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 1st 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 1st Notice – “Reminder – 1st 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”