

Mail Manager Overview User Guide



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INPS Ltd.

The Bread Factory
1a Broughton Street
London
SW8 3QJ

Website: www.inps.co.uk

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Mail Manager Quick Reference

This guide aims to give an overview of the Vision Mail Manager Module. More detailed information on this module can be found in the Mail Manager on-screen help (press F1 whilst in the Mail Manager module).

What's New in Mail Manager


DLM 510 (September 2016)

The following changes were introduced as part of the Vision DLM 510 release:

-  **Additional Medication (Acute) Requests** - You can now process additional medication (acute) requests submitted from your patients via Patient Services, see Additional Medication (Acute) Requests.
-  **Health Checks** - The following Health Check data received via the pathology message route can now be filed into the patient record in the usual way using the Read codes received, this addresses the issue with pathology not filing when Health Check details are received.:
 - **Waist Circumference**
 - **Weight**
 - **BMI**
 - **BMI 20 - 24**
 - **BMI under 20**
 - **BMI over 40**
 - **BMI 25 - 29**
 - **BMI over 30**

 **Note** - BMI entries are recorded as a Medical History entries and as such the values are not used for any BMI calculations or reporting.


- **Height**
- **BP** (systolic and diastolic)

 **Note** - If BP is not received as a pair of systolic and diastolic values it is recorded as Medical History entry with the results recorded in free text.

- **Smoking**

- **Alcohol**
- **Scores** (any type)
- **Pulse rate**
- **Pulse rhythm**

Any values received without valid Read codes attached do not file and the **Consider filing complete** option should be used to clear the message once your practice protocols have been followed.

-  **Scottish Breast Screening Service** - This release integrates the Scottish Breast Screening Service into Vision, see Scottish Breast Screening Service for details.

Introduction to Mail Manager

Switching to Mail Manager

For many years, Vision users have used Mailbox/Mail Administrator for structured PMIP Pathology results. This application only supports Pathology messages and there have been criticisms of it, particularly "disappearing results".

Some time ago INPS recognised that many more types of structured clinical messages would be received by Vision users and sought a solution to support them and solve the problems with the existing pathology message solution. These new messages include Out of Hours reports, GP2GP record transfers, Hospital Discharge messages, GP Summary messages to the Spine, Electronic Prescription messages, Choose and Book messages and PDS updates.

Mail Manager is the application that we have developed for these (and all future) clinical messages and PMIP Pathology messages are also supported. It seems only sensible for one application area to deal with ALL the clinical messages for a practice, as they all require the same functionality, assigning to patients when not matched, allocating to a clinician, filing and actioning.

The application has much more functionality than the simple Mailbox and requires some time to be invested to become competent with the new interface. However INPS believes that there are significant safety issues which Mail Manager solves and strongly suggest that practices move over to using it.

Most users require some training and as with all new functionality, it is worth planning the change and investing some time in ensuring all users become competent. We have trialled this software over a long period with many users and believe it is fit for purpose, scalable to receive the significantly increased volume of clinical messages, clinically safe and has rich functionality.

As always, we are pleased to listen to users feeding back their experiences of using our software and will try to address issues and suggestions as and when we are able.

Getting Started and Mail Maintenance

XML Messages

If an XML message is sent today to your practice, Vision **Mail Manager** could pick up and display this message once XML messaging is switched on. If you received mail in the previous Mailbox/Mail Administrator system, then you can receive mail on the new Mail Manager.


Up until now, in England, while pathology messages are still in EDIFACT format, they have been received in Mailbox and Mail Administrator, but it is now possible to receive EDIFACT messages, handled in XML format, into Mail Manager.

Scottish practices can now receive XML pathology messages through SCI Stores.

- For details of the Mail Manager display, see The Quick Reference Mail Manager section : *Mail Manager interface* (page 7), *Toolbar icons* (page 11), *Status icons* (page 14), *Menu Options* (page 17), *Tools - Lookup* (page 26), *Tools - Local IDs* (page 30), *Options (Tools)* (page 32), and Staff tab and Patients tab.
- For details of the Mail Manager functions, such as adding actions, see Overview of dealing with messages and Mail Manager Workflow.
- For details of details of specific applications that use Mail Manager, see Managing Mail Manager Messages, Pathology in XML format in England, SCI Stores - Scottish Pathology, PDS Updates, Choose and Book, GP2GP (transfer of electronic health records), ETP (Electronic Transmission of prescriptions), National Summary Care Record
- For help with Mail Manager, see the section on FAQs at the end.

Staff access and Mail Maintenance

Staff Access to Mail Manager needs to be set up in a separate module - **Mail Maintenance** - which is part of Control Panel (which manages File Maintenance, Security, Eventlog Viewer, System Status and Mail Maintenance). You are advised to discontinue use of the "old" File Maintenance, Security and Event Log.

 **Note** - After a member of your practice has attended a half-day's training, you will be able to switch on **Mail Manager**. This also switches on **Mail Maintenance** in **Control Panel**, and Staff Groups in **File Maintenance**.

Mail Maintenance provides these main functions related to Mail Manager:

- Staff Access - Assigning rights to individual users for Mail Manager
- Action Maintenance - Add and maintaining practice defined Actions. These are tasks or messages which are attached to incoming messages, which other practice staff will carry out, eg, Patient to make appointment.
- Action Status - Maintenance of Action status codes. These status codes track actions through an initial status of Newly Actioned, through to Completed Action. They are practice definable.
- Setting up SCI Stores - For Scottish practices receiving XML Test results from hospitals via SCI Stores.

Staff Groups

There is another function related to Mail Manager - that of Staff Groups, which is part of File Maintenance in Control Panel. This groups staff into practice-definable groups (eg GPs, Nurses) to enable mail messages to be actioned, copied to, etc.

XML Messages and Mail Manager

Mail Manager is the module where you can receive, view and file clinical XML messages. These messages are all important under the NHS Digital regime.

Previously, the NHS has standardised on X.400 for email and EDIFACT for structured messaging. The future is SMTP for e-mail and XML for messaging, and the Department of Health wants the rapid adoption of XML messaging throughout the Health Service.

XML stands for e**X**tensible **M**arkup **L**anguage. It is defined by the World Wide Web Consortium (www.w3c.org) and is a subset of Standard Generalised Markup Language (SGML).

- Up until now, EDIFACT pathology messages in **England** have been received in Mailbox and Mail Administrator. Once laboratories switch to XML messaging, path results will be received in Mail Manager. In the meantime, EDIFACT messages will be handled in XML format. See "Pathology in XML format in England".
- **Scotland** can receive XML messages from hospitals via SCI Stores (DLM 193, autumn 2005). Practices will at first continue to receive both SOAP and SMTP messages to ensure that those practices currently receiving SMTP pathology messages successfully will continue to do so, only switching over to SCI Stores when they are ready. See SCI Stores - Scottish Pathology

Incoming messages to Mail Manager are, for example:

- Hospital discharge summaries (also called In Patient Reports)
- Out of hours records (also called Third Party Contacts)
- Incoming pathology messages in Scotland through SCI Stores
- Incoming EDIFACT pathology messages in England, handled in XML format
- Mental health notifications
- Spine messages

Spine messages include:

- PDS Updates
- GP2GP (transfer of electronic health records)
- ETP (Electronic Transmission of prescriptions)
- Choose and Book
- National Summary Care Record.

Current Message Types

- 111 Messages - England
- Application Acknowledgment
- Bowel Cancer Screening - England
- Bowel Cancer Screening - Scotland
- Choose and Book messages
- Clinical Documentation Architecture (CDA)
- Community Care Report
- Discharge Summary
- Electronic Prescription (ETP messages in England)
- ePharmacy messages (Scotland)
- GP2GP messages (Legacy Request, Patient Notes, Request, Request Acknowledgement)
- Hospital Report
- In Patient Report
- Investigation Report
- Investigation Request
- Mail from patient
- Message Withdrawal Notification
- MIG Messages
- OOH Patient Alert
- Out of Hours Report
- Out of Practice Report
- Patient Task List
- Patient Services Messages - Repeat Requests
- Pathology (England)
- PDS Updates
- Record Transfer messages (Acknowledgement, Rejection, Request, Request Rejection)
- Referral Request
- SBSS (Scottish Breast Screening Services)
- SCCRS (Scottish Cervical Cytology Call-Recall System)
- SCI-Diabetes Collaboration (Scotland)
- SCI Investigation Report (Scotland)
- SCI Stores (SCI pathology) (Scotland)
- Shared Care Update

Plus

- Health Check data, Read coded and received via the pathology message route

Keeping Mail Gateway Open

Mail Gateway Reminder

To allow for messages to be sent and received efficiently, please remember to keep



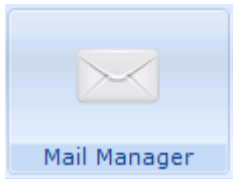
the Mail Gateway Mail Gateway open at all times if you are a LAN practice, and during working hours if you are on the Managed Service/AEROS.

Mail Manager Overview

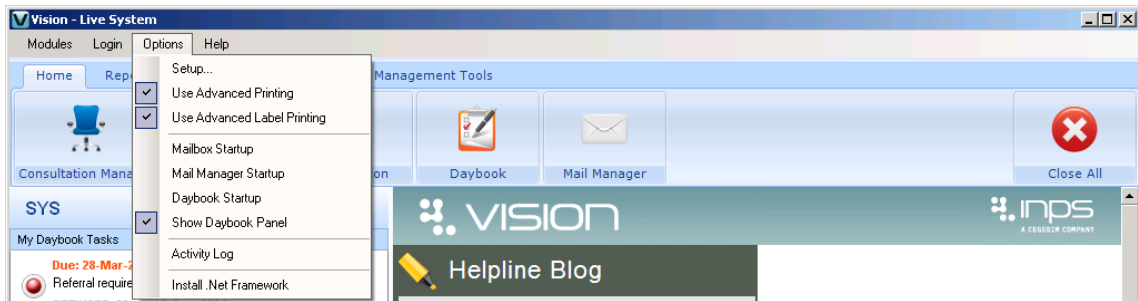
Mail Manager Interface

Accessing and Starting Up Mail Manager

To access Mail Manager, from the Vision front screen select **Home - Mail Manager**

