EFFECTIVE COMMUNICATIONS GUIDE

OIT Communications Team   Last Updated: October 2024

Guide Contents

SLACK AND EMAIL GUIDANCE

OIT staff use email and Slack to disseminate information, collaborate with coworkers, and discuss CMS-related topics. Individual staff may receive hundreds of messages per week on either platform, which can generate a noisy space. The more we work together to understand the purpose and uses of email and Slack, the easier it will be to share important messages and reach audiences who need critical communications.

Email serves as a system of record for CMS and can contain sensitive information. Slack is an informal communication tool that enables staff to create channels and share short messages with OIT, CMS, and other federal employees, vendors, and partners.

Please note: Slack is neither a "System of Record" nor approved for sensitive information or inappropriate use.

What does this mean for you?
1. You must only log into Slack from within the United States. Please log out of Slack on all devices before traveling outside the United States to ensure compliance with CMS policies and maintain security.
2. You should not expect posts or documents shared in this workspace to be backed up.
3. You should not share Personally Identifiable Information (PII) or Protected Health Information (PHI) in Slack.
4. You should not share sensitive information such as IP addresses, CIDR information, login information, ACA Cookies, or passwords.
5. Public channels and media posted to those channels are visible to all users. You cannot share sensitive data and media on these channels.
6. You should not post unprofessional, harassing, offensive, or inappropriate messages, images, or emojis related to race, color, religion, national origin, sex (including pregnancy, sexual orientation, and gender identity and expression), age, disability (physical or mental), genetic information, retaliation, veteran status, parental status, political affiliation, physical appearance, body size, or any other characteristic covered by the Agency's EEO and anti-harassment policies in Slack.
7. You should use SLACK to collaborate on business goals and build a community aligned with CMS' culture initiatives. All the guidance above applies to business and social use and should guide an individual's behavior with colleagues on this platform.
8. By default, your display name for Slack matches your EUA ID. You may change it to your preferred name (e.g., First and Last Names, only first name, or your nickname). When choosing a display name, keep in mind that this is a professional and diverse environment. When in doubt, default to your EUA ID.
9. You should adhere to the HHS Rules of Behavior when using Slack.

Questions?
Contact the [WHSD Service Desk Portal](#) via Jira.

Platform Uses

Use email to:
- Dispatch critical communications. Email serves as a system of record for CMS and, when necessary, can be a tool for sending sensitive information.
- Send information, announcements, meeting invitations, and documents that all staff may need to access, as email provides the most accessible experience.

Use Slack to:
- Streamline small-group collaboration and brainstorming through project-specific channels.
- Facilitate accessibility whenever possible using best practices for Slack accessibility.
    - While Slack is not fully accessible, it works relatively well with a screen reader on Windows desktop application and iOS. However, Mac screen reader functionality is limited. Slack should always be used *in addition to*, not instead of, email when sending information all staff need to access.

Message Format

Email:
- Send messages with a formal tone.
- Limit messages to 300 words or less whenever possible.
- Include smaller chunks of information:
    - Use bullet points and whitespace to avoid walls of text.
    - Limit paragraphs to two to three sentences spaced clearly apart.
- Bold and underline important information sparingly (e.g., use this to highlight questions that need answering, tasks, due dates, etc.).
- Use the same formatting or template for frequently sent messages (e.g., event invitations) to ensure all necessary information is provided and to help the reader easily identify the type of message being sent.

Slack:
- Limit posts to 40 words or less whenever possible, excluding the header and links.
- Ensure posts contain no more than two lines or two sentences, excluding the header and links.
- Send informal messages and facilitate one-on-one conversation and discussion.
    - Avoid sending sensitive information. Slack does NOT function as a system of record for CMS and should NOT contain sensitive communications.

Language

General guidelines:
- Use a formal tone in emails from professionalism and clarity, while Slack is ideal for a friendly, informal tone that supports quick collaboration.
- Begin sentences with action verbs to grab readers' attention.
- Provide a specific ask: Include the who, what, where, and when.
- Include a deadline and, when in a rush, a specific time of day to complete tasks.
- Use complete sentences; avoid confusing, one-word answers and short phrases.
- Proofread messages before sending.
- Follow plain language guidelines.

- Use [best practices for accessible written communication](#).

Email:
- Limit email subject lines to six words or less that indicate what the message addresses.
- Avoid using all caps.
- Call out attachments.
- Use acronyms sparingly.

