



Quick Reference to Mail Manager for Administrative Staff

INPS

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Quick Reference to Mail Manager for Admin Staff

What this Quick Reference Guide Covers

The **Quick Reference Guide to Mail Manager for Administrative Staff** is aimed to assist Admin staff who are using Mail Manager, in particular to receive and manage pathology results in XML format. It deals with tasks such as allocating messages to staff, assigning unmatched results, completing actions, etc.

Other Mail Manager User Guides include:

- **Quick Reference to Mail Manager for Clinical Staff;**
- **Quick Reference to Mail Manager Setup** (for System Managers)
- **Chapter 5** (version 7, 04/12/07) of the **Vision 3 Training Guide**, which can be downloaded from the INPS website www.inps.co.uk from Training.
- **On-screen help** within the Mail Manager module.

All the Quick Reference Guides are provided by INPS Training and included on the Training CD for Mail Manager and GP2GP.

Note that other XML messages can also be received in Mail Manager such as Out of Hours reports, ETP and PDS Updates etc. and also GP2GP messages. GP2GP messages are mostly automatic, though GP2GP Record Transfers need to be filed when received. This is covered in the GP2GP User Guide which can be downloaded from the INPS website under Client Zone - Downloads - CfH - GP2GP.

Overview of Mail Manager

How do I access Mail Manager?

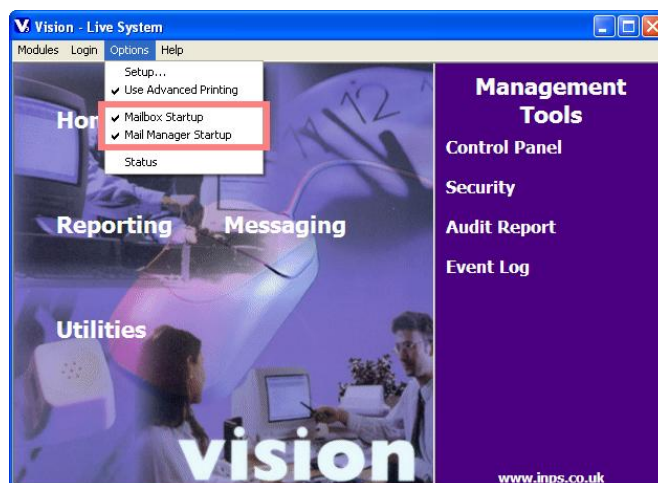
Mail Manager is accessed from the Messaging Menu on the front screen of Vision.



Startup option

There is also a **Mail Manager Startup** option which can be enabled from the Vision front menu under **Options**. Ticking this will automatically launch Mail Manager every time you log into Vision. You will see your mailbox and other mailboxes to which you have access rights.



As there will be a transitional period between switching from Mail Administrator / Mailbox to Mail Manager, it is advisable that, once you have switched Mail Manager on, you check that all the messages in your Mail Administrator/Mailbox have been dealt with. Once you are certain that you have dealt with such messages, you can disable the Mailbox start-up for Mail Administrator by selecting **Options - Mailbox Startup**.



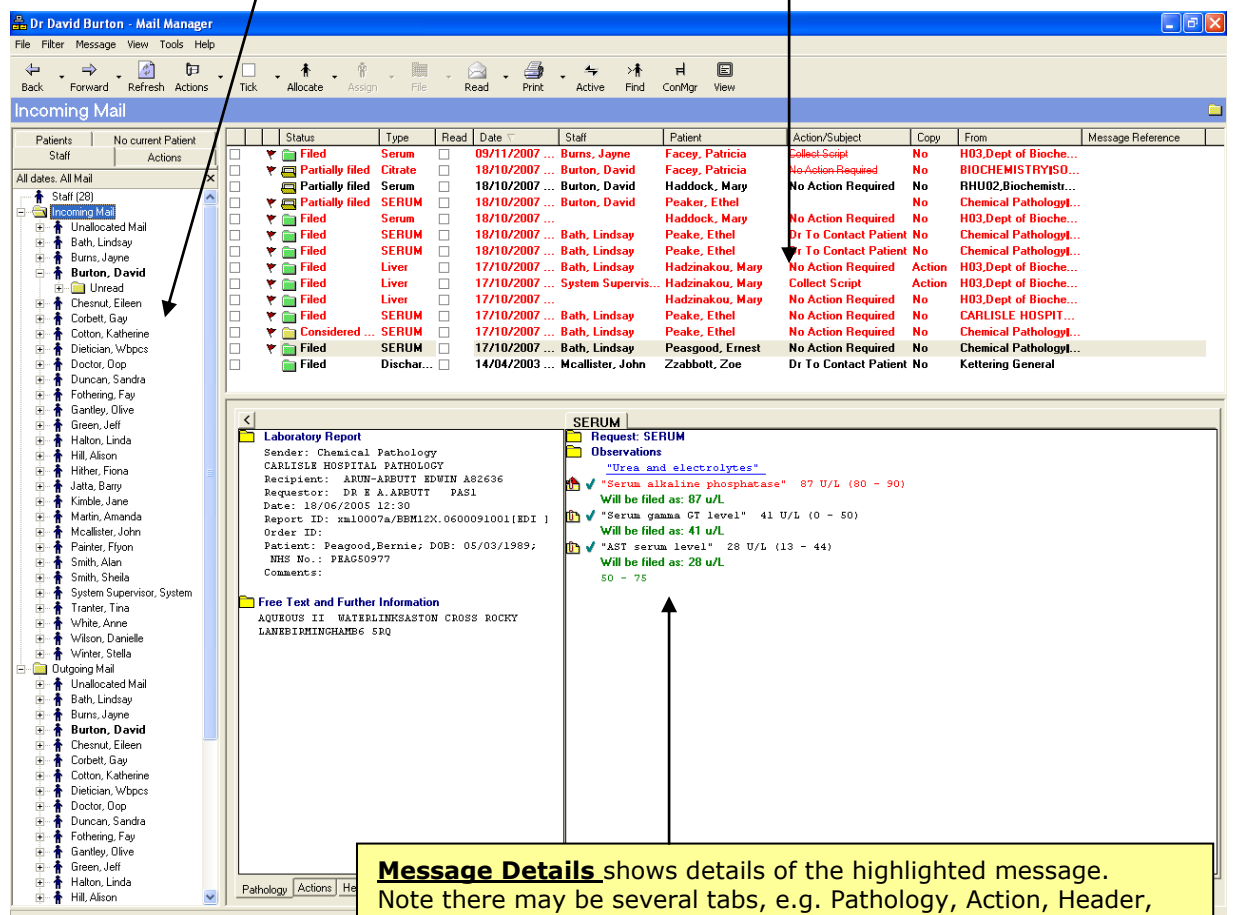
Switching on automatic Mailbox startup

The Mail Manager Interface

The Mail Manager interface contains three panes: Folder List, Message List and Message Details.

Folder list is divided into Incoming Mail and Outgoing Mail. The tree-view pane down the left-hand side can be expanded by clicking on  and collapsed by clicking on . Here you see your own mail, and any mail to which you have access rights. 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.

Message List across the top right contains a one-line summary of the currently selected message depending on what staff or patient is highlighted on the Folder List. The Read column is ticked if the message is Marked as Read. Right clicking on a message line gives several options. All columns are sortable by clicking on the column header.



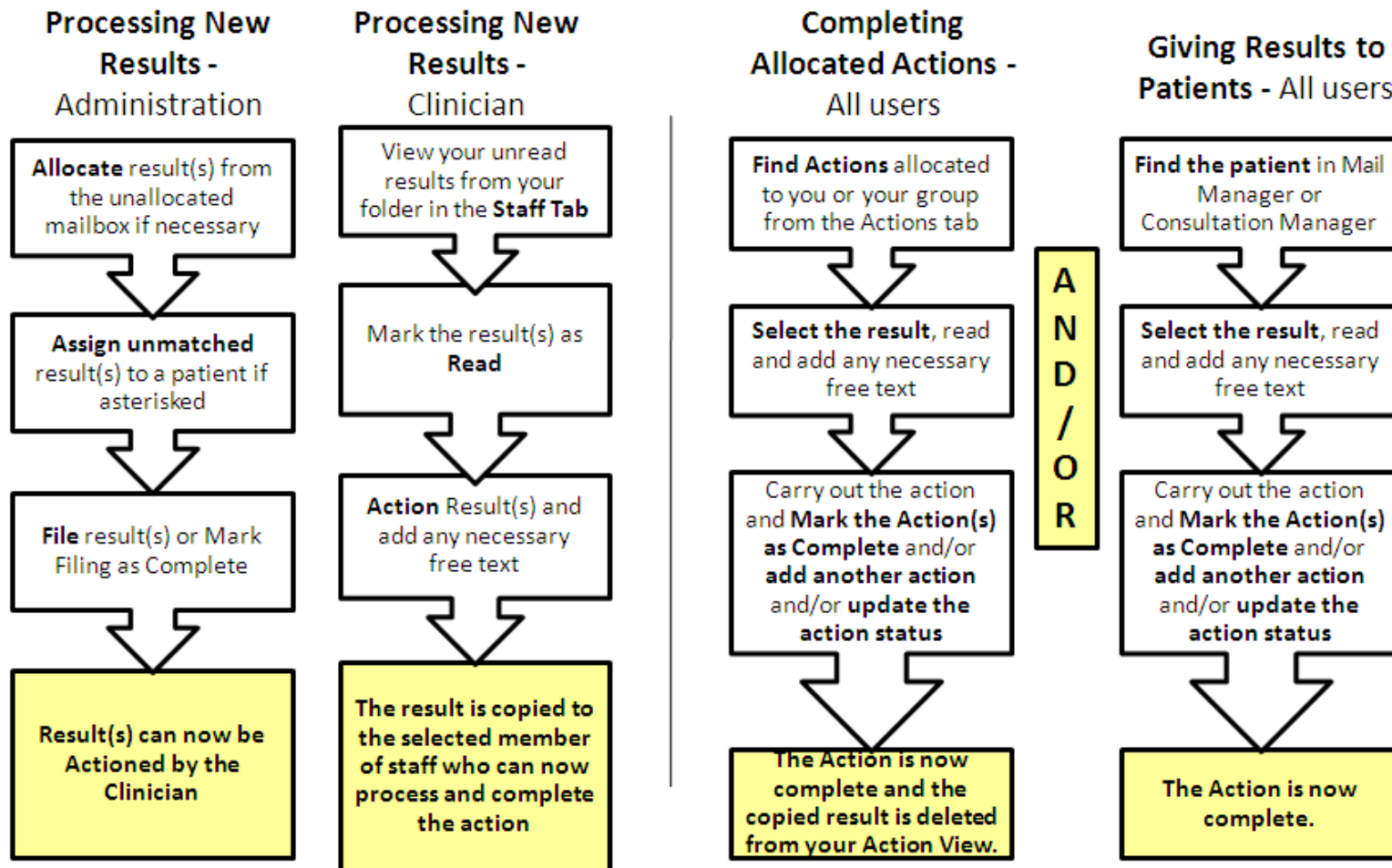
The screenshot shows the Mail Manager interface for Dr. David Burton. The interface is divided into three main panes:

- Folder List (Left):** A tree-view pane showing folders like 'Incoming Mail' and 'Outgoing Mail', and a list of staff members under 'Staff (28)'. 'Burton, David' is selected.
- Message List (Top Right):** A table of messages with columns for Status, Type, Read, Date, Staff, Patient, Action/Subject, Copy, From, and Message Reference. The selected message is from 'Burton, David' to 'Facey, Patricia'.
- Message Details (Bottom Right):** A pane showing details for the selected message, including a 'Laboratory Report' and 'Free Text and Further Information'. The report shows serum results for 'Urea and electrolytes'.

Status	Type	Read	Date	Staff	Patient	Action/Subject	Copy	From	Message Reference
<input checked="" type="checkbox"/>	Filed	<input type="checkbox"/>	09/11/2007 ...	Burns, Jayne	Facey, Patricia	Collect-Script	No	H03.Dept of Bioche...	
<input checked="" type="checkbox"/>	Partially filed	<input type="checkbox"/>	18/10/2007 ...	Burton, David	Facey, Patricia	No Action Required	No	BIOCHEMISTRY(SO...	
<input checked="" type="checkbox"/>	Partially filed	<input type="checkbox"/>	18/10/2007 ...	Burton, David	Haddock, Mary	No Action Required	No	RHU02.Biochemistr...	
<input checked="" type="checkbox"/>	Partially filed	<input type="checkbox"/>	18/10/2007 ...	Burton, David	Peaker, Ethel	No Action Required	No	Chemical Pathology...	
<input checked="" type="checkbox"/>	Filed	<input type="checkbox"/>	18/10/2007 ...	Burton, David	Haddock, Mary	No Action Required	No	H03.Dept of Bioche...	
<input checked="" type="checkbox"/>	Filed	<input type="checkbox"/>	18/10/2007 ...	Bath, Lindsay	Peake, Ethel	Dr To Contact Patient	No	Chemical Pathology...	
<input checked="" type="checkbox"/>	Filed	<input type="checkbox"/>	18/10/2007 ...	Bath, Lindsay	Peake, Ethel	Dr To Contact Patient	No	Chemical Pathology...	
<input checked="" type="checkbox"/>	Filed	<input type="checkbox"/>	17/10/2007 ...	Bath, Lindsay	Hadzinakou, Mary	No Action Required	Action	H03.Dept of Bioche...	
<input checked="" type="checkbox"/>	Filed	<input type="checkbox"/>	17/10/2007 ...	System Supervis...	Hadzinakou, Mary	Collect Script	Action	H03.Dept of Bioche...	
<input checked="" type="checkbox"/>	Filed	<input type="checkbox"/>	17/10/2007 ...	Bath, Lindsay	Hadzinakou, Mary	No Action Required	No	H03.Dept of Bioche...	
<input checked="" type="checkbox"/>	Filed	<input type="checkbox"/>	17/10/2007 ...	Bath, Lindsay	Peake, Ethel	No Action Required	No	CARLISLE HOSPIT...	
<input checked="" type="checkbox"/>	Considered ...	<input type="checkbox"/>	17/10/2007 ...	Bath, Lindsay	Peake, Ethel	No Action Required	No	Chemical Pathology...	
<input checked="" type="checkbox"/>	Filed	<input type="checkbox"/>	17/10/2007 ...	Bath, Lindsay	Peasegood, Ernest	No Action Required	No	Chemical Pathology...	
<input checked="" type="checkbox"/>	Filed	<input type="checkbox"/>	14/04/2003 ...	Mcallister, John	Zzabbott, Zoe	Dr To Contact Patient	No	Kettering General	

Message Details shows details of the highlighted message. Note there may be several tabs, e.g. Pathology, Action, Header, Audit. Pathology results have a divided pane, with the result details showing on the right. Abnormal results are shown in red. Filed items have a green tick. Right clicking gives several options.

Mail Manager Workflow



Viewing messages

Staff tab

Messages are normally viewed and processed from the **Staff Tab** in Mail Manager. By selecting the **Incoming Mail** folder, you can see all the messages to which you have rights, including those allocated to you. This could potentially display everybody's incoming messages but you will only see the messages of other users if you have access rights to view their mail.

Alternatively, to view only messages allocated to you, select your Mailbox from the Incoming Mail folder. By clicking on you are able to look at just the Read or Unread messages or select your name to look at both.

We advise that at least one or two staff have access rights to Unallocated Mail

Lines in **bold** are unread. **Red** lines are results where one or more are abnormal

1st column from left - whether ticked for selection

2nd column from left - **user alerts** set by a user in your practice; 3rd column from left - **system alerts** set by sender

Filing status - 4th column from left - shows whether filed , or partially filed , or unfiled , or autofiling failed . **Partially filed but considered complete** (ie it is not intended to file the outstanding items so this message should be treated as filed)

Staff list including Hill, Alison

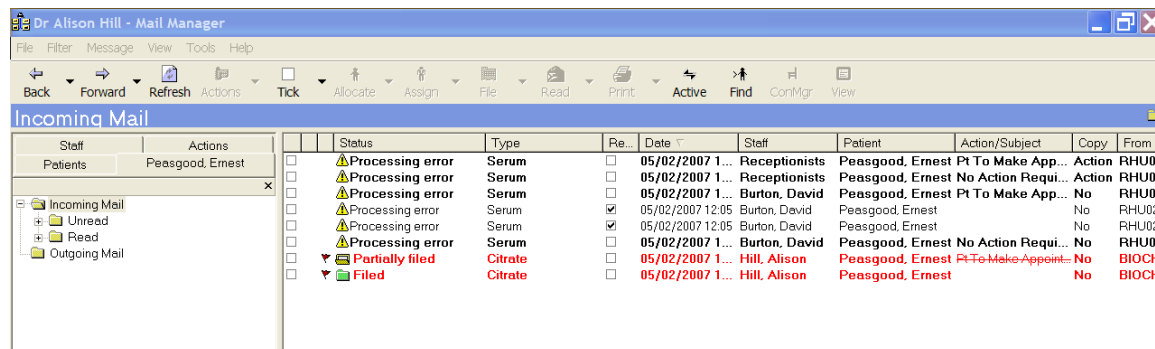
Status	Type	Re...	Date	Staff	Patient	Action/Subject	Copy	From
<input checked="" type="checkbox"/>	Available for filing	SERUM	05/02/2007 12:04	Hill, Alison	Karyne, Joseph			
<input checked="" type="checkbox"/>	Filed	SERUM	05/02/2007 11:55	Hill, Alison				
<input checked="" type="checkbox"/>	Partially filed	URINE	05/02/2007 11:55	Hill, Alison				
<input checked="" type="checkbox"/>	Available for filing	FLUORIDE•EDTA	05/02/2007 11:55	Hill, Alison				
<input checked="" type="checkbox"/>	Filed	SERUM	05/02/2007 11:55	Hill, Alison				
<input checked="" type="checkbox"/>	Available for filing	SERUM	05/02/2007 11:55	Hill, Alison				
<input checked="" type="checkbox"/>	Filed	Discharge Summary	14/04/2003 14:13	Hill, Alison				

Read column - ticked if mail has been read. If unread, there is no tick and the line remains bold. Either Mark as Read automatically by lingering, or right click and Mark as Read.

Show Patient Mail

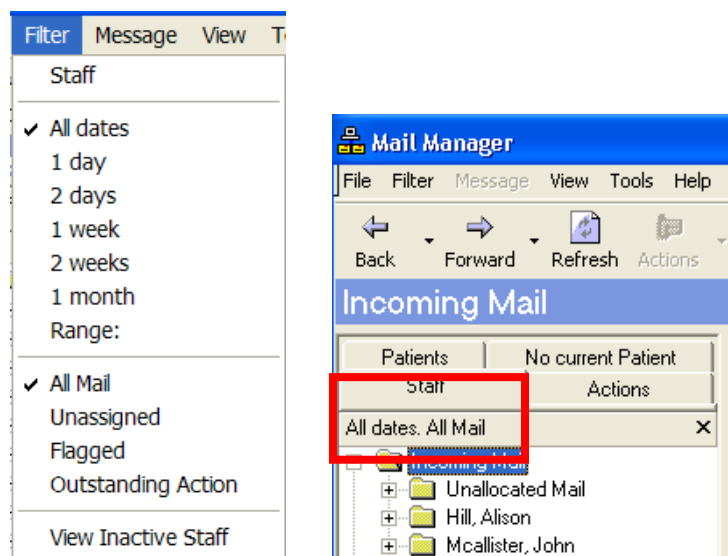
To list messages for individual patient, right click while pointing to a selected message in the Message List view, and select **View Messages for Patient**. This switches from the Staff tab to the tab previously titled No Current Patient, but now temporarily headed with the patient's name, and the individual patient's messages are listed, depending on the filter.