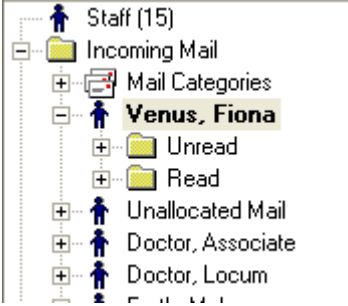


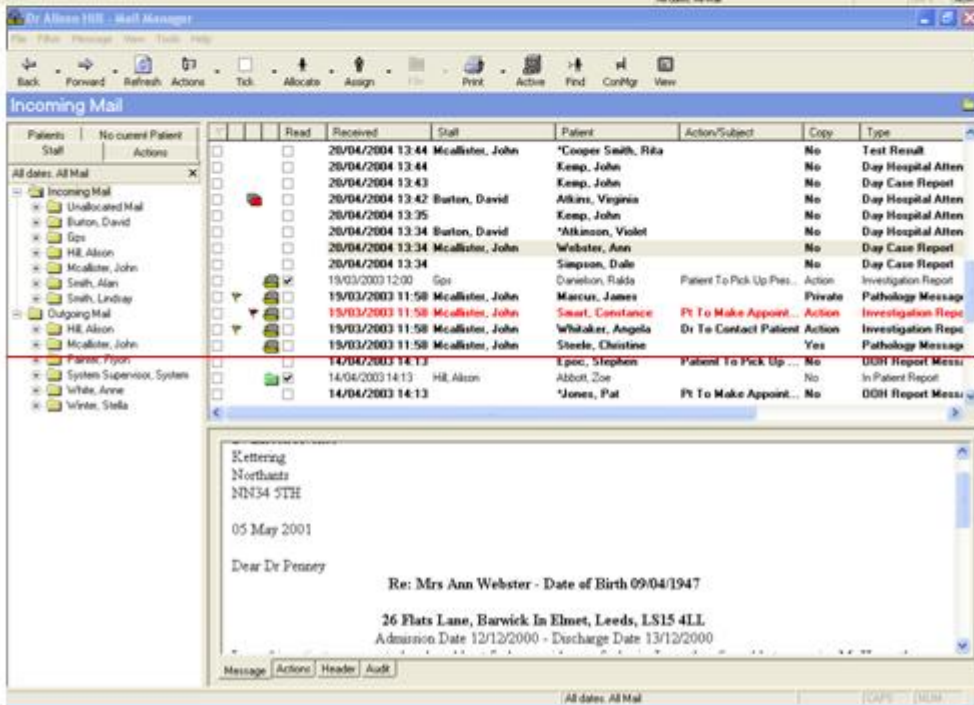
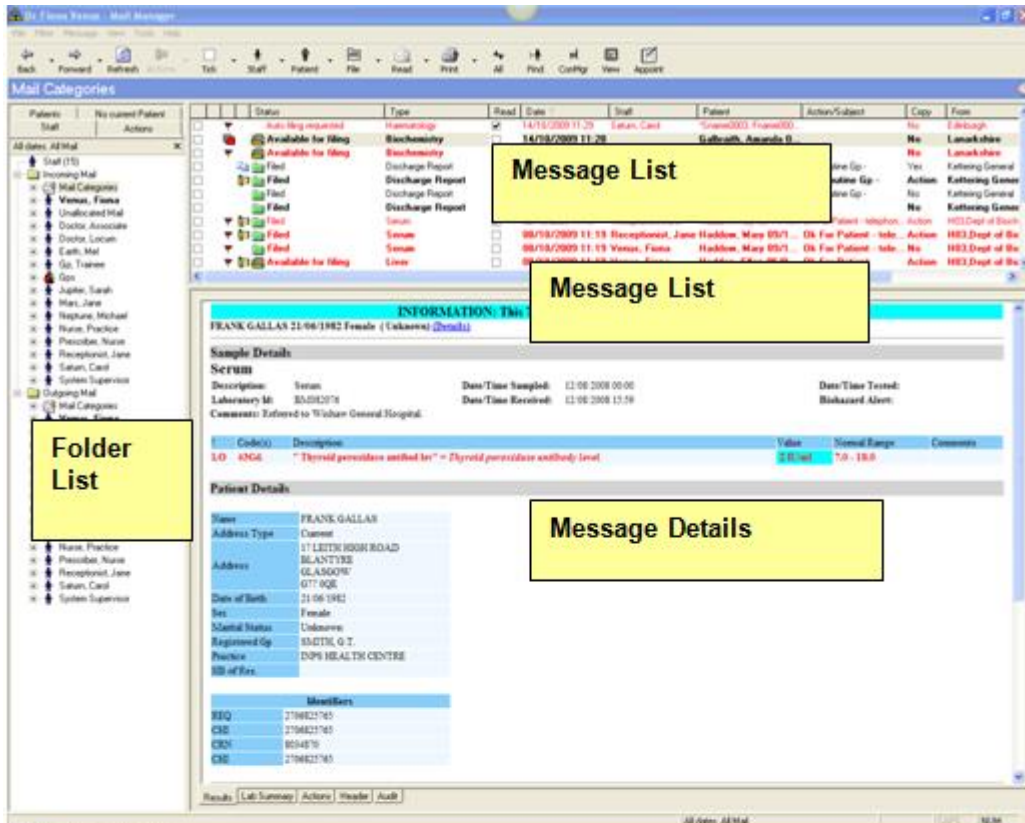
There is a Mail Manager Startup option on the Vision front menu under Options which if ticked, will automatically launch Mail Manager when you go into Vision.



Folder List, Message List, Message Details

The Mail Manager interface (also called the Message Queue Interface) contains three panes:

<p>Folder list</p>  <p>On access to Mail Manager, cursor rests on your Mail Folder within the incoming Mail Folder.</p> <p>Mail is divided into Incoming Mail and Outgoing Mail. You can view Incoming and Outgoing Mail by message type by clicking on the Mail Categories collapsible folder list (this is only available in the Staff and Patients Tab).</p> <p>The tree-view pane down the left-hand side classifies the messages into a navigable hierarchy.</p> <p>Expand the tree by clicking on <input type="checkbox"/> and collapse Folder List by clicking on <input type="checkbox"/>.</p> <p>Here you see your own mail, and any mail to which you have access rights.</p> <p>There are ways to view messages on four tabs: Staff (messages by staff), Actions (messages with actions), Patients (messages by patient name), Current (selected) Patient</p>	<p>Message list</p> <p>The Message List pane across the top contains a one-line summary of the currently selected message depending on what is highlighted on the Folder List.</p> <p>The Read column is ticked if the message has been read. Right clicking on a message line gives several options.</p> <p>All columns are sortable by clicking on the column header.</p> <p>Message Details</p> <p>The Message Details pane at the bottom of the screen displays details of the message highlighted in the Message List view.</p> <p>There may be several tabs: eg, Message (details), Actions, Header, Audit.</p> <p>For pathology results, there will be a Pathology tab where the result lines are listed. There are right click options on a result line</p>
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Staff tab of messages



Tabs on the folder list view messages four different ways


You can view the messages in one of four ways, selectable from the tabs above the Folder list tree view:






1. A Staff tab to view messages allocated to the current staff member
2. A Patients tab to view messages by patient.
3. A specific Patient View, showing all messages for a selected patient
4. An Action oriented view, showing all mail actioned to the current user.

See also: [Different Displays and Hiding the Folder List](#) (page 10)

Different Displays and Hiding the Folder List

- When entering Mail Manager, the cursor rests on your Mailbox.
- The splitters between the message list pane (at the top) and the detail pane (at the bottom), and between the Folder List (on the left) and other panes, can be moved. The settings will be saved from session to session.
- Click on  to expand a Folder List in the left-hand pane. Click on  to collapse a Folder List.

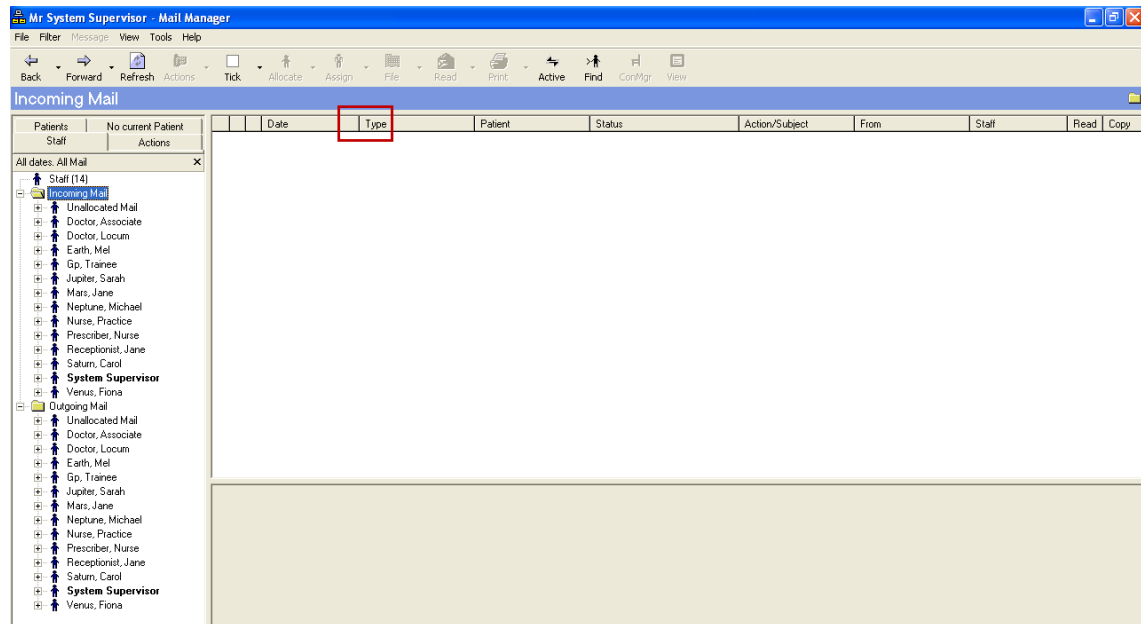
- **Show details of message full screen** - Control W or  View displays the details of a (highlighted) message full screen, hiding both the folder list and the Message List view.

- **Control W** or  View toggles between the current layout and a full window view of the actual message. **File - View Message** window has the same effect.
- **Hide the folder list (left-hand pane)** - Clicking the small black cross  on the Date filter line under the tabs on the Folder list hides the folder list, so that only the top right Message List View and Message Details in the bottom pane are displayed. Selecting **View** and unchecking **Folder List** has the same effect.
- Restore the view by selecting **View - Folder List** again.
- **Re-display a hidden folder list** - Clicking on the white arrow on the blue header  also re-displays a hidden folder list, but as an overlying window. If **View - Folder List** is ticked, then the folder list is embedded in the normal way.
- On the **View** menu, tick **Show completed messages** - this shows only active and completed messages. The **Active** icon has the same effect  (note that the Active icon toggles with the All icon ).
- On the **View** menu, hide or show removed messages.

- **Filter** the messages according to date from the *Filter Menu* (page 18). Also hide or show those that are unassigned (to a patient), unallocated (to a GP or clinician), flagged or those with outstanding action. There are further filter options in *Message tab* (page 34) in *Options (Tools)* (page 32).

Column Resizing

You can resize a column by double clicking on the column separator. This will resize the column to the largest data in that column or to the column header, (whichever is the larger).



