# Using Email Templates to Wrangle Your Researchers

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Andrew Isidoro (he/his) Public Services Specialist
Kathleen Monahan (she/hers), Reference, Instruction & Digital Services Librarian
Boston College

# Background Context

Opened reading room for both campus and guest researchers starting June 2020

Guest researchers:

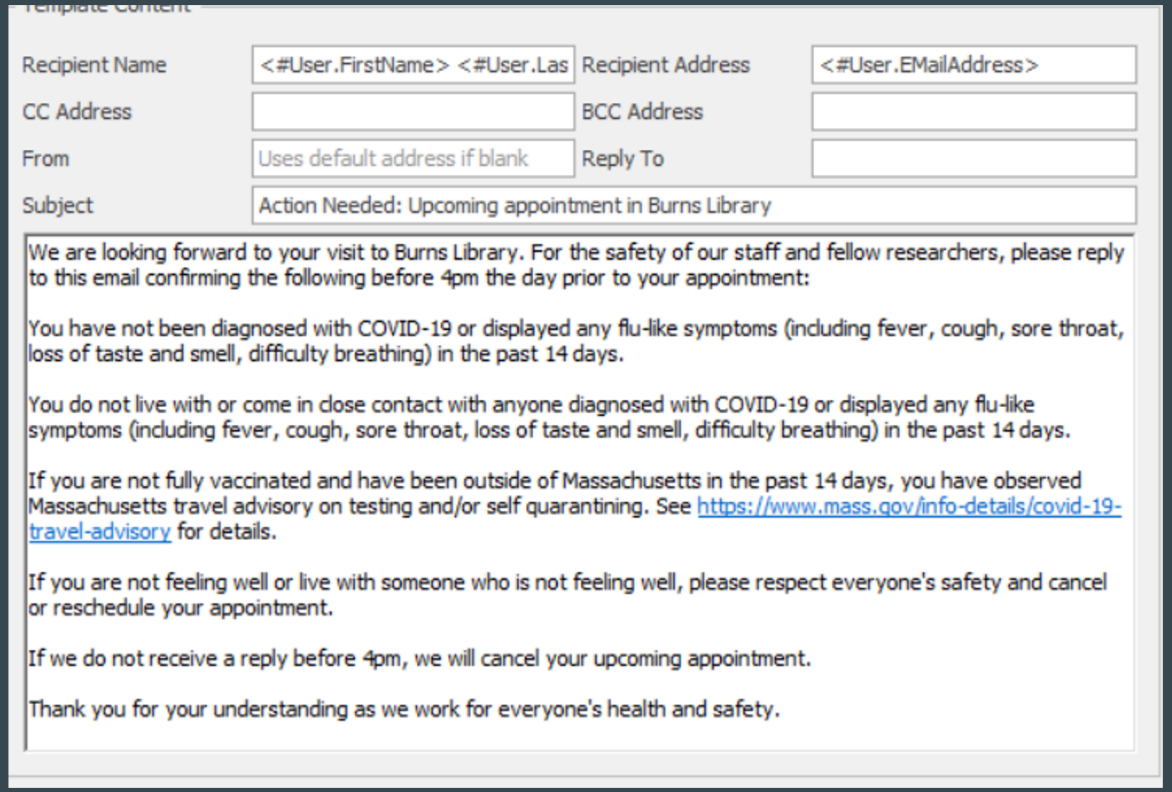
- Appointments required
- Needed confirmation email for appointment time
- Sent health check 2 days before appointment
- Appointment canceled if health check not replied to by 4pm day before appointment

Campus researchers:

- Appointments highly encouraged
- Needed confirmation email for appointment time
- COVID check done through campus-wide health app, not via email

# Guest Researcher Appointments

1. Researcher makes a request in Aeon
2. Staff review and send confirmation email & access and safety protocols
3. Researcher confirms time of appointment
4. Two days before appointment, staff send health check email
5. Researcher responds
6. Staff confirm appointment



Template Content

| | | | |
|---|---|---|---|
| Recipient Name | <#User.FirstName> <#User.Las | Recipient Address | <#User.EMailAddress> |
| CC Address | | BCC Address | |
| From | Uses default address if blank | Reply To | |
| Subject | Action Needed: Upcoming appointment in Burns Library | | |

We are looking forward to your visit to Burns Library. For the safety of our staff and fellow researchers, please reply to this email confirming the following before 4pm the day prior to your appointment:

You have not been diagnosed with COVID-19 or displayed any flu-like symptoms (including fever, cough, sore throat, loss of taste and smell, difficulty breathing) in the past 14 days.

You do not live with or come in close contact with anyone diagnosed with COVID-19 or displayed any flu-like symptoms (including fever, cough, sore throat, loss of taste and smell, difficulty breathing) in the past 14 days.

If you are not fully vaccinated and have been outside of Massachusetts in the past 14 days, you have observed Massachusetts travel advisory on testing and/or self quarantining. See https://www.mass.gov/info-details/covid-19-travel-advisory for details.

If you are not feeling well or live with someone who is not feeling well, please respect everyone's safety and cancel or reschedule your appointment.

If we do not receive a reply before 4pm, we will cancel your upcoming appointment.

Thank you for your understanding as we work for everyone's health and safety.

# Campus Researcher Appointments

1. Researcher places a request in Aeon
2. Staff review the request and send confirmation email & access and safety protocols
3. Researcher confirms appointment time
4. Staff ask to see campus health check app when they enter the reading room

# Result: A Whole Lot of Emails

4 email templates set up:

- Schedule Appointment- Campus version
- Schedule Appointment - Guest version
- Health Check for guest researchers
- Canceling appointment for not responding to the health check

# Benefit of email templates for staff:

- Big timesaver
- Guaranteed consistent messaging no matter who was answering
- Didn't have to remember which status required which details
- Replies went to our reference inbox
- Changes in messaging only required updating one place

# Benefits for researchers

- Quick information
- Complete & detailed information sent to them each time
- Included more logistics than before such as directions, accessibility, hours and construction warnings
- Included link to the state-wide travel order/advisory

# Downsides/Wishlist

- No HTML formatting
  - links must be spelled out
- No auto send

# Questions?