

## Steps for Sending Expiration Letters and Reminders 3/23/09

### **Expiration Letters** (sent daily based on report of expiring protocols)

1. Navigate to “My Human Subjects > Program Tools > Reminders and Notifications
2. Check all statuses that start with “**Approved**” under Protocol Selection Criteria
3. Click “Today’s Date” under Protocol ‘Approved To’ Date
4. Enter date range:
  - a. If today is a day following another workday:
    - i. Choose the “+” in the dropdown and enter “**0**” to “**1**”
  - b. If today is following a period of time when the office was closed (like a weekend):
    - i. Choose the “-“ in the dropdown and enter “**0**” to “**#**”, where # is the number of days since the last workday  
*TIP: for a regular weekend, the range is 0 to 3 to include Saturday, Sunday, and Monday*
5. Click “Continue”
6. If “Results 0 Protocol(s)” appears, stop here
7. If results appear at the bottom, check “Change the protocol status to:” and choose “Terminated – Expired” in the dropdown
8. Check “Batch Communication” and choose “TERMINATION NOTICE” in the dropdown
9. Check the box for “All” appearing on the **left side**
10. Click “Commit”
11. (Optional: view one of the letters to make sure it looks ok)
12. Check the box for “All” appearing on the **left side**
13. Click “Commit”

### **Reminder Letters** (2 letters sent every two weeks)

1. Navigate to “My Human Subjects > Program Tools > Reminders and Notifications
2. Check “Approved” under Protocol Selection Criteria
3. Click “Today’s Date” under Protocol ‘Approved To’ Date
4. Enter date range
  - a. For 1<sup>st</sup> Notice – enter 43 to 73
  - b. For Final Reminder – enter 1 to 42
5. Click “Continue”
6. If “Results 0 Protocol(s)” appears, stop here
7. If results appear at the bottom, check “Batch Communication” and choose:
  - a. For 1<sup>st</sup> Notice – “Reminder – 1<sup>st</sup> Notice”
  - b. For Final Reminder – “Reminder – Final Reminder”
8. Check the box for “All” appearing on the **left side**
9. Click “Commit”
10. (Optional: view one of the letters to make sure it looks ok)
11. Check the box for “All” appearing on the **left side**
12. Click “Commit”