Mail Manager for Admin Staff - Quick Reference Guide
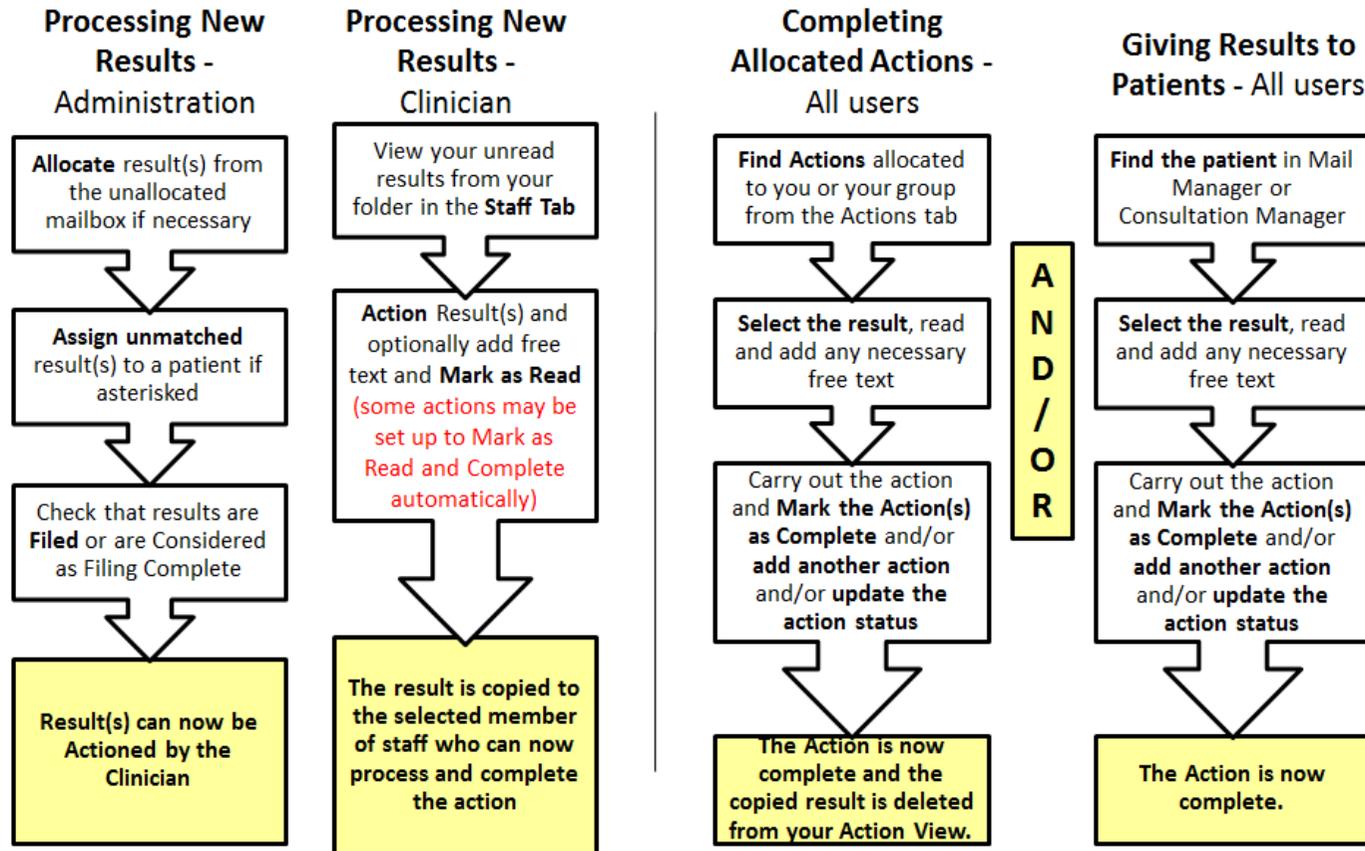
This Mail Manager quick reference guide for administrative staff tells you how to manage incoming pathology result. Namely:

> 🗋 **Note** -   As this is a quick reference guide, we have described the simplest way of processing Mail Manager messages.There are various other ways of carrying out these tasks which are detailed in the [Mail Manager User Guides](#).

