



**COI-SMART Limited Edition (LE)**  
**Reviewer Guide – Beta Version**

February 16, 2016

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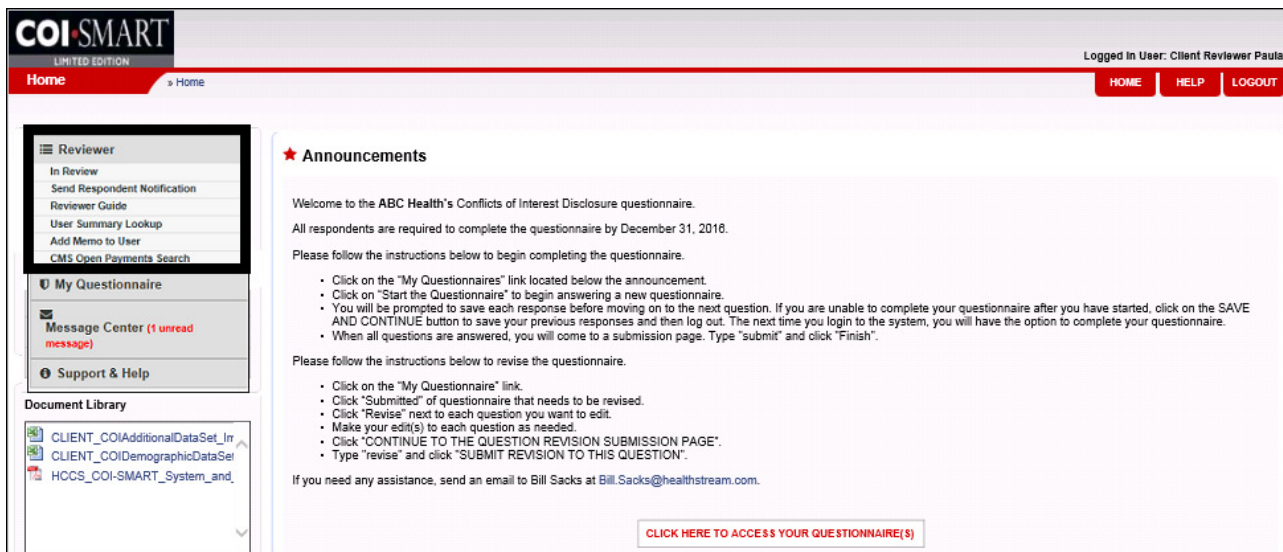
*\* For additional guidance, please check the Document Library, There may be policies and/OR other materials from your Institution Available.*

## 1. Overview of the Review Process

The COI-SMART Limited Edition (LE) system was designed to do more than simply manage the collection of COI Disclosures. The system is designed to manage **conflicts** that are uncovered through the disclosure process. The COI-SMART LE Review Process distinguishes this program from other systems on the market.

Within the Reviewer Module, assigned Reviewers can view disclosures, communicate with Respondents and take other review actions in order to move items on a trajectory toward resolution.

Administrators designate specific users as Reviewers with the “Reviewer” security profile and subsequently assigns the super reviewer permission in the user’s account. When a Reviewer logs into the system, the system will recognize them as a Reviewer, and the Reviewer menu will be available to them. The *Reviewer menu* includes the sub-menus: *In Review*, *Message Center*, *Send Respondent Notification*, *Reviewer Guide*, *User Summary Lookup*, *Add Memo to User*, and *CMS Open Payments Search*.



## 2. The Reviewer Queue

The Reviewer can select *In Review*, and will be presented with a queue of all questionnaires that have been submitted. Each line in the queue represents one submitted questionnaire. The reviewer queue shows the questionnaire name, the Respondent name, the number of items to be reviewed (the number of items classified as "disclosures"), the overall status of that questionnaire submission, and the date of each action.

**Reviewer Queue**

The Reviewer Queue provides access to disclosures assigned to reviewers. You may sort the Reviewer Queue by questionnaire name, status or by respondent name by clicking on the column heading.

To view disclosures or perform a review on one or more respondents' questionnaire you may search by name or status using "Simple Search". "Advanced Search" allows you to search with additional filters.

Clicking on an item will allow you to view the history of review activity on that item.

