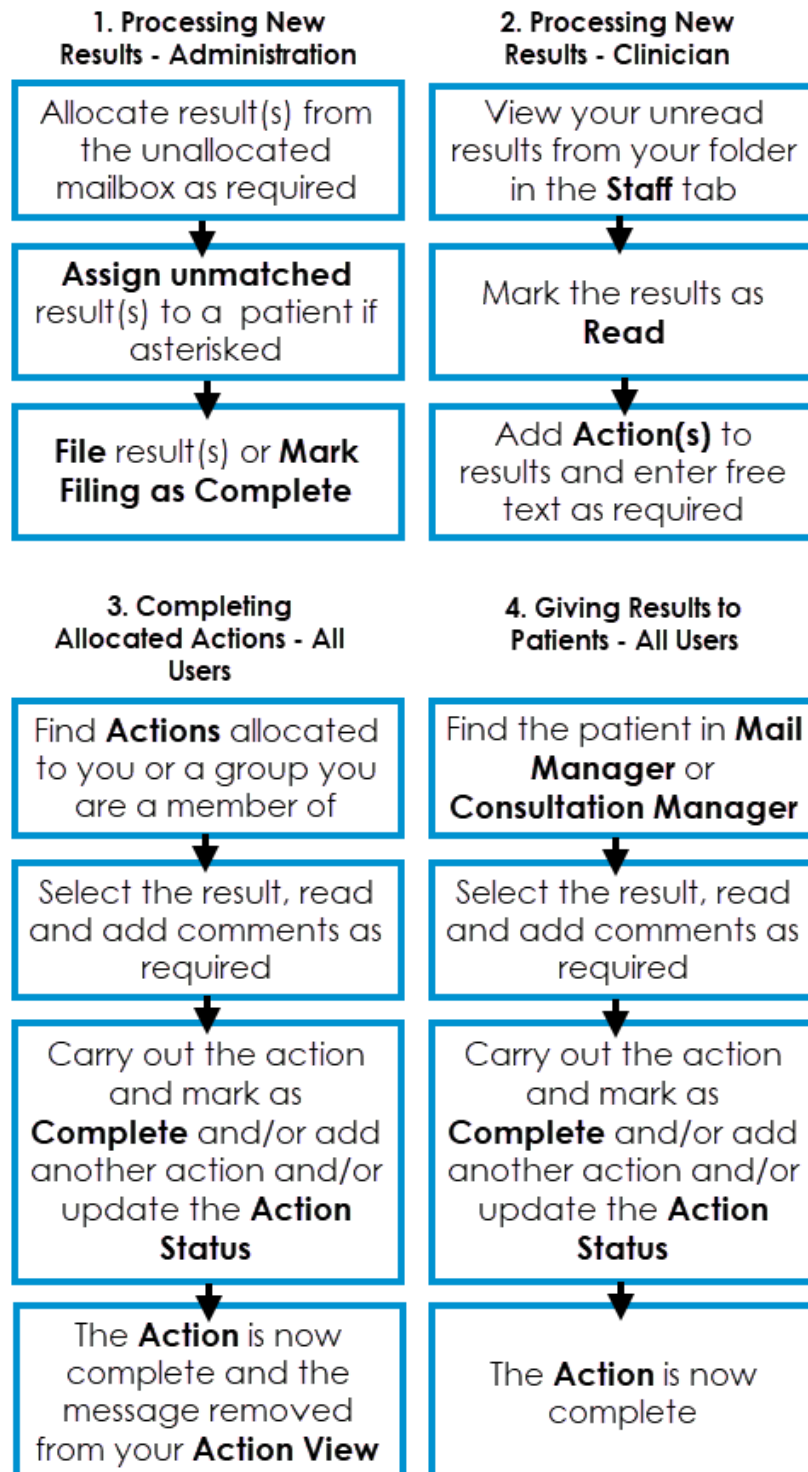


Mail Manager for Administrators Quick Reference

The following provides an overview of how **Mail Manager** messages are processed through your practice:



Assigning a Patient

Mail Manager is designed for the receipt and processing of clinical messages relating to a specific patient. When **Mail Manager** receives a message, it usually assigns the patient automatically from the information in the message.

Occasionally, the patient cannot be identified automatically. This may be because the patient does not exist on your system or because the details provided in the message are insufficient or incorrect.