Mail Manager Workflow Diagram

The following diagram shows how Mail Manager messages are processed throughout your practice:

Processing New Results - Administration

- **Allocate** result(s) from the unallocated mailbox if necessary
- **Assign unmatched** result(s) to a patient if asterisked
- Check that results are **Filed** or are Considered as Filing Complete
- **Result(s) can now be Actioned by the Clinician**

Processing New Results - Clinician

- View your unread results from your folder in the **Staff Tab**
- **Action** Result(s) and optionally add free text and **Mark as Read** (some actions may be set up to Mark as Read and Complete automatically)
- **The result is copied to the selected member of staff who can now process and complete the action**

Completing Allocated Actions - All users

- **Find Actions** allocated to you or your group from the Actions tab
- **Select the result**, read and add any necessary free text
- Carry out the action and **Mark the Action(s) as Complete** and/or **add another action** and/or **update the action status**
- **The Action is now complete and the copied result is deleted from your Action View.**

A N D / O R

Giving Results to Patients - All users

- **Find the patient** in Mail Manager or Consultation Manager
- **Select the result**, read and add any necessary free text
- Carry out the action and **Mark the Action(s) as Complete** and/or **add another action** and/or **update the action status**
- **The Action is now complete.**

Mail Manager Workflow

Processing New Messages

When new messages come in to Mail Manager, you must check that:

- *They are assigned to a patient* (page 3)

- *They are assigned to a clinician* (page 4)

- *They are filed on the patient record* (page 5) (if that is your practice protocol)

Assigning Messages to the Right Patient

Most messages received are automatically matched to a patient, however, you must regularly check if any incoming messages have not been assigned and match to the right patient as follows:

1. To access Mail Manager, from the Home tab on the Vision front screen, select

   Mail Manager .

   You may have Mail Manager set to open automatically when you login to Vision (Options menu on the Vision front screen).

2. The **Staff** tab is initially selected, which means that you are viewing all the staff members messages that you have access to. You may want to check the Date menu which determine the date range of the messages you are viewing. This is usually set to **All Dates, All Mail**.

