Document Information

Authorship

The *A Runnels Creative Learning Learning and Development* Instructional Design Team created this document and maintains sole rights and responsibilities of ownership.

Leading Icons

LED Notes:

- All icons must be placed in the content block, not the block label.
- Remove facilitator notes from the Learner Guide.

This document may include graphics that identify special sections as indicated below.

	Facilitator Note: A note with information for the Instructor only, reflective of a guideline or a tip useful for course facilitation.
	Producer Note: A note applicable to the course producer reflective of a guideline or tip useful for assisting with course facilitation.
	Knowledge Check: This icon highlights an area of review in the form of questions.
	Activity: This icon highlights instructions for a classroom activity.
	Discovery Dialogue: This icon highlights questions or issues that will be discussed openly in the classroom, to help apply content that was just covered.
	Workaround Process: This icon indicates that the process being described is a workaround until a permanent solution is in place.
	Audio/Video: Digital media presented in real time or as a supplement designed to enhance the instructional experience.

Instructional Preparation

Facilitator Preparation

To present this module, you must have the following:

X	Facilitator Guide
X	Companion PowerPoint Presentation (optional)
	Link to Learner Guide
X	Links to applicable Knowledge Library resources, quick reference guides, internal and external websites and other applicable resources
	List of supplies needed to complete the activity (e.g. index cards, chart paper, markers etc.)
	My Learning courses and assessments

Intended Audience

All CSRs in A Runnels Creative Learning Network.

Outlook Invitation

Send the invitation via Outlook three days prior to the course start date. Be sure to include the link to your WebEx room as well as the call-in number and conference code:

- Sending emails to members that conform to A Runnels Creative Learning policies and privacy laws.
- Learning objectives

- Learners will need login information for A Runnels Creative Learning Network
- Complete previous modules, *Accessing Templates* and *Privacy Laws and PHI.*
- Review the following prior to the start of this course:
  - *Privacy Laws Job Aid*
  - *CSR Frequently Used Templates*

Documents Used During the Session

Open the following documents/programs before starting the session:

- Outlook Email
- PowerPoint
- WebEx
- My Learning

Module Overview

Introduction

Facilitator Note: PPT slide 2; LG page 2.

Previously, we learned how to access templates as well as guidelines to follow which adhere to privacy laws. In this module, we will cover email etiquette and settings so Customer Service Representatives (CSRs) will communicate effectively externally while upholding privacy laws.

CSRs are tasked with the role of communicating A Runnels Creative Learning policies and account information to members as well as relaying information to the appropriate department within the A Runnels Creative Learning network. When dealing with our members, CSRs need to do so in a caring manner, with attention to detail, tact and adhering to HIPAA laws.

Objectives

Facilitator Note: PPT slide 3; LG page 3.

When given access to Outlook email and the need of communicating with a member arises, the CSR will be able to provide the requested information while adhering to all privacy laws as outlined in *Privacy Laws Job Aid*.

After completing this module, the learner should be able to:

- Identify the email template appropriate for the situation.
- Compose emails to members that conforms to all privacy laws and policies.
- Confirm that the email includes and/or omits all information from the *CSR Email Checklist*.

What's In It For Me?

Facilitator Note: PPT slide 4; LG page 4.

Learners fully engaging in the course will gain a collection of new skills to help them:

- Enhance capability of successfully interacting with members in different situations.
- Expand ability to provide feedback in a professional manner with a variety of personalities.
- Create more opportunities for growth at A Runnels Creative Learning by demonstrating effective use of new skills.

Prerequisites

- Accessing Templates
- Privacy Laws and PHI

Duration

Lesson Timing

This module includes these topics:

Topic	Timing
Lesson 1: Choosing Appropriate Email Template	5 minutes
Lesson 2: Completing Template and Reviewing Email	10 minutes

Lesson 1: Choosing Appropriate Email Template

Introduction

Facilitator Note: PPT slide 5 LG page 5

This lesson will provide information on how to identify which email template to use when contacting a member. By choosing a template tailored to a specific situation, the email becomes more personable and reinforces our company values of being Caring and Trustworthy.

Objectives

Facilitator Note: PPT slide 6; LG page 6.

At the conclusion of this lesson, learners will be able to:

- Locate the category the situation of the email falls under
- Determine the email template that best fits the response to send the member.
- Justify the use of the chosen template.

Template Categories

Facilitator Note: PPT slide 7; LG page 7.