[VIEW ARCHIVES](#)

Advanced Search

Show 10 entries

Year - Name	First Name	Last Name	# of Ques.	Overall Status	My Status	Date Added
2016 - Demo Questionnaire - WS	Bill	Sacks	2	Awaiting discussion by COI Committee		2015-12-09 13:32:11
2016 - Demo Questionnaire - WS	Client Respondent	Sacks	2	In Review		2015-12-09 10:54:29
2016 - Demo Questionnaire - WS	Jane	Doe	1	In Review		2015-12-14 09:26:02

The Reviewer may download a PDF version of the Respondent’s disclosures containing either all responses (a longer list) or a PDF containing the most recent responses (a shorter list). The PDF containing all of the responses will display all of the edits the respondent made to a question. The previous response will be grayed out and the most recent response will be displayed in black font. The PDF containing the most recent responses will only display the latest responses to the question. Both PDFs contain dates and timestamps for each response.

**★ Reviewer Queue** [VIEW MY ASSIGNMENTS/LOOKUP RESPONDENTS](#)

The Reviewer Queue provides access to disclosures assigned to reviewers. You may sort the Reviewer Queue by questionnaire name, status or by respondent name by clicking on the column heading.

To view disclosures or perform a review on one or more respondents' questionnaire you may search by name or status using "Simple Search". "Advanced Search" allows you to search with additional filters.

Clicking on an item will allow you to view the history of review activity on that item.

[VIEW ARCHIVES](#)

**Advanced Search**

Show  entries Search:

Reviewers Queue					
Year - Name	First Name	Last Name	# of Ques.	Overall Status	Date Added
2016 - Demo Questionnaire - WS	Bill	Sacks	2	Awaiting discussion by COI Committee	2015-12-09 13:32:11
2016 - Demo Questionnaire - WS	Client Respondent	Sacks	2	In Review	2015-12-09 10:54:29
2016 - Demo Questionnaire - WS	Jane	Doe	1	Awaiting further investigation	2015-12-14 09:26:02
2016 - Demo Questionnaire - WS	John	Doe	1	No Conflict Identified	2015-12-14 09:29:42

Showing 1 to 4 of 4 entries First Previous **1** Next Last

**2016 - Demo Questionnaire - WS**

[View History](#) | 
 [View User Memos](#) | 
 [Perform Review](#) | 
 [Archive](#)

View With All Responses | 
 View With Most Recent Response

If the Reviewer wishes to filter the reviewer queue, he/she may select *Advanced Search* and will then be presented with a series of filters to narrow the search. Advanced Search allows the Reviewer to search by Respondent name, questionnaire name, filing year, user status, whether there were or were not disclosures, and other factors. The Reviewer can also search for text that appeared in a response, so, for example, the Reviewer could search for "Pfizer" in the Response Text filter and find any submission that mentions Pfizer.

**COI-SMART LIMITED EDITION** Logged In User: Client Reviewer Paula

Home [HOME](#) [HELP](#) [LOGOUT](#)

**★ Reviewer Queue** [VIEW MY ASSIGNMENTS/LOOKUP RESPONDENTS](#)

The Reviewer Queue provides access to disclosures assigned to reviewers. You may sort the Reviewer Queue by questionnaire name, status or by respondent name by clicking on the column heading.

To view disclosures or perform a review on one or more respondents' questionnaire you may search by name or status using "Simple Search". "Advanced Search" allows you to search with additional filters.

Clicking on an item will allow you to view the history of review activity on that item.

[VIEW ARCHIVES](#)

**Advanced Search**

Show  entries Search:

Reviewers Queue						
Year - Name	First Name	Last Name	# of Ques.	Overall Status	My Status	Date Added
2016 - Demo Questionnaire - WS	Bill	Sacks	2	Awaiting discussion by COI Committee		2015-12-09 13:32:11
2016 - Demo Questionnaire - WS	Client Respondent	Sacks	2	In Review		2015-12-09 10:54:29
2016 - Demo Questionnaire - WS	Jane	Doe	1	In Review		2015-12-14 09:26:02

**Document Library**

- CLIENT\_COIAdditionalDataSet\_In
- CLIENT\_COIDemographicDataSet
- HCCS\_COI-SMART\_System\_and

## Advanced Search View

**SEARCH**

Login ID:  Filing Year:

First Name:  Questions:

Last Name:  Questionnaire Name:

Email:  Question Category:

Employee ID:  Has Attachments:

User Status:  Location:

Response Text:  Reviewer Comments:

---

Hide Additional Demographic and Status Filters ▲

<b>Roles:</b> <input type="checkbox"/> Check All 1. Committee Member 2. Conference Speaker/Abstract Submitter 3. Manuscript Submitter Annual Filer Board Member Business Development	<b>Overall Questionnaire Status:</b> <input type="checkbox"/> Check All In Review In Review (Updated) all reviews complete Approval Granted through 5/30/13 Awaiting Acceptance of Plan Awaiting Acceptance of Updated Plan	<b>Departments:</b> <input type="checkbox"/> Check All Department A Department B Department C Department D Region A Region B
---	--	---

**Cost Centers:**  
 Check All  
Grant A  
Grant B  
Grant C  
N/A

### 3. View History

When a Reviewer selects an item for review, they are taken to the **View History** section of the Review page. Initially, the History just shows that the item was automatically assigned to a status of "In Review". The "In Review" status indicates the respondent answered at least one question from the submitted questionnaire as a disclosure.

[View History](#) | 
 [View User Memos](#) | 
 [Perform Review](#) | 
 [Archive](#)  
[View With All Responses](#) | 
 [View With Most Recent Response](#)

**View History**

This section provides an overview of review actions for the questionnaire and/or individual questions. Review Actions are listed chronologically, with the most recent activity at the top. The first column indicates whether review actions are tied to the "Questionnaire" or to a specific "Question". For any item you may click on "View Details" to see the full history of review actions on that item.

To perform a review, click on "Perform a New Review".

In the "Simple Mode" any review action applies to the entire questionnaire. In the "Advanced Mode" you may perform a separate review action on each disclosure. You may only escalate items to a higher level of review in the "Advanced Mode".

From the "Perform Review" screen, you may select a Review Action Type, enter Comments, select a Next Action Date (which will trigger a reminder email to the Reviewer) or send an email to the respondent or other reviewers.

[ [Hide Summary](#) ]

**Questionnaire:** 2016 - Demo Questionnaire - WS  
**Respondent:** Bill Sacks  
**Overall Status:** Awaiting discussion by COI Committee

Show  entries Search:

Review Action For:	Action Date	Status	Reviewer	Comments	Review Level	Attachments	Action
<a href="#">Questionnaire</a> <a href="#">View Details</a>	December 9th, 2015 01:34:16 PM ET	Awaiting discussion by COI Committee	Bill Sacks		1	-	<a href="#">Perform a New Review on this Questionnaire</a>
<a href="#">Questionnaire</a> <a href="#">View Details</a>	December 9th, 2015 01:32:11 PM ET	In Review	Auto	Assign to review	1	-	<a href="#">Perform a New Review on this Questionnaire</a>

Showing 1 to 2 of 2 entries ◀ Previous Next ▶

**View/Hide Details.** The Reviewer selects this link to view/hide the disclosures. For example:

Currently Showing Only Disclosures - [Show All Questions](#) \* = Disclosure

**Question 1** - Do you or a related party have a greater than 5% ownership interest in a company that does business with (this organization) or competes with (this organization)?

Indicate if you have an interest - **Yes** \*

Who has the interest? - **Sibling** \*

Describe the Interest - **My brother owns 10% of Acme Corp.** \*

**View/Hide Message.** The Reviewer selects this link to view the email messages sent or received concerning the questionnaire -level review. For example:

**BASICS**

**From:** Lowell Luis  
**To:** Ben Diamond  
**Subject:** RE: Reviewer Correspondence  
**Sent:** Thu 11/17/2011 4:20:35 PM  
**Questionnaire:** COI Demonstration - BD  
**Question:** NA  
**Attachments:** Test Document 1.txt

**MESSAGE BODY**

Hi Ben,  
I have attached a document with information regarding my ownership in Acme Corp.  
Regards,  
Lowell

---

**From:** Ben Diamond  
**To:** Lowell Luis  
**Subject:** Reviewer Correspondence  
**Sent:** Thu 11/17/2011 1:18:56 PM PT  
**Questionnaire:** COI Demonstration - BD

Dear Lowell:

Please provide additional information regarding your recent disclosure form.

Your userid is: hccslowell

If you forget your password please use the "forgot password" feature on the Login Page.

If you experience any technical issues, please contact \_\_\_\_\_ at 111 222-3333, or email client@client.com

Sincerely,  
The Compliance Office



## 4. An Example of a Review

### 4.1 Performing a Review

In the example below, the Respondent disclosed that his brother owns a company that sells office equipment to the hospital. The Reviewer can then elect to "Perform a New Review" by clicking on the link in the far right hand column. This will bring the Reviewer to the *Review Action* section of the page.