Mail Manager

Drag and Drop Columns


The order of the columns in Mail Manager can be changed and customised to suit each user. Click on the Column header you wish to move, then keeping the mouse button depressed move the column to the required position. The column positions will be saved on exit.

Toolbar icons

Highlighted/ticked Toolbar Icons

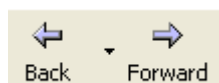
Previously, when you selected any of the **toolbar icons** in the Mail Manager, you were given the option whether you want to carry out an action for the **Ticked** or **highlighted** message(s).

We have now changed Mail Manager so that now when you make a single click on a toolbar icon, the required task on the currently **highlighted** item will be immediately performed. (E.g. When you click on a message then click on the Print icon, the printer screen appears immediately, rather than asking you if you want this to be performed on highlighted or ticked messages).

 **Note** – You are still able to carry out a function on selected or highlighted messages by clicking the arrows next to the relevant icon:



Highlighted/ticked option still available



Back/Forward - These let you track back or forward through the messages you have already viewed. For example, if you have viewed messages A, B and C, then want to go back to message A, press the Back button twice.

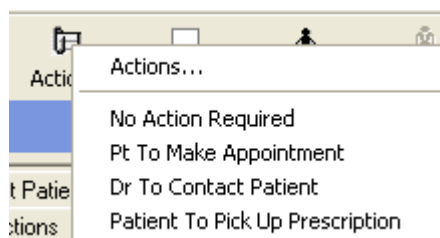


Refresh Use the **Refresh** icon if you want to refresh the screen manually. The interval for refreshment is set automatically on the *Message tab* (page 34) in "*Options (Tools)*" (page 32)". Refresh redisplay the screen with newly arrived messages, or newly copied messages, or hides messages if you have allocated messages to someone to whom you do not have rights to view mail, or hides

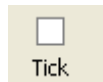
messages now completed and read if you have the Active icon selected (note that the Active icon toggles with the All icon).



Actions are pre-defined tags that can be attached to messages (see "Actions"). Their text and order is set up in Mail Maintenance. They can be classed as either Frequent Actions or Additional Actions. For example, a Frequent Actions list may consist of:

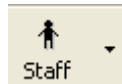


You can tick one or more messages that are for the same action message, then click on the Actions button and select the appropriate message. Complete the Action By field if blank and click **OK**.



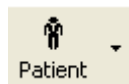
Tick

Tick - Toggles between Tick All, or Untick All - Selects or deselects all messages in this section, enabling them to be filed, assigned to patient, allocated to staff or printed. Tick All places ticks in the left-hand check boxes on the Message List view. You can also check the tick box manually for one or more messages. The File menu option of Ticked then allows various functions such as Actions, Allocate to Staff, Assign to Patient, File All, File Abnormal, Consider Filing Complete, Mark message as Read, Recover from archive, Print mail.



Staff

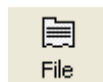
Allocate to Staff - Messages that have arrived without a GP or other recipient can be allocated to a GP or other member of staff. Unallocated mail has a blank in the Staff column on the Message list. See "Allocate Mail". You can tick one or more messages to be allocated to the same clinician, then click on Allocate.



Patient

Assign to Patient - Messages that have arrived without matching to a patient need to be assigned to a patient before they can be filed. These messages are marked with an * See "Assigning patients". You can tick one or more messages to be assigned to the same patient, then click on Patient and complete the assigning process.

<input type="checkbox"/>	<input type="checkbox"/>	14/04/2003 14:13		*Epoc, Stephan	No	Out o
<input type="checkbox"/>	<input checked="" type="checkbox"/>	14/04/2003 14:13	Hill, Alison	Abbott, Zoe	No	In Pati
<input type="checkbox"/>	<input type="checkbox"/>	14/04/2003 14:13		*Jones, Pat	No	Out o



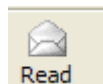
File

File - File the messages into the patients' records in Consultation Manager as attachments. You can use Tick All to check and file all the messages or select messages individually. You can tick one or more messages to be filed then click on the File icon. Select either File All, File Abnormal or Consider Filing Complete. See Filing.



File

If there are no messages ticked for selection or valid for filing, then the File icon appears greyed out.



Read

Read - Mark as Read. You can either mark individual messages or tick one or more messages to be marked as read. See Marking messages as Read.



Print

Print - prints the currently selected message. You can tick one or more messages to be printed then click on the Print icon (or File - Ticked - Print). See "Print mail".



Active

Active - When the Active icon is shown on the toolbar, this is displaying only active messages, ie Active only aims to remove from view any messages that

have been fully processed (read, filed, actions completed / marked as completed)

and these can only be shown by using the All icon .

A message remains active when:

- It is not allocated to a staff member
- It is not assigned to a patient
- It has not been read
- It has not been filed (if filing is appropriate)
- It has not been actioned or at least one action is still outstanding.

However, if not actioned and the above has been met, you have the option of marking the message as complete; OR if a message has been marked as Cancelled / Superseded, it will only be active if the message has not been actioned. (Cancelled / Superseded applies to an XML Pathology result which can be marked as Cancelled/Superseded from the right mouse menu, if a subsequent message has updated the original).



All - this icon toggles with the Active icon. When the All icon is displayed on the toolbar, this shows all messages, including those which are no longer considered active because the actions have been completed and the message has been read or filed.



Find a patient's message - see "Individual Patients tab and Search for a patient".



ConMgr - Access to "Consultation Manager"















View - This toggles the display between the Folder List, Message List and Details pane to just displaying the Details pane only. Also Control - W. See "[Mail Manager interface](#) (page 7)".















Appoint - Displays any booked appointments for the selected patient.

Status icons



The Status column can be seen as the fourth column from the left on the "Message List view (Staff and Patient tab)".

Incoming message status		
	Unfiled message, available for filing	
	Filed message	
	Partially filed (for example, pathology messages).	
	Partially filed but considered complete (ie it is not intended to file the outstanding items so this message should be treated as filed).	
	Auto-filing failed	The message may need assigning to a patient
	Cancelled / Superseded	An XML pathology message can be cancelled/superseded if a subsequent message updates the original.
	Withdrawn	
	Notes sent	GP2GP
	Acknowledged – notes not yet sent	GP2GP
	Request rejected	GP2GP
	Unmatched Response	A response was received but no record of the request.
	Processing error	




Outgoing States		
	Held in Queue	
Blank	Available for Transmission	
	Sent	
Blank	Unprocessed	
	Processing	
	Transmission error	An error occurred while transmitting the file but this may be recoverable so the system will retry automatically. No action can be taken by user.
	Fatal transmission error	Error(s) occurred while attempting to transmit the file. The error was either deemed fatal by the communications software or the transmission has been retried a number of times and will not retry again. The 'Reprocess' option will set the status back to 1001
	Sent awaiting acknowledgement	
	Acknowledged	Set when a positive acknowledgement is received
	Acknowledged with caveats	Used for special cases where a qualified acknowledgement is received. Currently only set for GP2GP requests where the acknowledgement states 'record to be sent soon' rather than 'immediately'
	Rejected	Negative acknowledgement received
	Withdrawn	
	Complete	Indicates that all business processes on the message are complete
Archived States		
	Sent	

Message Icons - Copies

An icon appears next to each message to depict whether it is an action message or is a copy:

- The  icon is shown for action copies.
- The  icon is shown for read only copies.
- No icon displays for original message

In the example below, you can see a copy action and original message with their corresponding icons/text:

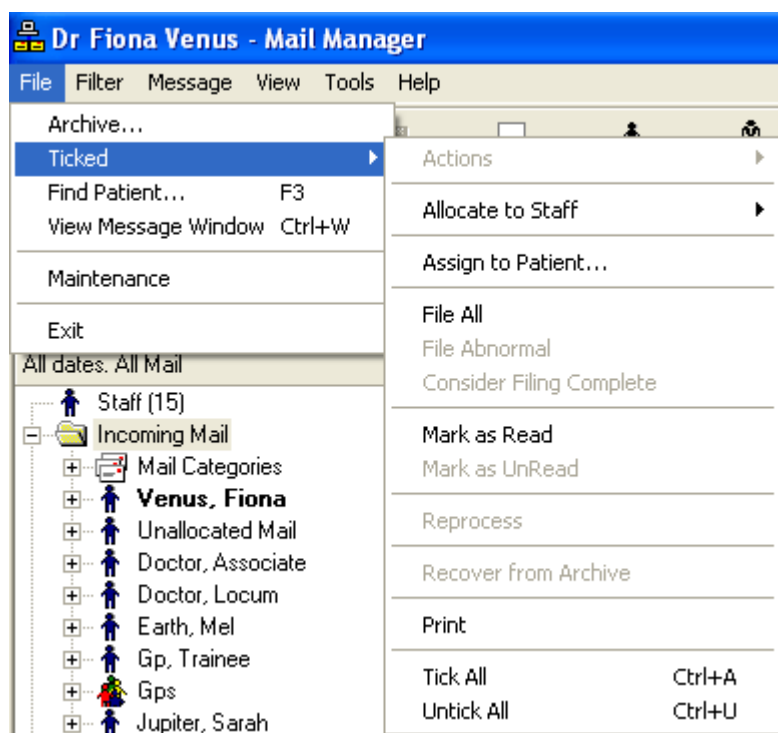
Status	Type	Read	Date ▾	Staff	Patient	Action/Subject	Copy
 Filed	Discharge Report	<input type="checkbox"/>	08/10/2009 11:31	Saturn, Carol	David, Harry 28/08/...	Tci Routine Gp -	Yes
 Filed	Discharge Report	<input type="checkbox"/>	08/10/2009 11:31	Receptionist, Jane	David, Harry 28/08/...	Tci Routine Gp -	Action
 Filed	Discharge Report	<input type="checkbox"/>	08/10/2009 11:31	Venus, Fiona	David, Harry 28/08/...	Tci Routine Gp -	No