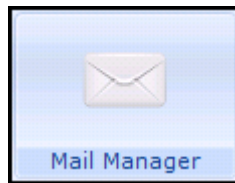
An unassigned patient is highlighted by the supplied name being prefixed with an asterisk:

* indicates unassigned patient

Status	Type	Read	Date	Staff	Patient
Available for filing	CMS Treatment Sum...	<input type="checkbox"/>	28/03/2018 11:31		*Karen, Norman 14/...
Filed	Biochemistry	<input type="checkbox"/>	25/09/2012 12:22	Receptionist, Jane Hammond, Matilda ?	

To assign or re-assign a patient to a message:

 **Note** - You cannot re-assign the patient on a filed message.



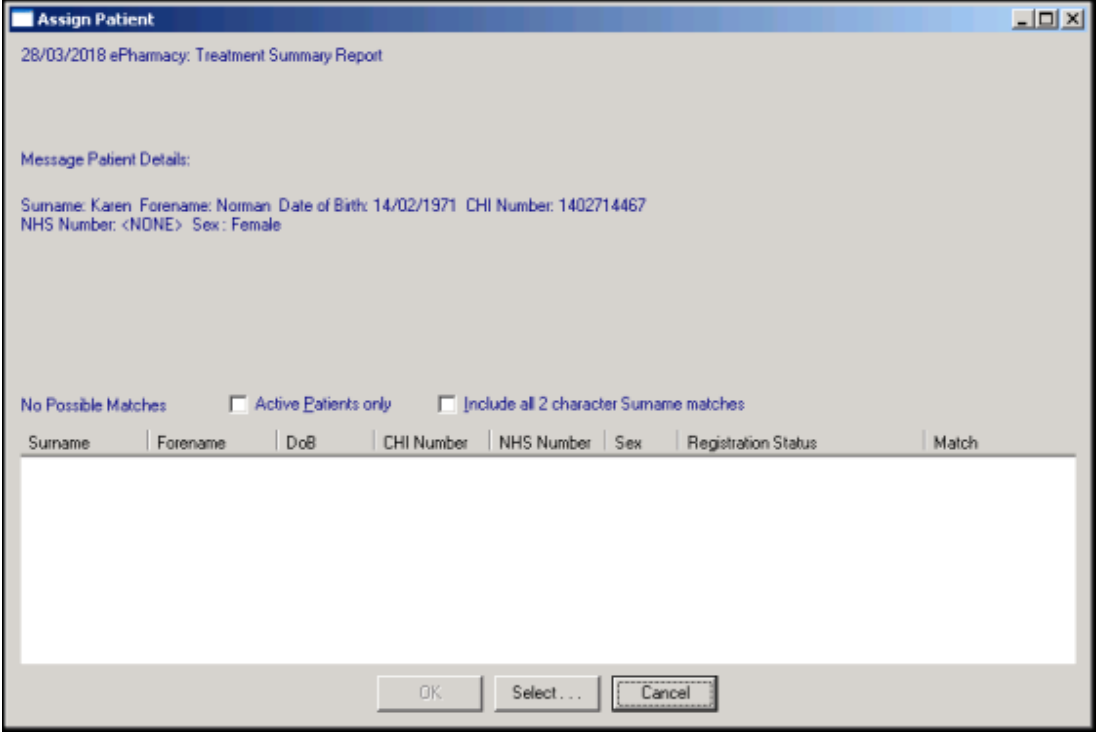
1. From **Mail Manager**, you can either:

- Right click on an unassigned or unfiled message, select **Assign to Patient** or **Re-Assign to Patient**.

- Tick message(s) and select **Patient** arrow  - **Ticked - Assign to Patient** or **Re-Assign to Patient**.


- Highlight a message and select **Patient** arrow  - **Highlighted - Assign to Patient** or **Re-Assign to Patient**.

2. The **Assign Patient** screen displays:




The message details are shown in the top pane, a list of possible matches to the **Vision 3** patient register is shown in the bottom pane. The **Match** column lists by possible matches as follows:

- A match on NHS number. If there is a match on NHS number and all the other fields, you are warned when selecting another patient and strongly discouraged from doing so.
- A good match (at least the first two characters) on Surname and Forename and an exact match for both sex and date of birth.
- An exact match on date of birth.
- A good match (at least the first two characters) on Surname and Forename and an exact match for one or either of sex or date of birth.
- A good match (at least the first two characters) on Surname and Forename.
- A good match (at least the first two characters) on Surname.

 **Note** - You can sort the columns by selecting the column header, so if, for instance, you are sure that Olive Beer is female, you can sort the 'matched on sex' column so as to demote all male patients that may appear as possible matches.