**i** Review Actions apply to the entire questionnaire.

**View History**

This section provides an overview of review actions for the questionnaire and/or individual questions. Review Actions are listed chronologically, with the most recent activity at the top. The first column indicates whether review actions are tied to the "Questionnaire" or to a specific "Question". For any item you may click on "View Details" to see the full history of review actions on that item.

To perform a review, click on "Perform a New Review".

In the "Simple Mode" any review action applies to the entire questionnaire. In the "Advanced Mode" you may perform a separate review action on each disclosure. You may only escalate items to a higher level of review in the "Advanced Mode".

From the "Perform Review" screen, you may select a Review Action Type, enter Comments, select a Next Action Date (which will trigger a reminder email to the Reviewer) or send an email to the respondent or other reviewers.

[ Hide Summary ]

**Questionnaire:** 2016 - Demo Questionnaire - WS  
**Respondent:** Bill Sacks  
**Overall Status:** Awaiting discussion by COI Committee

Show  entries Search:

Review Action For:	Action Date	Status	Reviewer	Comments	Review Level	Attachments	Action
Questionnaire <a href="#">View Details</a>	December 9th, 2015 01:34:16 PM ET	Awaiting discussion by COI Committee	Bill Sacks		1	-	Perform a New Review on this Questionnaire
Questionnaire <a href="#">View Details</a>	December 9th, 2015 01:32:11 PM ET	In Review	Auto	Assign to review	1	-	Perform a New Review on this Questionnaire

Showing 1 to 2 of 2 entries ◀ Previous Next ▶

## 4.2 Review Actions

LE provides several "Review Actions" that constitute the Review Process. These actions are available in a drop-down list in the *Review Action* section.

---

**Question 1** - Do you or a related party have a greater than 5% ownership interest in a company that does business with (this organization)?

INITIAL RESPONSE:

Indicate if you have an interest

**Yes \***

Who has the interest?

**Sibling \***

Describe the interest

**My brother owns Acme Office Supply, which does business with our organization. \***

What is the value of the interest?

**more than \$5000 \***

---

Respondent Name : Bill Sacks

Filing Year : 2016

Review Action Date : 01/07/2016

Review Action Type :

Comments :

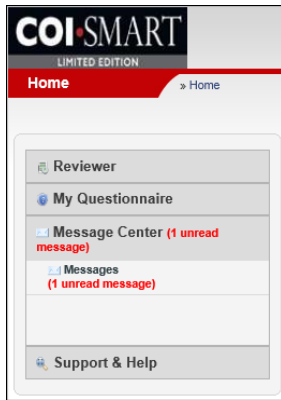
- Add to COI Meeting Agenda
- All Conflicts Managed
- All Reviews Complete
- Conflict Identified
- Further investigation required
- Internal Communication
- No Conflict Identified

The Reviewer can select a Review Action, according to the policies and procedures of the institution to move the item toward resolution.

## 4.3 Messaging

The COI-SMART LE review process enables and tracks detailed communication between Reviewers and Respondents. Correspondence may include attachments, which can be uploaded by Reviewer or Respondent.

COI-SMART LE uses a "Facebook" style message system. When a Reviewer sends a message to a Respondent, and the Respondent wants to reply, he/she does not click on "Reply" to the email. Instead, the Reviewer's email will contain a link which will return the Respondent to the COI-SMART LE system to reply to the message. The respondent may also log into COI-SMART LE and access the message directly from their inbox located in their **Message Center**.



When the message is sent via the Perform Review action, the OUTGOING messages and INCOMING responses are automatically captured and displayed in the *View History* section of the Reviewer's Queue.

As an example, a Reviewer could select the Review Action "Further Investigation Required" which would record that action in the history. The Reviewer could then click on "Send Email" which will open an outgoing message to the Respondent. The email will populate the sender and recipient fields, and will allow copies or attachments to be added as well. This is useful for requesting additional information from a respondent.

Indicate if you have an interest  
**Yes** \*

Who has the interest?  
**Sibling** \*

Describe the interest  
**My brother owns Acme Office Supply, which does business with our organization.** \*

What is the value of the interest?  
**more than \$5000** \*

Respondent Name : Bill Sacks  
Filing Year : 2016  
Review Action Date : 01/07/2016  
Review Action Type : Further investigation required

Comments :

