



Overview

One of the most timesaving aspects of the InfoReady platform is automating many of the email notifications that need to be sent among administrators, applicants, and reviewers. This guide is divided into two sections:

Section 1: Standard Platform Notifications

- Messages sent from the platform for different situations
- Cannot be customized by administrators

Section 2: Customizable Email Templates

- Listed in the Notifications section of each opportunity
- Default language provided in the platform, but the messages can be customized by administrators

*Note: If your site has customized terminology (e.g., the word “competition” has been replaced with “opportunity”), that language will be reflected in **all** email notifications.*

Section 1: Standard Platform Notifications

The emails below are hardcoded in the platform, meaning the default language cannot be changed. However, as a reminder, if your site has customized terminology that language will be reflected in **all** email notifications.

Any/All User Notifications

Email Notification:	Password Reset
Subject Line:	Password Reset
Merge Fields:	{name}
Email Text:	<p>Hello {name},</p> <p>We received a request to reset your password. Click the Reset Password button below to reset the password for your InfoReady Review account.</p> <p>If you have received this email in error, you can safely ignore it, and no changes to your password will be made.</p> <p>Reset Password (link to password reset page)</p>
Sent When:	External user requests a new password



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Email Notification:	New User Registration
Subject Line:	InfoReady Review – Registration Successful
Merge Fields:	{tenant name}
Email Text:	<p>Hello,</p> <p>Someone using this email address created an account for {tenant name} InfoReady Review service.</p> <p>If you created the account, please click the Confirm Account button to complete the account creation process.</p> <p>If you have received this email in error, you can safely ignore it, and no account will be created using your email address.</p> <p>Confirm Account (link to account activation)</p>
Sent When:	New user registers for an account

Email Notification:	New user added (external/non-SSO)
Subject Line:	Your new InfoReady Review Account
Merge Fields:	{tenant name}
Email Text:	<p>Hello {user first name},</p> <p>An account in {tenant name}'s InfoReady Review service has been created for you.</p> <p>Click the Set Password link below to set your password and start using InfoReady Review.</p> <p>Set Password (link to set password)</p>
Sent When:	New external user is added by an administrator (either from the Manage Users area or as a first-time reviewer)

Email Notification:	New user added (internal/SSO)
Subject Line:	Your new InfoReady Review Account
Merge Fields:	{tenant name}
Email Text:	<p>Hello {user first name},</p> <p>An account in {tenant name}'s InfoReady site has been created for you.</p> <p>Click the link below to login using your university credentials and start using InfoReady.</p> <p>Log In (link to login page)</p>
Sent When:	New internal user is added by an administrator (either from the Manage Users area or as a first-time reviewer)



Administrator Notifications

Email Notification:	Template shared with Administrator
Subject Line:	{admin name} has shared a template
Merge Fields:	{admin name} {tenant name} {template name}
Email Text:	<p>This message is to let you know that {admin name} of {tenant name} has shared with you the {template name} template. You may now use this template as-is, or if you wish to modify it, we will create a copy of it for you (including your modifications), leaving the original template as-is. You will continue to see any modifications to the original that the owner of that template makes. However, the owner's modifications would not appear in any copies you had made of this template prior to the owner's modifications.</p> <p>To see a list of all templates shared with you by other people, click on the MANAGE tab and look for the "Shared Templates" section on the right side of the page.</p>
Sent When:	A template is shared with an administrator

Email Notification:	Acting as Co-Administrator
Subject Line:	Acting as Co-Administrator for {competition title}
Merge Fields:	{user first name} {admin name} {tenant name} {competition name} {admin email}
Email Text:	<p>Hello {user first name},</p> <p>{admin name} created a new competition on the {tenant name}'s InfoReady site called {competition title}. {admin name} has asked for your help managing it and has added you as a Co-Administrator.</p> <p>Click the button below to view this competition. For more information please contact {admin email}.</p> <p>View (link)</p>
Sent When:	A user is added as a co-administrator



