

Mail Manager Enhancements User Guide

INPS



INPS

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Table of Editions and Contents

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09.10.09	MME - 2386	Further changes – additional action text in Mail For Patient, phone numbers correctly displayed in add action, staff access can be removed globally, no autofiling for TO/INT patients, Column adjustment now retained, folders for logged in staff display at the top of the staff list, messages from mail administrator now held in MM. Restructure of document. ESTU	.docx
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Mail Manager Enhancements

Overview

Since Mail Manager was first released to customers, there have been requests for various improvements to be made. INPS has worked closely with customers and in DLM 310 we have addressed such requirements and introduced further enhancements to Mail Manager. These enhancements set out to improve the existing Mail Manager interface, there are no changes to the basic workings of Mail Manager; messages are still to be processed in much the same way.

Summary of Changes

Control Panel Enhancements

- Add Action Changes – You can now select a **Default Action Status** and **Mark Original as Read** when creating a new action. See “Mail Maintenance” on page 4.
- **Global removal of staff access** – You can now remove user rights to a mailbox in one step. See “Mail Maintenance” on page 6.
- **Allocate frequent staff** – You can now construct a list of frequent staff to allocate messages to. See “Allocate Frequent Staff” on page 7.
- **Remove multiple users from a staff group** – It is now possible to remove more than one user at a time from a staff group. See “Remove Multiple Users from a Staff Group” on page 8.

Mail Manager Functional Enhancements

- There is a new **Mail Categories Filter** in the Staff and Patient tabs which allow you to filter messages by type. See “Mail Categories Filters” on page .9
- The initial filter settings for a new user are now set to **All Mail** and **All Dates** by default. See “Filter Set to All Mail/All Dates for New Users” on page 11.

- There is now an icon which enables you to view any future appointments for the selected patient. See "View Future Appointments from Mail Manager" on page 11.
- You can now tick the **Mark messages as Read** column for certain messages without highlighting the message first. See "Mark Message as Read without Highlighting" on page 12.
- There are now options within the Add Action screen which allow you to **Mark the Original Message as Read**. Depending on your Action Status settings, you can also configure Mail Manager to automatically mark the message as **complete**. See "Mark Original as Read" on page 13.
- **Allocate to Frequent Staff** – If you have set up a frequent staff list, you can now choose from this list when allocating messages. See "Allocate to Frequent Staff" on page 14.
- **Copy text option** – There are now copy text options for all pathology messages. This excludes Scottish pathology messages. See "Pathology Messages - Copy Text " on page 15.
- The audit trail tab display has been modified to make it more user friendly. See "Audit Trail" on page 16.
- You can opt to display a **New Message desktop alert** when a new message is received in Mail Manager. See "New Message - Desktop Alert" on page 16.
- From Tools – Options, you can set Mail Manager to **Automatically move to next message** after you have actioned the previous message. See "Automatically Move to Next Message" on page 17.
- **New units of measure** have now been added to the assign valid units screen. See "Assign Valid Units - New Units of Measure" on page 17.
- You can now **Reprocess multiple failed outgoing messages**. See "Reprocess Multiple Failed Outgoing Messages" on page 18.
- Archiving changes:
 - The 30 day restriction for archiving pathology and duplicate messages has now been removed. See "30 Day Restriction Removed for Pathology and Duplicate Messages" on page 19.
 - There is now an archiving **progress bar** and archive **completion confirmation** screen which display counts of archived messages. See "Archiving Progress Bar and Completion" on page 19.
 - Mail Administrator/non-xml** messages older than 30 days are now included in the archive view for View Mail for Patient. See "Mail for Patient Archive now contains messages from Mail Administrator" on page 20.
- Messages received for Transferred Out and Expired Temporary patients are no longer automatically filed. A warning also displays when you select a message for such patients. See "Messages for Transferred Out and Expired Temporary Residents" on page 20.

Mail Manager Display Enhancements

- **Patient Date of Birth** now displays next to the patient name in the Mail Manager Patient column. See "Patient Date of Birth" on page 21.
- **Add Action** screen changes:
 - The **action date label** has now been amended to read **Due Date** when the complete tick box is not checked, and **Complete** when the complete tick box has been checked. See "Action Date Change" on page 21.
 - Additional actions** are now listed first in the actions menu. See "Additional Actions Listed First" on page 22.
 - Patient contact numbers** are now properly displayed with labels. See "Patient Contact Numbers" on page 23.
- We have changed the Allocate and Assign buttons so that they now read **Staff** and **Patient** respectively. See "**Error! Reference source not found.**" on page **Error! Bookmark not defined.**
- We have now changed the **Mail Manager toolbar icon** functionality so that when you make a single click on an icon, the required task on the currently **highlighted** item is immediately performed. See "Highlighted/ticked Toolbar Icon Changes" on page 23.
- The Mailbox for the current user now displays at the top of the Mailbox list, rather than in alphabetical order. See "Current User's Mailbox displays at the top of the Mailbox Folders" on page 24.
- There are now **clearer tabs on Multi-specimen messages**. See "Clearer tabs on Multi-specimen Messages" on page 25.
- We have added icons for copied and read only messages. See "Message Icons - Copies" on page 25.
- We have removed some unnecessary fields from SCI Pathology messages. See "SCI Pathology Scotland – Removal of Unnecessary Fields" on page 25.
- We have now **hidden the header tab** by default. You choose to display this tab from Tools – Options. See "Removal of Message Header Tab" on page 26.

Consultation Manger - View Mail for Patient Enhancements

- Action free text now appears alongside the action in the View Mail For Patient window. See "Action Free Text" on page 27.
- The last filter option is now retained in View Mail for Patient. See "Default Filter Option Retained" on page 28.
- There is now an **Appointments button** in View Mail for Patient which links to future appointments. See "Link to Future Appointments – View Mail for Patient" on page 28.

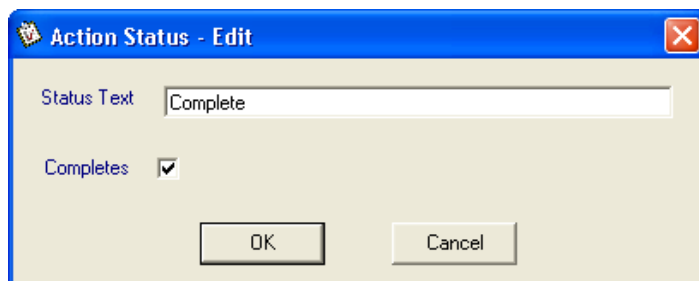
Control Panel Enhancements

This section details the changes introduced to Mail Maintenance and Staff Groups in Control Panel. The implementation of these changes is not prescriptive and can be implemented in a way that suits the needs of your practice.

Mail Maintenance

Default Action Status

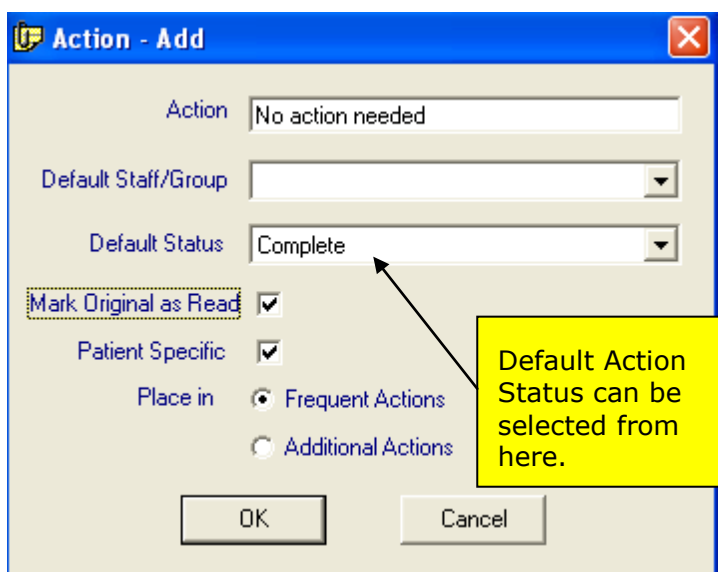
Previously, in **Control Panel – Mail Maintenance**, you were able to set an action status which could be applied as an Initial Status to all messages, or be chosen from the selectable list in the Add Action screen. You could also choose whether the initial or selectable status completes the message:



Old Mail Manager – Action Status

From this release, Action Status is still configured in the same way (from Control Panel – Mail Maintenance - Action Status). However, we have now amended the Add Action screen (Control Panel – Mail Maintenance – Add Action) so that you can select a **Default Action Status** for an action.