You can also use the **Find** icon to select an individual patient's messages.





View Filters

Whilst on 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. By default All Dates and All Mail is shown.



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

Active/All

By selecting the Active  or All  icons, you can also filter between just active messages (i.e. those not yet completed), or both active and inactive messages which will also display messages that have been completed and marked as read.

Processing messages

There are various ways of processing results within Mail Manager, you can:

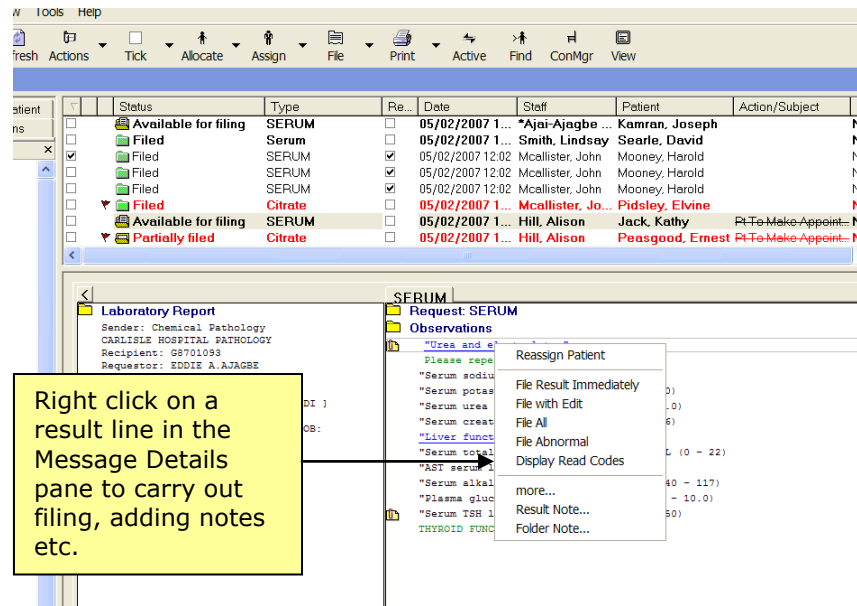
- Use the right click context-sensitive menu options.
- Use the menus or icons from the menu and toolbar at the top of the screen.
- Double click on a result which takes you through *all* the functions in turn.

The screenshot shows the 'Dr Alison Hill - Mail Manager' application window. The interface includes a menu bar (File, Filter, Message, View, Tools, Help) and a toolbar with icons for Back, Forward, Refresh, Actions, Tick, Allocate, Assign, File, Print, Active, Find, ConMgr, and View. Below the toolbar is a header for 'Hill, Alison' and a list of messages. A context menu is open over one of the messages, displaying options such as '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', 'Print...', 'Archiving', and 'Consultation Manager'. A yellow callout box with a black border points to the context menu, containing the text: 'Right click on a message to carry out functions from the right click menu, on that highlighted message only'. The message list shows columns for Status, Type, Re., Date, Staff, and Patient. The selected message is 'Available for filing' with Type 'SERUM' and Date '05/02/2007 1...'. The patient details for 'Hadd' are visible at the bottom of the window.

Status	Type	Re..	Date	Staff	Pati
Available for filing	SERUM		05/02/2007 1...	Hill, Alison	Jack
Partially filed	Citrate		05/02/2007 1...	Hill, Alison	Pea
Filed	Citrate		05/02/2007 1...	Hill, Alison	Pea
Available for filing	SERUM		05/02/2007 1...	Hill, Alison	Hill
Available for filing	SERUM		05/02/2007 1...	Hill, Alison	Facr
Available for filing	SERUM		05/02/2007 1...	Hill, Alison	Eam
Available for filing	SERUM		05/02/2007 1...	Hill, Alison	Dad
Available for filing	SERUM		05/02/2007 1...	Hill, Alison	Cain
Available for filing	SERUM		05/02/2007 1...	Hill, Alison	BacI
Available for filing	SERUM		05/02/2007 1...	Hill, Alison	Rac
Available for filing	SERUM		05/02/2007 1...	Hill, Alison	Edd
Filed	SERUM		14/04/2003 14:13	Hill, Alison	Zzeb

Right click on a message to carry out functions from the right click menu, on that highlighted message only

laboratory Request: Ser.TSH
Serum free T4 level" 10.0 pmol/L
"Full blood count - FBC"
"Haemoglobin estimation" 13.0 g/dL
Free-text (comment) #1a
Free-text (comment) #1b
"Total white cell count" 6.0 10⁹/L
"Platelet count" 600 10⁹/L (140 -
"Monocyte count"
Free-text (result) #2
"Red blood cell (RBC) count"
"Mean corpuscular volume (MCV)"
Free-text (result) #3
"Mean corpusc. haemoglobin (MCH)" 28



Processing results in five steps

The following five steps show how each result should be initially processed. See page 10 for details of how to bulk process messages and page 32 for Managing Actioned Messages.

Note Points 1-3 are normally carried out by administrative staff and Points 4 and 5 are normally dealt with by clinicians.

1. Allocate the result to a user if necessary

Unallocated mail is listed under the Unallocated Mail folder in the left-hand Folder List. The result is unallocated because it has not been allocated to a GP or nurse in your practice. Right click on the result, select **Allocate** and select the correct GP or nurse.

2. Assign the result to a patient if asterisked

Unassigned results do not match to a patient in your practice list. They have an asterisk by their name, for example: *Jones, Pat Right click on result, select **Assign** and select the correct patient.

3. File or mark as filing complete

- Either completely file the result - right click on result and select **File All**.
- Or partially file the message, if pathology, (for example, right click on message, and select **File Abnormal**) AND then mark the result as **Consider Filing Complete**. Note the other ways to partially file a pathology result are to right click on a result line in Message Details pane on the Pathology tab, and select either **File Result Immediately**, or **File with Edit** (the latter lets you make amendments on an Update screen).

- Or if no filing is required, mark the result as **Consider Filing Complete**.

4. Mark the result as read.

A clinician should carry this out. Right click on result, select **Mark as Read**. Note that for multi-tabbed specimens, you must view EACH tab.

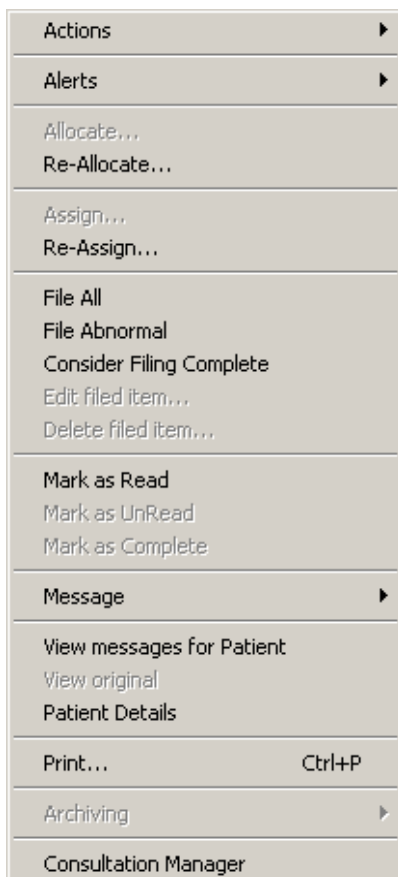
5. Then action if required:

- Either add one or more actions
- Or if no action is required, use the **Mark as Complete** option. For audit purposes, we recommend that you always add an action even if you immediately complete it.

Right click message options

Using the right mouse menu options on a message line is often the quickest way to access the message processing functions for individual messages.

Note that the right click options will only apply to the currently highlighted message. To apply a function to more than one message, see Processing Multiple Messages on page 14.



Action

Actions – Select one of the frequent actions from the list or select Actions again to pick from a list of both frequent and Additional Actions.

Alerts

Add or Remove User Alert to flag the result.

Allocate

Allocate - 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

Re-Allocate - You can re-allocate a message from your own in-tray to another staff member.

Assign

Assign - Right click and assign to a patient using the normal Select Patient routine (see page 16).

Re-Assign - Re-assign a message already assigned to a patient, to another patient. If there are patient specific actions allocated to the current patient you will be warned.

Filing

File All (see page 25) -File all the result lines in a message manually. If a multi-specimen message with more than one tab, it will file all the results on all the tabs.


Mark

Mark as Read - Mark a message as having been read by the recipient, usually a clinician

Mark as UnRead – Mark a read item as unread.



Mark as Complete – Mark a message as complete if you are not adding any action (although we recommend that all results are actioned).



Message

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.

Copy Message - copy message to another user

Delete Copy – Delete a copy of a message.

File Abnormal - Only files those pathology messages with results highlighted in red as being abnormal. These abnormal result lines have either a red triangle  or  (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 /Delete Filed Item - currently disabled.

Delete Message - Delete the selected message

View

View Messages for Patient - List all the messages for that patient on the Individual patient tab.

View original – For a copy of a message, view the original message.

Patient Details - View contact number and address of patient

Print

Print – Print a message.

Consultation Manager

Consultation Manager – Provides a link into Consultation Manager to the currently selected patient's record (see page 19)

Note If you have marked messages for bulk processing using the tick boxes, use the **File – Ticked** option or the relevant icons on the toolbar. The functions on the right click menu on a message in the Message List will work only for the highlighted message.