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Applicant Notification

Email Notification:	Proxy added by administrator (sent to applicant)
Subject Line:	Proxy applicants designated for {applicant name}
Merge Fields:	{applicant first name} {admin name} {admin email} {tenant name} {proxy name} {proxy email}
Email Text:	<p>Hello {applicant first name},</p> <p>{admin name}{admin email} has designated the individual(s) below as applicant proxies for your account in {tenant name}'s InfoReady Review system. The proxy applicant(s) can now submit applications in InfoReady Review on your behalf. Please coordinate your efforts to ensure any applications are submitted on time and with all required materials included. Click here for information and instructions about the proxy functionality.</p> <p>To change the proxy permissions on your account, please click the link below to access your profile.</p> <p>Newly designated proxy applicant(s):</p> <ol style="list-style-type: none">1. {proxy name}{proxy email} <p>View Your Profile (link)</p>
Sent When:	An administrator adds a proxy to a user's account



Viewer Notification

A Viewer is a non-Admin user that has access to the Data Grid only once an opportunity has been launched. They can view, but not edit, the information displayed in the grid. Users with this role do *not* count toward your allotted license total.

Email Notification:	Viewer added to an opportunity
Subject Line:	Viewer Access
Merge Fields:	{viewer name} {admin name} {tenant name} {competition title} {admin's email address}
Email Text:	Hello {Viewer Name}, {Admin Name} has given you access to view submission for an opportunity on the {tenant name} site called {competition title}. You will be able to view, but not edit, information for this opportunity. You can also download application contents in PDF format and extract competition reports. You will need to log in after clicking the "View" button below. Please contact {admin's email address} if you have any questions. View (link)
Sent When:	Viewer is added to an opportunity by an administrator



Reviewer Notifications

Email Notification:	Review Requests Digest Email
Subject Line:	Review or Approval Requests for {tenant name}
Merge Fields:	{reviewer name or email} {tenant name} {date Digest sent} {competition title} {administrator name} {administrator email} {review deadline}
Email Text:	<p>Hello {reviewer first name or email},</p> <p>Below is a summary of your current assigned reviews at {tenant name} as of {date Digest sent}. Click the 'Go to Reviews' button below to log in to view and manage your assignments. Once you're there, you will see a to-do list of your pending reviews and can navigate to reviews that have been previously submitted. If there are any additional details and instructions from administrators, you will find them below the summary.</p> <p>Go to Reviews (link to Reviews tab)</p> <p>Review form lengths may vary. Application content and additional reviewer instructions can be found within the system.</p> <p>Review Assignment Summary:</p> <p>{competition title} Administrator: {administrator name} {administrator email} Pending Reviews: (#) Type: (#) Approvals, (#) Reviews Next Review Due Date: {review deadline}</p> <p>Details and Instructions (instructions from administrators)</p>
Sent When:	Monday and Thursday mornings (default schedule), or tenant custom schedule to any reviewer with incomplete reviews assigned in the last 14 days



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Proxy Notifications

InfoReady allows users to designate other users as proxies for themselves (i.e., User 1 makes User 2 a proxy for User 1). The only action proxies can take is to submit applications on behalf of the applicant. Proxies are unable to submit reviews or progress reports on behalf of other users.

Email Notification:	Proxy added by applicant (sent to proxy)
Subject Line:	Acting as a proxy for {applicant name}
Merge Fields:	{proxy first name} {tenant name} {applicant name}
Email Text:	Hello {proxy first name}, {applicant name} has made you an applicant proxy in {tenant name} InfoReady site. This means that you can now submit applications on behalf of {applicant name}. Please coordinate your efforts to ensure any applications are submitted on time and with all required materials included. View Your Profile (link)
Sent When:	Proxy is added by applicant

Email Notification:	Proxy removed by applicant (sent to proxy)
Subject Line:	Change in proxy status for {applicant name}
Merge Fields:	{proxy first name} {tenant name} {applicant name}
Email Text:	Hello {proxy first name}, {applicant name} has removed you as a proxy in {tenant name}'s InfoReady site. This means that you can no longer submit applications on behalf of {applicant name}. If you have any questions about this change, please reach out to {applicant name} to discuss further. View Your Profile (link)
Sent When:	Proxy is removed by applicant