Example Original, Action and Copy Messages

Menu Options

File menu

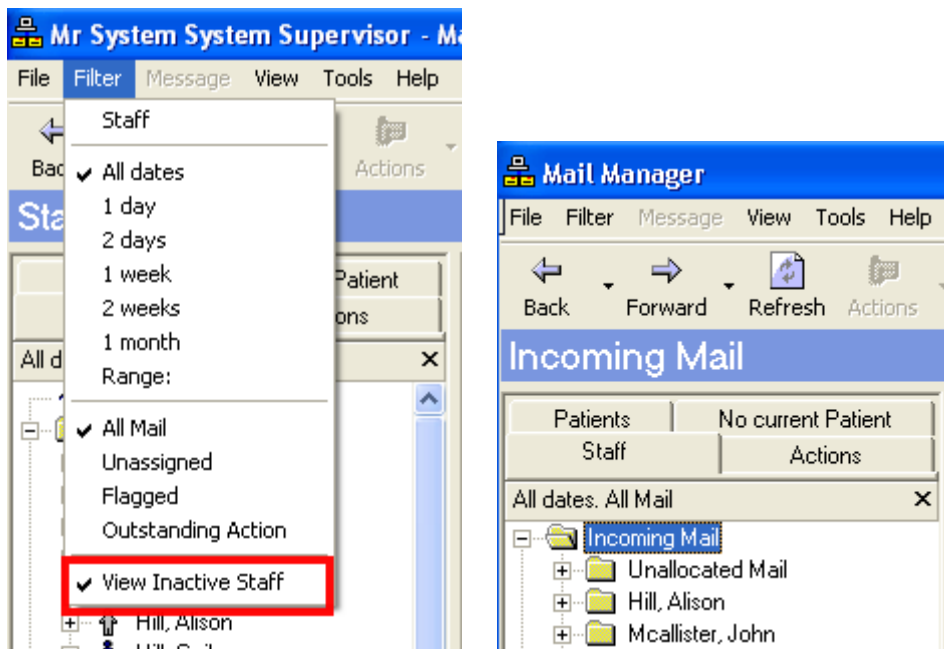
- **Archive** - Remove messages permanently from Mail Manager (see Archiving)
- **Ticked** - For messages that have been ticked in the left-hand check boxes on the Message List view, either manually or using the Tick icon, you can carry out the following functions: Actions, Allocate to Staff, Assign to Patient, File All, File Abnormal, Consider Filing Complete, Mark as Read, Reprocess, Recover from Archive, Print,



- **Find Patient, F3** - List all the messages for that patient on the Individual patient tab (see "Individual Patients tab and Search for a patient" on page)
- **View Message Window** (Control W) - Hide the folder list so Message List view is full page width. To return to the normal display, re-select **File - View Message Window** (or Control W).
- **Maintenance** - When ticked, introduces an Import menu option.
- **Exit** - Close Mail Manager.

Filter Menu

When you are in the **Staff** tab or **Patients** tab on the Folder List, you can apply a number of different filters from the **Filter** menu, which determine which messages are shown. For new users, the default is set to All Dates and All Mail.



The currently selected filter is shown in the heading line just beneath the tabs. By default, **All Mail for All dates** is shown.

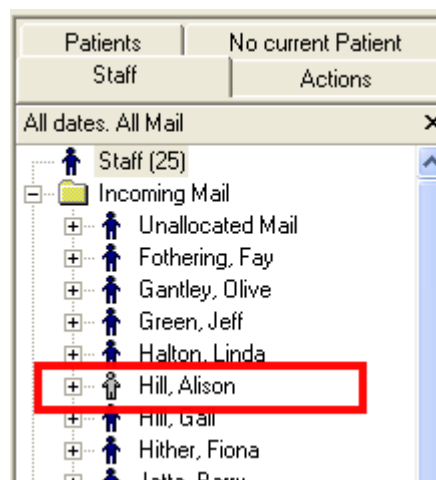
- The Staff tab can have different filters applied from the Patients View. For example, on the Patient View, you might have a filter of last week or fortnight, so it is primarily used to look for new mail for a patient. On the Staff View, however, the filter may be just today's mail, or for a long period.
- Filters are user specific, and if you set a filter for All Dates, for example, when you exit and re-enter, the same filter is applied.

Selecting by Date

- a specific date **range**
- **All dates** (no date filter), or one of the following:
- **1 day**, defined as all mail on the current day (**not 24 hours**).
- **2 days**, defined as all mail on the current and previous day
- **1 week**, defined as mail received in the last 7 days
- **2 weeks**, defined as mail received in the last 14 days
- **1 month**, defined as mail received in the last 31 days


Selecting by type of mail

- **All Mail** - This displays all mail, subject to the date filter applied above, and depending on whether you have the All or Active icon displaying on the toolbar (see note below).
- **Unassigned Mail** - Displays mail which has not yet been assigned or matched to a patient. See "Assigning patients" on page . To cancel a ticked option, click on All Mail.
- **Flagged Mail** - Displays mail flagged for attention. To cancel a ticked option, click on All Mail.
- **Outstanding Actions** - Displays mail with actions set by the current user which have not been completed. To cancel a ticked option, click on All Mail.
- **View Inactive Staff** - If this is ticked, you can see the mailboxes of staff made inactive, who have a greyed out icon. Any messages for inactive staff is posted to the unallocated mail folder.



You can combine these filters, for example, 1 week, All Mail, to give the display in the Folder List. If, for example, you want to see all unassigned mail for the last month, check both the options of 1 month and Unassigned Mail.

You can also filter out messages that are no longer considered active (see "[Toolbar icons](#) (page 11)" for a definition of "active"). These are messages that have been read and which have completed actions. In order to see all messages both active

and completed, you need to make sure you have the All icon  displayed on

the toolbar, and not the Active icon  .

Selecting by type of message

On the *Message tab* (page 34) in *Options (Tools)* (page 32), specific filters are available for message types that are particularly numerous:

- PDS Updates
- Electronic Prescriptions

These have the options Hide Completed/Sent. Any message matching a selected message type (eg PDS Updates) that has a status of completed or sent will be filtered from the interface. What we recommend here is that you untick both options (Show PDS Updates, Show Sent Electronic prescriptions) so that only unsuccessful/error messages are shown, and successful messages are hidden (this will improve performance and declutter your screen).

 **Note** – you can view messages by message category see [Mail Category Filters](#).

Filtering from the View menu

Refer also to *View Menu* (page 24) which allows you to hide completed messages.

Message menu and Right Mouse Options

The Message Menu and right mouse options are the same.

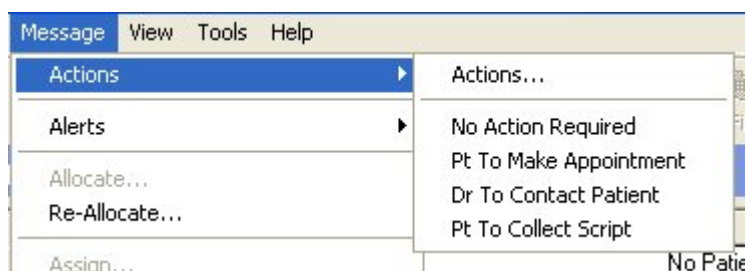
This is a quick context-sensitive set of menu options which are quicker to use than the alternative double clicking on a message which takes you through a lengthy dialogue designed to guide you through all stages of processing a message: assigning to patients, allocating to staff, marking as read, filing, actioning. If you only want to perform one of these functions (e.g. mark the message as read), you can use the context-sensitive menu which will involve fewer keystrokes.

On either the Staff or Patients tabs, you can either point to a single message and right click, or place a check in the box of messages you want to select, then right click or use the Message menu for the following options:


Actions	▶
Alerts	▶
Allocate to Staff	▶
Re-Allocate to Staff	▶
Assign to Patient...	
Re-Assign to Patient...	
File All	
File Abnormal	
Consider Filing Complete	
Edit filed item...	
Delete filed item...	
Mark as Read	
Mark as UnRead	
Mark as Complete	
Message	▶
View messages for Patient	
View original	
Patient Details	
View future appointments	
Print...	Ctrl+P
Archiving	▶
Consultation Manager	

Actions

Display a list of Frequent Actions and add to currently selected message (see "Actions")



Alerts


- **Add User Alert** - Place yellow flag ▼ against message as an alert (2nd column from left in Message List pane) (see Set/Clear Alert flag)
- **Remove User Alert** - Remove a flag added as a user alert (see "Set/Clear Alert flag")
- **Remove duplicate status** – On a duplicate message marked  , which is the duplicate copy of an original message already received (they will have the same message reference), you can remove the duplicate status then archive the copy (see "Duplicate Messages").



- **Allocate to Staff** - For an incoming message that has not been allocated to a GP or other staff member, you can allocate the message to a suitable recipient (see Allocate Mail)
- **Re-Allocate to Staff** - You can re-allocate a message from your own in-tray to another staff member (see "Reallocating Mail")
- **Assign To Patient**- An unassigned message is marked * and has not been matched to a patient. Right click and assign to a patient using the normal Select Patient routine (see "Assigning patients").
- **Re-Assign To Patient** - Re-assign a message already assigned to a patient, to another patient
- **File All** (see "Filing") - File all the result lines in a message manually. If a multi-specimen message with more than one tab, File All files all the results on each tab.
- **File Abnormal** - Only files only those pathology messages with results highlighted in red as being abnormal. These result lines have either a red triangle (abnormal and outside normal range) or a red question mark (potentially abnormal).
- **Consider Filing complete** - If you have only partially filed a message, either some of the results or File Abnormal, you need to select **Consider filing complete** FOR EACH MESSAGE so the system knows that that message is complete.
- **Edit Filed Item** – For pathology and currently disabled

- **Delete Filed Item** - For pathology and currently disabled
- **Mark as Read** - Mark a message as having been read by the recipient (see "Marking messages as Read")
- **Mark as UnRead** – Mark a read item as unread.
- **Mark as Complete** – Mark a message as complete if you are not adding any action (see "Overview of dealing with messages").

Message

- **Hold Message / Unhold Message** – For "Outgoing messages"
- **Remove Message** - For outgoing messages only and currently disabled.
- **Reactivate Message** - For outgoing messages and currently disabled. This will reactivate a removed message.
- **Reactivate as held** - For outgoing messages and currently disabled
- **Reprocess** - For "Outgoing messages" should you wish to re-send
- **Cancel/Supersede** - An XML Pathology result can be marked as Cancelled/Superseded  from the right mouse menu, if a subsequent message has updated the original. This option can also be selected from the Message menu. See "Cancel/Supersede"
- **Copy Message** - copy message to another user (see "Copying Mail")
- **Delete Copy** – Delete a copy of a message.
- **Delete Message** - Delete the selected message
- **View Messages for Patient** - List all the messages for that patient on the Individual patient tab (see "Individual Patients tab and Search for a patient").
- **View original** – For a copy of a message, view the original message.
- **Patient Details** - View contact (telephone) number and address of patient
- **View Future Appointments** – View future booked appointments.
- **Print** – Print a message (see "Print mail") - Also Control P.

Archiving

- **Archive** - remove message permanently from Mail Manager (see Archive individual message)
- **Recover from Archive** - Retrieve message from archive file

Consultation Manager

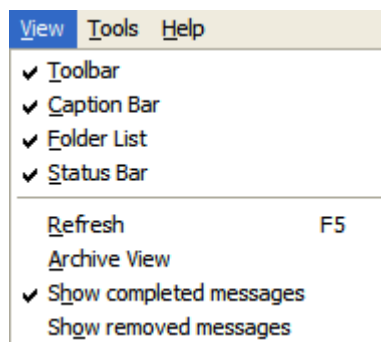
- **Consultation Manager** - Link into Consultation Manager to the currently selected patient's record (see Consultation Manager)


View Future Appointments

- **View Future Appointments** - Link to the currently selected patient's Appointments (see View Future Appointments)

View Menu


- **Toolbar, Caption Bar, Status Bar** - Ticking any of these will display them.