4. You must then either:

- Select a patient from the offered match list, or
- Choose **Select** to find the patient you require in the usual way.

 **Note** - When finding a patient, if you have **Active Patients Only** selected, only active patients are offered. Remove this tick if you are assigning to a transferred out patient. You are warned that the patient is no longer active but assign and file to the correct patient anyway. It is your clinical responsibility to forward any result for a transferred out patient to the patient's new practice, in paper format or electronically, for the benefit of the patient's new clinician.

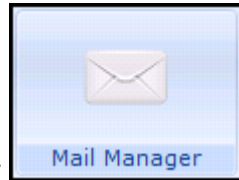
5. Select **OK** once the required patient has been selected.

All assignment and reassignment of patients are fully audited.

Allocating a Message

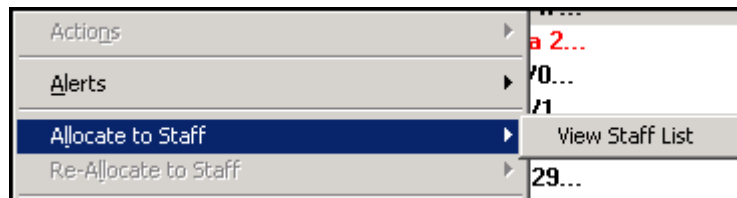
 **Note** - It is only possible to allocate messages to which you have rights.

To allocate or re-allocate a message:



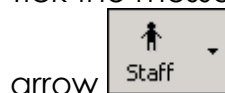
From **Mail Manager**, you can either:

- Right click on the message, select **Allocate to Staff** or **Re-Allocate to Staff - View Staff List** and then select the staff member required:




Or


- Tick the message(s) you want to allocate or re-allocate, select **Staff**



arrow - **Ticked - Allocate to Staff** or **Re-Allocate to Staff - View Staff List** and then select the staff member required.

 **Note** - If you have set up a **Frequent staff list** in **Control File - File Maintenance - Staff Groups**, you have the option to select from this shorter list rather than the full staff list.

If you do not have rights to see the messages of a staff member that you have allocated a message to, the following message displays: *You will have insufficient rights to view this message once it has been Allocated to [name], Do you wish to continue? Yes/No.* The message is allocated to the staff member you selected, but the message details are not shown in the bottom pane and on refresh the message disappears from your in-tray.

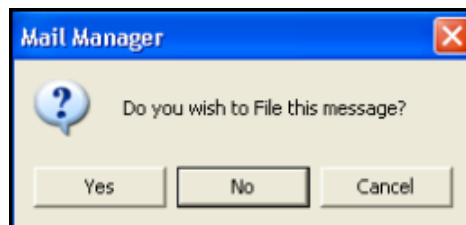
 **Note** - You cannot allocate an original pathology message to a group, it must be allocated to an individual. Only copies of messages and actions can be allocated to a group.

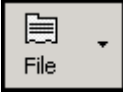
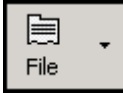
Filing Messages

Most messages are filed automatically into the patient's record even though they are **Unread**. Those not filed automatically must be filed manually.

To manually file a message, either:

- Right click on a message and select:
 - **File All** - Select to file the whole message.
 - **File Abnormal** - Select to file abnormal results only.
 - **Consider Filing Complete** - Select to mark a message as filed without filing it to a patient record.
 - **Edit filed item** - Disabled.
 - **Delete filed item** - Disabled.
- Double click on the message, you are asked: *Do you wish to File this message? Yes/No*, select **Yes**:



- Highlight the message and select **File** arrow  - **Highlighted**.
- Tick the message and select **File** arrow  - **Ticked**.
- To file results from only one tab of a multi-specimen message, right click within a result pane and select **File Tab**, this files the results on the current tab only.