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Email Notification:	Proxy added by administrator (sent to proxy)
Subject Line:	Acting as a proxy for {applicant name}
Merge Fields:	{proxy first name} {tenant name} {applicant name}
Email Text:	Hello {proxy first name}, {admin name}{admin email address} has designated you as an applicant proxy for {applicant name} in {tenant name}'s InfoReady Review system. This means that you can now submit and contribute to applications in InfoReady Review on behalf of {applicant name}. Please coordinate your efforts to ensure any applications are submitted on time and with all required materials included. Click here to learn how to apply as a proxy and collaborate on applications.
Sent When:	Proxy is added by administrator

Email Notification:	Proxy removed by administrator (sent to proxy)
Subject Line:	Change in proxy status for {applicant name}
Merge Fields:	{proxy first name} {admin name} {admin email} {applicant name} {tenant name} {applicant email}
Email Text:	Hello {proxy first name}, {admin name}{admin email} has removed you as a proxy for {applicant name} in {tenant name}'s InfoReady site. This means that you can no longer submit applications in InfoReady on behalf of {applicant name}. If you have any questions about this change, please reach out to {applicant name} ({applicant email}) to discuss further. Click here for information and instructions about the proxy functionality. View Your Profile (link)
Sent When:	Proxy is removed by administrator



Section 2: Customizable Email Templates

Each default email template is listed below in the order they appear in the in the Customize Email Notifications section of the Notifications page of an opportunity.

Customize Email Notifications

You may choose to edit and customize notifications for **Sample Opportunity**. Begin by selecting an email notification below. After updating the notification, be sure to click "Save". To restore the notification to the default, click "Restore Default Notification". You may see how your message will appear when delivered by clicking "Preview".

Select an Email Notification:

- Select Notification -

- Select Notification -

Reference Letter Writer:

Reference Letter Reminder

Reviewer:

Multiple Review Request

Review Request Digest Instructions

Review Request

Routing Step Reset

Routing Step Recap

Committee Review Packet

Committee Review Assignment

Admin:

Application Received from Applicant

Review Submitted

Reviews Complete for Routing Step

Progress Report Submitted

Applicant:

Share Announcement

Your Application Received

Return Letter of Intent Application to Applicant

RESTORE DEFAULT

PREVIEW

SAVE NOTIFICATION

Fields that appear in curly braces { } are mail merge fields. This means specific opportunity data will populate into that place in the message. Each template has different available mail merge fields, which appear below the subject line after a template is selected.

Customize Email Notifications

You may choose to edit and customize notifications for **Sample Opportunity**. Begin by selecting an email notification below. After updating the notification, be sure to click "Save". To restore the notification to the default, click "Restore Default Notification". You may see how your message will appear when delivered by clicking "Preview".

Select an Email Notification: Review Request

Subject: Request to Review an Application

Notification Fields:

Please do not use a placeholder that does not appear in a notification's Mail Merge Fields, even if it appears in other notifications.

- {competition title} Insert
- {admin name} Insert
- {application title} Insert
- {applicant name} Insert
- {review deadline} Insert

If you delete the "View Application" button, but then later want to include it, you will need to click "Restore Default". {applicant name} is only used if reviewers for that routing step may see applicant identity.



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Administrators can edit as needed, including the subject line and body. Editing these templates upfront can save administrators time later when they need to send messages from the platform. However, in most cases, they can also wait to edit the message right before sending.

(Exceptions to this are the *Your Application Received* and *Progress Report Submitted* notifications that go to applicants automatically).

To get a more accurate view of what each message will look like, use the **Preview** button in the email template editing screen (outlined below). Make sure to click the **Save Notification** button if any edits are made.

Thank you for submitting your application {application title} to {opportunity title}. An Administrator will now evaluate your application.

Words: 18, Characters: 138

RESTORE DEFAULT PREVIEW SAVE NOTIFICATION

Reference Letter Writer Notification

Email Notification:	Reference Letter Reminder
Subject Line:	Reference Letter reminder
Merge Fields:	{competition title} {applicant name} {reference letter deadline}
Email Text:	This is a reminder that you have been asked to write a reference letter for {applicant name} associated with {competition title}. The deadline for your submitted reference letter is {reference letter deadline}. Start Reference Letter (link to Reference Letter submission page)
Sent When:	Varies, depends on what the applicant selects under the Reference Letter section of the application