Message Status

A Pathology result is always in one of three basic states:

- **Active** - the result has not been filed and actioned.
- **Complete** (or Inactive) - the result has been filed and actioned.
- **Archived** - the result has been archived, either manually or via the bulk archiving function.

Toolbar icons and their functions

Refresh allows you to refresh the screen manually. The automatic refresh can be set from the **Message** tab in **Tools – Options**.

Allocate – allows you to allocate messages that have not been addressed to a Clinician.

File – allows you to file individual or multi-selected messages into the patients' record.

Read – allows you to mark individual or multi-selected messages as Read.

Active – when active on the toolbar, it indicates that you are only viewing active messages. When toggled, this changes to **All** to show both active and inactive messages that have been completed and read.

View – Toggles between the details pane and the full Mail Manager screen allowing the message to be viewed as a full page. NB **Ctrl+W** can also be used.



Back/Forward

Lets you track back and forward through the messages you have already viewed.

Tick toggles between Tick All or Untick All for multi-selection of messages.

Assign – allows you to assign or reassign individual or multi-selected messages to patients.

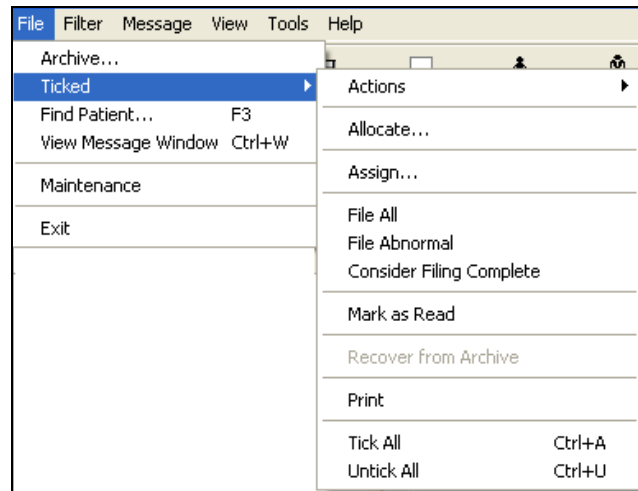
Print – allows you to print individual or multi-selected messages.

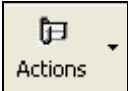
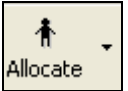

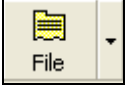

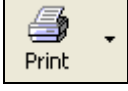
Find – allows you to find a patient's messages.

ConMgr – opens the currently selected patient's record in Consultation Manager.


Processing Multiple Messages

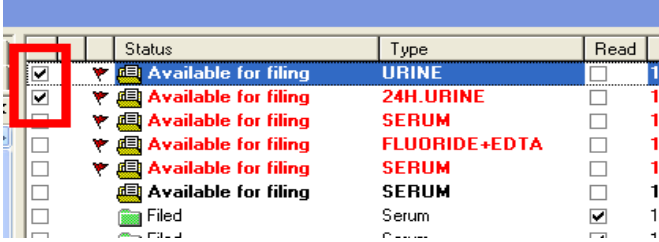
Within Mail Manager you are able to apply the following processes to multiple messages at the same time. This is done from **File – Ticked** or by selecting **Ticked** from the relevant icon on the toolbar.



-  Action
-  Allocate
-  Assign
-  File All /File Abnormal/Consider filing complete
-  Mark as read
-  Print
- Recover from Archive (from Archive View)

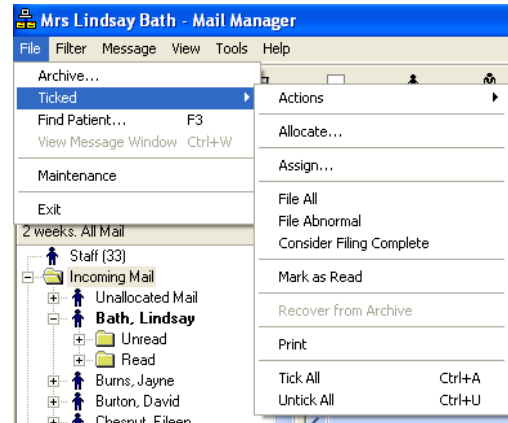
Note You should use the bulk action facility with caution and restrict it to messages that have been read. Adding a bulk action does NOT itself mark a message as read. There is a clinical risk of actioning items that have not been viewed, let alone, read.

1. Select the required messages by ticking the select boxes next to them or using the Tick icon 

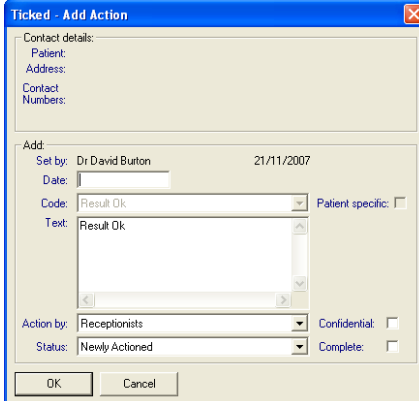


	Status	Type	Read
<input checked="" type="checkbox"/>	Available for filing	URINE	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Available for filing	24H.URINE	<input type="checkbox"/>
<input type="checkbox"/>	Available for filing	SERUM	<input type="checkbox"/>
<input type="checkbox"/>	Available for filing	FLUORIDE+EDTA	<input type="checkbox"/>
<input type="checkbox"/>	Available for filing	SERUM	<input type="checkbox"/>
<input type="checkbox"/>	Filed	Serum	<input checked="" type="checkbox"/>

2. Click on **File – Ticked** and select the required function you would like to perform on the selected results.



3. In this example we have chosen to Action the two ticked messages, so you will be taken to the Action screen to select the Action and the person who should carry out the action.



Ticked - Add Action

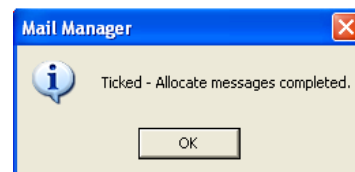
Contact details:
 Patient:
 Address:
 Contact Numbers:

Add:
 Set by: Dr David Burton 21/11/2007
 Date:
 Code: Result Ok Patient specific:
 Text: Result Ok

Action by: Receptionists Confidential:
 Status: Newly Actioned Complete:

OK Cancel

4. Once the required process has been performed on the ticked messages, you will be prompted with a confirmation that the selected bulk action process has been completed.



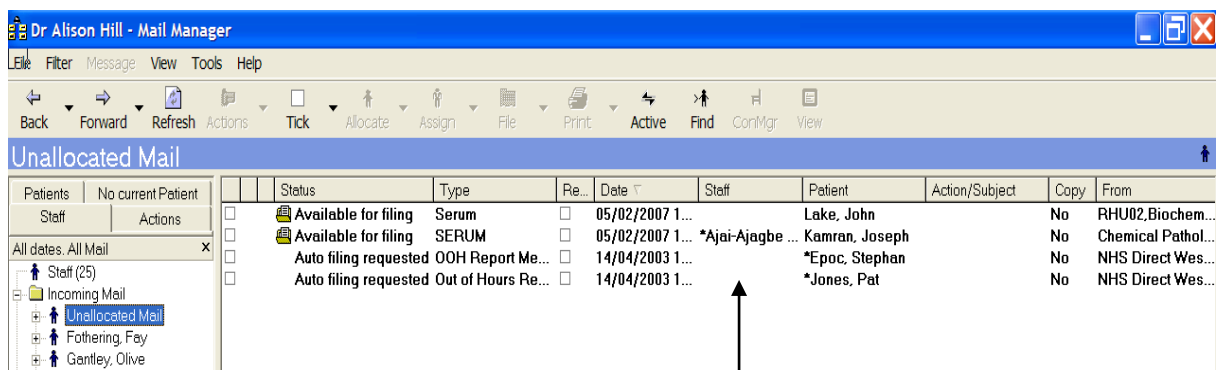
5. On clicking OK, the ticked messages will then be refreshed with the selected changes.

Note If you have marked messages for bulk processing using the tick boxes, use the **File – Ticked** option or the relevant icons on the toolbar. The functions on the right click menu will work **only** for the *highlighted* message.

Unallocated Mail

What is Unallocated Mail?

Unallocated Mail displays results which do not match to a staff member, either because their name has been misspelt or there is no valid staff recipient to receive the result. Mail Manager allocates mail to the patient's usual GP by default. If there is no matching usual GP, the message is deemed as unallocated and should be processed in the usual manner.

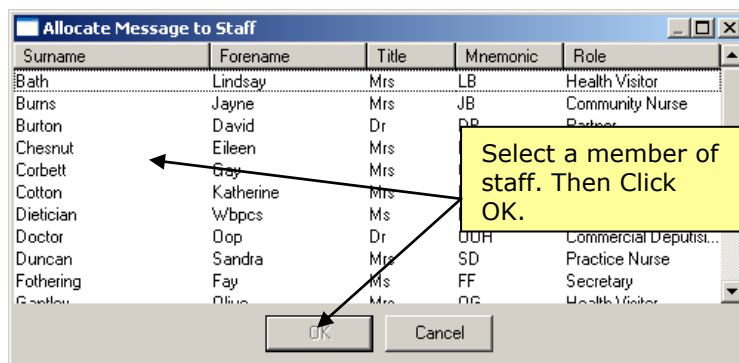


If there is a blank space in the Staff column or a misspelt GP or nurse's name with an asterisk *, the message is unallocated. Right click on the message line, select **Allocate**, and select the correct recipient.

Note Results do not need to be allocated to a particular user before they can be processed.

How do I allocate a message?

