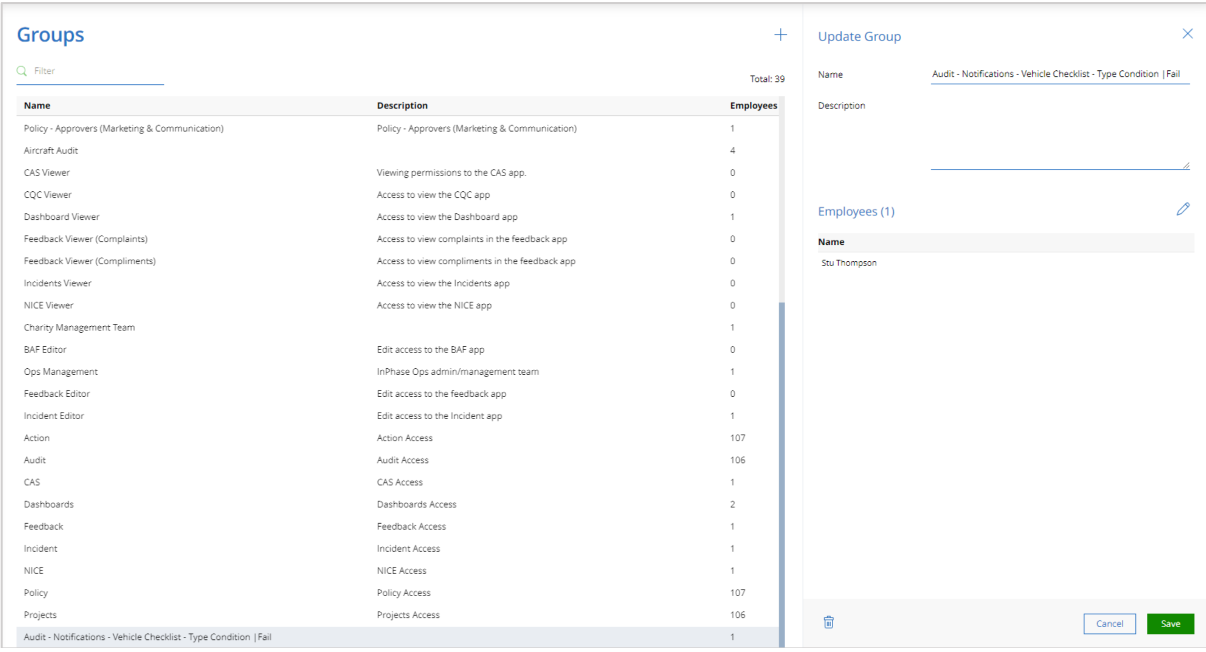
Setting up Questionnaire Email Notifications (Based on a question answer)

Creating Custom Groups

Create a custom group for each question / answer. We would suggest something like: **"[Questionnaire Name] - Notify – [Question Name] | [Question Answer]"** and add the required members to that group.

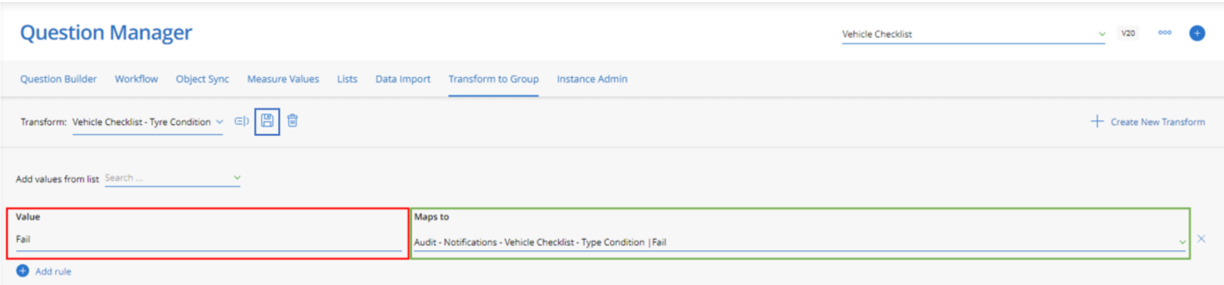
These can be created by a Model Administrator licence holder. Simply click People > Groups and select + to create a new group(s). A Group must have a unique name and (optionally) a Description > Click Save.

Tip: If you are creating many similar named groups, you may find that developing these in MS Excel initially and then copy/pasting the name and description could save you time.



Creating Transform to Groups

Select **Transform to Group** > **Create New Transform**. Give the Transform a name. We would recommend something like **[Questionnaire Name] – [Question Name]** so that each transform is unique. Example: "Vehicle Checklist – Tyre Condition"



Enter the answer(s) that will trigger the email notification into the Value column (e.g. Fail) (Red Highlight) and select the corresponding custom group that you set up previously for that question / question answer (Green Highlight).

Tip: If you are creating many values (instead of adding values from a list) and mapping the custom groups you may find that developing these in MS Excel initially and then copy/pasting could save you time.