This allows for a default action status to be applied to individual actions rather than a default for all messages (although this is still possible) whilst still allowing for the message to be marked as complete on selecting the action.

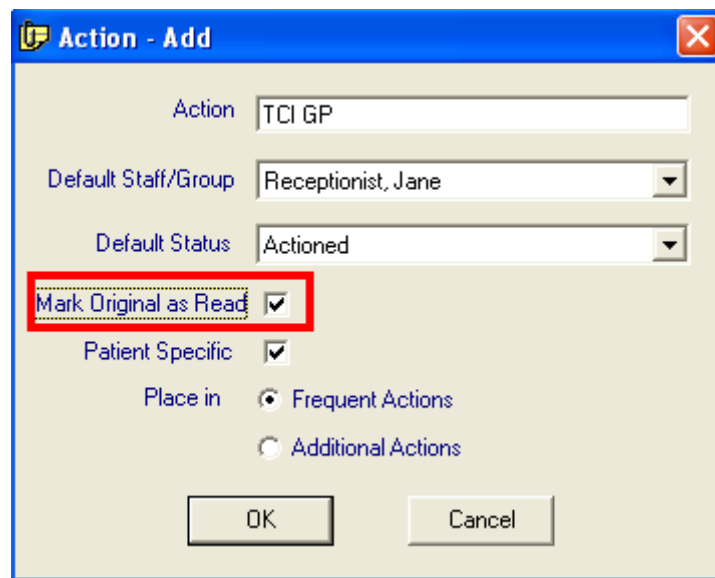


Add Action – Default Status

With the combined Mark Original as Read option, see below, you are now able to **simultaneously Complete an action and Mark a Message as Read**. You can use the Default Status and Mark Original as Read as separate functions.

Mark the Original Message as Read when Adding an Action

Within the Add Action form (accessed from Control Panel – File Maintenance – Actions), you can now choose to **Mark the Original Message as Read** when selecting an action. With the combined Default Action Status, see above, you are now able to **simultaneously Mark the original message as Read and Complete an action**. You can use the Default Status and Mark Original as Read as separate functions if required.



The screenshot shows a dialog box titled "Action - Add". It contains several fields and options:

- Action: TCI GP
- Default Staff/Group: Receptionist, Jane
- Default Status: Actioned
- Mark Original as Read: (highlighted with a red box)
- Patient Specific:
- Place in: Frequent Actions, Additional Actions
- Buttons: OK, Cancel

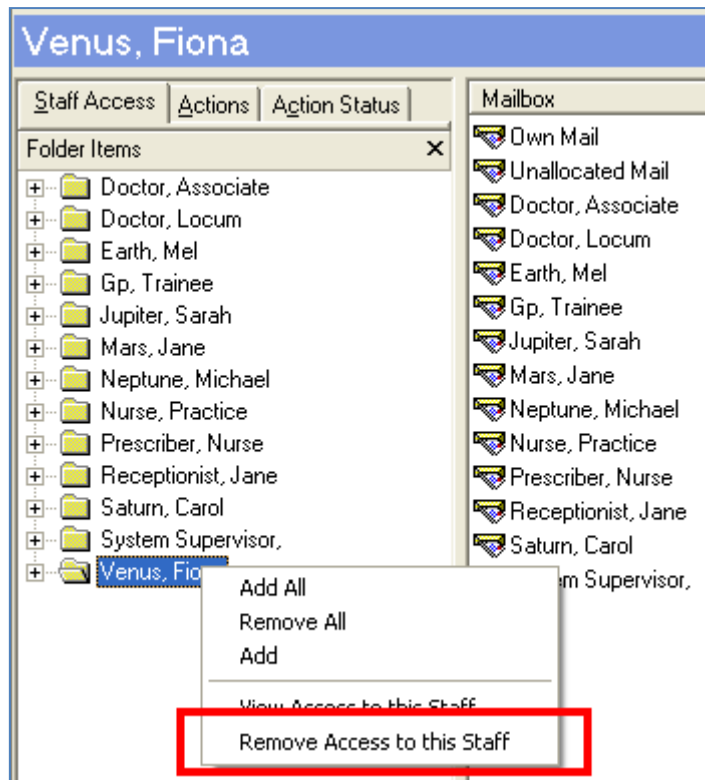
Mark Original as Read

Note – The original incoming message is marked as read – copies and read only messages are not included.

Global Staff Access Removal

Previously, to remove access rights to an individual's mailbox you had to remove access from each staff mailbox individually. From now on, you can globally remove staff access rights for all staff to a particular mailbox in one step.

1. From the Vision front screen, go to **Control Panel - Mail Maintenance**.
2. From the **Staff Access** tab, find the staff member for whom you would like to revoke mailbox access for all staff.
3. Select **Remove Access to this Staff**.



Control Panel - Mail Maintenance - - Staff Access - Remove Access to this Staff

4. When prompted with *Remove nnn's access rights for all Staff?* Select Yes.
5. All access right to the selected mailbox are now revoked.

File Maintenance - Staff Groups

Allocate Frequent Staff

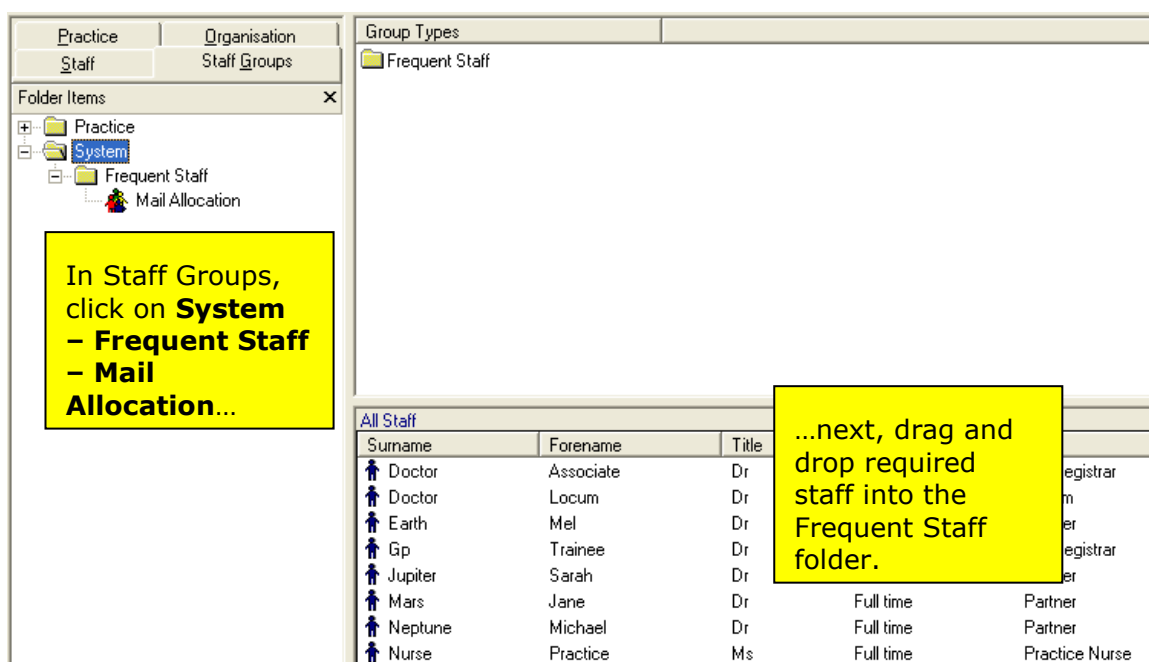
Previously, when you allocated a message to a member of staff in Mail Manager, you had to select the required person from the full staff list. From this release, you now have the option of setting up a staff group which you most frequently allocate messages to.

1. Go to **Control Panel – File Maintenance – Staff Groups**.
2. There are now two folders in the Staff Groups tab- Practice and System:

Practice Groups allows you to create your own defined staff groups (i.e. Reception Staff, GPs etc.).

System Groups lists groups that are defined by INPS (currently there is only a Frequent Groups folder listed which contains the Mail Allocation group). You are able to add and remove staff from this group, but you cannot remove the group itself.

3. Click on  next to the **System Folder** to display the Frequent Staff folder, then  to display the **Mail Allocation** group.