- **Folder List** - If Folder List is ticked, the left-hand pane with the list of folders or mailboxes is shown. Unticked, it is hidden and the Message List View is spread across the screen. Clicking on the small cross  beneath the tabs for Staff, Patients, Actions (on the same line as the filter details that currently apply, for example, **All dates, All Mail**) hides the folder list and is the equivalent to unchecking **View - Folder List** (see also [Mail Manager interface](#) (page 7) under Display differently). You can briefly re-display the folder list by clicking on the down arrow by Incoming Mail.



- To permanently re-display the folder list, go to View and check Folder

List. Note that Control W or  displays the details of a message full screen, hiding the folder list, and the Message List view. Control

 W or  again restores the view. File - View Message window has the same effect.

- **Refresh (F5)** - Refreshes the screen to receive any further incoming mail
- **Archive View** - switch to a special Archive mode (see "Viewing Archives")
- **Show completed messages** - If ticked, only completed messages will be displayed. The definition of a completed message differs depending on the message type and message status.
- For instance, an XML pathology message is complete if assigned to a patient, allocated to a clinician, marked as read, filed (or marked as "Consider Filing complete"), and actioned (or marked as complete if no action is required).
- A GP2GP message is considered completed when all messages have been received, ie Sent Awaiting Acknowledgement, then Sent then Completed.

- **Show removed messages** - Removed messages will be included in the Message List. The remove function is currently disabled but will apply to outgoing messages only, not incoming.

Refer to the *Message tab* (page 34) on *Options (Tools)* (page 32) for other ways to filter certain messages, for example, PDS Updates or Electronic Prescriptions.

Tools - Lookup

The Lookup option relates to pathology results.

On the Tools - **Lookup** screen, you can see which READ codes have been mapped to Provider Descriptions on the *Read Code tab* (page 26); and which Vision units have been mapped to Provider units on the *Units tab* (page 28).


Once a Read Code is assigned to a Provider Description, or a valid Vision unit assigned to a Provider unit, then whenever that Provider Description / Units appears again, the assigned READ code or Units will automatically be applied.

For example, a provider description of "White Cell Count" can be assigned to the Read Code 42H..00 Total white cell count.

If the provider description for a result is not recognised or assigned to a READ code, the result is marked with a red cross **x** in the list of results. To map a result line, right click on it (within Observations on Message Details), select Assign Read codes and select a suitable code from the Read dictionary. Then either select Add to Translations for a permanent mapping (appearing in the Lookup table) or Use Once, for this result only.

Other results, also marked **x**, may be lacking valid units, which need to be assigned

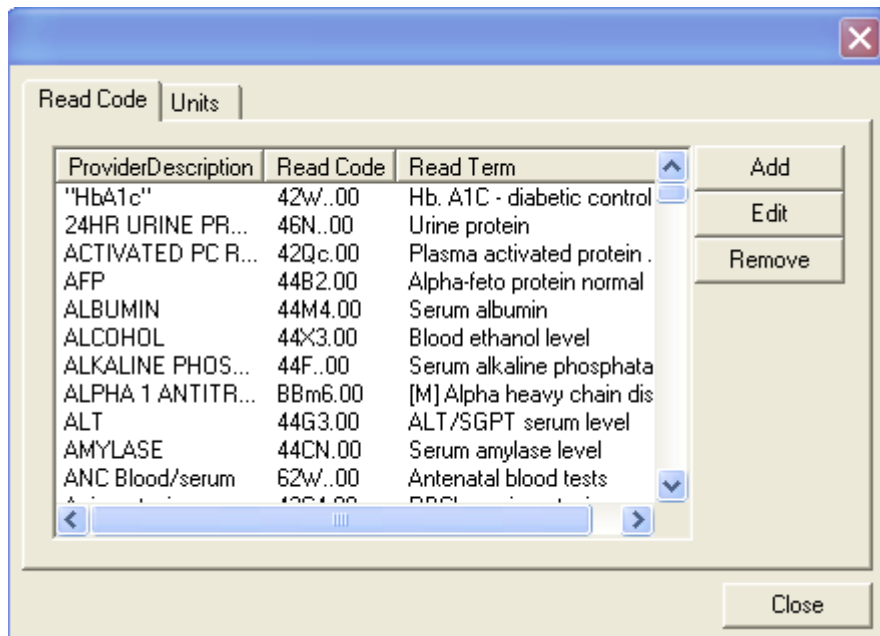
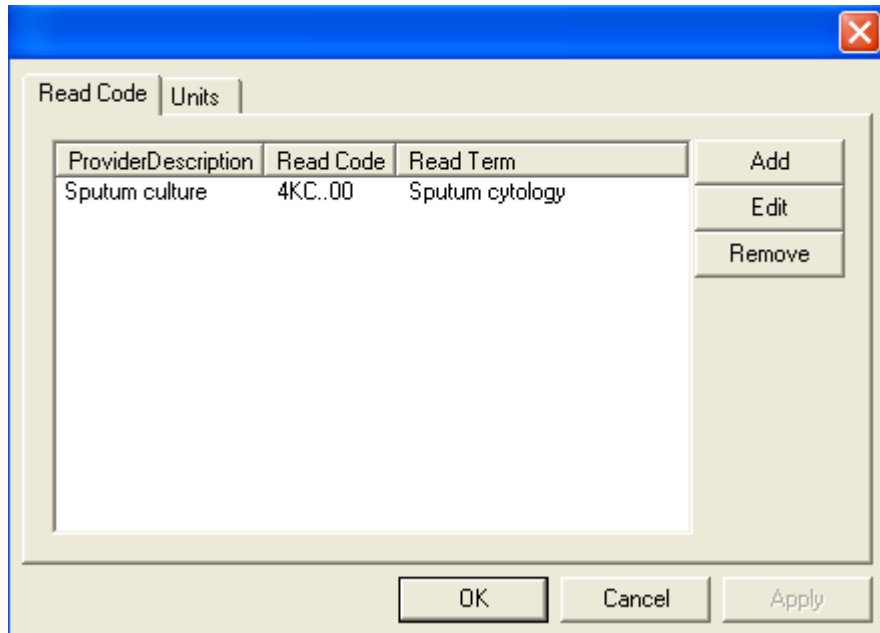
If a result lacks a valid READ code, it cannot be filed into Vision until a READ term has been assigned.

 **Note** - that those practices where Read codes or units have been mapped to Provider descriptions in Mail Administrator and then converted to XML pathology will NOT need to re-add the Read codes or units in Mail Manager, as these will be carried across.

Read Code tab

Selecting the Read Code tab lists those provider descriptions currently mapped to a Read code.

There are options to add further mappings, edit an existing one, or remove a mapping.



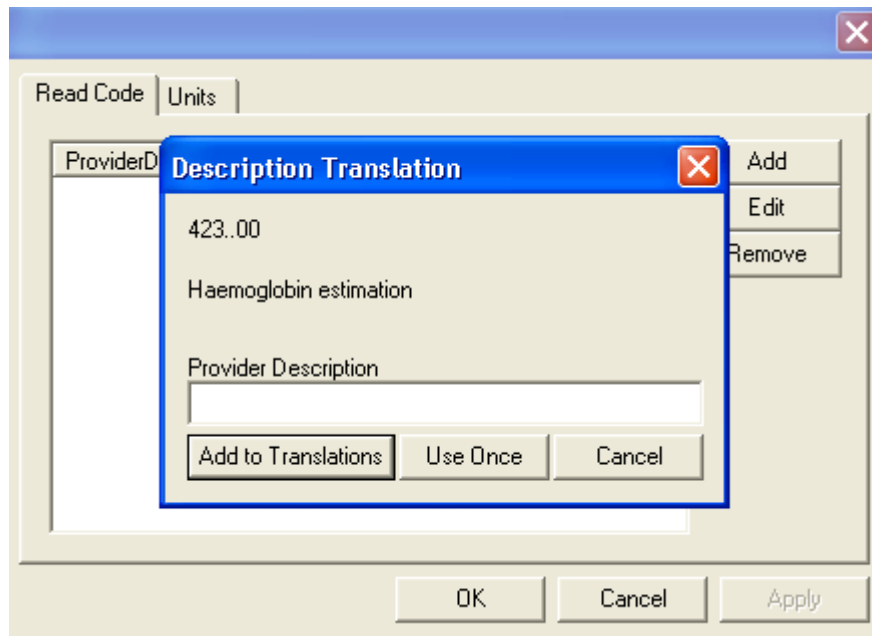
1. If you select Add, a READ select screen is shown.
2. Select a suitable term by either keyword or code and click OK. The **Description Translation** screen is displayed. In Provider Description, type in the text that the provider uses to describe this particular result, for example, HAEM instead of Haemoglobin estimation.

3. Then click on either:

- **Add to Translations** - this will ensure all future results with that provider description are mapped to the READ code you have selected.

or

- **Use Once** - this will map this provider description to that READ code for this one occasion only.