3. Click on the **Incoming Mail** Folder.

4. Click on the **Patient** column to sort results in patient order. All messages which are not matched to a patient (unassigned) are marked with an asterisk ***** and are therefore placed at the top of the list.
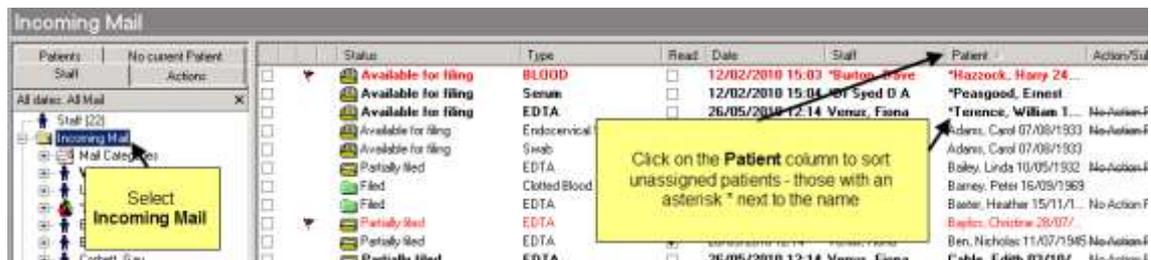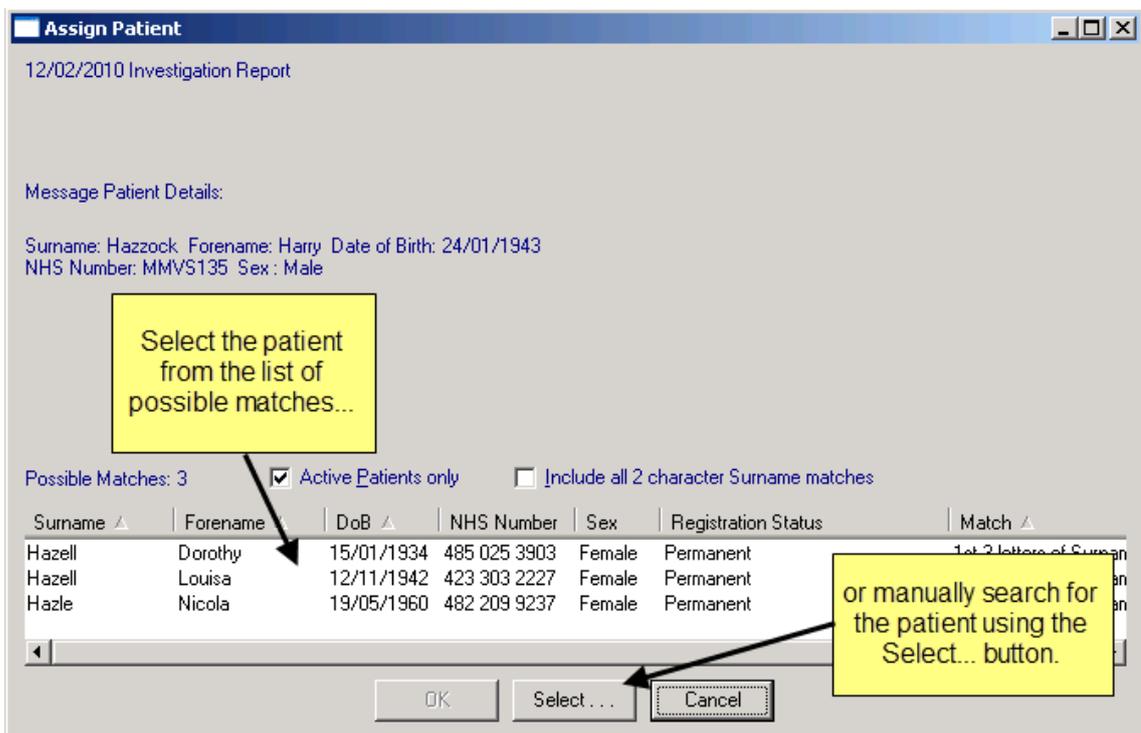

Sort Unassigned Patients

5. Right click on the message and select **Assign to Patient**.
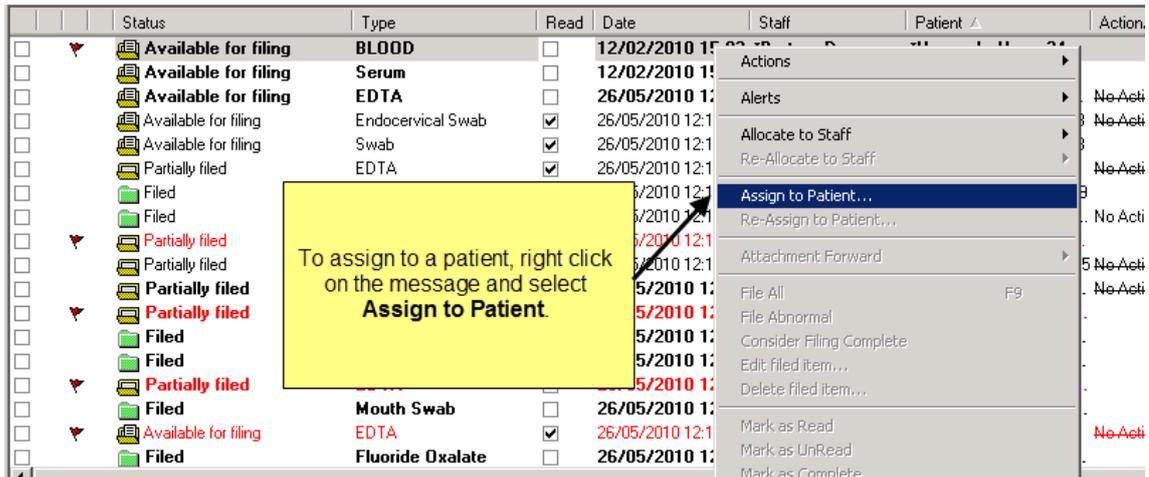
Right click - Assign to Patient