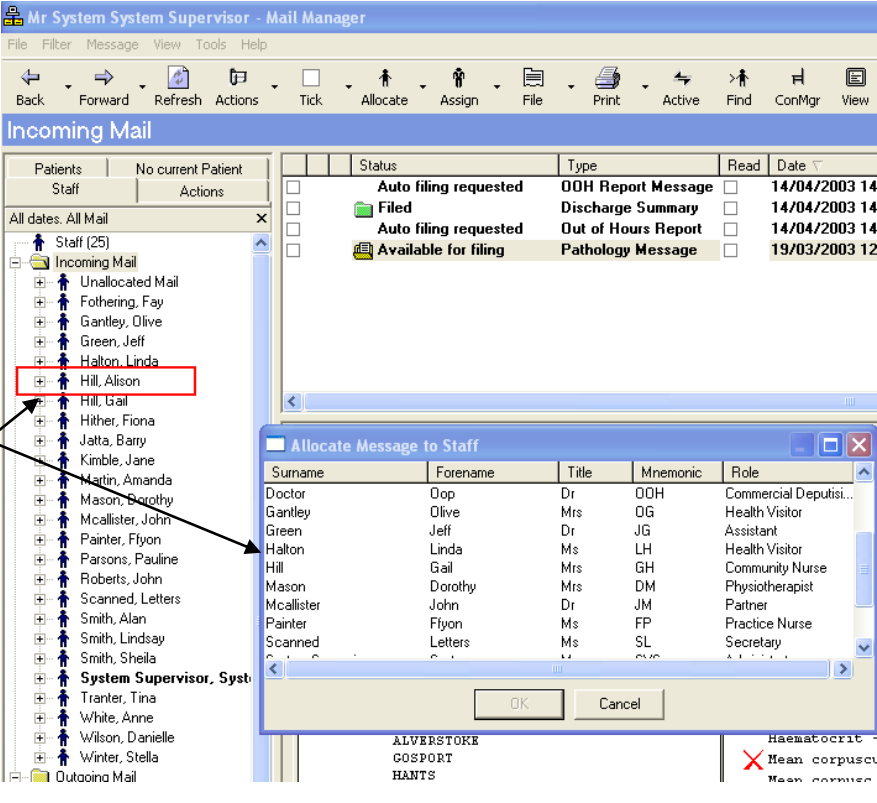
To allocate an unallocated message, right click on the unallocated message in the top right Result List and select **Allocate**. This displays the Allocate Message to Staff screen. Select a staff member and click OK.



Allocating Mail to Inactive Staff

If a member of staff does not have rights to Mail Manager (either because they have been inactivated as a Vision user or they have had their Security rights to Mail Manager removed), you are not able to allocate messages to their Mailbox as it will not be available for selection from the Allocate Message to Staff screen.

In this example, Allison Hill does not have any rights to Mail Manager. Although she has a Mailbox, you can see that she cannot be selected for message allocation from the Allocate Message to Staff screen.



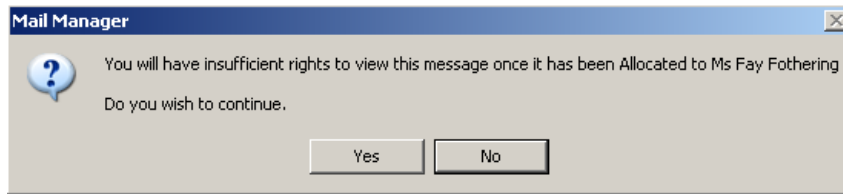
The screenshot shows the 'Mr System System Supervisor - Mail Manager' application. The 'Incoming Mail' pane lists several messages, including 'Auto filing requested', 'Filed', 'Discharge Summary', 'Out of Hours Report', and 'Pathology Message'. The 'Allocate Message to Staff' dialog box is open, displaying a list of staff members with columns for Surname, Forename, Title, Mnemonic, and Role. The list includes names like Doctor, Gantley, Green, Halton, Hill, Mason, Mcallister, Painter, Scanned, Smith, Tranter, White, Wilson, and Winter. Allison Hill is not listed in this dialog box, despite being present in the main staff list on the left.

Why can't I see any unallocated mail?

You probably don't have rights to view unallocated mail. Any staff member can be given rights to view and action Unallocated Mail. We strongly advise that at least one, if not two, staff members can access Unallocated results and deal with them on a daily basis.

Why can't I allocate unallocated mail?

It is only possible to allocate results to which you have rights. If you do not have rights to see this person's mail, you will be prompted with the following message:



Rights to view mail is set up in Control Panel - Mail Maintenance - Staff Access (see Quick Reference to Pathology Setup by System Managers).

I've allocated mail but can't see the result details

When you allocate a result to a selected staff member, if you have insufficient rights to view the staff member's mail, the result details will not be shown in the bottom pane. When the screen next refreshes, the result will disappear completely from your in-tray.

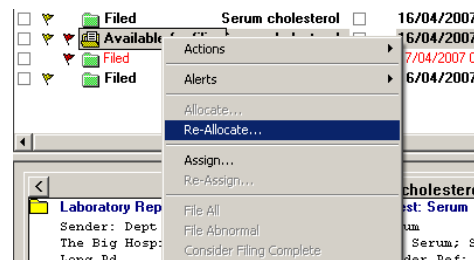
Can I allocate mail to a group, rather than an individual?

You cannot allocate an original pathology result to a group - it must be allocated to an individual. Only copies of results and actions are allocated to groups of staff.

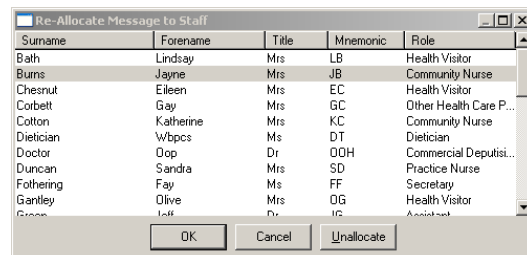
How do I Reallocate Mail?

Mail can be reallocated to another staff member at any time. Reallocation can only be performed by the current 'owner' of the mail item. A copied result cannot be reallocated. To reallocate:

1. Right click on the result and select **Reallocate**.



2. Choose the required individual, click OK.

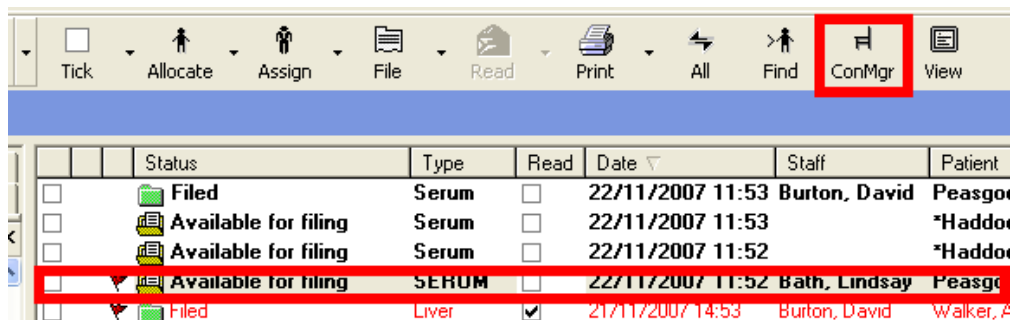


Once a result has been reallocated, it will disappear from the previous owners in-tray and appear in the new owners in-tray. Reallocation automatically resets the status of the result to 'unread'. All reallocations are audited.

How do I access the patient record from Mail Manager?

From any point within the context of an individual patient, it is possible to switch to Consultation Manager for review of the patient record, as long as you have the appropriate security rights.

1. In Mail Manager, select the message for the patient for whom you wish to open the patient record.
2. Select the **Consultation Manager** icon from the toolbar.

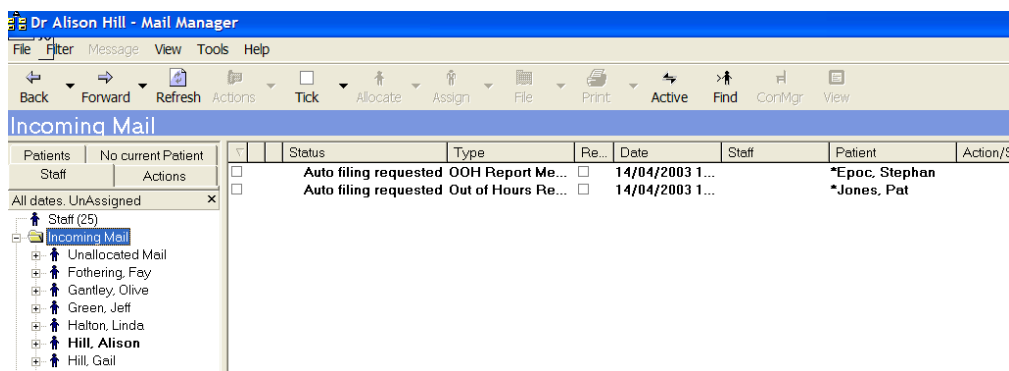


3. You are taken to the patient record in Consultation Manager. When you have finished with the selected patient record, close the consultation and click back to Mail Manager.

Unassigned Patients

What are unassigned patients?

Unassigned patients are the messages whose details have not matched to a patient in your system. This could be due to a spelling mistake by the lab, a change of name since the test was sent to the lab or because the patient is not on your system. The patient details criteria is based primarily on Surname and Forename, but will take into account Sex, Date of Birth and NHS No, where provided.



