (i.e., Please contact the Customer Contact Centre for assistance at 780-498-3999) and what to expect when you return.
- **Separate emails must be sent for each worker/claim file –** if you are not able to separate the information, forward the email to *Mailbox CS Customer Records Image Team/WCBAlta* . Include the worker's full name and claim number for each worker discussed in the email. Customer Records will send a copy to each worker's file after redacting the other information. Remind our external customers to send one email for each claim/worker.
- **Tagging emails to file** – an email does not need to be tagged to file each time a reply is made. This results in multiple email threads being scanned to file. Only one copy of the email should be tagged to file. The discussion in the email thread should be final when tagged to file.

For information about the 'tag' function for Outlook, refer to the tip sheet in Microsoft Teams at:
https://wcbalberta.sharepoint.com/:w:/s/Proj-MicrosoftOutlook/Ed7junrhPnlBmWHjfX5CSQEBT1YEiwedtgthbNc3dI9Rkw?e=ar5Ted

Tips to have emails scanned to file faster:

- Save excel spreadsheets (i.e., ELP calculator) as a PDF before sending.
- Separate the email from embedded images, if there are images such as photos, invoices, receipts pasted into the email they all have to separated. If possible, include them as attachments to the email.
- Remove email addresses that show as links.
- Try to avoid sending password protected emails, if you do include the password.
- Have the worker submit invoices and receipts through the ***myWCB app***.

Standard requirements

- **Response time to emails:** Emails should be acknowledged within **1 business day**. A complete response should be provided within **5 business days**.
  - When issues are more complex (use your discretion on what qualifies as complex) you should acknowledge the email and advise of the date you will provide a detailed response.
  - Otherwise, your response should be sent within five business days.

  If the claim owner receives multiple emails from someone, in a short period of time, a separate response is not required for each email. It may be appropriate to work with that person to identify when they can expect an email response. Supervisor approval is required in these unique circumstances. **Add an Alert**, usage type - Disability Management and alert type - Communication and document the information in the description.

- **Limit email threads to one topic** – emailing with multiple topics may result in multiple emails and confusion between the parties on what is being discussed.

- **Subject line information** - only use the worker's first name, last initial and claim number as outlined in the quick reference section.
- **Pay attention to who you are replying to** – consider who the sender has copied on their email, as it may be inappropriate to include all parties on your response.
- **Employee email signature** - your email signature should include your full name, position, company name, phone number, fax number and email contact information, Pronouns: eg., she, her, hers (if you wish to include), as outlined above. You may include a response time message (e.g., I try to reply to emails within two to five business days of being received.). A standard corporate message or relevant promotion can be included, (such as, *Stay connected with us with the myWCB app. Available in the App Store and Google Play.)* No other messages should be included in the signature.
- **Educate external customers** - encourage them to follow the same guidelines.

Email retention

It is important to take care when sending emails. Any email you send as part of your job, is considered a record, and may be disclosed in response to a FOIP request or be subject to a legal proceeding. Remember, not all emails need to be tagged to file. Determine if there is a business need to keep the email, if so, send it to the claim file. **If there is no business need, delete the email.** The documents below can help determine if an email should be tagged to file.

Email decision process.pdf

Knowledge Guide - Using and Managing Email.pdf

Knowledge Guide - Transitory Records.pdf

Extenuating circumstances

Extenuating circumstances may warrant a shift from these guidelines. If an extenuating circumstance occurs, clearly outline the reasons for the shift in a file note.

Examples of extenuating circumstances may include:

- The recipient is unreachable via more secure methods of communication (i.e., telephone, in-person meeting, fax, mail), and the information is urgently required to reach a decision.
- The recipient requests communication via email alone. Ensure the recipient was notified of other communication options and informed that email is not a secure form of contact.
- Your worker has restrictions which prevent them from communicating verbally or in person (i.e., psychological restrictions).
- Direction from senior management to email letters vs. mailing them for safety (i.e., an emergency or pandemic situation).

Archived on 01/27/2022 02:01:38 AM.

Archived on 01/19/2022 02:00:39 AM.

Archived on 01/15/2022 02:02:03 AM.

Archived on 07/09/2021 02:02:30 AM.

Archived on 06/04/2021 02:02:19 AM.

Archived on 08/15/2019 02:01:10 AM.

Archived on 08/14/2019 02:01:11 AM.

Validation & Authorization Documents

Authorization Document Approved by CN=Debbie Langkamp/O=WCBAlta.