In Staff Groups, click on **System – Frequent Staff – Mail Allocation...**

...next, drag and drop required staff into the Frequent Staff folder.

Surname	Forename	Title		
Doctor	Associate	Dr		registrar
Doctor	Locum	Dr		m
Earth	Mel	Dr		er
Gp	Trainee	Dr		registrar
Jupiter	Sarah	Dr		er
Mars	Jane	Dr	Full time	Partner
Neptune	Michael	Dr	Full time	Partner
Nurse	Practice	Ms	Full time	Practice Nurse

System – Frequent Staff - Mail Allocation

4. To add staff to the Mail Allocation list, highlight the required staff from the **All Staff** window and drag and drop required staff into the Frequent Staff folder.

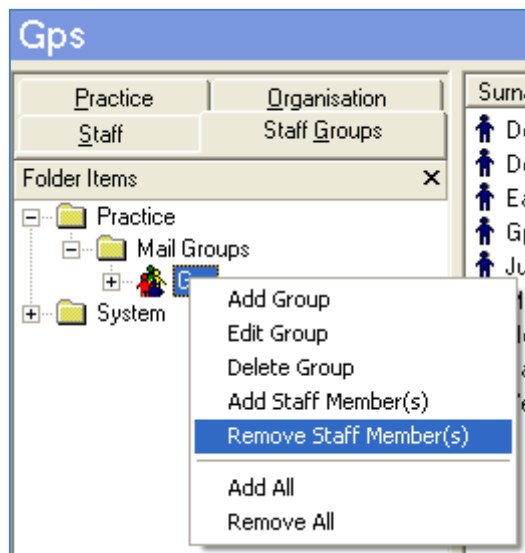
Reminder – If the staff member listed does not have an associated Vision login, they will not be permitted to be added to the Mail Allocation staff group.

5. From now on, when you want to allocate/re-allocate messages in Mail Manager using the right click menu – Allocate Staff, you are presented with the Frequent Staff list. See “Allocate to Frequent Staff” on page 14.

Remove Multiple Users from a Staff Group

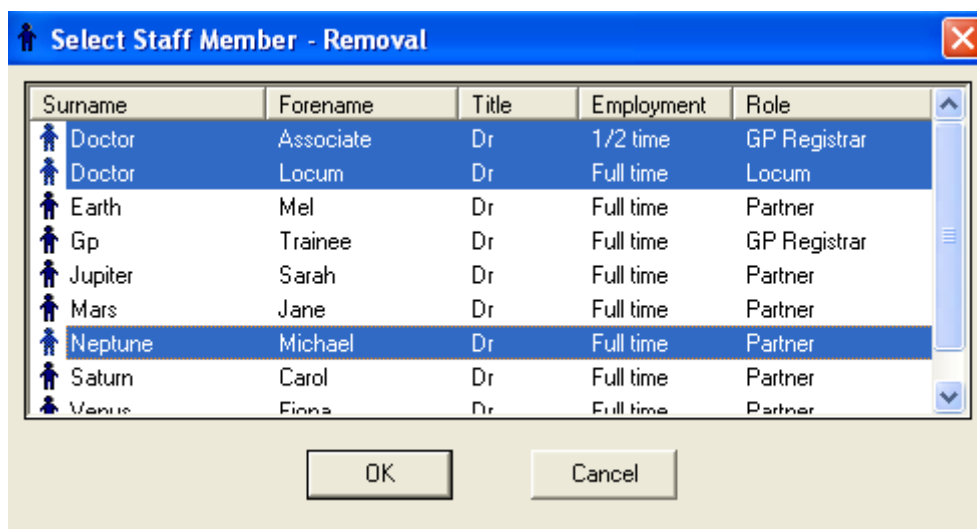
You can now remove multiple users from a staff group:

1. Click on **Control Panel – File Maintenance – Staff Groups**.
2. Right click on the group from which you would like to remove staff.
3. Select **Remove Staff Member(s)**.



Staff Groups – Remove Staff Member(s)

4. At the **Select Staff Member – Removal** window, hold down your control key and click on the staff members you would like to remove from the group.



Select Staff Member Removal

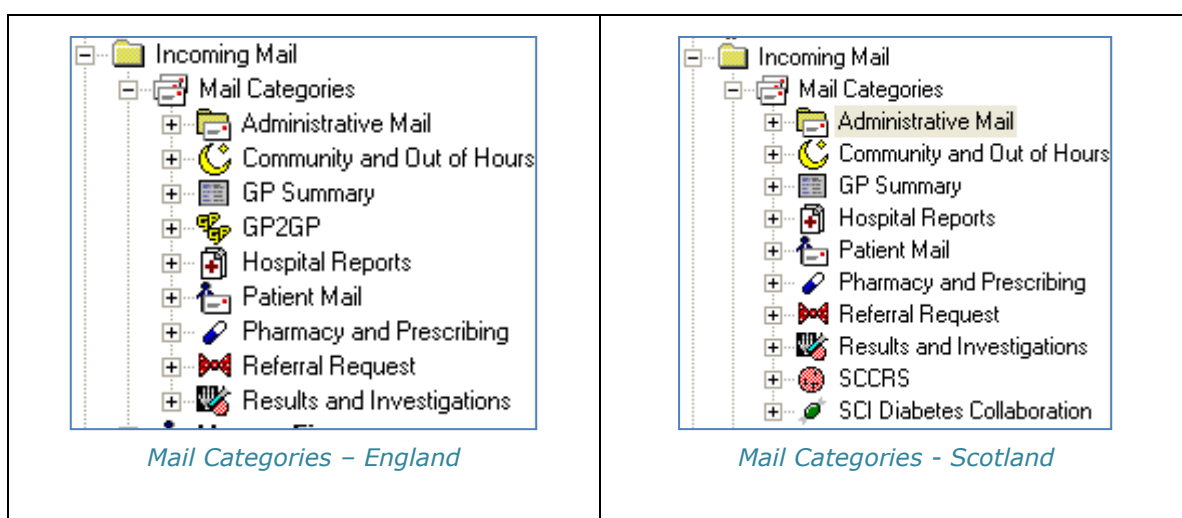
5. Click OK for the selected staff to be removed from the group.

Mail Manager Functional Enhancements

This section describes the enhancements that affect the Mail Manager interface.

Mail Categories Filters



In the Mail Manager **Staff** and **Patients** tabs, within the Incoming and Outgoing Mail folders, we have introduced a **Mail Categories filter**. This allows you to view messages by message type e.g. you can click on Hospital Reports to display Discharge Summaries only:












Note –For English practices, there is an additional GP2GP category. Scottish practices have additional SCCRS and SCI-DC mail categories

Message Types

Message types are categorised into the following:

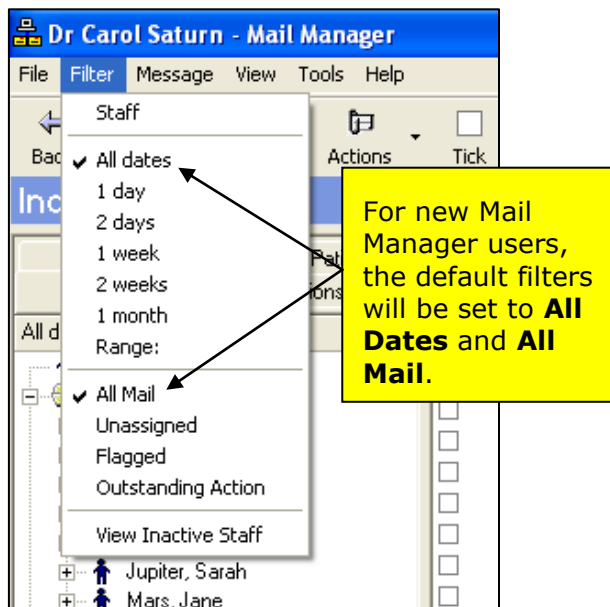
Category	Message Types
 Administrative Mail	Message Withdrawal Notification PDS Update Application Acknowledgement
 Community and Out of Hours	Community Care Report Out of Hours Report Shared Care Update OOH Patient Alert Out of Practice Report

 GP Summary	GP Summary Initial GP Summary
 GP2GP (England Only)	Record Transfer Request Record Transfer Request Rejection Record Transfer Acknowledgement Record Transfer Rejection GP2GP Legacy Request Record Transfer - No longer used GP2GP Request GP2GP Patient Notes GP2GP Request Acknowledgement
 Hospital Reports	In Patient Report Out Patient Report Hospital Report Discharge Summary
 Patient Mail	Mail from patient Patient Task List
 Pharmacy and Prescribing	Electronic Prescription ePharmacy: Registration ePharmacy: Compliance ePharmacy: Treatment Summary Report
 Referral Request	
 Results and Investigation	Investigation Request Investigation Report Investigation Report – Scotland
 Scottish Cervical Call Recall Service (SCCRS) - (Scotland Only)	
 SCI Diabetic Care (Scotland Only)	

Note - This change only applies to the Incoming and Outgoing mail folders in the Mail Manager **Staff** and **Patients** tabs.

