Mail Manager for Clinicians Quick Reference

The Mail Manager Overview

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

1. Processing New Results - Administration

1. Allocate result(s) from the unallocated mailbox as required
2. **Assign unmatched** result(s) to a patient if asterisked
3. **File** result(s) or **Mark Filing as Complete**

2. Processing New Results - Clinician

1. View your unread results from your folder in the **Staff** tab
2. Mark the results as **Read**
3. Add **Action(s)** to results and enter free text as required

3. Completing Allocated Actions - All Users

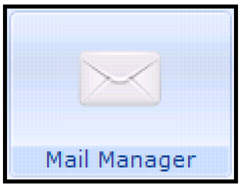
1. Find **Actions** allocated to you or a group you are a member of
2. Select the result, read and add comments as required
3. Carry out the action and mark as **Complete** and/or add another action and/or update the **Action Status**
4. The **Action** is now complete and the message removed from your **Action View**

4. Giving Results to Patients - All Users

1. Find the patient in **Mail Manager** or **Consultation Manager**
2. Select the result, read and add comments as required
3. Carry out the action and mark as **Complete** and/or add another action and/or update the **Action Status**
4. The **Action** is now complete

Viewing Your Messages in Mail Manager

To view your messages in **Mail Manager**:

1. From the **Vision 3** front screen, select **Mail Manager** 
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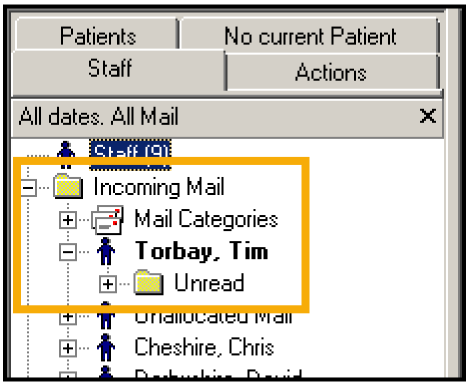
Training Tip - You can set **Mail Manager** to open automatically when you log in from the **Vision 3 front screen - Options - Mail Manager Startup**.

2. Mail for all staff displays, from the **Staff** tab, select **Incoming Mail - Your name**:



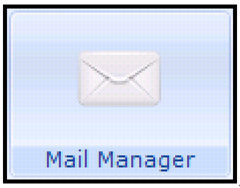
3. All your messages, read and unread display in the right hand screen. To display **Unread** messages only, select **Expand** ⊞ - **Unread**.

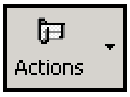
Note - It is advisable to check the dates selected under **Filter** to ensure you are seeing all the messages required.

4. Your messages now display ready for processing.

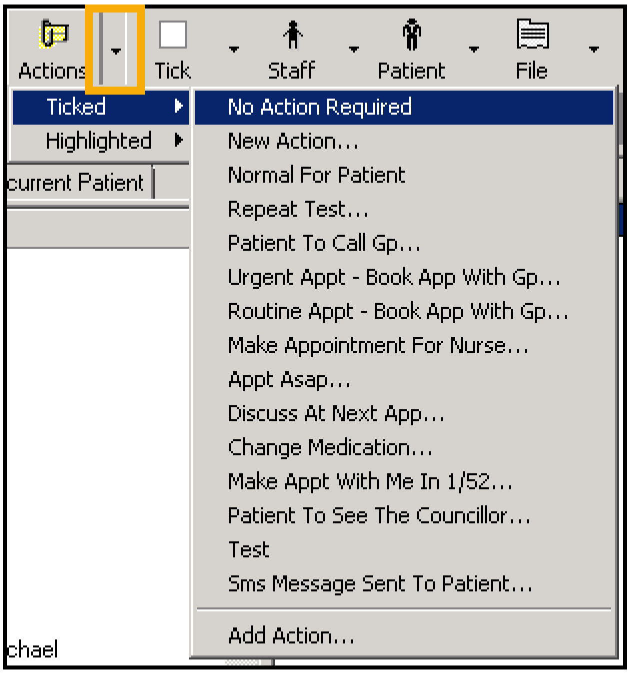
Adding an Action to a Message

To add an **Action** to a message:

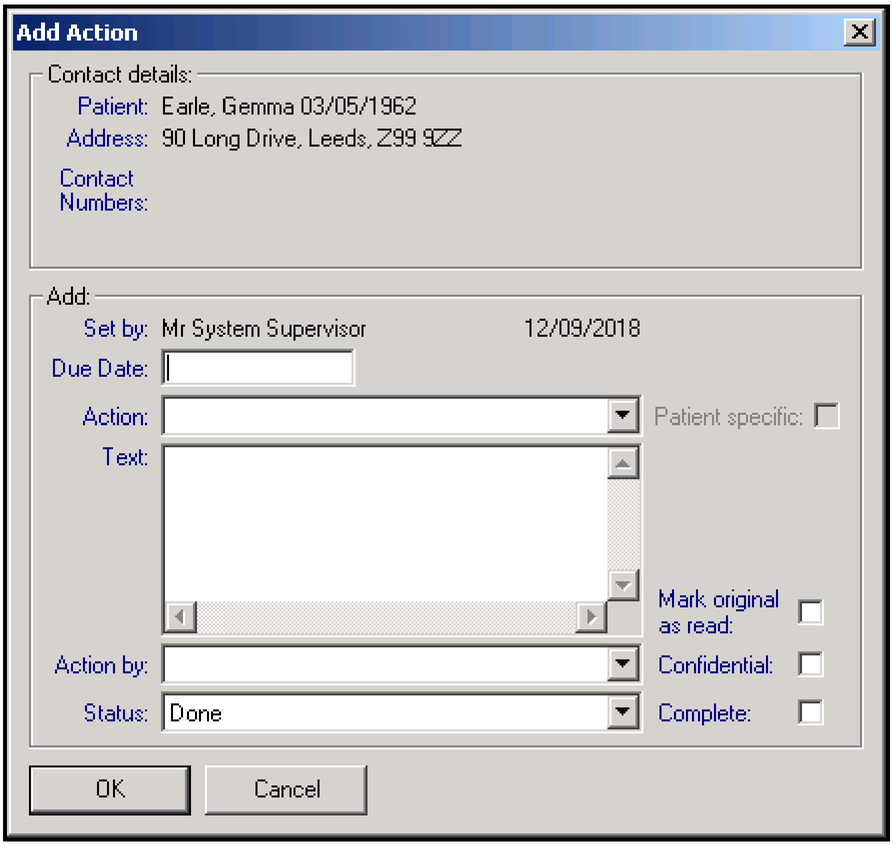
1. From **Mail Manager** 

, select the message required, if more than one message needs the same **Action**, tick all the messages required.
2. Now, either:
    - Right click on the message and select **Actions**. The **Frequent Action** list displays as a quick list, select the action required or select **Add Action** to select from the full list available,
    - Select **Actions** 

 to select from the full list available, or
    - For multiple messages, select the **Action** arrow – **Ticked** or **Highlighted** depending on how you select your messages and select from the available list:



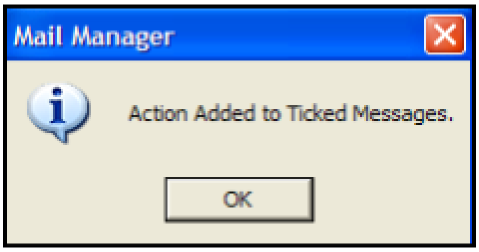
3. The **Add Action** screen displays with the patient details at the top:



4. Complete as required, some parts of this form may be automatically completed by the initial **Action** set up, but can be updated if appropriate:
   - **Due Date** (optional) - Enter the date you want this **Action** completed by.
   - **Action** - Select the **Action** you require from the available list.
   - **Text** - The **Action** requested displays. If required, add any additional free text comments to the end of existing text.
   - **Action by** - Select either the member of staff or the group of staff you want to allocate this action to, the message automatically displays in their mailbox in **Mail Manager**.
   - **Status** - Select from the available list.
   - **Patient specific** - Tick to indicate that should this action need to be changed, entries elsewhere in **Vision 3** may need to be addressed, for example, an appointment made may need updating, bringing forwards or cancelling.
   - **Mark original as read** - Tick to mark the original message as **Read** once you select **OK**.

- **Confidential** - Tick to mark an **Action** request as confidential. If an action request is marked as confidential, the right-hand side of the message details, the **Request** and **Observations** folders are hidden from view. Confidential action requests cannot be filed.
- **Complete** - Tick to mark the action as complete. If you select a **Status** with a **Completed** flag, this is ticked automatically.