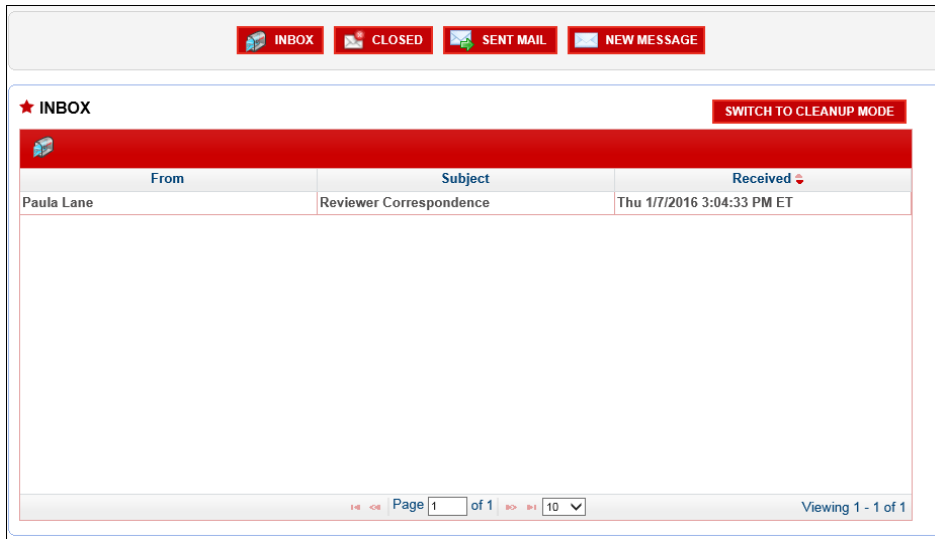
Next Action Date :

Upload one or more files as attachments to this review action

Send Email :

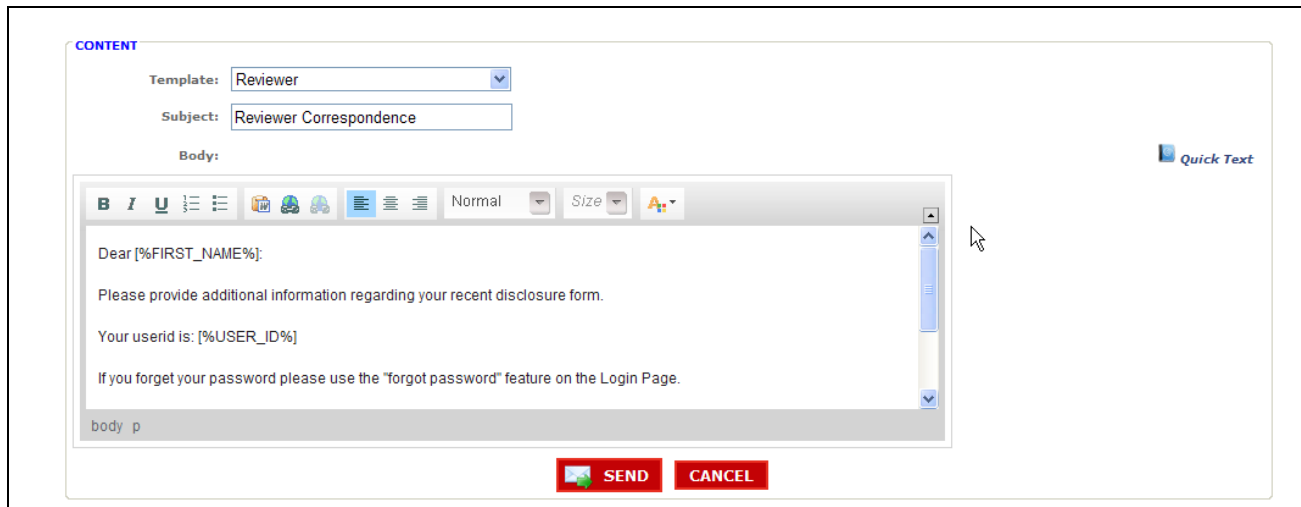
**CANCEL** **SAVE**

Messages sent directly from the **Message Center**, are captured and displayed in the INBOX under the **Message Center**. Here, Reviewers also have the option to view messages and also close and cleanup old messages either individually or in bulk by utilizing the *Clean Up Mode*.



## 4.4 Email Templates

Finally, the Reviewer can select an email template that could populate the text of the outgoing email. Refer to the “LE Implementation Guide” for more information about the Email Templates.



### 4.5 Reminders

While performing a review action, the Reviewer can set a reminder by clicking on the "Next Action Date" and add a comment in the comment section. The reminder is automatically added to the **View History** list under the Action Date column.

If the "Next Action Date" is populated, by default, COI-SMART LE will send the reviewer a Review Action Reminder email if no action is taken by the "Next Action Date".