Filter Set to All Mail/All Dates for New Users

When a new user starts Mail Manager, the Filter menu is now automatically set to display **All Mail** and **All Dates**.



Filter Menu

View Future Appointments from Mail Manager

There is a new facility in Mail Manager which allows you to look at future appointments for the selected patient. This is also accessible from View Mail For Patient in Consultation Manager, see "Link to Future Appointments – View Mail for Patient" on page 28.

1. In Mail Manager, select a message from the message list.



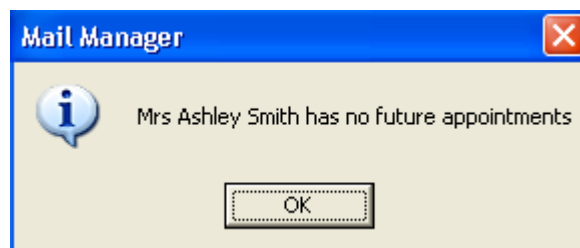
2. Click on the Appoint icon or right click on the message and select **View Future Appointments**.
3. If the patient has future appointments booked, the **Future Appointments** window is displayed listing the appointment date, time, book owner and any appointment comments.

Future appointments for Mr Andrew Smith			
Date	Time	Owner	Comment
06/08/2009	10:40	MICHAEL NEPTUNE	
04/09/2009	15:40	MICHAEL NEPTUNE	

Close

Future Appointments

4. If there are no booked future appointments for the patient, you are prompted with the following message *The patient has no future appointments:*



No future appointments message

Note – If the selected message is unallocated, the link to view future appointments is displayed as inactive.

Mark Message as Read without Highlighting

Previously, in order to mark the message as read using the Read tick box, you had to highlight the message first then tick the Read box. You are now able to directly tick the Read box without having to highlight the item first. For some message types, such as pathology messages outside of Scotland, you must still view the message (i.e. click on the message) before you can mark the message as read.

	Read	D
	<input checked="" type="checkbox"/>	06
	<input checked="" type="checkbox"/>	06
	<input checked="" type="checkbox"/>	06
ab	<input checked="" type="checkbox"/>	06
	<input checked="" type="checkbox"/>	06

Please take care when clicking on the Mail Manager Message list as you might unintentionally mark a message as read.

Mark Original as Read

The Add Action screen now has an option to **Mark Original as Read**. This saves you from having to tick the Read box separately after you have added an action.

(See "Mark the Original Message as Read" on page 5 for default configuration instructions).

The screenshot shows the 'Add Action' dialog box with the following fields and options:

- Contact details:**
 - Patient: Smith, Ashley 09/09/1963
 - Address: 7 Russell Street, Leeds, Z99 9ZZ
 - Contact Numbers:
- Add:**
 - Set by: Mr Mr System Supervisor
 - Date: 28/07/2009
 - Code: No Action Needed
 - Text: No Action Needed
 - Patient specific:
 - Mark original as read:
 - Confidential:
 - Complete:
- Buttons: OK, Cancel

Mail Manager – Add Action

When adding multiple actions to a message, as long as one of the actions has Mark Original as Read selected, the message is marked as read.

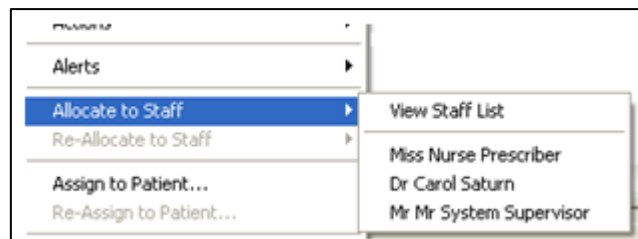
Note - The Mark Original as Read option will **not** be available when updating existing actions.

Depending on your action status settings, you can configure the Add Action screen so that the action is marked as completed automatically. See "Default Action Status" on page 4.

Allocate to Frequent Staff

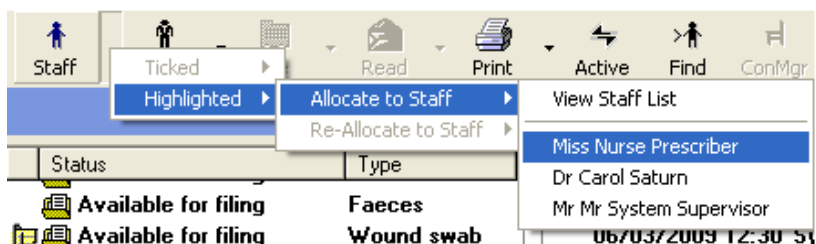
Once you have configured the Staff Group for Allocate Frequent Staff, see "Allocate Frequent Staff" on page 7, when allocating a message to a user, you are initially presented with a list of your pre-configured **Frequent Staff**. This saves the need to scroll down a long list of Vision users in your practice:.

1. In Mail Manager, select an unallocated message from the message list.
2. Right click on the message, select **Allocate to Staff**. You can then select a user to allocate to from your predefined list of frequent users.



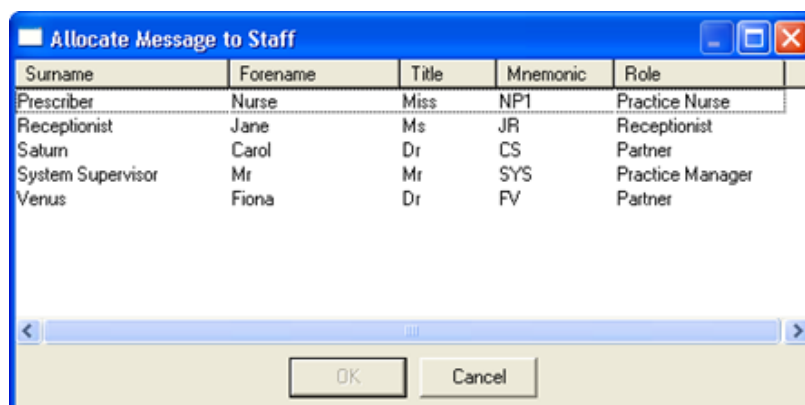
Right Click - Allocate to Staff

Alternatively, you can click on the arrow next to the Staff Icon and select Allocate to Staff:



Staff Icon - Allocate to Staff

To select from the full list choose **View Staff List** or click on the Staff icon



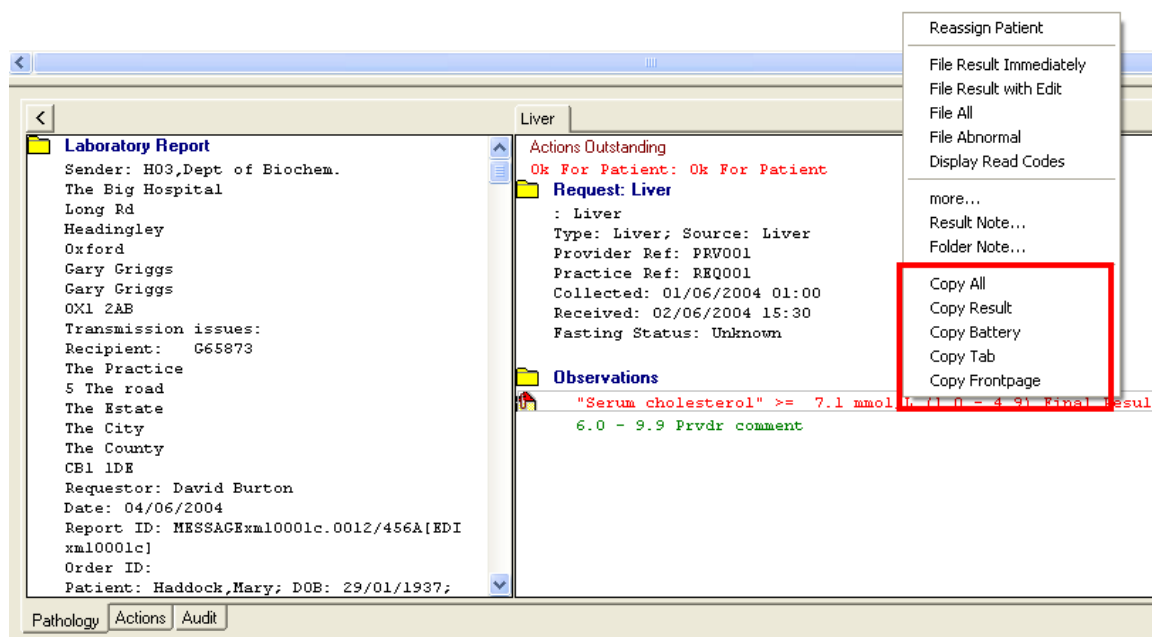
View full staff list

Note – The Allocate to Frequent Staff functionality also applies to message reallocation.

