

1. Understand the Custom Email Concept

All Action Champions will be sent an Action Plan Update form for each open finding. The form will be pre-populated with standard information (e.g. finding number, finding title, etc.) to simplify your administrative responsibilities. The form is designed as a custom email form so that it can be saved, referenced and forwarded easily.

Custom email forms are similar to normal emails in many ways: they are received in your 'inbox', contain standard fields (subject, to, from, received) and can be replied to and forwarded. What makes custom emails unique is that they have multiple pages and can collect other information that is user defined.

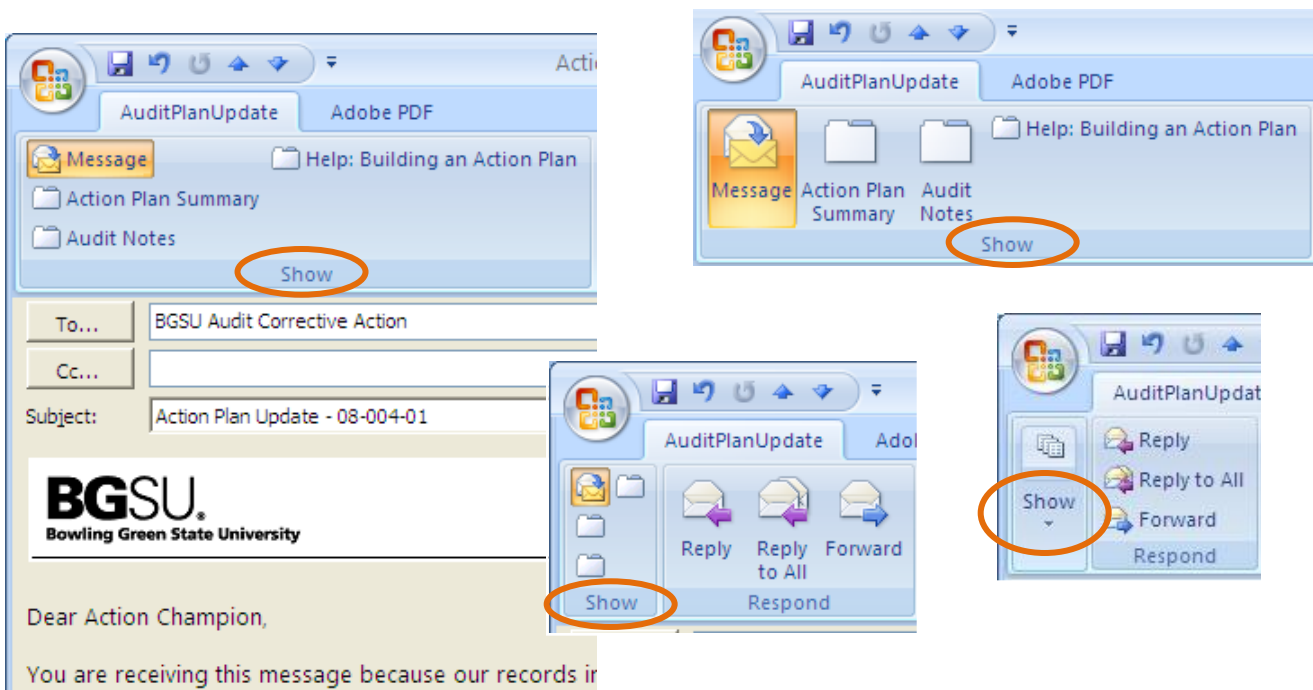
2. Access the Custom Content

To open the custom pages of an email form, you need to look for the "Show" menu on your message ribbon, which always displays in the left-most position. Depending on the size of your message window, the "Show" menu will look quite different: you may see large folder icons or small folder icons; there may be label text shown or not; you may only see a title that, once clicked, will display the folders.

Because there are three custom pages in the Audit Plan Update form, you will see a "Message" icon and three additional icons that look like folders. The folders are the three custom pages:

- **Action Plan Summary.** This page has two purposes. First, it contains the basics of your finding including the finding title, number and class. Second, it allows you to update your plan summary, revise your planned completion date, or add, change and delete action champions.
- **Audit Notes.** This page is where you can quickly see how audit views the finding and your plan.
- **Help: Building an Action Plan.** This page gives some helpful guidance on how to build a good plan and is included for easy and convenient reference.

To access any of the custom pages, simply click the desired folder. You can switch between pages at any time simply by clicking the folders within the Show menu ribbon.



3. Create a Submission Copy

You can think of the Action Plan Update form like a sticky ping-pong ball. Each time you get a message you want to keep the clean copy as a record of what you received and then send a revised version back to us with updated information. Likewise, we will keep your submission and create a copy to send updates.

To keep your original and create a copy that can be updated and submitted, you will use a common email function: Forward. When you click Forward, a new copy of your form will be created with all of the text exactly as it was. It is important NOT to use Reply, as the custom elements of the form will disappear.

4. Update As Needed

Updating the information on the Action Plan Update form is simple. Go to the Action Plan Summary page (see Step 2, and note that the “Show” menu will have shifted to the right) and click your cursor in any text box that needs to be changed. The form is pre-formatted for text, dates and pull-downs. Please note that you should NOT use the <ENTER> key when typing long text into the Action Plan Summary box, as that will impact the functionality of our database.

The screenshot shows the 'Action Plan Update' form in a browser window. Three areas are highlighted with orange boxes and labeled with letters A, B, and C:

- A:** The 'Action Plan Summary' text area, containing a paragraph about athletics personal and deferred liability accounts.
- B:** The 'Action Champions' section, which includes a 'Lead' dropdown (Swartz, S) and a list of other champions (Elbasser, J).
- C:** The 'Forecast Completion Date' dropdown, currently set to 'None'.

The three areas where updates should be considered and made where necessary are:

Action Plan Summary (A). This box should reflect the new controls that will be implemented in a succinct and streamlined way. Your own action plan may contain detailed steps or the names of responsible individuals, but that information is not required here.

Action Champions (B). The first action champion will be considered the “lead” and will have primary responsibility for the action plan. If that person changes, or if additional action champions should be included (i.e. copied on this plan or invited to meetings) they should be included here.

Forecast Completion Date (C). This is the date when all actions will be completed, functioning as intended, and ready for audit review.

5. Send It Back

Like any email, sending a custom email form is as simple as addressing it (in this case, to auditca@bgsu.edu) and clicking Send – no text message is necessary. We’ll expect to get the form from the lead Action Champion, and leads should cc: any other Action Champions included on the finding. **Please note that if you do not “Forward” the original email (see Step 3) you will not see the Send button will not appear.**

The most current version (whether it was sent to you from us, or from us to you) will be reported during our quarterly corrective action meetings and will be the basis of our dialogue.

The screenshot shows an email client interface. The 'Send' button is highlighted with an orange diamond. The email content includes the subject 'Action Plan Update - 08-004-01', the BGSU logo, and the recipient 'Dear Action Champion,'.