Question 1 - Do you or a related party have a greater than 5% ownership interest in a company that does business with (this organization)?

INITIAL RESPONSE:

ENTITY RESPONSE 1

Indicate if you have an interest

Yes \*

Who has the interest?

Self \*

Describe the interest

Own shares \*

What is the value of the interest?

---

Respondent Name : Jane Doe

Filing Year : 2016

Review Action Date : 01/07/2016

Review Action Type : Further investigation required ▾

Comments :

Next Action Date : 01/29/2016

Upload one or more files as attachments to this review action

Send Email :

**CANCEL** **SAVE**

**USER DETAILS**

Respondent : Jane Doe  
 Filing Year : 2016  
 Job Title :  
 Phone : n/a  
 Login ID : jane.doe  
 Email : jane.doe@coinoemail.com  
 User Status : Active

Primary Department:  
 • Department A

Primary Role:  
 • Employee

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**Document Library**

- CLIENT\_COIAdditionalDataSet\_In\_A
- CLIENT\_COIDemographicDataSe
- HCCS\_COI-SMART\_System\_and

Year - Name	First Name	Last Name	# of Ques.	Overall Status	Date Added
2016 - Demo Questionnaire - WS	Bill	Sacks	2	Awaiting discussion by COI Committee	2015-12-09 13:32:11
2016 - Demo Questionnaire - WS	Client Respondent	Sacks	2	In Review	2015-12-09 10:54:29
2016 - Demo Questionnaire - WS	Jane	Doe	1	Awaiting further investigation	2015-12-14 09:26:02
2016 - Demo Questionnaire - WS	John	Doe	1	In Review	2015-12-14 09:29:42

Showing 1 to 4 of 4 entries First Previous 1 Next Last

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**2016 - Demo Questionnaire - WS**

[View History](#) | [View User Memos](#) | [Perform Review](#) | [Archive](#)  
[View With All Responses](#) | [View With Most Recent Response](#)

**View History**

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From the "Perform Review" screen, you may select a Review Action Type, enter Comments, select a Next Action Date (which will trigger a reminder email to the Reviewer) or send an email to the respondent or other reviewers.

[ Hide Summary ]

**Questionnaire:** 2016 - Demo Questionnaire - WS  
**Respondent:** Jane Doe  
**Overall Status:** In Review

Show  entries Search:

Review Action For:	Action Date	Status	Reviewer	Comments	Review Level	Attachments	Action
Questionnaire <a href="#">View Details</a>	January 7th, 2016 03:14:14 PM ET	Awaiting further investigation	Client Reviewer Paula		1	-	Perform a New Review on this Questionnaire
Questionnaire <a href="#">View Message</a>	January 7th, 2016 02:53:51 PM ET	Message Sent		Reviewer Correspondence	1	-	Perform a New Review on this Questionnaire
Questionnaire <a href="#">View Details</a>	December 14th, 2015 09:26:02 AM ET	In Review	Auto	Assign to review	1	-	Perform a New Review on this Questionnaire

Showing 1 to 3 of 3 entries Previous Next

## 5. A Discussion about "Questionnaire Status"

★ **Reviewer Queue** [VIEW MY ASSIGNMENTS/LOOKUP RESPONDENTS](#)

The Reviewer Queue provides access to disclosures assigned to reviewers. You may sort the Reviewer Queue by questionnaire name, status or by respondent name by clicking on the column heading.

To view disclosures or perform a review on one or more respondents' questionnaire you may search by name or status using "Simple Search". "Advanced Search" allows you to search with additional filters.

Clicking on an item will allow you to view the history of review activity on that item.

[VIEW ARCHIVES](#)

[Advanced Search](#)

Show  entries Search:

Reviewers Queue					
Year - Name	First Name	Last Name	# of Ques.	Overall Status	Date Added
2016 - Demo Questionnaire - WS	Bill	Sacks	2	Awaiting discussion by COI Committee	2015-12-09 13:32:11
2016 - Demo Questionnaire - WS	Client Respondent	Sacks	2	In Review	2015-12-09 10:54:29
2016 - Demo Questionnaire - WS	Jane	Doe	1	Awaiting further investigation	2015-12-14 09:26:02
2016 - Demo Questionnaire - WS	John	Doe	1	No Conflict Identified	2015-12-14 09:29:42

Showing 1 to 4 of 4 entries First Previous 1 Next Last

Questionnaires submitted with at least one question answered as a disclosure are assigned the system-generated status of **In Review**. Questionnaires submitted with zero questions answered as disclosures are assigned the system-generated status of **Complete Without Disclosure**. Overall questionnaire status is determined by the most recent review action. RED items need work, but GREEN items are resolved. This way, a quick glance at the Reviewer Queue gives an indication of how well items are moving through the queue.