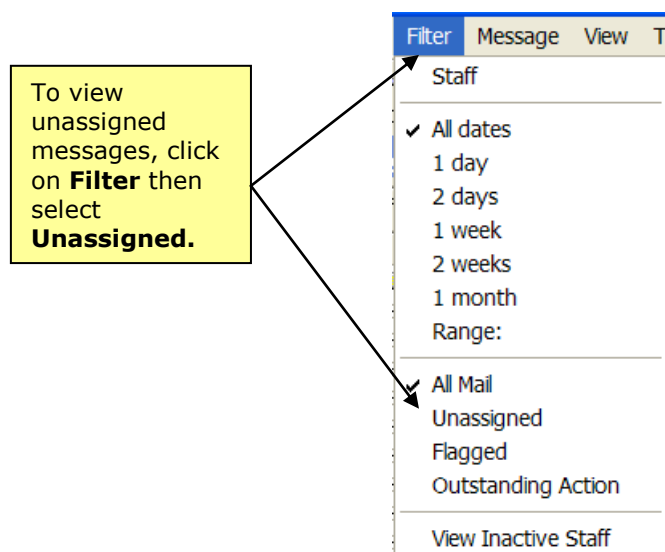
How do I find unassigned patients?

Either look down the patient column for patient names with an asterisk:

*Jones, Pat

Or Click on the **Patient** heading to sort the list to display unassigned patients first.

Or from the **Filter** menu, select **Unassigned** and a suitable date period such as All Dates.

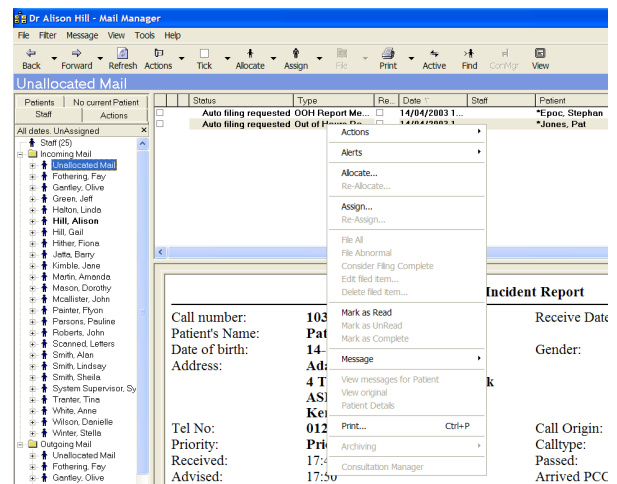


Why do I need to assign unassigned patients?

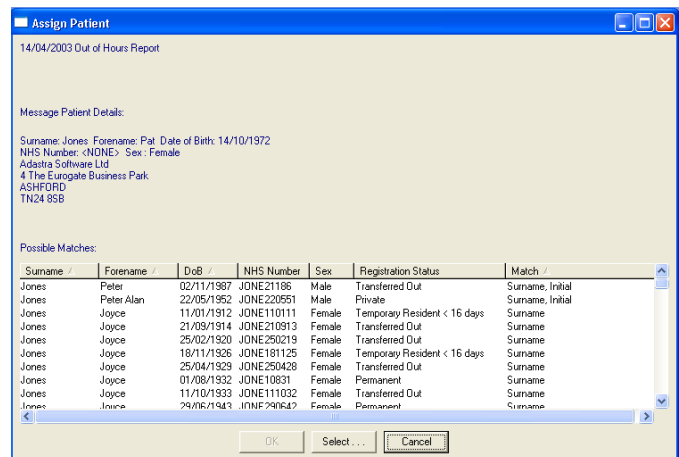
Messages about unassigned patients will not file into Consultation Manager. You need to match them up with the right patient on your database so the message will be filed in their patient record.

How do I assign a patient?

1. Right click on result. Select **Assign**.



2. The **Assign Patient** screen is displayed with a list of possible matches to the Vision patient register in the bottom pane.



You have two options:

Either a patient may be selected from the list of possible matches,

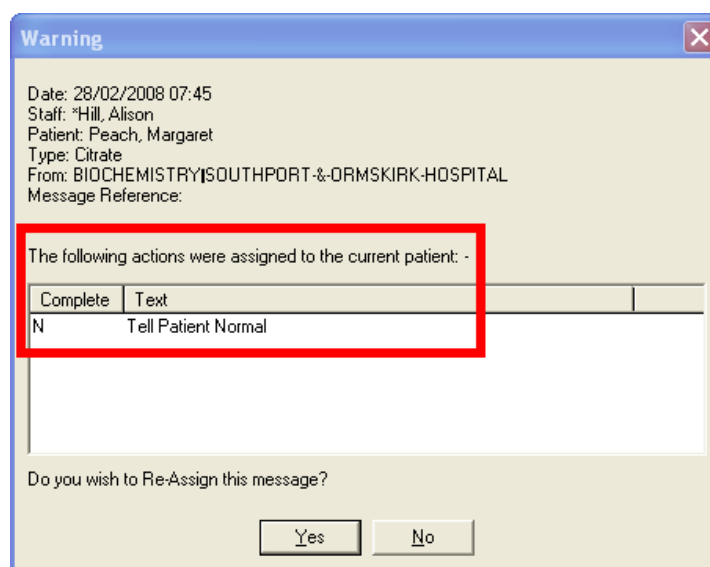
Or this list may be ignored and the normal Vision Patient Select dialog brought up by pressing **Select**.

1. Click OK once the required patient has been selected and the message will be assigned to that patient.

Reassigning a patient

If you the message has been assigned to the wrong patient by mistake, you can reassign the message to a different patient. You cannot reassign a result that has been already filed or partially filed:

1. Right click on the message, select re-assign
2. Choose the correct patient from the list or click on select to search the practice list.
3. When have found the required patient click OK.
4. If the message has patient specific actions relevant to the currently assigned, you will receive the following warning message: *The following actions were assigned to the current patient – Do you wish to reassign the message?*

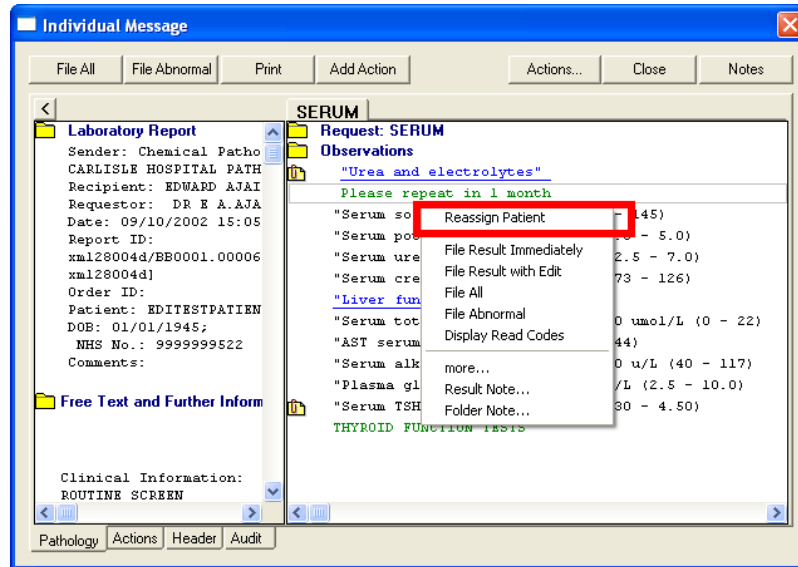


5. Select Yes to reassign to the selected patient or No to keep the message assigned to the original message.

Assigning/Reassigning Patients from View Mail for Patients

As long as you have not filed or partially filed results to a patient record, you are able to assign or reassign a message from the patient record in Consultation Manager.

1. With the patient selected in Consultation Manger select View Mail for Patient.
2. Select the required result from the list.
3. Right click in the result area and select Assign Patient or Reassign Patient from the menu.

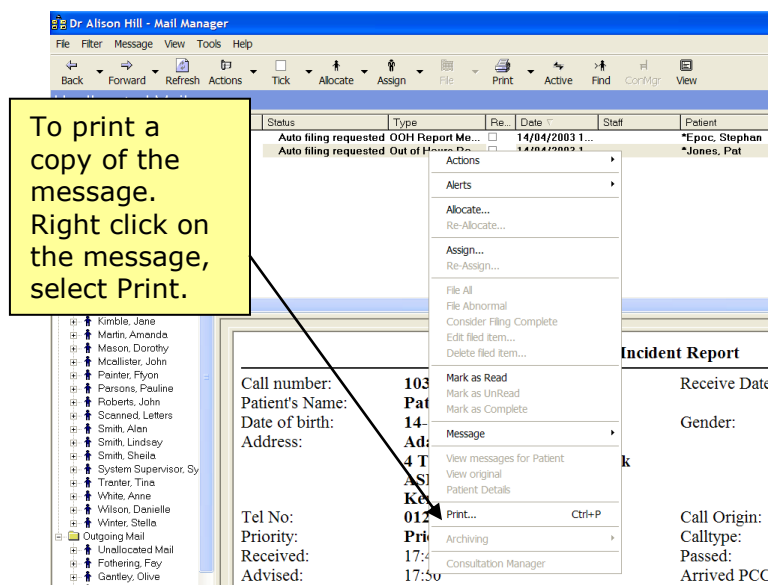


4. Choose the required patient from the list or choose select to search for the patient in the practice list.
5. Once you have found the correct patient, select OK to save. The message will now be removed from the current patient record and sent to the selected patient.