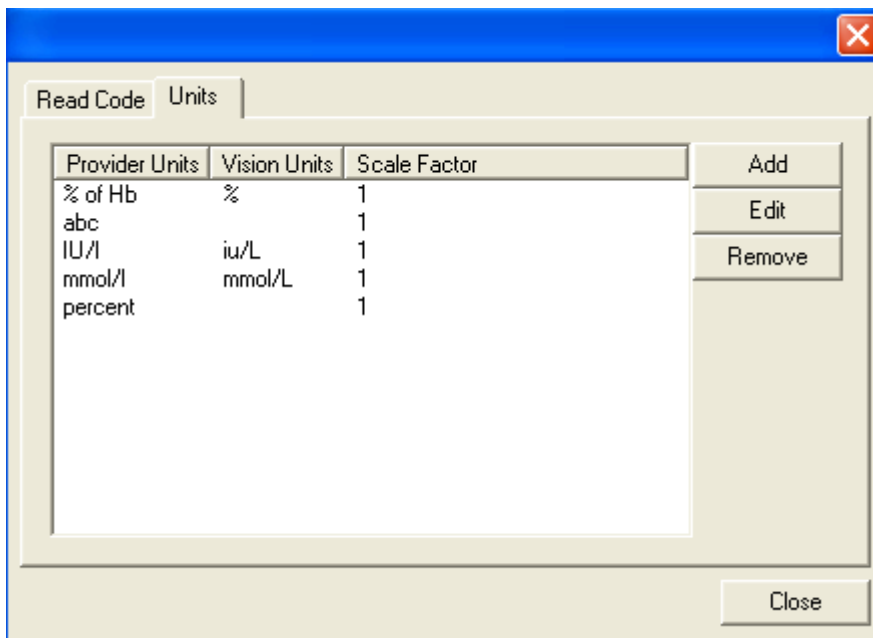
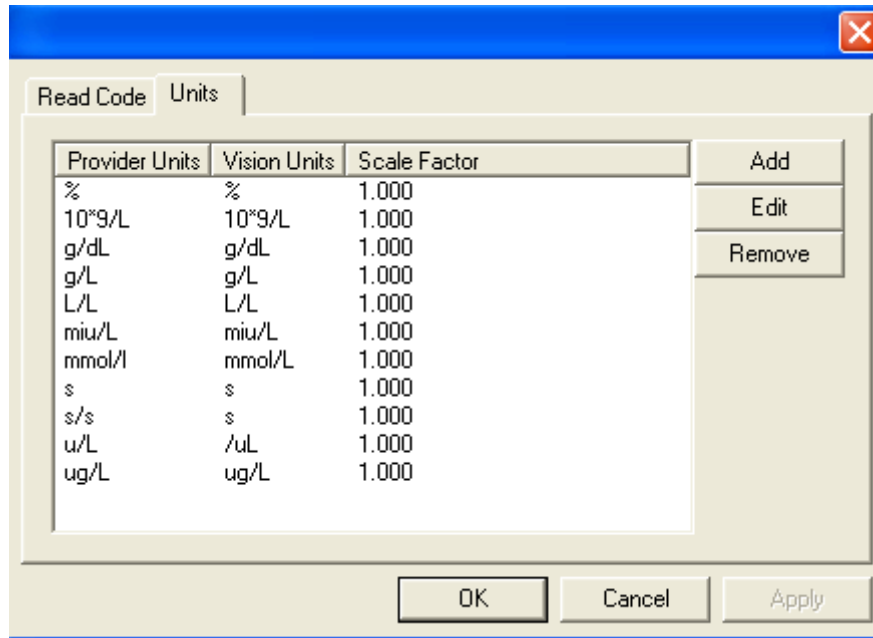


You can remove or edit any entry by highlighting it first before selecting either Remove or Edit.

Units tab

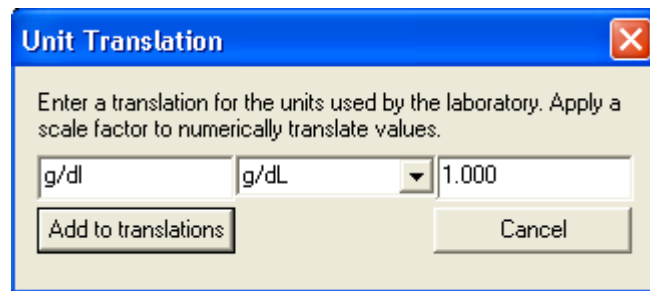
Selecting the Units tab lists those Provider units which have been mapped to Vision units.

There are options to add further mappings, edit an existing one, or remove a mapping.



1. If you select Add, this displays the **Unit Translation** screen.
2. Type in the unit used by the provider.

3. Click on the selection arrow in the middle Vision Units box and select an appropriate alternative from the picklist. For instance:
 - $10^9/L$ should be $10^*9/L$;
 - s should be second;
 - micromol/L should be umol/L
 - g/dl should be g/dL
 - mmol/l should be mmol/L
4. You may need to alter the Scaling Factor from 1, for example, to convert litres to ml = multiply by 1000.
5. Click on **Add to translations**. This will ensure that all future results with those units will now be translated into the correct valid units.



You can remove or edit any entry by highlighting it first before selecting either Remove or Edit.

Tools - Local IDs


The Local IDs option relates to pathology in England and Scotland.

When a pathology test is ordered by a nurse, locum or any member of staff receiving pathology results who does not have their own GMP code, a local identifier of, for example, NURSE01, LOCUM01 can be allocated by the laboratory. When the result comes back, it will be directed to NURSE01, LOCUM01. Who NURSE01 or LOCUM01 actually are may change over time and you map this reference to the correct person at the time.

You need to find the local identifier in the message and add it to the Local ID mapping tool so that for future messages results will be directed to the person with the corresponding Local Identifier. A Local Identifier can only relate to one staff member at a time.

Therefore the labs do not have to keep a long list of locums, nurses etc. What you do have to do is agree each Local Identifier with the path lab beforehand. The Local Identifier is in place of the GMP code which non-principals lack.

If there is more than one locum, or nurse, then make more Local Identifiers, eg LOCUM2, LOCUM03, or NURSE02, NURSE03. A Local Identifier can only relate to one staff member at a time.

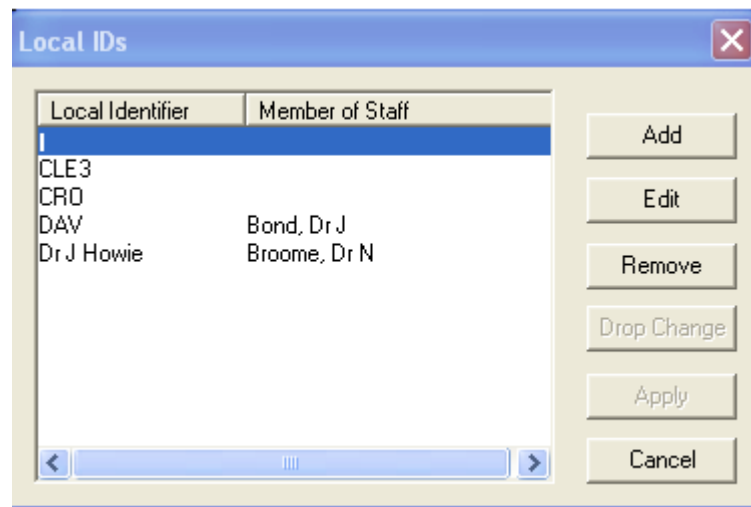
 **Note** - Those practices that added local IDs in Mail Administrator and then converted to XML pathology will NOT need to re-add the IDs in Mail Manager, as these will be carried across

In Scotland

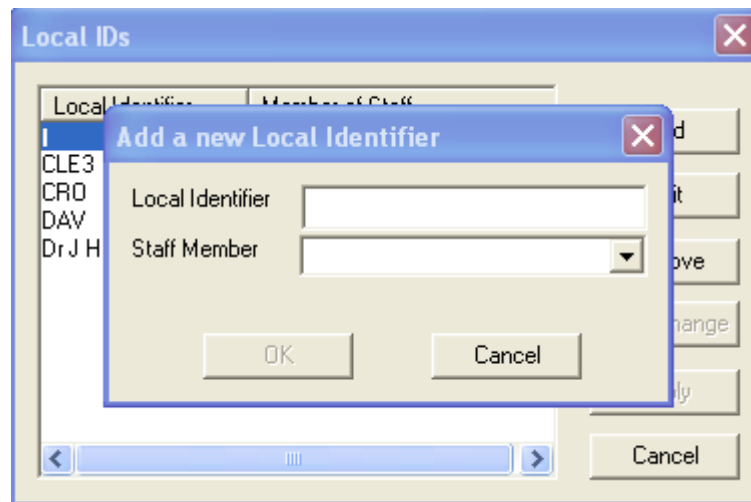
The GMC code is used to match the message to a GP for Scottish pathology. There is a Requester Details section on the Results tab. Mail Manager will attempt to match one of the (Requester) Identifier codes with a Vision GP's GMC code. If this fails, it will attempt to match the (Requester) Name with a Vision Local Id. If no matches are found, the patient's Usual GP is used.

Adding a Local ID

1. First of all the nurse, locum etc must be in the staff file (Control Panel - File Maintenance – Staff).
2. Select **Tools - Local IDs**.



3. To add a Local Identifier, click on Add.



4. Enter the agreed code for the nurse or locum in **Local Identifier**, and select the staff member from the picklist under **Staff Member**.
5. Click **OK**.
6. Highlighting the local identifier you have just added, click on **Apply**.

Tools – Message Redirection

You can now automatically redirect you own , or other users Mail Manager messages for a defined period of time. See [Redirecting your Messages](#) (page 33) and [Redirecting on Behalf of other Users](#) (page 33) (system administrators only).

Redirecting your Messages


1. To redirect your own mailbox go to **Vision – Home – Mail Manager** select **Tools – Message Redirection**.
2. Select **Add** from the menu.
3. This opens the Message Redirection – Add window; from the drop down menu select the recipient you wish to redirect messages to.
4. Enter a start date, the end date is optional.
5. Click **OK**. The redirect will take place from the start date. All mail will be redirected as soon as it is received into the mailbox.
6. If when allocating mail in Mail Manager you select a mailbox that has an active redirect, you will be prompted: "*A message redirection exists for (Mailbox Name). This message will be re-allocated to (Redirection Recipient Name). Do you wish to continue?*" Click **Yes** to redirect the mail.
7. All redirected messages are marked **Redirected** in the message audit trail in **Mail Manager**.

Redirecting on Behalf of other Users

1. Go to **Vision – Management Tools - Control Panel -- Mail Maintenance** and select **Msg Redirection**.
2. Select the mailbox to redirect, right click and select **Add**.
3. This opens the Message Redirection – Add window; from the drop down menu select the recipient you wish to redirect messages to.
4. Enter a start date, the end date is optional.
5. Click **OK**. The redirect will take place from the start date. All mail will be redirected as soon as it is received into the mailbox.

 **Note** – This includes all message types, including copied messages.

6. If when allocating mail in Mail Manager you select a mailbox that has an active redirect, you will be prompted: "*A message redirection exists for (Mailbox Name). This message will be re-allocated to (Redirection Recipient Name). Do you wish to continue?*" Click **Yes** to redirect the mail.

All redirected messages are marked **Redirected** in the message audit trail in **Mail Manager** and  displays next to their name in Mail Maintenance – Msg Redirection.