6. Mail Manager displays possible matches. Select the patient from the possible match list or click on **Select** to search for the patient manually.

Assign Patient

7. Click **OK** to assign the message to the patient.

📄 **Note** - If the message is not for one of your registered patients, you can print the message and inform the sender of the message that they have the wrong surgery. You can then right click and delete the message.

Allocating Unmatched Messages to a Clinician

Most messages received are automatically matched to a clinician, however, you must regularly check if any incoming messages have not been allocated and match to the right clinician as follows:

1. To access Mail Manager, from the Home tab on the Vision front screen, select
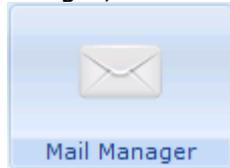
   Mail Manager .

   You may have Mail Manager set to open automatically when you login to Vision (Options menu on the Vision front screen).

2. The **Staff** tab is initially selected, which means that you are viewing all the staff members messages that you have access to.

3. Click on the **Incoming Mail** Folder.

4. Select **Unallocated Mail**.

Unallocated Messages

5. Right click on the message and select **Allocate to Staff**. A list of frequent staff is displayed for you to select from. To view the full staff list, select **View Staff List**.
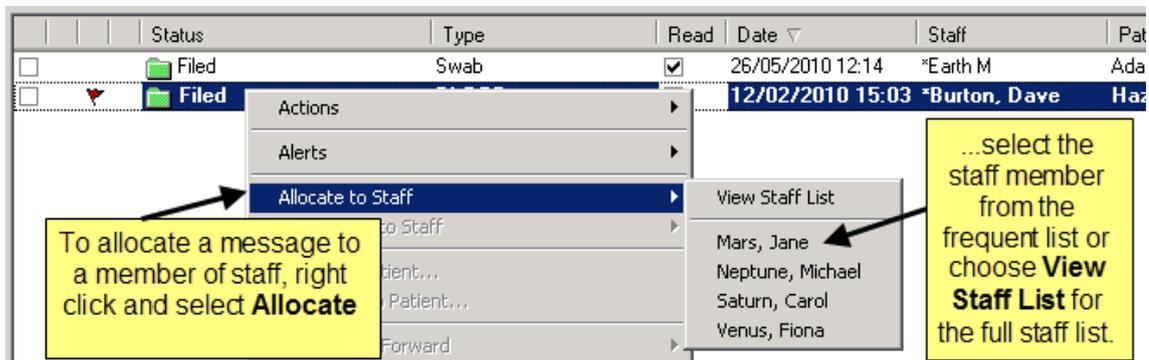
Allocate to Staff

6. The message now displays in the selected person's list for processing.

Filing Messages

Most practices have the Autofiling facility enabled which means that the content of all messages which are matched to a patient are automatically filed on the patient record when they are received in Vision. However, some messages do not get autofiled, such as those that weren't matched to a patient. Depending on your practice protocol, you can manually file messages as follows:

1. To access Mail Manager, from the Home tab on the Vision front screen, select

   Mail Manager .

   You may have Mail Manager set to open automatically when you login to Vision (Options menu on the Vision front screen).

2. The **Staff** tab is initially selected, which means that you are viewing all the staff members messages that you have access to.