Slack:
- Limit Slack headers to six words or less that indicate what the post addresses.
- Follow these [10 tips for Slack accessibility](#) when using emojis, images, and videos, such as:
  - Provide a file name and description for images.
  - Practice caution when choosing [GIFs](#) to accommodate people with photosensitive seizure disorders.
  - Apply accessibility best practices to Slack emojis (e.g., Don't replace words with emojis, etc.)

Audiences

Slack:
- Contains potential audiences of federal employees, vendors, and contractors.
- Consists of channels created and managed by individual users whose conversations may be private or public.

Email:
- Consists of conversations written for specific audiences and may contain links to sensitive documents or files.
- Contains dynamic distribution lists that can include any recipient in the Active Directory (e.g., all OIT federal employees).
- Includes options for individual users to manually populate recipient fields or create their own distribution lists.
  - Users should regularly update manual distribution lists by removing inactive email addresses and individuals who have requested removal.

Maintenance

Email:
- Fill out email fields correctly:
  - Use BCC to protect recipients' privacy and hide their email addresses.
  - Use CC to copy recipients who may need to be "in the know" but aren't required to respond.
  - Use Reply All sparingly to cut down on inbox clutter:
    - Select Reply All only when all recipients need to have the same information.
    - Direct replies to mass emails (e.g., meeting invitations, congratulatory messages, announcements, and other noncritical messages) to the sender only.
  - Use caution when forwarding emails:
    - Don't forward sensitive information unless necessary.
    - Summarize forwarded emails before sending them, especially when forwarding long email chains.

- Guidance around sending newsletters or general news communications:
  - All CMS-wide distribution list requests for newsletters, should instead have their content included within Office of Communications (OC) publications (Pulse, Things to Know, etc.)
  - Consider using existing distribution lists for internal OIT emails, such as PlanetOIT and OIT Broadcast.
  - For OC publications (Pulse, Things to Know), please submit the request first to Rosanne Hodge and April Arnold. Once approved, requests can go to OC for review and revisions.
  - If you would like to send a CMS-wide newsletter or general news to the CMS audience, you should instead have the news content distributed in an already existing OC publication, such as Pulse or Things to Know.
    - Contact Roseanne Hodge and April Arnold for approval if you would like to submit content to one of the OC Publications. Once approved, requests will go to OC for review and edits.
  - If you are looking to send an OIT-wide newsletter or general news to the OIT audience, consider using existing OIT distribution lists, such as PlanetOIT and OIT Broadcast.
    - Contact April Arnold if you would like to submit content to one of the OIT distribution lists.

Slack:
- Channels:
  - Create Slack channel names that indicate the intended purpose or audience of the channel (e.g., #announcements-ISPG).
  - Establish a structure for naming conventions (e.g., department-location-team) to prevent duplicate channels and to determine which channels to combine or delete.
  - Establish a library of channel prefixes (e.g., #help-HR, #announcements-companywide, #events-ISPG) to clarify the intended purpose and audience of each channel.
  - Use dashes in channel names to separate words and to provide context and clarity (e.g., #questions-508-team).
  - Archive Slack channels when the channel is no longer needed or active to prevent duplicate channels.
- Notifications:
  - Use @channel only when sending time-sensitive, urgent, or critical posts.
  - Use @here to notify channel users who are *currently active* on Slack, when you need a question answered quickly or want to schedule an impromptu discussion or meeting.

Timing

Email:
- Plan ahead when sending emails to avoid disseminating messages on Fridays. Many staff take flex and PTO days on Fridays and may overlook messages. When it's necessary to send a message on a Friday, send it in the morning, when staff are more likely to check email.

Slack:
- Coordinate with similar groups to post similar messages and cut down on Slack clutter. For example, when creating a training, find out if another OIT group managing the training can cross-promote Slack posts (e.g., BOG and Workforce Resilience, etc.).

EVENT AND INFOGRAPHIC DESIGN

The templates below serve as a blueprint for creating visual communications for OIT groups. Whether your group is hosting an event or providing a project update, these customizable templates suggest recommendations for the structure and layout of communication materials.

Template file
See the Event and Infographic Template files in the attached folder.