*Hint: When reviewing respondents that have more than one disclosure in a questionnaire, the Review status of the questionnaire should be based on the LEAST evolved item. So if one item has been resolved, the status may still be "Conflict Identified" until all conflicts have been resolved.*

## 6. Archiving

Once a respondent's questionnaire has completed the review process, you can archive their questionnaire so that it is removed from the 'In Review' queue.

**★ Reviewer Queue** [VIEW MY ASSIGNMENTS/LOOKUP RESPONDENTS](#)

The Reviewer Queue provides access to disclosures assigned to reviewers. You may sort the Reviewer Queue by questionnaire name, status or by respondent name by clicking on the column heading.

To view disclosures or perform a review on one or more respondents' questionnaire you may search by name or status using "Simple Search". "Advanced Search" allows you to search with additional filters.

Clicking on an item will allow you to view the history of review activity on that item.

**VIEW ARCHIVES**

**Advanced Search**

Show  entries Search:

Reviewers Queue						
Year - Name	First Name	Last Name	# of Ques.	Overall Status	Date Added	
2016 - Demo Questionnaire - WS	Bill	Sacks	2	Awaiting discussion by COI Committee	2015-12-09 13:32:11	
2016 - Demo Questionnaire - WS	Client Respondent	Sacks	2	In Review	2015-12-09 10:54:29	
2016 - Demo Questionnaire - WS	Jane	Doe	1	Awaiting further investigation	2015-12-14 09:26:02	
2016 - Demo Questionnaire - WS	John	Doe	1	No Conflict Identified	2015-12-14 09:29:42	

Showing 1 to 4 of 4 entries First Previous **1** Next Last

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**2016 - Demo Questionnaire - WS**

[View History](#) | 
 [View User Memos](#) | 
 [Perform Review](#) | 
 **Archive**

[View With All Responses](#) | 
 [View With Most Recent Response](#)

To Archive a review, highlight the questionnaire and then select 'Archive' at the bottom of the review queue section.

**★ Reviewer Queue** [VIEW MY ASSIGNMENTS/LOOKUP RESPONDENTS](#)

The Reviewer Queue provides access to disclosures assigned to reviewers. You may sort the Reviewer Queue by questionnaire name, status or by respondent name by clicking on the column heading.

To view disclosures or perform a review on one or more respondents' questionnaire you may search by name or status using "Simple Search". "Advanced Search" allows you to search with additional filters.

Clicking on an item will allow you to view the history of review activity on that item.

**VIEW ACTIVE REVIEWS**

**Advanced Search**

Show  entries Search:

Reviewers Queue						
Year - Name	First Name	Last Name	# of Ques.	Overall Status	Date Added	
2015 - Legacy 2015 questionnaire (DO NOT DELETE)	Bill	Sacks	1	In Review	2015-12-09 10:32:10	
2015 - Legacy 2015 questionnaire (DO NOT DELETE)	Client Respondent	Sacks	1	In Review	2015-12-09 10:52:37	
2016 - Demo Questionnaire - WS	John	Doe	1	No Conflict Identified	2015-12-14 09:29:42	

Showing 1 to 3 of 3 entries First Previous **1** Next Last

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**2016 - Demo Questionnaire - WS**

[View History](#) | 
 [View User Memos](#) | 
 **Un-Archive**

[View With All Responses](#) | 
 [View With Most Recent Response](#)