3. Click on the **Incoming Mail** Folder.

4. Click on the **Status** column to sort results. All messages which are not filed display with the status **Available for Filing** or **Partially Filed**.
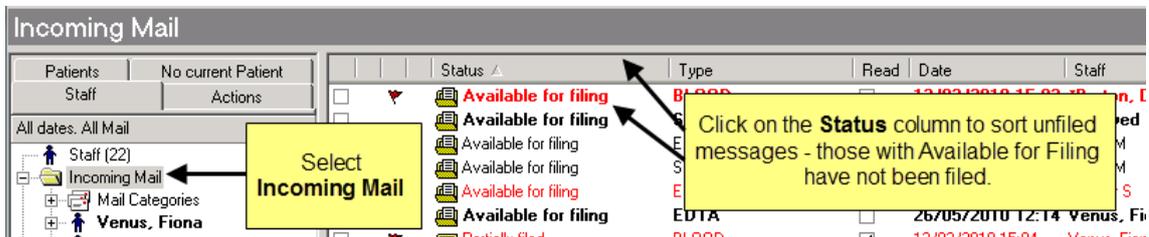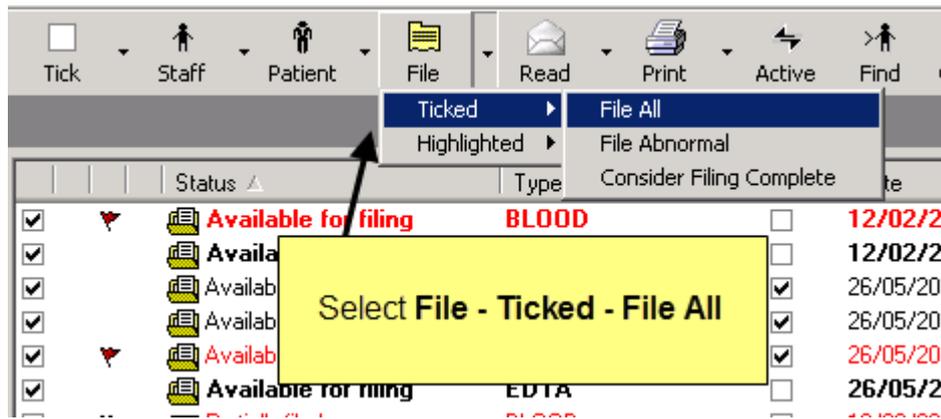

Sort Unfiled Messages

5. Select the messages you want to file by ticking the box in the first column in the message list.
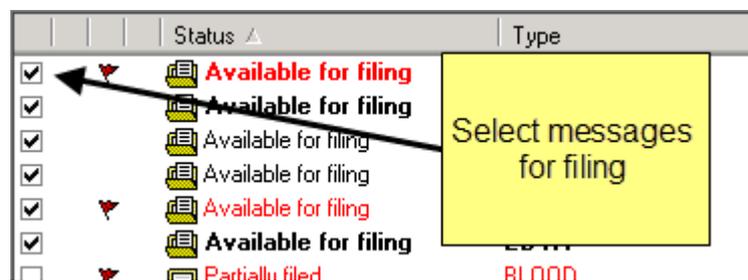
Select Messages for Filing

6. Click on **File - Ticked - File All**.

File - Ticked - File All

7. A progress bar is displayed as the messages are filed on the patient record.

🗋 **Note** - Some messages may remain as Available for filing or Partially filed, this simply means that the result will need further tasks performed to enable it to be filed into the patient record, such as a Read code or a unit of measure needs to be assigned to a result in the message.