Pathology Messages - Copy Text

For non-Scottish pathology messages, we have enhanced the menu within the Mail Manager message to provide the following options for copying text which can be pasted into other applications, such as a Word document. This will be particularly useful when creating clinical correspondence.

Note – The copy text functionality only applies to **non-Scottish pathology** messages.



Copy Options on Right Mouse Menu

The new options copy the following text:

Copy all – copies all information in the message and is like printing the message to the clipboard. This includes actions and folder notes. The “frontpage” section is actually placed at the end.

Copy result –copies the selected result line including free text from the laboratory, and notes added by clinicians and Vision.

Copy battery –copies all results contained within the same battery as the selected result. For stand-alone results this is just the same as copy result.

Copy tab – copies all the information contained under the selected tab, with the exception of actions and folder notes.

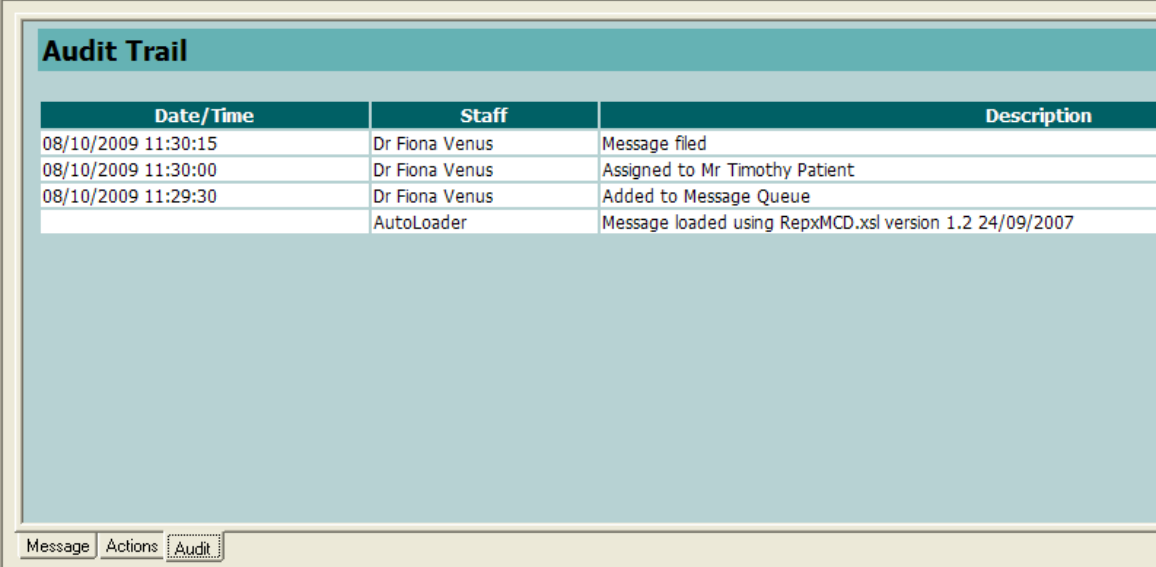
Copy Front-page – copies the “Laboratory Report” and “Free text and further information” sections.

Note – All other message types can be copied and pasted using the standard windows shortcuts (Ctrl-C for copy and Ctrl-V for paste).

Audit Trail

We have simplified the audit trail tab so that audit information is displayed in 3 columns:

- **Date/Time** – displays the date and exact time of the audit log.
- **Staff** – displays the name of the staff member who has edited the message. Automated changes are also listed.
- **Description** – outlines the detail of the change to the message.



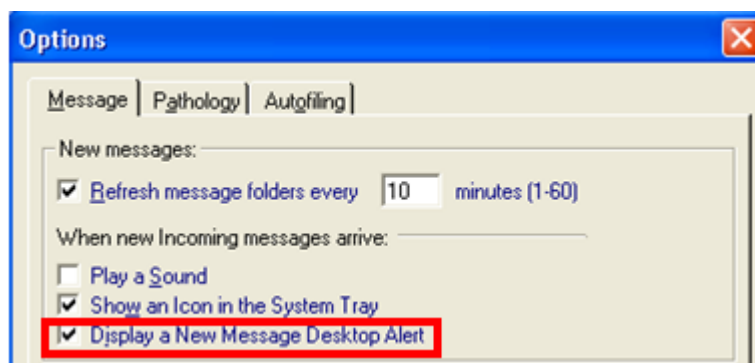
Date/Time	Staff	Description
08/10/2009 11:30:15	Dr Fiona Venus	Message filed
08/10/2009 11:30:00	Dr Fiona Venus	Assigned to Mr Timothy Patient
08/10/2009 11:29:30	Dr Fiona Venus	Added to Message Queue
	AutoLoader	Message loaded using RepxMCD.xml version 1.2 24/09/2007

Audit Trail Tab

New Message - Desktop Alert

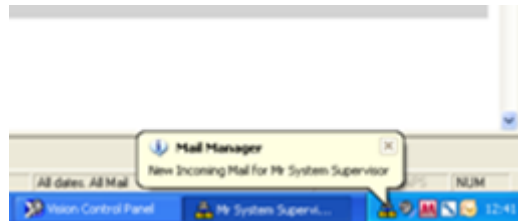
You can now configure Mail Manager to display a desktop alert which displays when a new message allocated to your mailbox is received. This is in addition to the existing option to display a system tray alert and is a per user setting. To set the desktop alert:

1. In Mail Manager, go to **Tools – Options**.
2. On the Message tab, tick **Display a New Message Desktop Alert**.



Tools – Options – Message – Desktop Alert

3. Click OK to save.
4. When a new message is received which is allocated to your mailbox, the following alert is displayed for approximately 8 seconds:



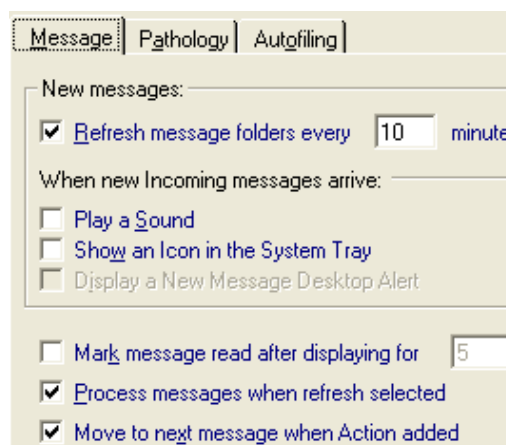
Desktop Alert

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

Automatically Move to Next Message

You now have the option to set up Mail Manager so that you are automatically taken to the next message after having actioned the previous message from the right click menu. This is saved on a per user basis:

