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BEST PRACTICES FOR EMAIL COMMUNICATION

General Considerations

As a department, we are striving to become more conscious of the number of emails staff read and answer each day. Over the last few years, during the pandemic, communication has become less personal and more dependent on technology. As we emerge from the pandemic, now is a good time to consider how to communicate better with each other. This best practices guidance offers ideas to help us all manage our inboxes and write/respond to emails most efficiently and effectively.

Before you hit “Send,” ask yourself 3 questions:

1. Is this issue best communicated through email, or should a phone call or in-person conversation take place?
2. If multiple people are involved, should a meeting be scheduled instead of an email?
3. Is it possible to use [Teams Chat](#) to avoid many back-and-forth emails?

9 Tips for Sending Effective Messages

1. Use Standard Formatting
 - a. Check font and size for consistency.
 - b. If you used “copy/paste,” check that font/size is consistent throughout the email.
2. Include a Clear Subject Line
 - a. Title your email so the recipient knows what the message is about.
 - b. If an email chain switches to a different topic, please update the subject line, or consider starting a new chain.
3. Include an Action Step
 - a. State upfront what you would like the individual/group to do with the information shared.
4. Always Keep Your Tone Professional
 - a. Think about your word choices and how others may interpret your intention.
5. “To/Cc” Fields
 - a. It's important to decide which staff get placed in **To** and **Cc** groups. Please include in the **To** line all staff who are involved in getting the task and/or follow-up done. If a group needs to be included for “awareness,” please include them in the **Cc**.
 - b. Always double-check recipients to ensure you have the correct recipients, particularly if the chain originates from an outside entity and you are converting to an internal email chain.
6. What time is it?
 - a. Work-life balance matters. Refrain from sending emails after work hours or on the weekend unless it is an emergency. Emails can be saved in your “draft” folder and/or scheduled for the next day. [Delay or schedule sending email messages - Microsoft Support](#)
7. Reply Within 24-48 hours
 - a. If you are unable to fully respond within 24-48 hours, acknowledge that the email was received.

8. Is it better to pick up the phone?
 - a. If an email evolves into a “meeting,” pause and schedule a meeting, or make a phone call.
 - b. If an email chain is getting voluminous and confusing, or tensions are running high, consider picking up the phone or scheduling a meeting to discuss. An email is never a place for conflict or for expressing displeasure.
9. Attachments
 - a. Double-check attachments to make sure the correct one is included or that the attachment is in fact included.

Form and Tone of Messages

Although an email is often viewed as informal communication due to the ease and speed of sending one, email should be considered the equivalent of formal correspondence sent through traditional mail. Remember that the recipient is free to share email as they choose. As such, you should compose your email with the following in mind.

Use Discretion

Use caution when sharing information over email because it may not remain confidential.

Emails discussing Department business, even if sent from a personal email address, are considered Department records that are subject to public disclosure under the Freedom of Information Law (“FOIL”). See Article 6 (Sections 84-90) of the NYS Public Officers Law (“POL”). Although there are a limited number of exemptions from disclosure under the law (POL § 87(2)(a-g)), an email may become a public record with or without your knowledge. In addition, emails may be subject to discovery in litigation and under third-party subpoenas. Accordingly, take steps to protect private, sensitive, privileged and/or confidential information about yourself, others, and the Department.

Identify a communication as confidential:

- When communicating with the Department’s legal counsel, consider including the terms “Privileged & Confidential” in the subject line or at the beginning of the body of the email. This will help identify the email as a communication likely protected by attorney-client privilege that should not be shared outside of the Department.
- Use “Confidential” in the subject line when the email includes either sensitive information, or if the communication may not be appropriate for disclosure beyond the specified recipients.
- When it is necessary to share documents or data containing private/sensitive information beyond what is included in the body of the email, consider including these documents as an attachment in a password-protected file. (Note: The password to the file should be sent to the recipient in a separate communication.)

How to: [Protect a document with a password - Microsoft Support](#)

Responding and Forwarding Messages

Replying to Email

- The benefit of using "Reply all" is that you can respond to everyone at once to let them know you're addressing an issue. When in doubt, use "Reply" to respond only to the sender, and to avoid unnecessary emails. To determine which to use, consider the information you're sharing and who it most affects.

- Sometimes, it may be necessary to remove one or more of the original recipients when you send a reply. At the same time, you want to maintain the thread. You should clearly indicate that you have intentionally removed some original recipients.

Think Before Forwarding

- Please be sure to read the entire chain and use caution when forwarding. Consider starting a new chain with a summary of information, especially when sending it to outside entities.
- If the email chain is being forwarded, a good practice is to summarize what's being discussed at the top, so the recipient quickly knows what you need from them.
- It's also important to remember that some emails may contain private, sensitive, or privileged information, so you might not be able to forward them. If in doubt, check with the initial sender.

Informative Out-Of-Office Replies

If you plan to be out of the office for an extended period, set up an automated Out-Of-Office reply to let people know you won't be able to respond to their emails until a specific date. Include a contact name if there's an urgent matter.

How to link: [Create a signature and automatic reply - Microsoft Support](#)

Organizing the Different Parts of an Email

Shorten Links

When sharing a website, use a link shortener to shorten the link or hyperlink text within the email.

How to: [Create or edit a hyperlink - Microsoft Support](#)

Email Signature

An email signature is a special text box that displays your contact information at the bottom of an email. A signature typically includes only your name, job title, email address, and phone number. Additional information such as historic quotes, witty sayings, or life advice is sometimes not welcome by all recipients. It also adds more reading for the recipient. It is best if these are avoided.

NYS Guidelines for Email Signature:

Name (Arial Bold 16pt)

Fonction (Arial Regular 12pt)

Agency Name (In the Grouping Color - Arial Bold 12pt)

Address (Arial Regular 12pt)

Contacts

Website