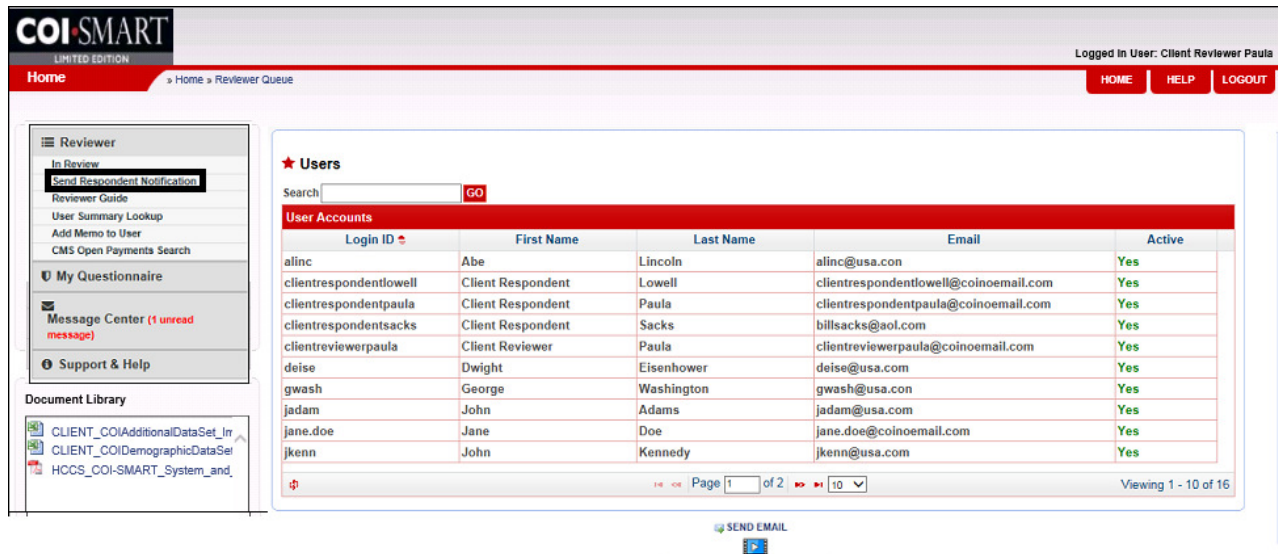
To unarchive a questionnaire, click on the 'View Archives' button at the top of the reviewer queue, select the respondent's questionnaire, and then click on the 'Un-Archive' link at the bottom of the archived review's list.



To go back to the list of active reviews, click on the ‘View Active Reviews’ button at the top of the archived reviews list.

## 7. Sending Respondent Notifications

The Reviewer can select **Send Respondent Notification** in order to send manual Questionnaire Announcement and Questionnaire Reminder emails to respondents.



- The Questionnaire Announcement email can be used in lieu of the automated announcement or is useful when respondents cannot locate the automated announcement email. The Reviewer can manually send a specific questionnaire announcement email to a respondent while speaking with the respondent on the phone and can ensure receipt.
- The Questionnaire Reminder email is useful for reminding delinquent respondents to submit their questionnaire.

After searching for and selecting the target respondent, the Reviewer clicks on the ‘Send Email’ button at the bottom of the users screen.

The Reviewer selects the Questionnaire Name, Email Type and Template. The associated template will be populated in the body of the email. The Reviewer can edit or replace the template as desired and then click on ‘Send’.

**Send Email To Dwight Eisenhower**

**TO:**  
User Name: Dwight Eisenhower - deise@usa.com

**QUESTIONNAIRE:**  
If this email is being sent in regards to a specific questionnaire then select the questionnaire from the drop down list, otherwise you can leave this blank. If the questionnaire you want does not appear in the drop down list then make sure the user is assigned an appropriate role for that questionnaire.

Questionnaire Name:  ↙

**EMAIL TYPE:**  
You can generate the body and subject of this email automatically by selecting an email type and template from the drop down lists below, or you can choose not to use a pre-defined template, leave these fields blank and simply fill in the subject and body fields yourself in the box below.

Email Type:  ↙  
Template:  ↙

**CONTENT:**  
**IMPORTANT:** The email message will be sent exactly as shown below. If you see placeholders for questionnaire related merge fields in the body below then make sure you have chosen a questionnaire above.

Subject:

Body:

**B I U** [List Icons] [Color Icon] [Font Size Icon] Normal [Size] [Color]

Please complete the form no later than June 30, 2016.

You may access the site by logging into the following URL: [https://ie-demo.coi-smart.com/password\\_reset.php?a=edXpKxKGGZI006/m%2BG5Fq%3D%3D&b=MIANDcANB73SAI2slOuCIA%3D%3D](https://ie-demo.coi-smart.com/password_reset.php?a=edXpKxKGGZI006/m%2BG5Fq%3D%3D&b=MIANDcANB73SAI2slOuCIA%3D%3D)

If this is your first time accessing the site, you will be prompted to set your password. If you have previously logged in, please enter your user id and password.

Your username is: deise

If you forget your password please use the "forgot password" feature on the Login Page.

If you experience any technical issues, please contact \_\_\_\_\_ at 111 222-3333, or email client@client.com

Sincerely,  
The Compliance Office