1. In Mail Manager, go to **Tools – Options**.
2. On the Message tab, tick **Move to next message when action added**.



Tools – Options – message - Move to next message when action added

3. Click OK to save.

Assign Valid Units - New Units of Measure

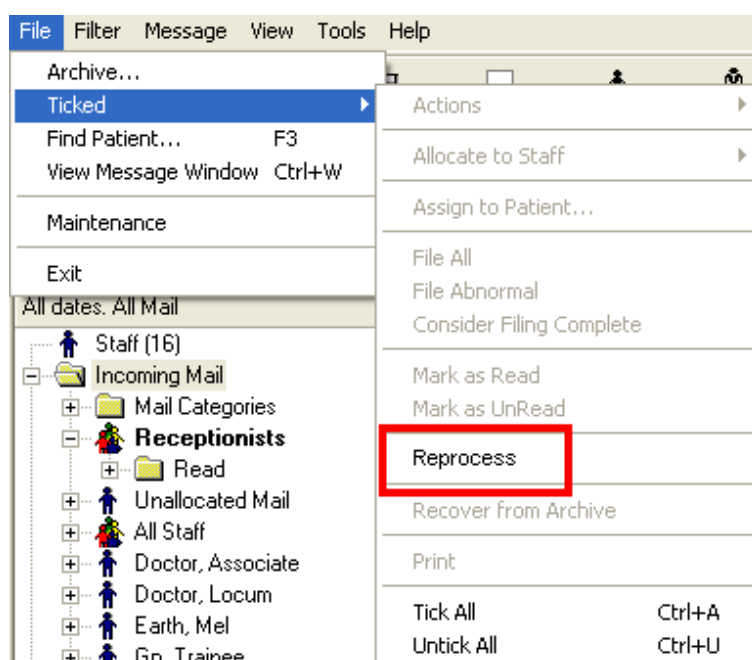
The following units of measure have been added to the Assign Valid Units list in Mail Manager:

- ugFEU/mL
- mOsm/kg
- GPL U/mL
- GPM U/mL

Reprocess Multiple Failed Outgoing Messages

Previously, if outgoing messages needed to be reprocessed, e.g. if PDS updates were displaying transmission errors, you would have to reprocess each message individually. From now on, you can choose to **Reprocess** for multiple failed outgoing messages:

1. In Mail Manager, go to the **Outgoing Mail** folder.
2. Tick each message which needs to be reprocessed.
3. Then go to **File – Ticked – Reprocess**.



File – Ticked - Reprocess

4. Mail Manager then attempts to reprocess all the selected messages.

Archiving

30 Day Restriction Removed for Pathology and Duplicate Messages

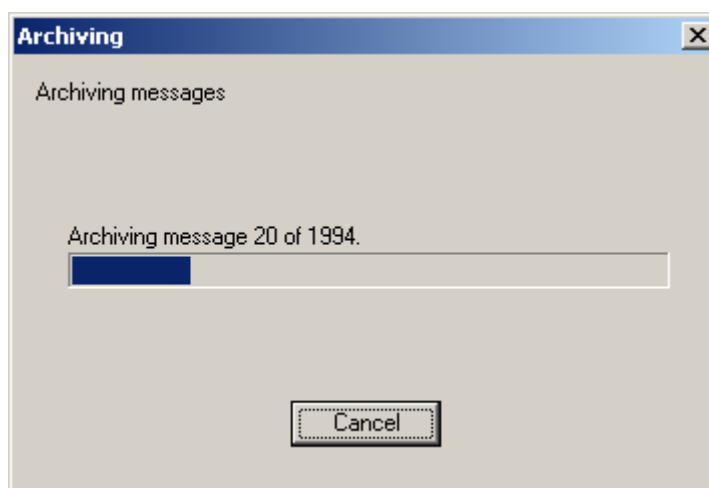
The archiving restriction which prevented the archiving of messages less than 30 days old has now been removed for English and Welsh pathology messages and duplicate messages. You still need to ensure that the messages have been read and completed before archiving can take place.

Cancel Button Renamed

We have renamed the Cancel button on the archiving screen to read Close.

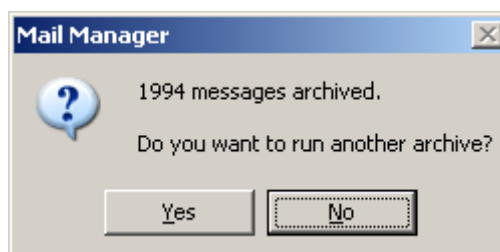
Archiving Progress Bar and Completion

Whilst the Mail Manager archive is running, you are now presented with a progress bar which displays how many messages have been archived, plus the total message count to be archived.



Archiving Progress Bar

When archiving is complete, you are now presented with a window giving you a count of the number of messages archived and the option to run another archive or close the archive form.



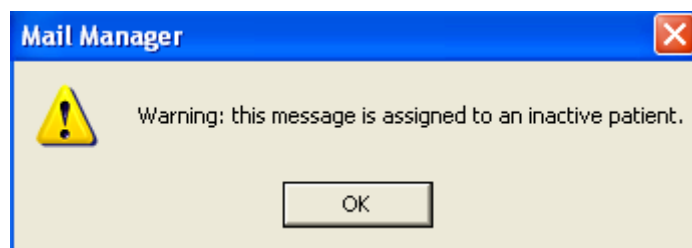
Archive Complete

Mail for Patient Archive now contains messages from Mail Administrator

Messages previously received in Mail Administrator (i.e. non-xml messages) older than 30 days are now accessible from the Archive button in **Consultation Manager - View Mail for Patient**. Non-XML messages received in the last 30 days should still be managed from Mail Administrator but will progressively be visible from View Mail for Patient as they exceed the 30 day threshold.

Messages for Transferred Out and Expired Temporary Residents

Messages received for transferred out or expired temporary registered patients are no longer automatically archived. Instead, the message status now reads *Available for Filing* and when you select the message, the following warning appears *Warning: This message is assigned to an inactive patient:*



Mail Manager Display Enhancements

Patient Date of Birth

To allow for quick and easy identification of patients, the patient's date of birth now appears in the **Patient** column alongside the patient's name:

Patient
Smith, Andrew 04/01/1967

DOB now appears next to patient name

Note – For messages which are unassigned, the date of birth details are extracted from the incoming message. If there is no date of birth in the message, the patient name displays only. If the unallocated patient name exceeds 30 characters, the patient date of birth is omitted from view

Add Action Screen Changes

We have made various enhancements to the Add Action screen:

Action Date Change

We have changed the action **date label** on the Add Action screen in Mail Manager and View Mail for Patient in Consultation Manager. From now on, when an action is not complete, the date is labelled **Due Date**. When the complete box/action is completed, the date label now reads **Completed**.

The screenshot shows the 'Add Action' dialog box with the following details:

- Contact details: Patient: Hadden, Ellen 05/05/1911, Address: 26 Durley Rd, Gosport, Leeds, Z99 9ZZ, Contact Numbers:
- Add: Set by: Dr.Fionna.Venus, 14/10/2009
- Due Date: 14/10/2009 (highlighted with a red box)
- Action: (dropdown menu)
- Text: (text area)
- Action by: (dropdown menu)
- Status: Actioned (dropdown menu)
- Complete: (highlighted with a red box)
- Other options: Patient specific, Mark original as read, Confidential (all unchecked)

Action not complete – date is labelled Due Date

Completed action – date is labelled Completed date

Additional Actions Listed First

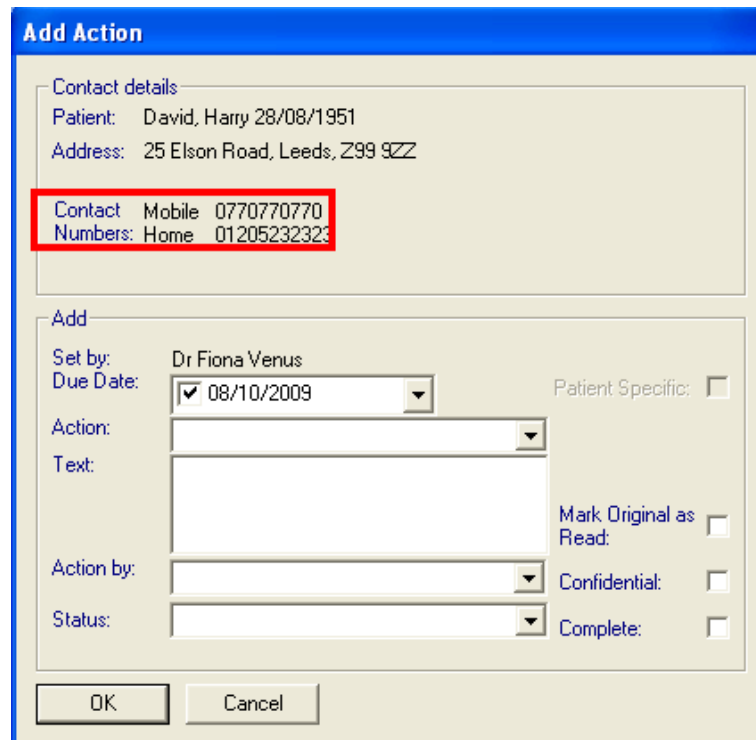
Previously, when selecting an action from the Action drop down box in the Add Action form, frequent actions were displayed at the top of the list followed by additional actions.