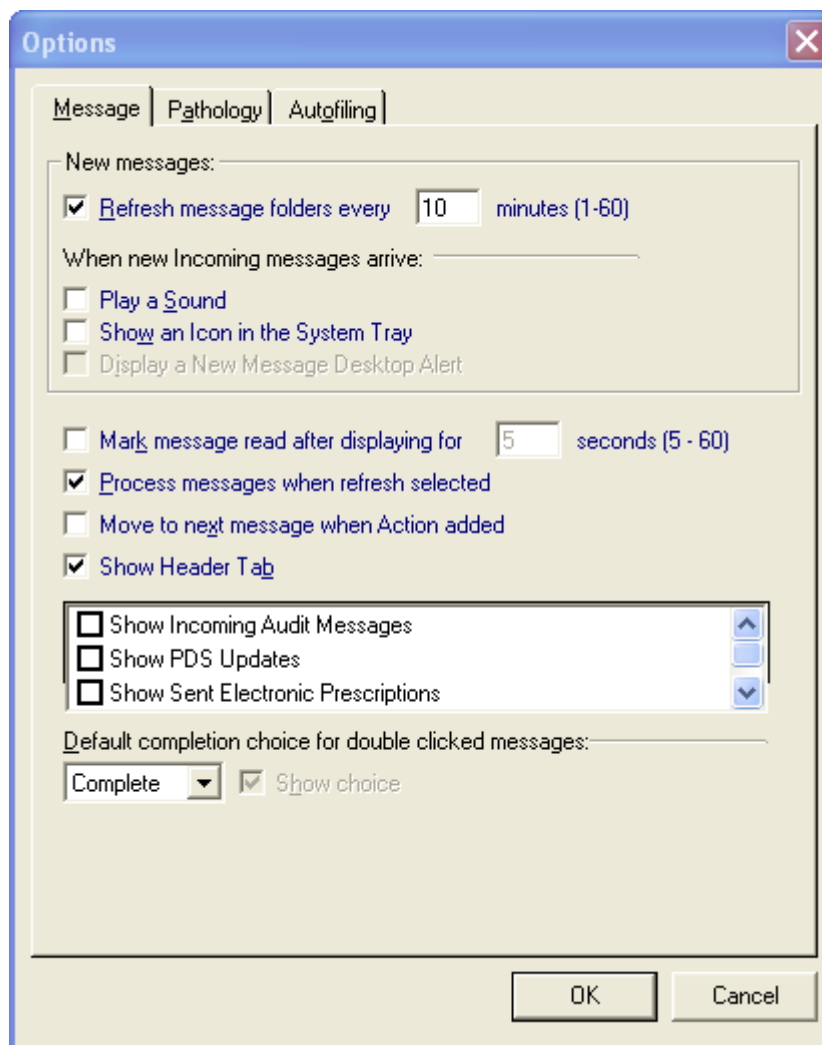
See also Message Redirection.

Options (Tools)

Various set-up options are available from **Tools - Options**.

In England, until XML Pathology is enabled, there is one tab - **Message**, after which there is a second tab called **Pathology**.

In Scotland, once pathology is enabled, there is a second tab called **SCI Stores**. Scottish practices using SCI-DC or SCCRS should tick the relevant box on the **Autofiling** tab.



Message tab

The Message tab from **Tools - Options** has the following options, which are set per user:

New Messages

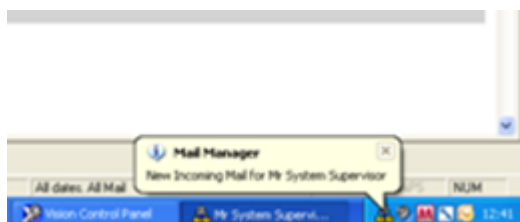
Refresh Message folders every [n] minutes [1-60] - This processes any new incoming messages. The default is 10 minutes. Select between 1 minute and 60 minutes.

When new Incoming messages arrive:

Play a sound - The default is unchecked.

Show an Icon in the System Tray - The default is unchecked.

Display a New Message Desktop Alert - When a new message is received which is allocated to your mailbox, the following alert is displayed for approximately 8 seconds:



Desktop Alert

Note - Unchecking the Show item in the System Tray option automatically disables the Display a New Message Desktop Alert option.

Mark message as read

Mark message read after displaying for [n] seconds [5-60] - the default is 5 seconds if this option is checked. You can change the time period between 5 and 60 seconds. If the highlight is on a message in Message List view (so that the details of the message are displayed in the bottom Message Details pane), and remains there for that period of time, the message line is read, and the line loses its bold formatting. If left unchecked, then in order to mark messages as read, you will either tick in the *Read* column on Message List, or right click and *Mark as Read*. See Marking messages as Read.

Note - We generally advise against using the option to mark as read automatically. This is because anyone who has access rights to a message can mark the message as read, irrespective of staff role. So if admin staff are given access rights to clinicians' mail in Mail Manager, the option to mark messages as read automatically should not be used. If, however, admin staff always access test results in Consultation Manager and not in Mail Manager, then the option could be considered.

Process messages with Refresh

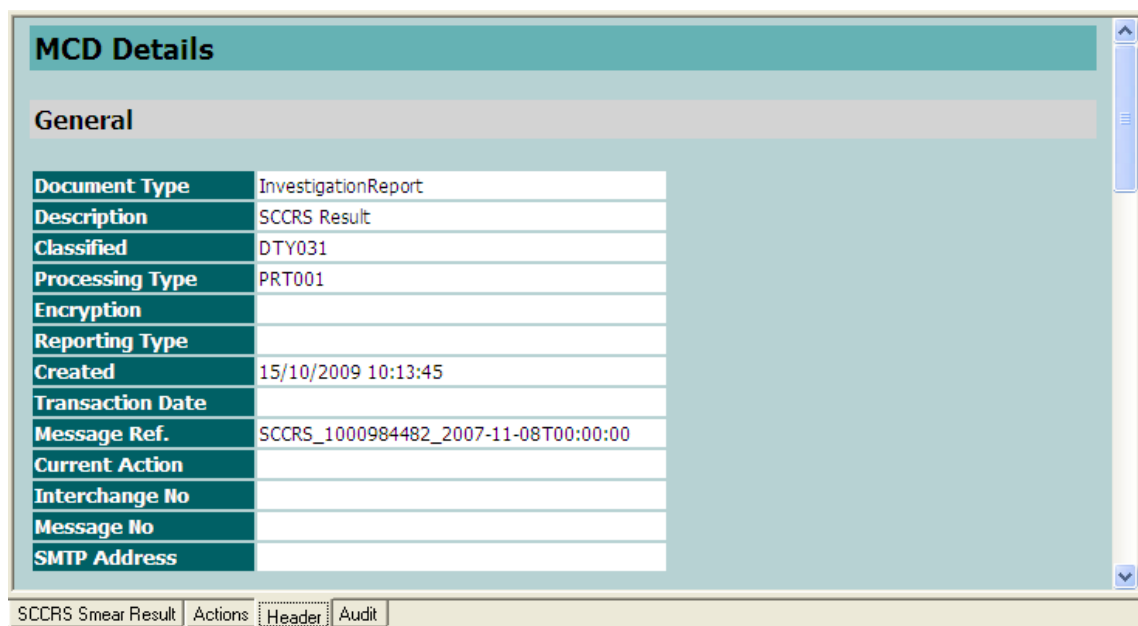
Process messages when refresh selected - The default is checked. Outgoing and incoming messages will be processed when you press Refresh.

Move to Next Message When Action Added

Move to Next Message When Action Added - You are automatically taken to the next message after having actioned the previous message from the **right click menu**.

Show Header Tab

Show Header Tab - We have removed the Header tab from automatically appearing in the message pane. If you would like the Header tab to be permanently included in your message view, tick the Show Header Tab box. The Header tab is now visible in the message view for all messages.



The screenshot shows a window titled "MCD Details" with a "General" tab selected. The tab contains a table with the following data:

Document Type	InvestigationReport
Description	SCCRS Result
Classified	DTY031
Processing Type	PRT001
Encryption	
Reporting Type	
Created	15/10/2009 10:13:45
Transaction Date	
Message Ref.	SCCRS_1000984482_2007-11-08T00:00:00
Current Action	
Interchange No	
Message No	
SMTP Address	

At the bottom of the window, there is a navigation bar with the following tabs: "SCCRS Smear Result", "Actions", "Header", and "Audit". The "Header" tab is currently selected and highlighted.


Header Tab

Filtering messages

- **Show incoming Audit Messages** - Tick this option to display any incoming QOF audit messages (England and Scotland only). Unticked, the messages will be hidden.
- **Show PDS Updates** - (England only) **We recommend you leave this option unticked so that only unsuccessful/error messages relating to PDS Updates (changes in patient demographics) are shown, as this will improve performance and declutter your screen.** If ticked, all messages are shown. Some messages are always shown regardless and the following table lists the messages that are hidden (not shown) or always shown if you leave **Show PDS Updates** unticked.

Filing Status	Shown, if Show PDS Updates unticked
Held in Queue	Not shown
Available for Transmission	Not shown
Sent	Not shown
Unprocessed	Not shown
Held in queue (Unprocessed)	Not shown
Processing	Always shown
Processing error	Always shown
Transmission error	Always shown
Fatal transmission error	Always shown
Sent awaiting acknowledgement	Always shown
Acknowledged	Not shown
Acknowledged with caveats	Not shown
Rejected	Always shown
Withdrawn	Not shown
Complete	Not shown
Processed	Not shown

- **Show Sent Electronic Prescriptions** (England only) - If you are ETP enabled, we recommend that you leave this option **unticked** so that only unsuccessful/error messages are displayed, as this will improve performance and declutter your screen. If this option is ticked, all messages including sent and complete ETP messages are displayed.

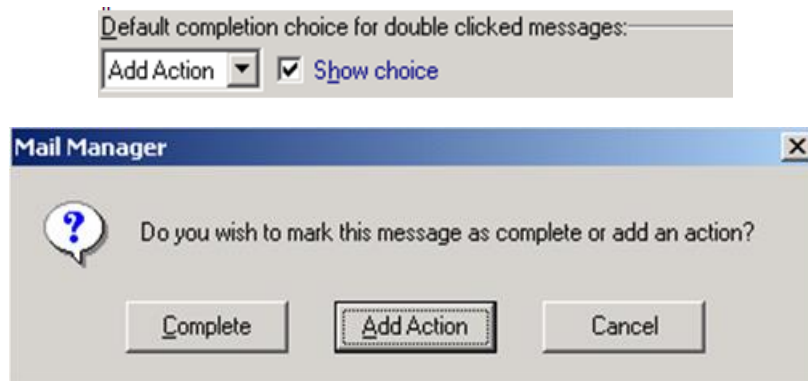
 **Note** - you can also filter the display of messages from the *Filter Menu* (page 18) (by date and type of mail) and *View Menu* (page 24) (completed or sent messages).

Default completion choice for double clicked messages

Double clicking on a message takes you through a whole pathway of functions - filing, marking the message as read, adding an action, completing an action, etc. For a single function, the advice is to use the right click menu as a quicker option. However, for those who prefer to double click on the message, there is an option in Tools - Options - Message which can be set **per user**. This allows you to decide whether the default focus is on Complete (the message) or Add an action.

An additional Show Choice tickbox allows the user the option to swap from their usual choice to the alternative when double clicking on the message.

- Selecting **Complete** means the default focus will be on the **Complete** button on the screen *Do you wish to mark this message as complete or add an action?*
- Selecting **Add Action** and with **Show Choice** ticked, the focus is on the **Add Action** button
- Selecting **Add Action** with **Show Choice** unticked leads straight to the **Add Action** screen.