Reviewer Notifications

Email Notification:	Multiple Review Request
Subject Line:	Request to Review Applications
Merge Fields:	{competition title} {admin name} {review deadline} {application links}
Email Text:	Hello, {admin name} has requested your assistance to act as a Reviewer for {competition title}. There are applications ready for your review. Please complete this by {review deadline}. Thank you! Note: Make sure to review all applications before submitting your final review for any individual applications. {application links}
Sent When:	Reviewers are assigned to multiple applications using the Batch Actions menu on the Data Grid

Email Notification:	Review Request Digest Instructions
Subject Line:	Review Request Digest Instructions
Merge Fields:	n/a
Email Text:	You have been assigned applications to review. A list of the assigned reviews can be accessed by following either the link at the top or bottom of this email to visit the Reviews tab. The Reviews tab contains a list of all reviews that have ever been assigned to you. You can sort and filter the list to accommodate the way you would like to organize your reviews. On the Reviews tab, click the application title (in blue text) to access the desired review. Once in a review you can navigate between assigned reviews by clicking the 'Next' and 'Previous' buttons found on the right side of the page. Lastly, this video tutorial (link to video) of the reviewer experience provides a brief overview of the review process and should help you get started with the reviews.
Sent When:	Review Request Digest is sent, but only if the administrator has chosen to include them



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Email Notification:	Review Request
Subject Line:	Request to Review an Application
Merge Fields:	{competition title} {admin name} {application title} {applicant name} {review deadline}
Email Text:	Hello, {admin name} has requested your assistance to act as a Reviewer for {competition title}. There is an application ready for your review. Please complete this by {review deadline}. Thank you! Application: {application title} {applicant name} View (link to application)
Sent When:	A reviewer is assigned to an individual application

Email Notification:	Routing Step Reset
Subject Line:	Review Reset Notification
Merge Fields:	{competition title} {reviewer name or email address} {routing step count} {routing step number} {routing step}
Email Text:	Hello {reviewer name or email address}, The Administrator for {competition title} has made adjustments to the review process. You have been identified as a reviewer for {routing step} which is {routing step number} of {routing step count} total steps in the review process. Please check your Reviews tab to see whether you have any draft reviews as it is possible that any previously submitted review content has been discarded. If you don't see any draft reviews then you will see an additional email when your input is requested.
Sent When:	Adjustments are made to routing steps after reviews have been assigned



InfoReady Notifications Guide

Email Notification:	Routing Step Recap
Subject Line:	Routing Step Recap
Merge Fields:	{competition title} {application title} {reviewer name or email address} {routing step}
Email Text:	Hello {reviewer name or email address}, All the reviews are in for routing step {routing step} of the application {application title} to {competition title}. The attached document is a recap of those reviews.
Sent When:	All reviewers assigned to a specific Routing Step have completed that step's reviews. Reviewers receive a separate Recap for each application they review.

Email Notification:	Committee Review Packet
Subject Line:	Committee Review Packet
Merge Fields:	{competition title} {default reviewer}
Email Text:	To Committee Members: Thank you for being part of the review committee for {competition title}. The attached file contains the application packets for all submissions under review by the committee. The committee's decisions will be collected and entered by the designated reviewer. For more information, please contact {default reviewer}.
Sent When:	Default reviewer for a Committee Routing Step (Approval or Ranking) sends out the committee packet

Email Notification:	Committee Review Assignment
Subject Line:	Committee Review Assignment
Merge Fields:	{competition title}
Email Text:	You are the designated reviewer on the Committee for {competition title}. Applications have been added to the committee review step in InfoReady. At any time, you can go to the Reviews tab, select one of the applications, and email a Committee Packet to yourself and any other committee members. This packet will contain all applications assigned up to that point.
Sent When:	Administrator assigns reviews to the default reviewer of a Committee Routing Step (Approval or Ranking)



Administrator Notifications

Email Notification:	Application Received from Applicant
Subject Line:	Application received from "{applicant name}" for "{competition title}"
Merge Fields:	{competition title} {application title} {applicant name}
Email Text:	Hello {competition title} Administrator, {application title} was submitted by {applicant name}, to {competition title}. View (link to application)
Sent When:	An application is submitted