5. Select **OK** to save.
6. If multiple messages are selected, the '*Action added to Ticked Messages*' message displays:

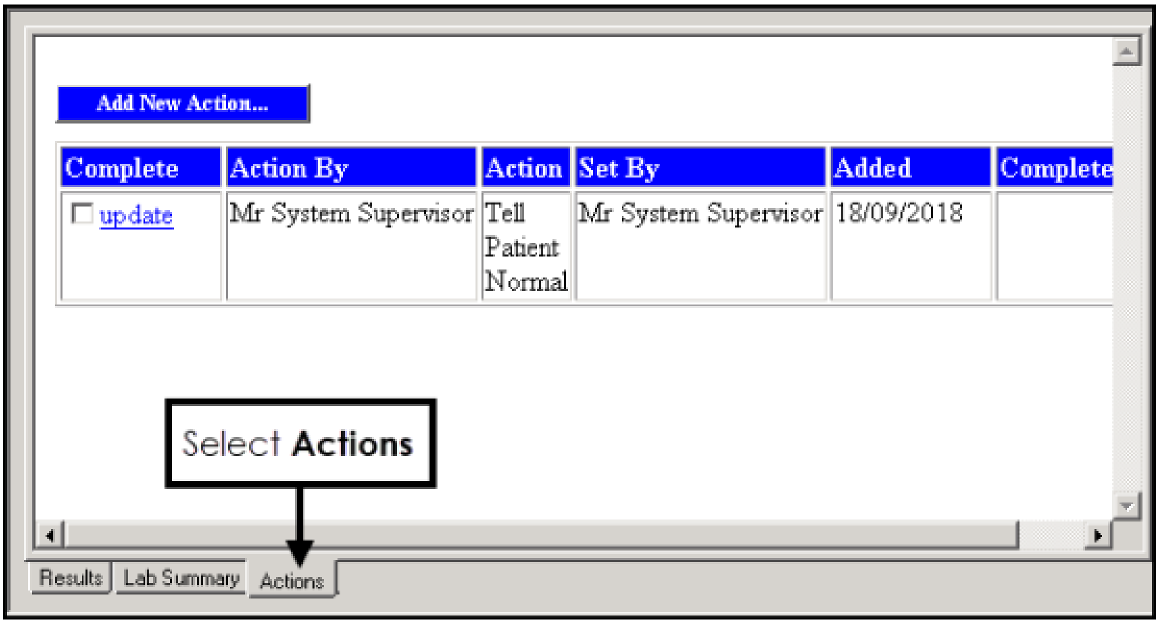


7. Select **OK** to continue.

Note - If you update an **Action**, the original **Action** is deleted and a new one created, this does not apply if deleting or updating a copied **Action** item where that **Action** is directed at the current user.

Completing an Action from the Message Actions tab

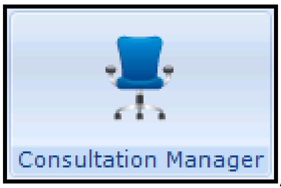
To complete an **Action** from the **Actions** tab of a message:



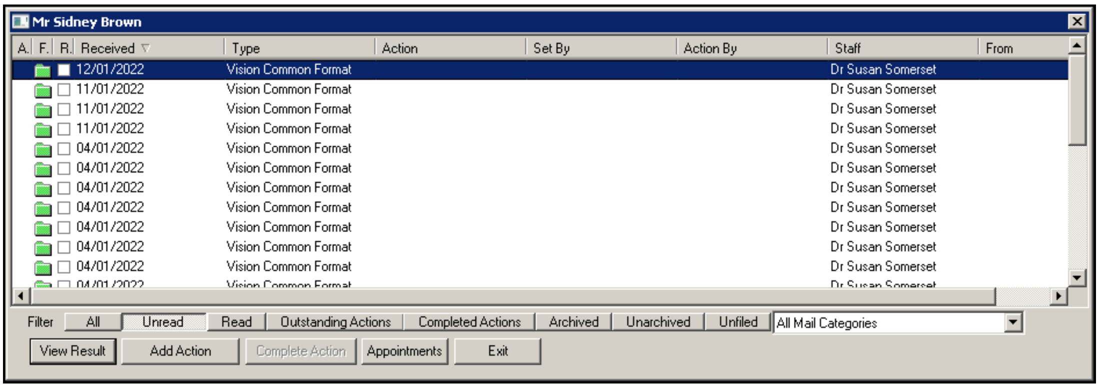
- Highlight the message required and select the **Actions** tab at the bottom of the screen:
    - Tick under **Complete** to mark an Action as complete, this is especially useful if more than one **Action** has been added to a message. Select **Yes** to the *Please confirm you wish to complete the selected 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** - Indicates there is an action for this message.
- **F** - Indicates Filed.
- **R** (with tick box) - Indicates whether the message has been read.

5. 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 any mail with outstanding actions for this 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 the message from the list available if required.

6. 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**.