GP2GP Messages

- **Allocate requests to responsible GP** - If this is checked, any GP2GP Record requests that are incoming will go into the mailbox of the patient's registered GP.
- **Treat requests as unallocated** - (This toggles with the above option). If checked, GP2GP messages come in unallocated and will need to be dealt with by a member of staff who has rights to view unallocated mail.

SCI Stores tab

This tab relates to pathology in Scotland.

- **SCI Stores** - Scottish practices can select the SCI Stores from which they wish to retrieve test results. The SCI Store list only appears on Vision systems with a country flag set to Scotland. Check the box or boxes of the stores which you want regularly scanned for new messages. You can revisit this screen for information about the date and time of the Last Download.

Note - Each SCI Store sets up a Vision login account. Once you have confirmation that your SCI Store is ready, you need to enter the Login ID and in some cases, the SCI Practice ID, in Control Panel - Mail Maintenance. These IDs are obtainable from the Local SCI Store administrator at the Health Board (see "SCI Stores - Scottish Pathology").


The screenshot shows a Windows-style dialog box titled "Options" with a close button (X) in the top right corner. The dialog has three tabs: "Message", "Pathology", and "SCI Stores", with "SCI Stores" being the active tab. Below the tabs, there is a heading: "Ticked stores will be routinely scanned for new". Underneath is a table with two columns: "Store" and "Last Download". The "Store" column contains a list of Scottish regions, each with an unchecked checkbox to its left. The "Last Download" column is currently empty. Below the table, there are two labels: "Last attempted access:" and "Last successful access:". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Store	Last Download
<input type="checkbox"/> Ayrshire and Arran	
<input type="checkbox"/> Borders	
<input type="checkbox"/> Dumfries and Galloway	
<input type="checkbox"/> Fife	
<input type="checkbox"/> Forth Valley	
<input type="checkbox"/> Grampian	
<input type="checkbox"/> Greater Glasgow	
<input type="checkbox"/> Highland	
<input type="checkbox"/> Inverclyde Royal Hospital	
<input type="checkbox"/> Lanarkshire	
<input type="checkbox"/> Lothian	
<input type="checkbox"/> Orkney	
<input type="checkbox"/> Royal Alexandra Hospital	
<input type="checkbox"/> Shetland	
<input type="checkbox"/> Tayside	

Pathology tab

The Pathology tab from **Tools - Options** are practice wide options. Only a system manager can make changes here.

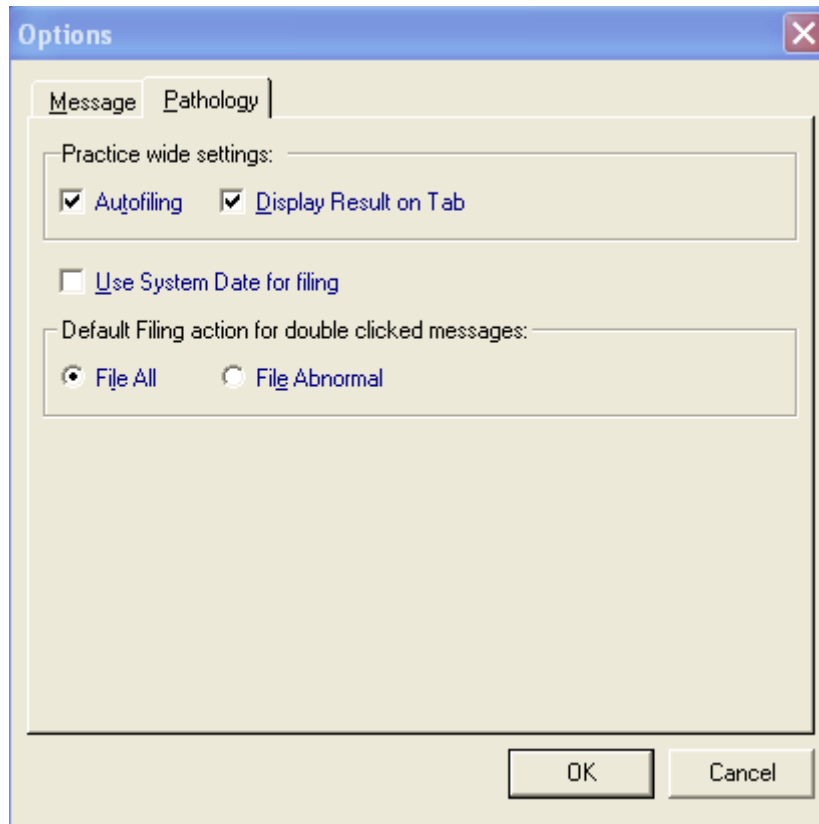
Practice wide settings

- Both **Autofiling** and **Display Result on Tab** are greyed out if the user is not a system manager (set in Security module within Control Panel).
- **Autofiling** - Autofiling is a global option, not user specific. Check the **Autofiling** box if you want results filed automatically into the patients' records in Consultation Manager (see Filing- Autofiling). The mail items can still be viewed and actioned in Mail Manager. If autofiling fails, a status of *Filing failed* is shown by the message  and the message has to be filed manually. The Autofiling option is greyed out if the user is not a system manager (see Security module within Control Panel). Note that messages received for transferred out or expired temporary registered patients are not automatically archived. The message status reads *Available for Filing* and when you select the message, the following warning appears *Warning: This message is assigned to an inactive patient*.
- **Display Result on Tab** - For incoming results, this allows you to choose what labels display on the results tab: if **Display Result on tab** is ticked, then the tab title takes the first result line. If unticked, then the specimen header is displayed (eg Blood, Urine etc). Switching this option on or off does not affect results already in the system. This option is greyed out if the user is not a system manager (see Security module within Control Panel).
- **Use System date for filing** - If this is unchecked, then the date of collection of the specimen is the preferred date that the system uses when filing the result. If checked, then the system date is used.

Default filing action for double clicked messages

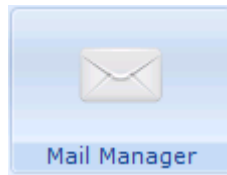
File All - File all result lines in a message

- **File Abnormal** - File only those result lines with an abnormal flag within a message. Abnormal result lines are marked by the laboratory with either a red triangle (abnormal and outside normal range) or a red question mark (potentially abnormal).

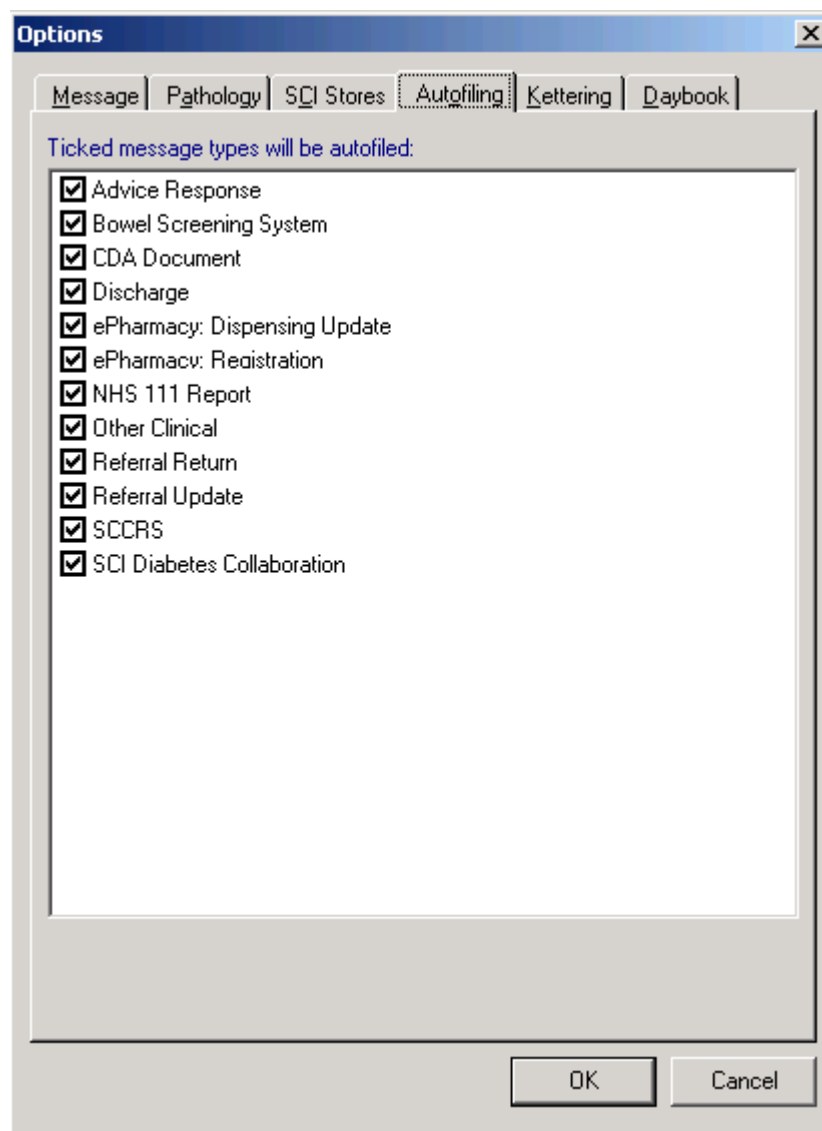


Autofiling tab


The Autofiling tab enables the automatic filing of specific messages into the patient records without manual intervention.



1. From **Mail Manager**, select **Tools - Options** switched on from **Tools - Options**.
2. Select the tab you require:
 - **Pathology** - To switch autofiling for pathology results.
 - **Autofiling** - To switch autofiling on for other message types.



Tools - Options - Autofiling

 **Remember** - Alternatively you can forward **MIG, SCI Gateway Advice** and **Discharge attachments to Docman** see Forwarding Attachments to Docman. You cannot autofile these messages if you choose this option.





3. Tick the message type(s) that you want to autofile.
4. Click **OK**.

Kettering Tab

Kettering messages are incoming messages that are received into GP Communicator and transferred automatically into Mail Manager (Kettering is the name given to the configuration of the XML message). They encompass a variety of message types e.g. Discharge summaries, Out of Hours, Accident and Emergency Reports. You can file the message into the patient's record in Consultation Manager with the clinical event date instead of the default system date. This date is not selected from the body of the message but is retrieved from the header in the message which has to be included by your provider if it is to be used.

To file messages with the Clinical Event date; In Mail Manager choose **Tools - Options - Kettering**. Untick the box **System date**.

 **Note** - This is a Practice wide setting.

 **Note** - If the message does not contain an event date the system date is used. This may be due to the fact that the message header sent by your provider does not contain the relevant information. To check if the required information is present in the message you need to view the content on the message in GP communicator. To do this Log onto GPC, choose **Messaging - GP Communicator** from the Vision front menu. Select the plus  icon in front of the incoming mail folder   **Incoming (1)**, highlight Today or All (depending on when the message was received). Find the incoming message, highlight it and choose content at the base of the screen. The message must contain the following fields.

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