



Expanded Auto-CC for Additional Emails

Updated: March 21, 2025

We're excited to introduce expanded **automatic CC (carbon copy) functionality** in Sara! Previously, additional email addresses could only be auto-CC'd on **assignment emails**. Now this feature extends to **appointment emails, manually composed emails, and bulk communications**, making it easier to keep parents, guardians, service providers, and others informed!

What's New?

1. Expanded Auto-CC Options

You can now elect to automatically CC additional email addresses on:

- Assignment emails
- Appointment emails
- Manually composed emails (option to include bulk communications)

How to Enable Auto-CC:

1. Navigate to the **Profile** tab on your client's record.
2. Under **Additional Email Addresses**, click **[+Add]** to add a new email or **[Edit]** to modify an existing one.
3. Enter or update the **Email Address** field.
4. Select the types of communications to auto-CC:
 - a. Assignment Emails
 - b. Appointment Emails
 - c. Manually Composed Emails
5. Click **[Save]** to finalize.

Client Overview - Jane Doe Global Client Search

Jane Doe
carly.vandenende@saraworks.com
Client ID: 85537

[Upload Picture](#)

[Refresh Client Record](#)

Primary Counselor: Carly Vandenende
State Level
Current Track: Employed
Track Start Date: 05/22/2024 [Change Track](#)

Profile Alerts Communications Appointments (3) Assignments (9) Documents Case Notes Reassign / Show / Refer

Name: **Jane Doe**
Language: **English**
Primary Email: **carly.vandenende@saraworks.com**
Primary Cell: [REDACTED]

[Edit Profile Information](#)

Additional Email Addresses

| | | |
|----------------------|---------------------------|------------------------|
| Edit | serviceprovider@gmail.com | Add |
| | Cc on All Emails | Delete |

Additional Phone Numbers

Client ID: [REDACTED]
Participant ID: [REDACTED]
Ethnicity: [REDACTED]

[Edit Additional Information](#)

Add Email Address

Email Address: parent/guardian@outlook.com

Cc on Assignment Emails
 Cc on Appointment Emails
 Cc on Manually Composed Emails

[Cancel](#) [Save](#)

Edit an existing alternative email address

Note: If an additional email was previously set to auto-CC for assignment emails, that setting will remain unchanged. However, to enable auto-CC for appointment and manually composed emails, you must select these options manually.

2. Adding More Email Addresses to CC Fields

Emails set to auto-CC will automatically populate in the CC field. However, you can **manually add additional email addresses** as needed—simply type them into the field and **separate each address with a semicolon (;)**.

Send Email to Jane Doe

To: carly.vandenende@saraworks.com (Primary)

Cc: service_provider@gmail.com; parent-guardian@outlook.com; ADDemailHERE@hotmail.com

Subject: [REDACTED]

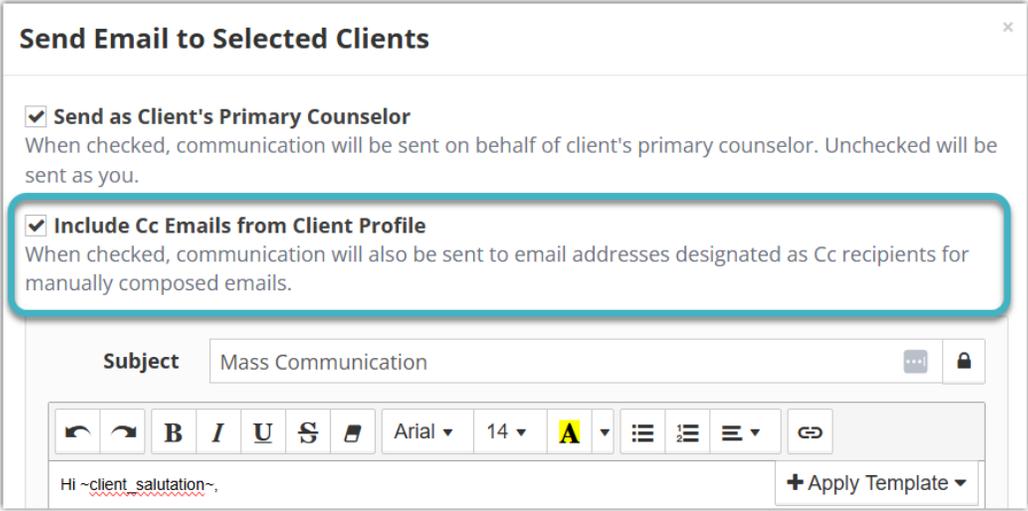
Auto-CC'd emails will populate automatically

You can still manually add email addresses by separating with a semicolon (;)

3. New Bulk Email Auto-CC Option

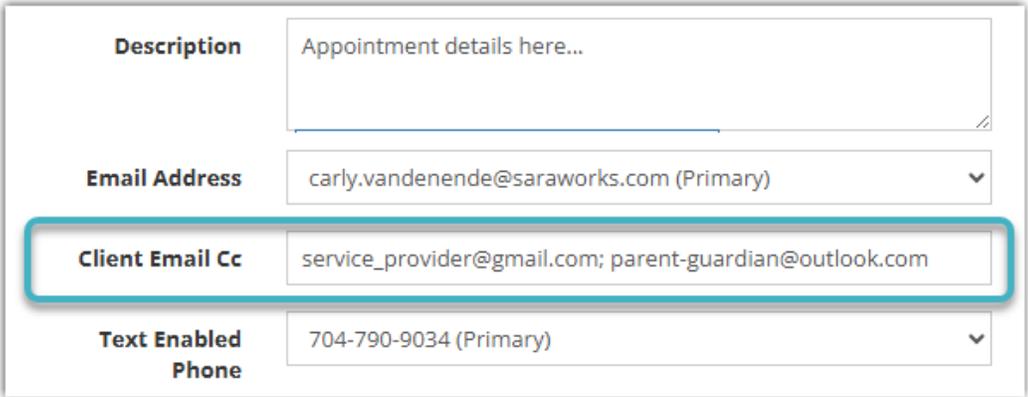
When sending emails via **Bulk Actions**, you can now choose whether to **include or exclude** additional email addresses set to auto-CC for manually composed emails.

Simply check or uncheck the box labeled "**Include CC Emails from Client Profile**" at the top of the email template.



4. Updated Placement for Client Email CC Field (Appointments)

When Auto-CC for Appointment emails is enabled, the **Client Email CC** field will now appear **directly below the primary email** address on the **Appointment Template**. If no CC email is set up for Appointments, the field will remain in its original location under Advanced Settings.



We are committed to enhancing your experience with Sara and look forward to your feedback on this update!