As it is more likely that you would want an **additional action** rather than a frequent action when selecting from the Add Action form (as you can easily access frequent actions by right clicking on the message), we have changed the order of actions so that the **additional actions are listed first**, alphabetically, followed by frequent actions, listed in display order.

Additional Actions listed first on the Add Action form

Patient Contact Numbers

When adding an action in Consultation Manager or Mail Manager, Home and/or Contact for Patient telephone numbers are now clearly displayed and labelled on the **Add Action** window:



The screenshot shows the 'Add Action' dialog box. The 'Contact details' section includes:
Patient: David, Harry 28/08/1951
Address: 25 Elson Road, Leeds, Z99 9ZZ
Contact Numbers: Mobile 0770770770, Home 01205232323 (highlighted with a red box).
The 'Add' section includes:
Set by: Dr Fiona Venus
Due Date: 08/10/2009
Action: (dropdown menu)
Text: (text area)
Action by: (dropdown menu)
Status: (dropdown menu)
Checkboxes: Patient Specific, Mark Original as Read, Confidential, Complete.

Add Action Window – Patient Telephone Numbers

Highlighted/ticked Toolbar Icon Changes

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).

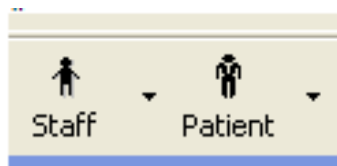
Note – You are still able to carry out a function on selected or highlighted messages by clicking the arrows next to the relevant icon:



Highlighted/ticked option still available

Re-labelling of Allocate and Assign Icons

To make the definitions clearer, we have relabelled the **Allocate** and **Assign** icons in Mail Manager. They are now called **Staff** and **Patient** respectively:

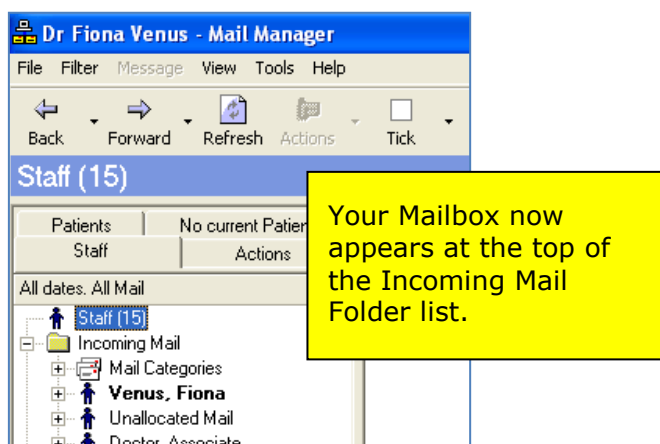


Re-labelling of Allocate and Assign Icons

Within other message menus, Allocate and Re-allocate have been renamed to **Allocate Staff** and **Re-allocate Staff** and Assign and Re-assign have been changed to **Assign Patient** and **Re-assign patient**.

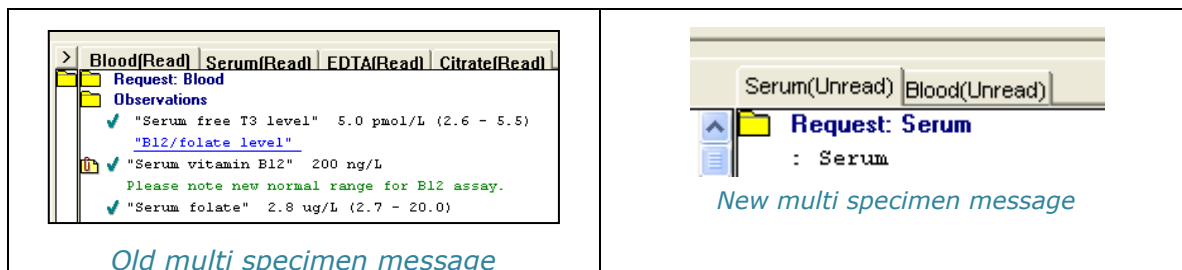
Current User's Mailbox displays at the top of the Mailbox Folders

From now on, when you log into Mail Manager your Mailbox is displayed in bold at the top of the Incoming and Outgoing folders (previously this was displayed alphabetically in the folder list).



Clearer tabs on Multi-specimen Messages



For messages with multi specimen results, we have introduced clearer tab labelling:





Note – This does not apply to Scottish pathology messages.

Message Icons - Copies

An icon now 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

SCI Pathology Scotland – Removal of Unnecessary Fields

We have removed the following headings from the Result tab in the SCI Pathology message:

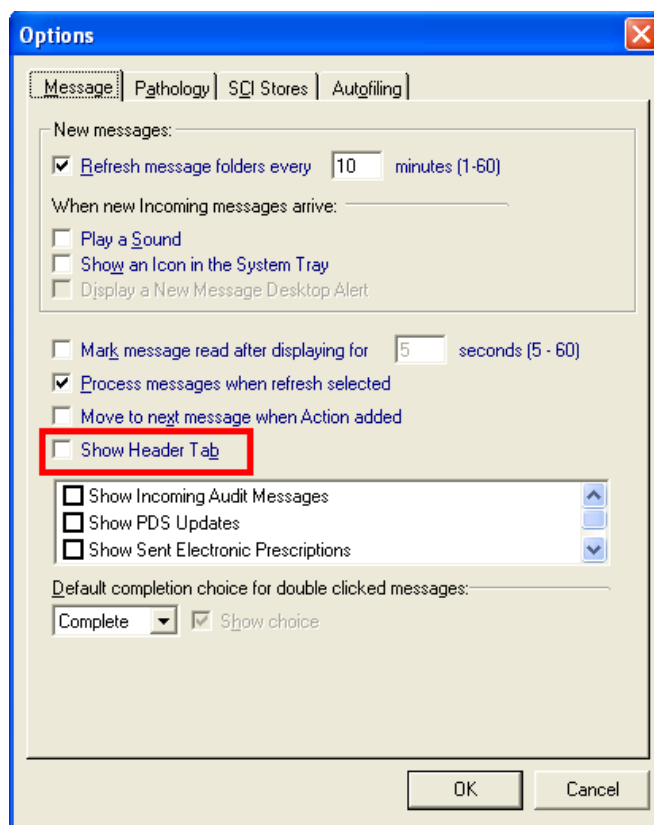
- Status Field
- Discipline Specific Values

The Test Interpretation field is only displayed when relevant data is contained in the message.

Removal of Message Header Tab

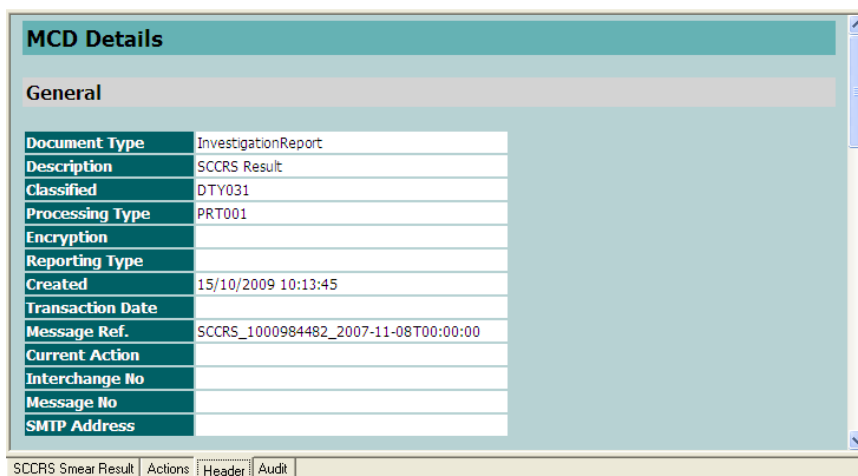
We have removed the Header tab from automatically appearing in the message pane. If you would like the Header tab to be permanently included in your message view:

1. In Mail Manager, go to **Tools – Options**.
2. In the **Message** tab, tick the box next to **Show Header Tab**.




Mail Manager – Tools – Options – Show Header Tab

3. The Header tab is now visible in the message view for all messages.



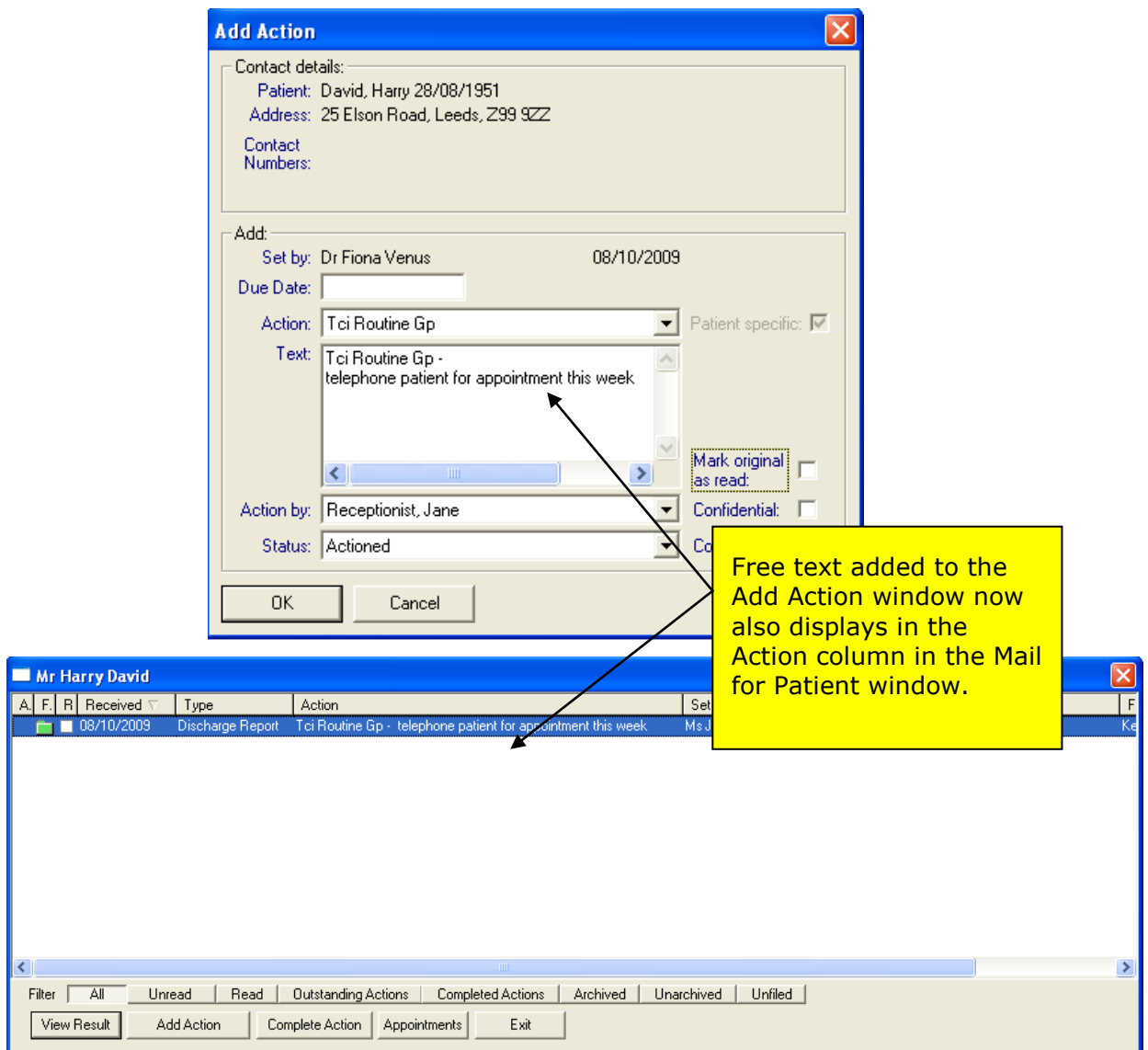
Header Tab

Consultation Manager – View Mail for Patient Enhancements

This section details the Mail Manager enhancements that affect the **View Mail For Patient**  screen in Consultation Manager.

Action Free Text

From DLM 310, any free text added to the message Action now automatically displays alongside the Action in the View Mail for Patient screen:

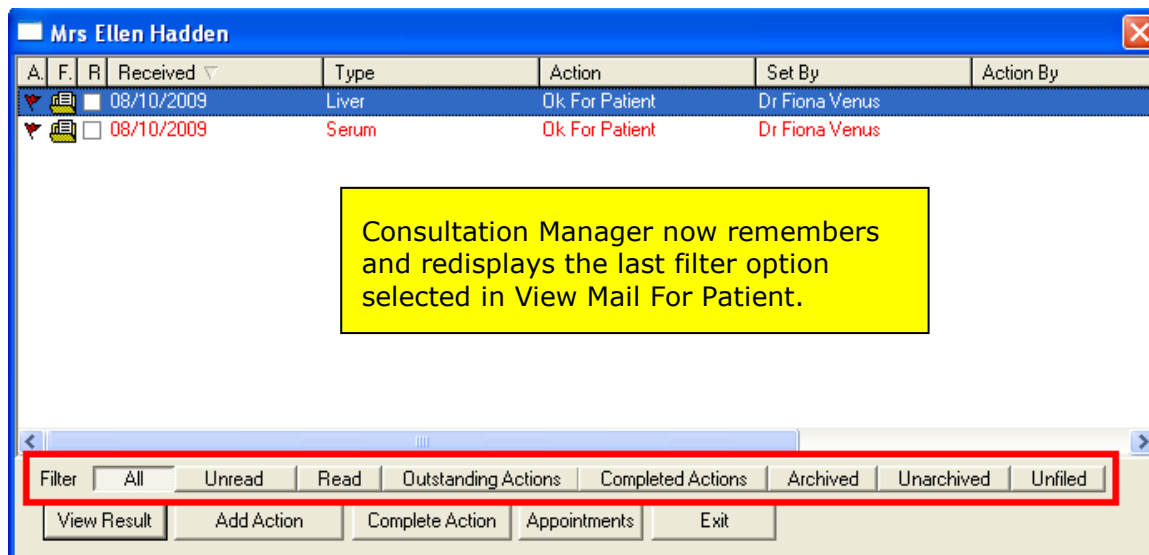


Add action

Note – If there is more than one action allocated to a message, the initial action, along with accompanying text is displayed in the action column for View Mail for Patient. You can access the details of additional actions from the Outstanding Actions tab.

Default Filter Option Retained

Consultation Manager now remembers and redisplay the **last filter option** that you selected in View Mail for Patient. This is on a per user basis.

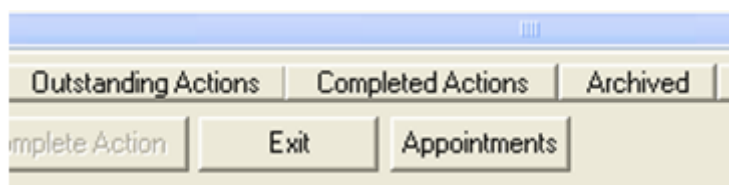


Filter Selection Retained

Link to Future Appointments – View Mail for Patient

There is now an **Appointments** button in View Mail For Patient which allows you to view booked future appointments for the selected patient.

From the **View Mail For Patient** screen , click on the **Appointments** Icon.



Appointments icon in Mail For Patient

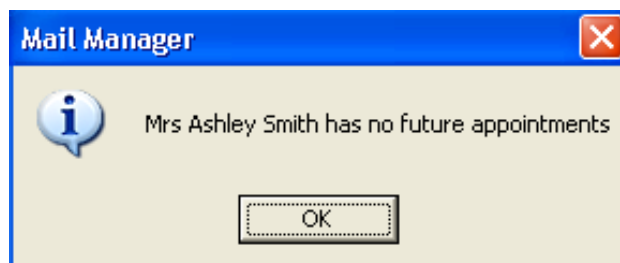
1. If the patient has future appointments booked, the Future Appointments window is displayed listing the date time, book owner and appointment comments.

Future appointments for Mr Andrew Smith			
Date	Time	Owner	Comment
06/08/2009	10:40	MICHAEL NEPTUNE	
04/09/2009	15:40	MICHAEL NEPTUNE	

Close

Future Appointments

- If there are no booked future appointments for the patient, you are prompted with the following message *The patient has no future appointments:*



No future appointments message

See also "View Future Appointments from Mail Manager" on page 11.