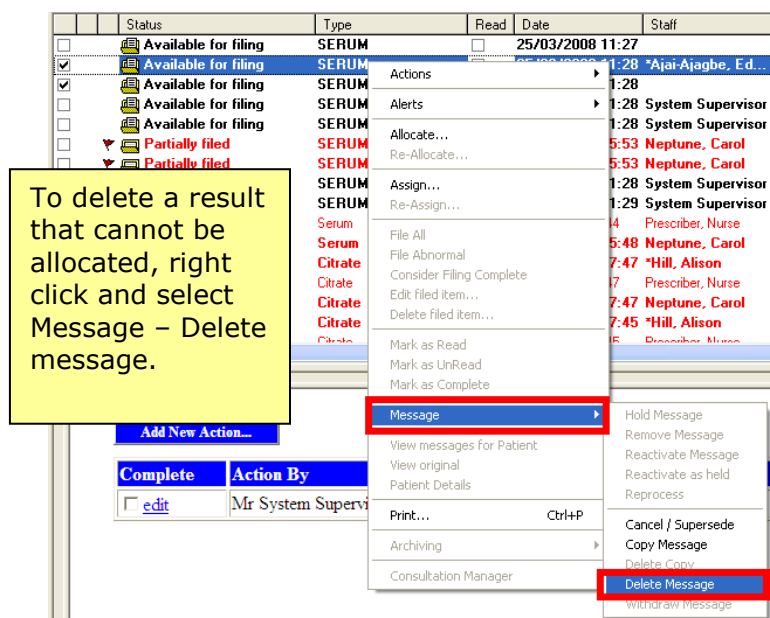
What should I do if a result cannot be assigned to a patient?

If you cannot assign a result to a patient (i.e. if the patient is not registered) then you can remove the result. **You should inform the sender of the message if the patient is not registered at your practice.**

1. Right click on the result and select the **Print** option. You can then inform the result sender with a printed copy that this is not your patient.



2. Right click on the result and select **Message – Delete Message**.



3. The message is now completely removed from Mail Manager.


Messages assigned to transferred out, expired temporary or immediately necessary patients

When a message has been assigned to a transferred out, expired temporary or immediately necessary patient, when selecting the message, you are warned with the following message: "Warning: this message is assigned to an inactive patient".



Filing


Filing Status




The fourth column from the left on the Message List View is the filing status. This is a checkbox that appears for incoming items only.









Most practice use **automatic filing** where the result is Read coded in to the Journal in Consultation Manager upon receipt. If successful, the filing status is **filed** . Even when filed, a message can be processed, i.e. have an action added, be marked as read, copied etc.

Result lines that have been filed are marked with a **green tick**:

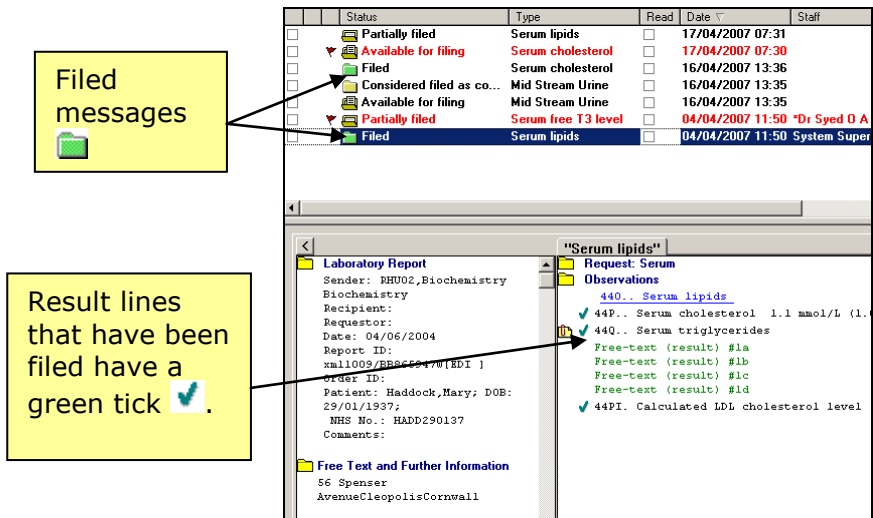
  "Serum cholesterol" 6.7 mmol/L (2.5 - 6.5)

If automatic filing is unsuccessful, the filing icon is  (check if the message is assigned and allocated). The results for unassigned patients will need to be manually filed after the result has been assigned to a patient.

Any **unfiled**  or **partially filed**  items are normally dealt with by administrative staff. Partially filed items can occur if only the abnormal result lines have been filed (File Abnormal) or individual result lines have been filed. To complete partially filed items, right click on the message and select Consider Filing Complete - this then adds the following filing icon  which indicates it was partially filed but considered complete (i.e. it is not intended to file the outstanding items so this message should be treated as filed).

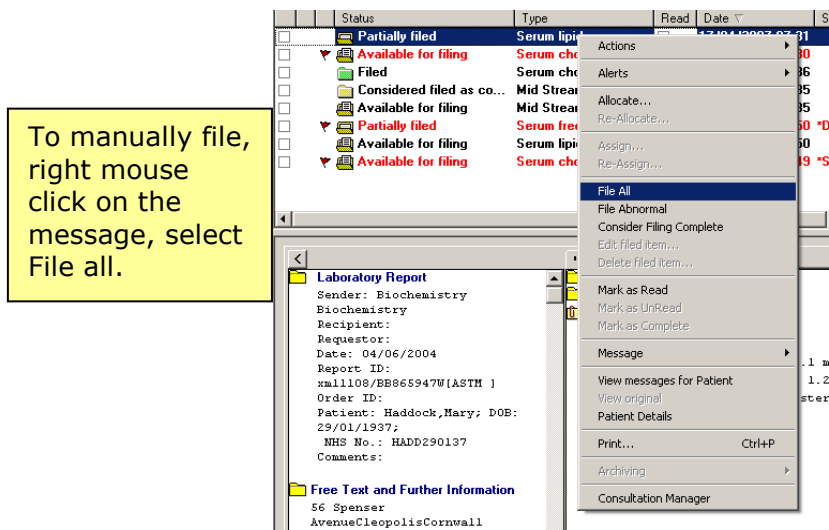
	Status	Type	Read	Date	Staff	Patient
<input type="checkbox"/>	 Partially filed	Serum lipids	<input type="checkbox"/>	17/04/2007 07:31		Haddock, Mary
<input type="checkbox"/>	 Available for filing	Serum cholesterol	<input type="checkbox"/>	17/04/2007 07:30		*Haddock, Mary
<input type="checkbox"/>	 Filed	Serum cholesterol	<input type="checkbox"/>			Haddock, Mary
<input type="checkbox"/>	 Considered filed as complete	Mid Stream Urine	<input type="checkbox"/>			Franklin, Natalie
<input type="checkbox"/>	 Available for filing	Mid Stream Urine	<input type="checkbox"/>			*Nuttall, Edith
<input type="checkbox"/>	 Partially filed	Serum free T3 level	<input type="checkbox"/>		Dr Syed O A	Soobhan, Cindy
<input type="checkbox"/>	 Available for filing	Serum lipids	<input type="checkbox"/>			*Haddock, Mary
<input type="checkbox"/>	 Available for filing	Serum cholesterol	<input type="checkbox"/>		Spenser, Edmund	*Haddock, Mary

Filing status and Icon for messages.



How do I file a result manually?

To file a result manually, right click on the result in the Message List and select **File All**. File All files all the result lines in the selected message into the patient's record in Consultation Manager.



File result lines manually

You can also right click within the result lines on the Message Details (bottom right pane) and select one of the following:


File Result Immediately files a result line directly into Consultation Manager.

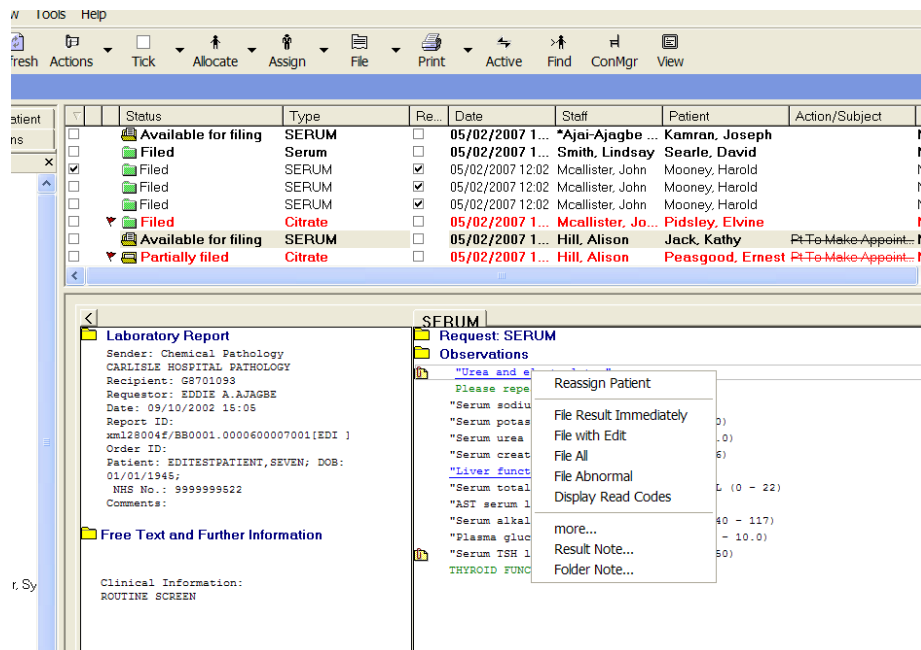
File with Edit files the result but stop at an update screen in case you want to add your own free text notes.

File All files everything in the message.


File Tab only files results on the currently displayed results tab.

File Abnormal files only those lines flagged as abnormal (in red).

If partially filed  (e.g., after using File Abnormal), then select **Consider Filing Complete** so that the message is completed  and eventually archived.

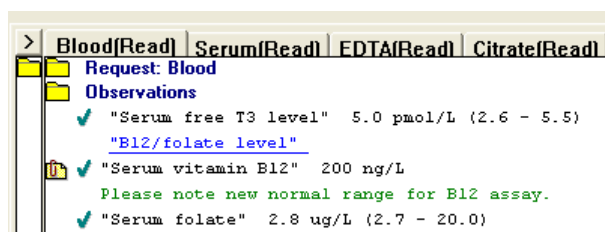


Result lines that have been filed are marked with a green tick:

 "Serum cholesterol" 6.7 mmol/L (2.5 - 6.5)

Filing Multi-specimen Messages

When you select File all or File Abnormal on a multi-specimen message, Vision will attempt to file all the results found on all the tabs (or all the abnormal ones) within the selected message i.e. you do not need to individually file the contents of each tab. To file the results on the currently selected tab only, select **File Tab**.