Email Notification:	Review Submitted
Subject Line:	Review Submitted
Merge Fields:	{competition title} {application title} {reviewer name or email address}
Email Text:	{reviewer name or email address} has submitted a review of {application title} for {competition title}. View (link to review)
Sent When:	A review is submitted

Email Notification:	Reviews Complete for Routing Step
Subject Line:	{routing step name} reviews completed for {application title}
Merge Fields:	{competition title} {application title} {routing step name}
Email Text:	{competition title} This message is to inform you that all the {routing step name} reviews for the application {application title} have been submitted. View (link to application)
Sent When:	All reviews for a routing step are completed for a particular application



InfoReady Notifications Guide

Email Notification:	Progress Report Submitted
Subject Line:	Progress Report Submitted by {applicant name}
Merge Fields:	{competition title} {application title} {applicant name} {progress report name}
Email Text:	{competition title} Application: {application title} {progress report name} for {competition title} was submitted by {applicant name}. View (link to application)
Sent When:	A progress report is submitted



Applicant Notifications

Email Notification:	Share Announcement
Subject Line:	Announcing {competition title}
Merge Fields:	{competition title} {competition details}
Email Text:	We are pleased to announce the launch of {competition title}. Click on the link below to view more information. Thank you! {competition details} View (link to competition details)
Sent When:	An Administrator sends a message from the Share section of the opportunity

Email Notification:	Your Application Received
Subject Line:	Application Received
Merge Fields:	{competition title} {application title}
Email Text:	Thank you for submitting your application {application title} to {competition title}. An Administrator will now evaluate your application.
Sent When:	An application is submitted

Email Notification:	Return Letter of Intent Application to Applicant
Subject Line:	Important Application Information
Merge Fields:	{competition title} {application title} {applicant name}
Email Text:	Hello {applicant name}, We noticed a few items that need to be addressed in your {application title} application. Please make the updates outlined below and re-submit. Thank you! View (link to application)
Sent When:	A Letter of Intent (phase 1) application is returned to an applicant



InfoReady Notifications Guide

Email Notification:	Return Application to Applicant
Subject Line:	Important Application Update
Merge Fields:	{competition title} {application title} {applicant name}
Email Text:	Hello {applicant name}, We noticed a few items that need to be addressed in your {application title} application. Please make the updates outlined below and re-submit. Thank you! View (link to application)
Sent When:	An application is returned to an applicant for edits

Email Notification:	Accept Letter of Intent application
Subject Line:	Important Application Update
Merge Fields:	{competition title} {applicant name}
Email Text:	Hello {applicant name}, The application you submitted to {competition title} has been approved by an Administrator and, if needed, will enter into a review process. Please note that {competition title} has multiple stages. You will receive another email in the near future announcing the status of your application. Thank you for your submission!
Sent When:	A Letter of Intent (LOI) application is accepted by an Administrator to move on to a review process in the LOI phase)



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Email Notification:	Converted Letter of Intent (Advanced)
Subject Line:	Your {letter of intent} has advanced - Action Required
Merge Fields:	{competition title} {letter of intent} {application title} {launch sentence}
Email Text:	<p>Your application, {application title}, has been selected to move forward to {competition title}.</p> <p>Click the button below to log in, view the full details for the competition, and access your draft application. You will be able to make edits, if necessary, provide additional information requested, and submit your application when you are ready.</p> <p>{launch sentence}</p> <p>View (link to application)</p>
Sent When:	Administrator converts Letter of Intent (phase 1) to regular opportunity (phase 2)

Email Notification:	Accept Application
Subject Line:	Important Application Update
Merge Fields:	{competition title} {application title} {applicant name}
Email Text:	<p>Hello {applicant name},</p> <p>The {application title} application you submitted to {competition title} has been approved by an Administrator and, if needed, will enter into a review process. You will receive another email in the near future announcing the final decision on your application.</p> <p>Thank you for your submission!</p>
Sent When:	An application is accepted by an Administrator, typically to move to the review stage of the opportunity



InfoReady Notifications Guide

Email Notification:	Reference Letter Submitted
Subject Line:	A reference letter has been submitted
Merge Fields:	{reference letter writer} {competition title}
Email Text:	{reference letter writer} has submitted a reference letter on your behalf.
Sent When:	Any reference letter is submitted