Completing Actioned Messages

When clinicians have actioned their allocated messages you:

- *must check for any actions assigned to you in Mail Manager* (page 8)

- *when the patient requests result outcomes you can Complete actions in Consultation Manager* (page 9)

Completing Actions in Mail Manager

1. In **Mail Manager**, Click on the **Actions** tab to see all messages with an outstanding action assigned to you or the group of users you belong to. You can also drill down to look at the actions grouped by action type.
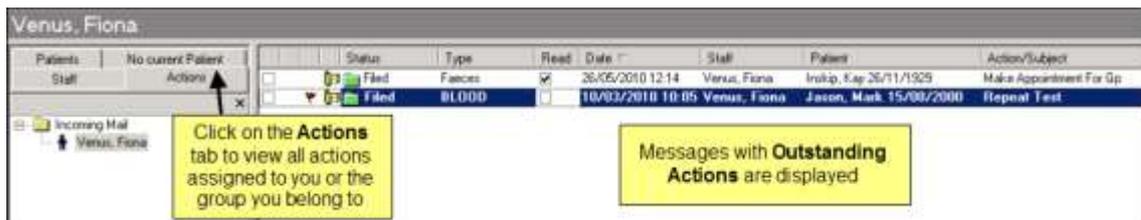
Actions Tab

2. Select the message you wish to complete the action for.

3. In the message detail pane, select the **Actions** tab.

4. Tick the box in the Complete column. You are asked "*Please confirm you wish to complete the selected action*". Click **Yes**. You can select update to add further comments to the action before completing if you wish.
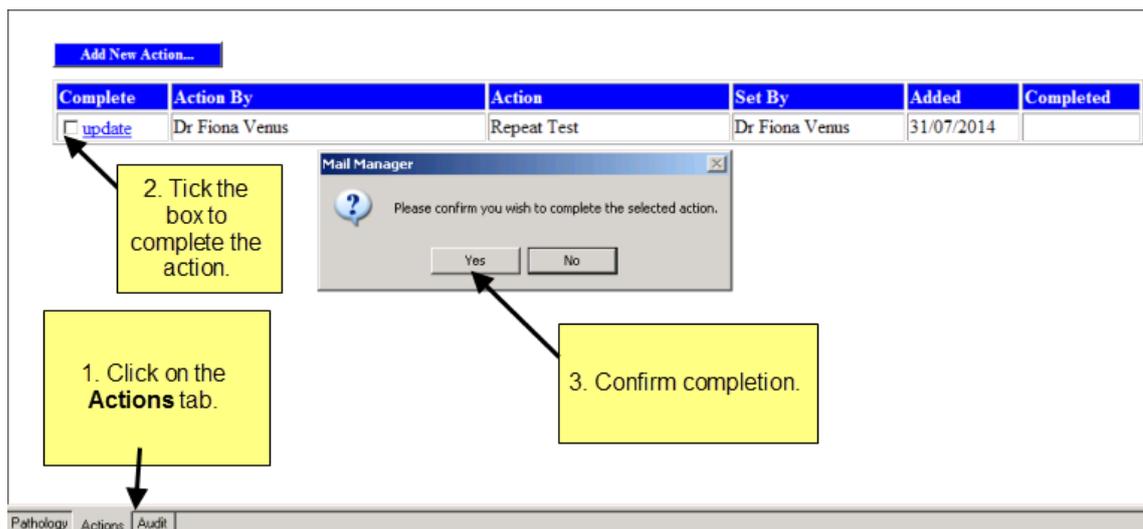
Complete Action from the Action Tab