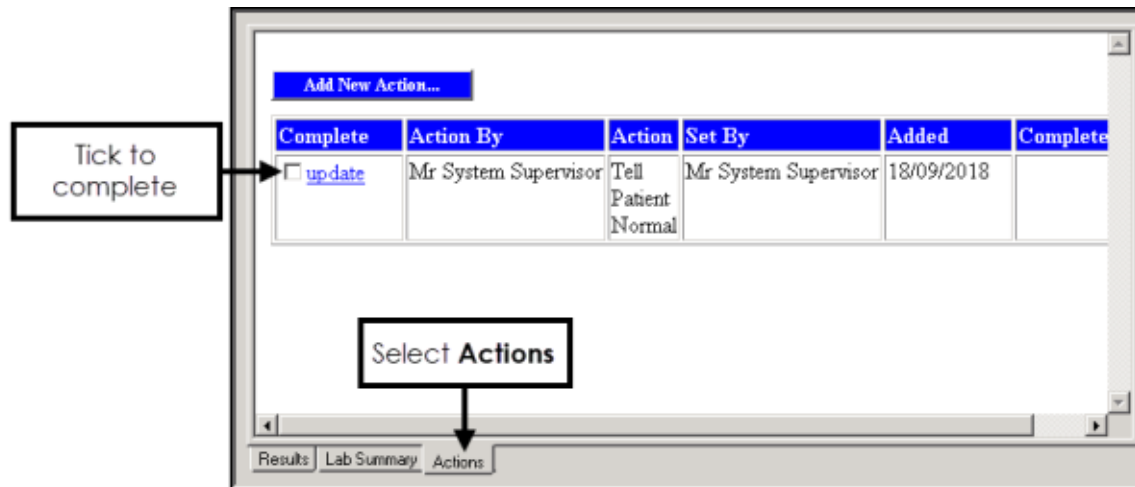
On the messages list **Filed**  displays.

A message does not file if:

- It needs terms assigning.
- It needs valid **Vision 3** units assigning.
- It needs to be assigned to a patient, see [Assigning a Patient](#) on page [2](#) for details.
- An action copy is marked as confidential. No-one viewing an action copy can see the right-hand side of the message details, these cannot be filed.
- If it has already been filed.

Completing Actions from the Message Actions tab

You can complete an **Action** from the **Action** tab of a message:




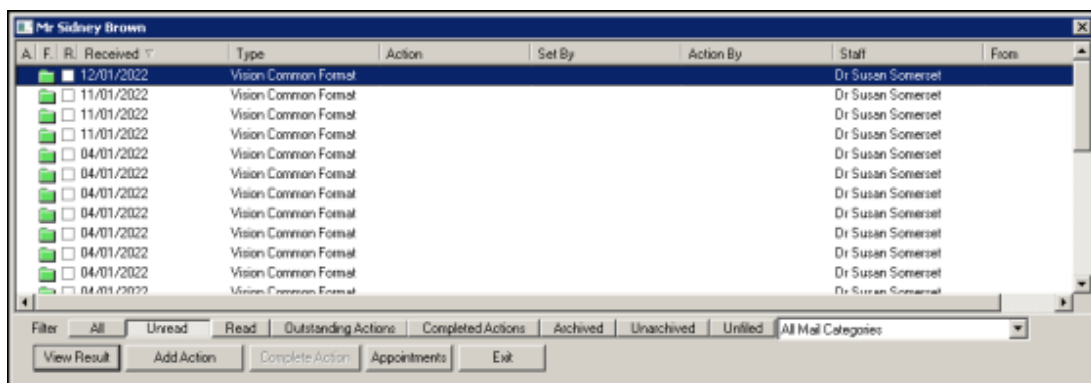
- Highlight the message required and select the **Actions** tab at the bottom of the screen:
 - Tick under **Complete** to mark an Action as complete, this is especially useful if more than one **Action** has been added to a message. Select **Yes** to the *Please confirm you wish to complete the selected action?* message.
 - Select **update** to view the full **Action** request and update if required.

Completing Actions from the Patient Record

To view and complete **Actions** on a message from **Consultation Manager**:



1. From **Consultation Manager**, select the patient in the usual way.
2. Select **View Mail for Patient**  (indicates unread mail)  (indicates no new mail).
3. The patient's mail screen displays:



The status columns at the top left are:

- **A** to denote there is an action for this message.
- **F** for Filed.
- **R** (with tick box) to indicate whether the message has been read.

Filter the mail you are viewing if required:

- **All** - Displays all mail for the patient.
- **Unread** - Displays all unread mail for the patient.
- **Read** - Displays all read mail for the patient.
- **Outstanding Actions** - Displays all mail with outstanding **Actions** for the selected patient.
- **Completed Actions** - Displays all completed mail for the patient.
- **Archived** - Displays all archived mail for the patient.
- **Unarchived** - Displays all unarchived mail for the patient.
- **Unfiled** - Displays all unfiled mail for the patient.
- **Categories** - Select the specific category of message if required.

4. Select the result you require and then select:
- **View Result** - To view the **Individual Message** screen, you can add actions, print and check Appointments from here.
 - **Add Action** - To add a new **Action**.
 - **Appointments** - To view recent and future appointments.
 - **Complete Action** - Select to complete an existing **Action**.