The three designs within this file include:
1. Infographic
2. Save the Date Basic
3. Save the Date Graphics
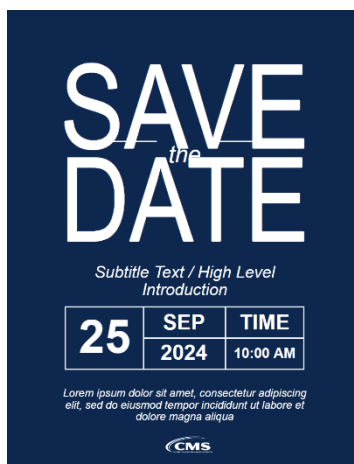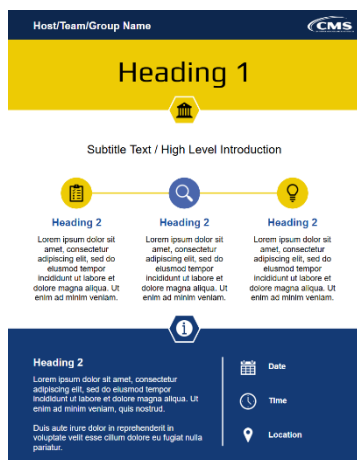
Please note the template file is a PowerPoint (.ppt) so that users may edit all files no matter their level of graphic design knowledge and experience.

Steps to Customize a Template

1. Open the relevant template from the shared folder (linked above).
2. Customize the text and visuals based on the current project or event.
3. Ensure all information is up-to-date and accurate.
4. Proofread for consistency and errors.
5. Distribute your one-pager through the appropriate channels.
   - *Please note the PowerPoint one-pager/event template must be converted, once finalized to a PDF or .jpeg file.* Ensure your project is Accessible by checking Section 508 compliance.
   - If you're distributing a document to an audience, convert it to PDF as PDFs can be made more accessible than standalone images. Convert your document to an image only when the image will be placed inside another document. Be sure to include alt text. Standalone images and images of text are not considered accessible. For example, avoid pasting images of handouts into Slack as they require more alt text than is recommended, and alt text cannot contain headings, which enables people with disabilities to quickly understand the content inside a document.

- *Please note, because you are customizing and creating the content using the provided template, your group is responsible for making sure the content is accessible. Check accessibility only on final files (PDF or .jpeg).*

Infographic/Event Design Best Practices

- Use consistent brand and tone throughout all newsletters and documents.
- Keep language clear and concise.
- Incorporate visuals or icons where appropriate.
- Ensure information is well-organized and easy to read.
- Use call-to-actions where relevant.

Read the attached **OIT Importance of Visual Communications presentation** for more information

Resources and Support

The OIT Communication team can provide basic guidance on using these templates. If you need guidance on creating an original one-pager, event flier, or Outlook email template, please contact April Arnold (april.arnold@hhs.cms.gov), who will connect you with the CMS Office of Communications.

OIT DISTRIBUTION CHANNELS

If you have Office of Technology (OIT) news to share with the OIT and/or CMS audience, please use the distribution channels listed below.

Broadcast Email
Covers critical CMS news and announcements
- **Distribution**: As needed, for urgent or time-sensitive information
- **Audience**: All CMS staff
- **Submission deadline**: Rolling basis
- **Submission guidelines**: See Broadcast Email Guidelines
- **Contact**: April Arnold, april.arnold@cms.hhs.gov

PlanetOIT
Covers news and information about OIT, including innovative technological solutions, human-centered design principles, staff achievements and interests, upcoming meetings and events, and useful tips and tools
- **Distribution**: Weekly, Tuesday or Wednesday morning
- **Audience**: All OIT staff and contractors
- **Submission deadline**: Flexible, depending on the scope of the submission
- **Submission guidelines**: Submit questions, comments, and articles ideas to the OIT Communications Team; CC GTL or the gov lead on all submissions.
- **Contact**: April Arnold, april.arnold@cms.hhs.gov

Pulse
Covers CMS employee news and resources, including announcements, technology and tools, human capital, training and learning, health, safety, and wellness, and clubs and activities
- **Distribution**: Monthly
- **Audience**: All CMS staff
- **Submission deadline**: Approximately the 10th of each month for articles published the following month (e.g., January article due date: Dec. 11, as Dec. 10 fell on a Sunday). See the current issue for specific due dates.
- **Submission guidelines**: Submit news, suggestions, and articles of 200 words or less to CMS Internal Communications.
- **Contact**: April Arnold, april.arnold@cms.hhs.gov

Things to Know
Covers life at CMS, including trainings, announcements, benefits, technology, events, wellness, and more
- **Distribution**: Weekly on Tuesday
- **Audience**: All CMS staff
- **Submission deadline**: Rolling basis
- **Submission guidelines**: Submit questions, comments, and articles ideas to the OIT Communications Team; CC GTL or the gov lead on all submissions.
- **Contact**: April Arnold, april.arnold@cms.hhs.gov