You can also add the values (Red Highlight) based on a list. Simply select the list from the dropdown box to pre-populate all the potential value answers for that question if you are using a list. This useful if the question answer list has many options – e.g. Team Name.

Click Save (Blue Highlight)

Editing the Workflow

Double-click on the Workflow Stage that email notification needs to be setup in and select either 'On Entering the Stage' or 'When Saving This Stage' based on your requirements and expand the Email Notifications section.

Title

This can be free text that is included as the subject header in the email notification. If you wish to include the ID of the record in the subject header you can include "(@Model.UniqueId)" as part of the title.

Example: "Record @(Model.UniqueId) has been created"

Header

This can be free text that is included at the top of the email notification

Example: Thank You for raising this record"

Footer

This can be free text that is included at the bottom of the email notification. You might consider including a reference for the notification. A 'register' could then to maintained so that is becomes easier to manage such notifications.

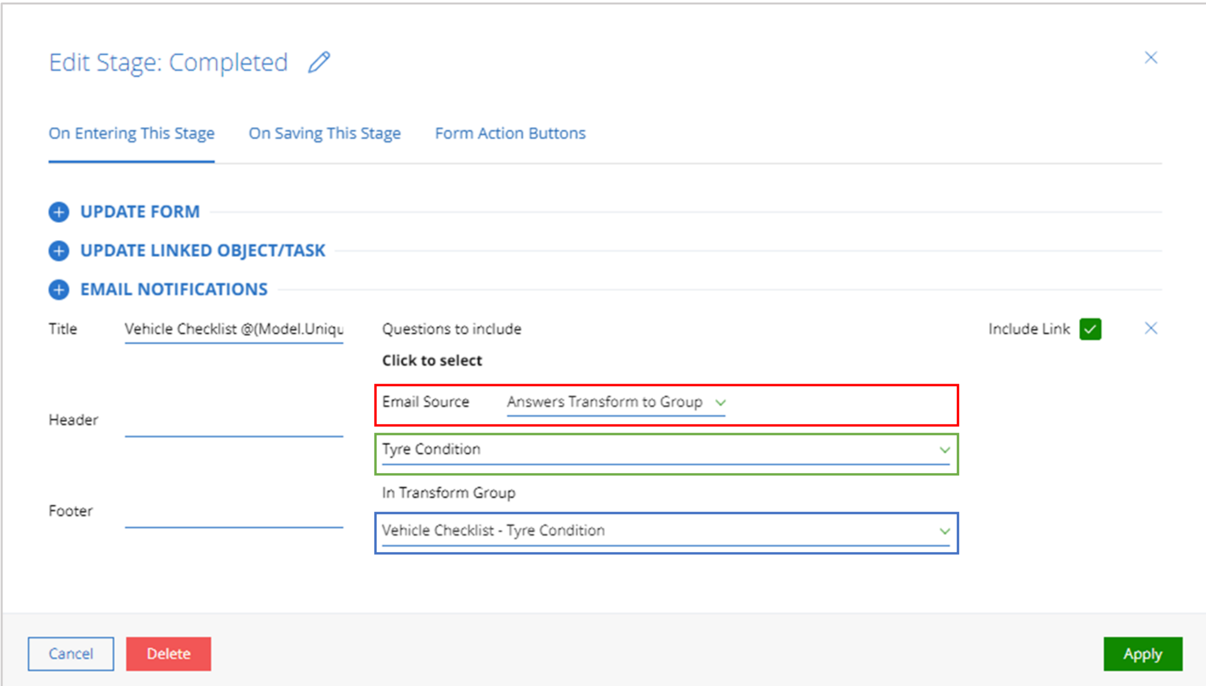
Example:

Notification #	Trigger Question	Answer	Transform	When	Stage
Notification #9	Division		Incidents - Division	Saving	New Incident to be Reviewed
Notification #10	Department		Incidents - Department	Saving	New Incident to be Reviewed
Notification #11	Specialty		Incidents - Specialty	Saving	New Incident to be Reviewed
Notification #12	Incident Category		Incidents - Incident Category	Saving	New Incident to be Reviewed
Notification #13	To what extent was the patient physically harmed		Incidents - Physical Harm	Saving	New Incident to be Reviewed
Notification #14	What type of event do you want to record?		Incidents - Incident Local Type	Saving	New Incident to be Reviewed
Notification #15	Does this event meet the national definition of a never event?		Incidents - Never Events	Saving	New Incident to be Reviewed

Questions to Include

You can choose which **Questions to include** as part of your email notification by clicking '**Click to Select'** and selecting all that apply. This will include the question name and corresponding answer into the email notification.

In the **Email Source** select 'Answers in Transform Group' (Red Highlight) and select the **Question Name** that the transform should be applied to (Green Highlight) and the name of the corresponding **In Transform Group** that was set up previously (Blue Highlight)



Click 'Apply'