Surveys conducted annually by Best Consumer Health Insurance have revealed that customers have an overall lower impression of health insurance providers who they deem do not provide personalized service. In particular, the need to choose more than 3 options on an IVR, and receiving stock emails. With this in mind, A Runnels Creative Learning understands that responding to emails that directly addresses our members' concerns will hold us accountable to our promise to be Easy-to-do-Business-With. However, to lessen the likelihood of grammatical errors and more importantly of adhering to A Runnels Creative Learning PHI Policy and HIPAA, we have created templates based on a variety of topics and situations that CSRs communicate with our members about.

When CSRs receive an email from a member or determine that information needs to be sent to a member, the CSR will complete the following steps:

Step	Action
1	Determine what information needs to be sent such as: policy start date, latest policy changes or procedure approvals.
2	Navigate to the **CSR Email Templates** section in CSR Resources.
3	Locate the **Category** deemed appropriate for the situation in Step 1.
4	Select the email template that best fits the response needed.
5	Verify that the information to be filled in the template matches the information that the member requested.

Lesson Summary

Learners are now able to analyze incoming emails from members and use that information to choose the appropriate **CSR Email Template**.

Lesson 2: Completing Template and Reviewing Email

Introduction

Facilitator Note: PPT slide 9 LG page 9

In the previous lesson, you learned how to determine the appropriate email template to use for a given situation. In this lesson, you will learn

how to use the selected template to compose and send the email to the member.
This lesson will provide learners with knowledge on how to provide members with personalized service while ensuring that A Runnels Creative Learnings core values are met as well as privacy laws being upheld.

Objectives

Facilitator Note: PPT slide 10; LG page 10.

At the conclusion of this lesson, learners will be able to:

- Apply email template to Outlook Email.
- Assess the included information to verify it meets checklist criteria.

Composing Email in Template

Facilitator Note: PPT slide 11; LG page 11.

Now that the appropriate template has been chosen, follow these steps:

Step	Action
1	Click **Download** to the right of the template you will use.
2	Choose **Open** on the pop-up that displays.
3	Hover over the top left corner of the document, when displays, right click and select **Copy**.
3	Navigate back to **Outlook Email**, then click **New Email**.
4	In the body of the email just above your signature, right click and click **Paste**.
5	Fill in the highlighted information with the member's information.

Reviewing Completed Template

Facilitator Note: PPT slide 12; LG page 12.

Prior to sending any information both internally and externally, CSRs must always ensure that the receiver is approved to receive such correspondence. A Runnels Creative Learning has developed the *CSR Email Checklist* which functions as a reviewer by allowing the user to check off each item so no inappropriate information is sent. The *CSR Email Checklist* also acts as a reminder of what should be included that may not have been in the template.

Practical Application

Facilitator Note: PPT slide 13; LG page 13.

Facilitator will email each CSR a request for information from a Test Account Member (TAM).

Design practical activities and discovery dialogs according to these guidelines:

- Provide clear and concise instructions including materials/tools needed.
- Write the activity at the lesson map level.
- Use discovery dialogs (chat, whiteboard, break-out rooms etc.) as a means to deepen learners' understanding of concepts and how they apply to the job.
- Use hands-on practices and/or simulations to build skills and the confidence to perform necessary tasks on the job.

Facilitator Activity Instructions	(10 mins) Instruct CSRs to open and read the email from TAM. The CSR is then to use the information to determine appropriate template to use, insert, fill in, review and send template.

Learner Instructions: Open Outlook Email. There is a new email from a member, TAM. Use the information from the module, read the email and determine what kind of response is required. Then navigate to templates and choose the template you think matches the situation best. Complete the template and review it using the *CSR Email Checklist*. Once you are confident that the email meets all privacy policies and address the member's concerns, send the email. Your instructor will receive the email and provide feedback.

Lesson Summary	Learners now have the knowledge of how to take the previously selected **CSR Email Template** and use it to send members an email that meets A Runnels Creative Learning grammatical standards, privacy guidelines/laws and company core values.

Summary

Module Summary

Facilitator Note: PPT slide 14; LG page 14.

In this module, participants learned about composing and sending emails to members and how to ensure the emails meet applicable laws/guidelines.

Learners should now be able to:

- Categorize emails from members.
- Compose emails conveying requested information while protecting sensitive data.
- Evaluate composed email verifying it meets *CSR Email Checklist*.

Additional Resources

- *CSR Frequently Used Templates*
- *Privacy Laws Job Aid*

Document Statistics

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Publishing Data

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1	8/4/2017	**Summary:** **SMEs:** **Author:** Aisha R Runnels