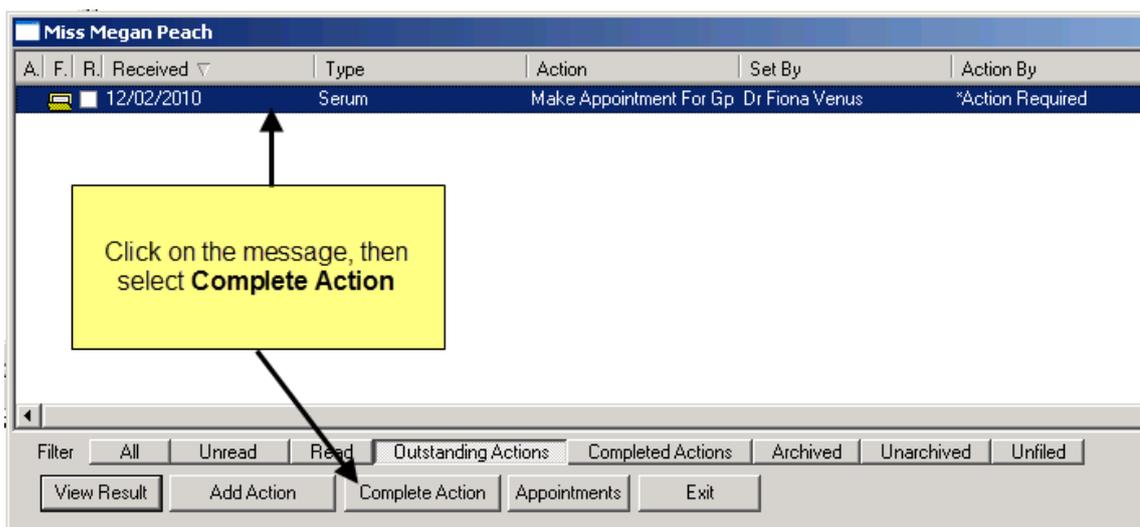5. The message is now removed from your Actions list.

> 📄 **Note** - You can also complete actions from the **View Mail for Patient** button in Consultation Manager.

Completing Actions in Consultation Manager

To complete actions from the patient's record:

1. In **Consultation Manage**r, select the patient.

2. Click on **View Mail for Patient** [icon] on the toolbar ([icon] denotes there is no patient mail). This lists the patient's mail messages, eg pathology, regardless of whether they have been filed or read from Mail Manager or Mailbox.

3. Click the "**Outstanding Actions**" filter to display the actions which haven't been completed (you can use the other filters to look at other result status).

Complete Action

4. Click on the message then select **Complete Action** [Complete Action] .

5. The message is removed from the Outstanding Actions filter and is not classified under Completed Actions:
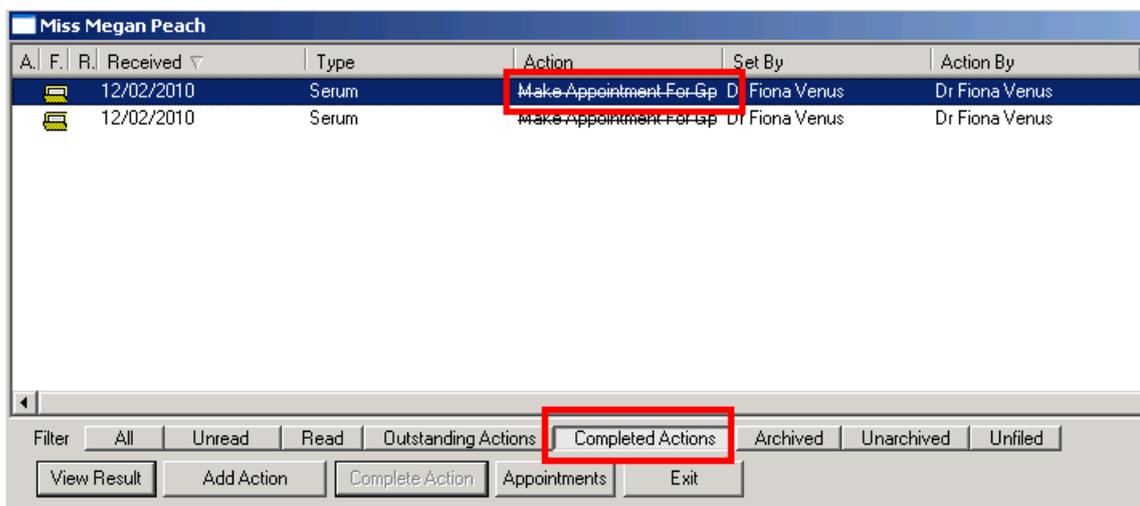
Completed Action