Email Notification:	Required Reference Letters Submitted
Subject Line:	Required Reference Letters Submitted Notification
Merge Fields:	{competition title}
Email Text:	This message is just to let you know that all reference letters required by {competition title} have been submitted.
Sent When:	All reference letters are submitted

Email Notification:	Award Application
Subject Line:	Important Application Information
Merge Fields:	{competition title} {application title} {applicant name} {feedback header} {feedback from routing steps} {reference text} {award amount}
Email Text:	Hello {applicant name}, Congratulations! Your application {application title} has been selected as an awardee for {competition title}. You have been awarded {award amount}. {reference text} View (link to application) {feedback header} {feedback from routing steps}
Sent When:	An Administrator awards an application. Please note you can edit this notification to not include all mail merges. For instance, removing the reviewer feedback or award amount.



InfoReady Notifications Guide

Email Notification:	Reject Application
Subject Line:	Important Application Update
Merge Fields:	{competition title} {applicant name} {feedback header} {feedback from routing steps} {reference text} {application title}
Email Text:	Hello {applicant name}, Thank you for applying to {competition title}. After careful consideration, your application {application title} was not selected. We hope you will consider applying again in the future. Your application history can be viewed via the View button below. {reference text} View {feedback header} {feedback from routing steps}
Sent When:	An Administrator rejects an application. Please note you can edit this notification to not include all mail merges. For instance, removing the reviewer feedback.

Email Notification:	Withdraw Rejection
Subject Line:	Your application is reinstated
Merge Fields:	{competition title} {application title}
Email Text:	Hello, Your application {application title} is once again under consideration. Please contact the Administrator if you have any further questions. Thank you!
Sent When:	An Administrator withdraws a rejection



Awardee Notifications

Email Notification:	Rescind Award
Subject Line:	Your application status has changed
Merge Fields:	{competition title} {application title} {applicant name}
Email Text:	Hello {applicant name}, We regret to inform you that your application {application title} is no longer under consideration for {competition title}. Please contact the Administrator if you have further questions.
Sent When:	An Administrator rescinds an award

Email Notification:	Progress Report Assignment
Subject Line:	Progress Report Assignment
Merge Fields:	{competition title} {application title} {applicant name} {progress report deadline} {progress report name}
Email Text:	{competition title} Application: {application title} Hello {applicant name}, You have been asked to complete the progress report {progress report name} associated with the application listed above. This report is due {progress report deadline}. Additional information can be found by clicking the "View" button below and logging in to view the progress report. View (link to progress report)
Sent When:	An Administrator assigns a progress report to awardee(s)



InfoReady Notifications Guide

Email Notification:	Progress Report Reminder
Subject Line:	Progress Report Reminder
Merge Fields:	{competition title} {application title} {progress report deadline} {progress report name} {applicant name}
Email Text:	{competition title} Application: {application title} Hello {applicant name}, This note is a reminder to complete and submit {progress report name} for the application listed above. Please take the time to complete this progress report. It must be submitted by {progress report deadline}. {progress report name} Deadline: {progress report deadline} View (link to progress report)
Sent When:	On the assigned date the Administrator pre-determined would be the reminder date

Email Notification:	Progress Report Submitted
Subject Line:	Thank You for Submitting Your Progress Report!
Merge Fields:	{competition title} {application title} {applicant name} {progress report name}
Email Text:	{competition title} Application: {application title} Hello {applicant name}, Thank you for submitting {progress report name} for your {competition title} application award. There may be additional progress reports to submit in the future. You will receive an email notification if/when further reports are assigned. View (link to progress report)
Sent When:	An awardee submits a progress report



InfoReady Notifications Guide

Email Notification:	Progress Report Updated Deadline
Subject Line:	Progress Report Deadline Changed
Merge Fields:	{admin email} {progress report name} {competition title} {applicant name} {admin name} {application title} {progress report deadline} {new progress report deadline}
Email Text:	{competition title}: Application: {application title} Hello {applicant name}, This is a note to let you know that the due date for {progress report name} has changed from {progress report deadline} to {new progress report deadline}. Please contact {admin name} at {admin email} if you have any questions. View Report (link to progress report)
Sent When:	An Administrator changes the progress report deadline