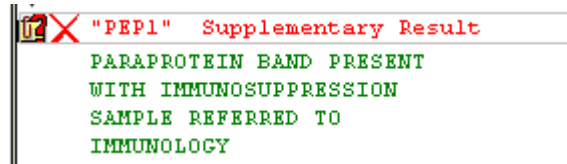
Consider Filing Complete

If a result hasn't been completely filed but you are happy the necessary information has been Read coded into the patient Journal, you can select **Consider Filing Complete** from the right click menu.

Why won't my message file?

A message or result line will not file:

- If the result line needs Read codes assigning (right click and select Assign Read codes).



```
"PEP1" Supplementary Result
PARAPROTEIN BAND PRESENT
WITH IMMUNOSUPPRESSION
SAMPLE REFERRED TO
IMMUNOLOGY
```

- If the result line needs valid Vision units (right click on the result line and select Assign Valid Units).
- If the message needs to be assigned to a patient (right click on message and select Assign - see page 21).
- If an action copy is marked as confidential, anyone viewing that action copy will not be able to see the right-hand side of the message details, i.e. the Request and Observations folders will be hidden. Such action copies cannot be filed.

Action Status

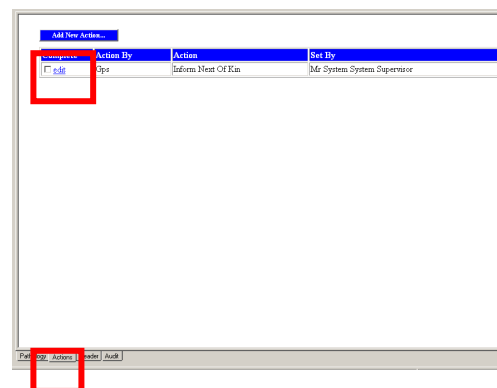
Once an action has been assigned to a message, it may go through a number of stages prior to the action being marked as complete, for instance if you need to contact the patient to tell them about a result and they were not home. At each stage, the responsible user may wish to update the selectable status of the message. This is done by adding an **Action Status** to a result.

Note You do not have to use the selectable action status functionality, an initial status, for example, Newly Actioned is added to all actions by default.

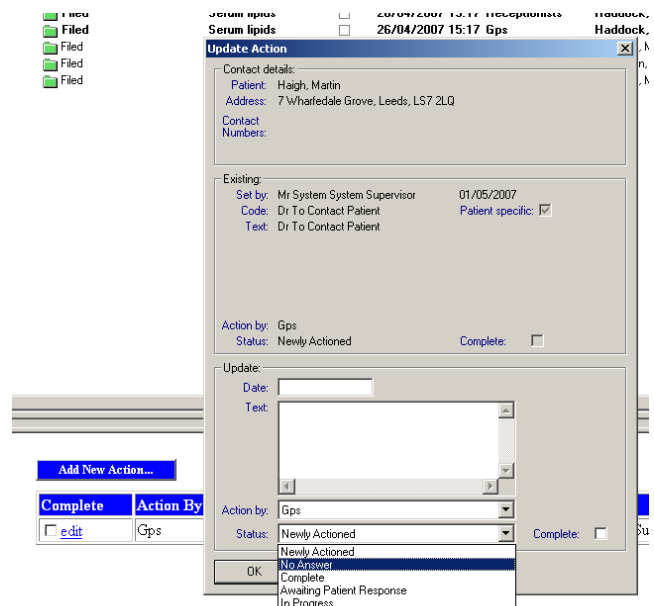
How do I record an action status?

Action status can be added either whilst you are actioning a message or at any other stage prior to completion in Mail Manager or in Mail for Patient in Consultation Manager. Depending on how they have been added to the system, some action status will complete the action. See Quick Reference to Mail Manager Setting Up.

1. To record an action status, click on the **Actions** tab. In the bottom pane of a selected message. Click on **edit** which displays the **Update Action** screen.



2. From the drop down list, select a relevant action status e.g. No answer, Awaiting Patient Response, In Progress. Click OK.

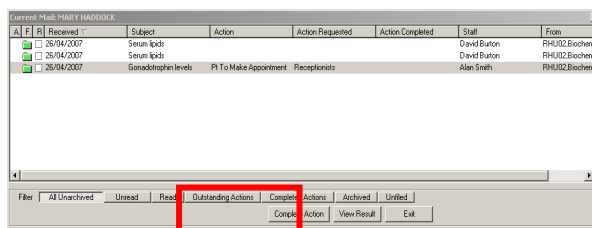


How do I add an action status to a result from Consultation Manager?

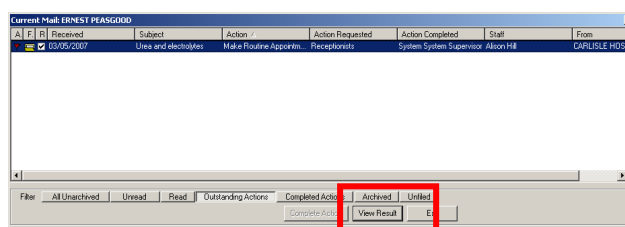
1. Click on **View Mail for Patient**  in **Consultation Manager**.



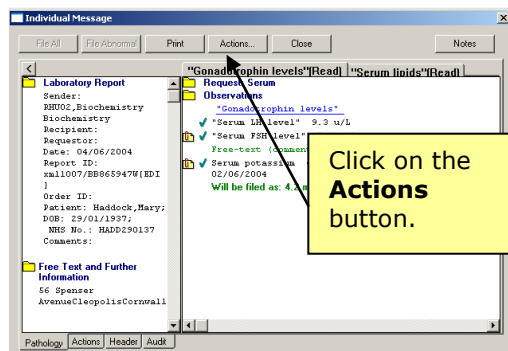
2. Click on the **Outstanding Actions** tab. All results with outstanding actions are displayed.



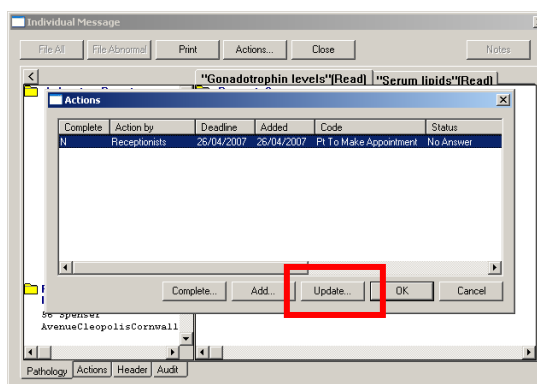
3. Click on the appropriate result, then click on the **View Result** button.



4. Click on the **Actions** button and select relevant message to update.



5. Click on **Update**.



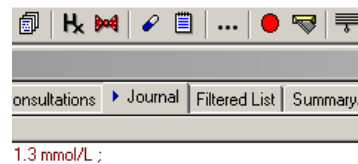
6. Select **Action Status** from the drop down list.

7. Click OK to save.

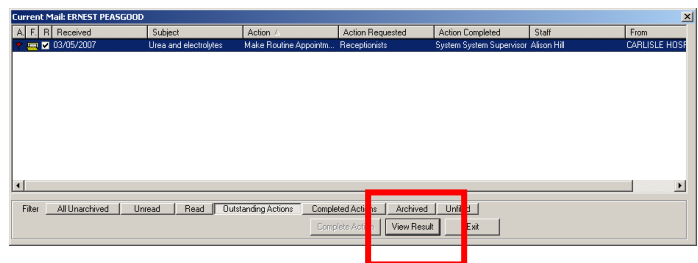
How do I view action status?

To view action status in Consultation Manager:

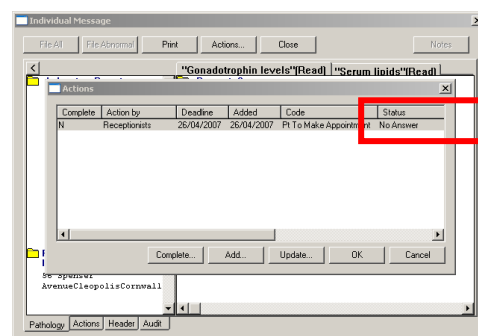
1. Click on the **View Mail for Patient**  in **Consultation Manager**.



2. Click on the appropriate result, then click on the **View Result** button.



3. Select the **Actions** button. The action status is under the heading "Status".



Managing Actioned Messages

When actions are added to messages they are either assigned to a specific user or group. In Mail Manager, you can list the messages for you and then group them by action.

Action(s) can be completed from within Mail Manager, either from the **Actions** tab or by using **Find Patient**, and also from Consultation Manager **View Mail for Patient**. It is important that Actions are completed when they are carried out so that they are no longer listed as outstanding this ensures that the status of the result is accurately reflected in the audit trail.

Finding and Completing Actions directed at me or my Staff Group

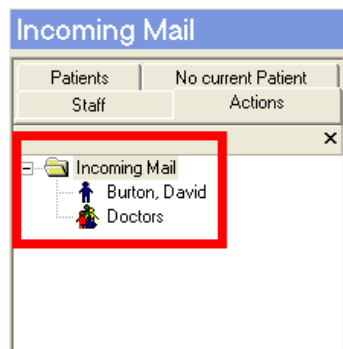
If you switch to the Actions tab in the left-hand pane, this displays only the incoming messages with an outstanding action directed at you as the current user or to a group to which you belong, e.g. reception, admin etc. It does not display all results that have been actioned for the whole practice unless you have a group containing everyone in the practice.

To find actions assigned to you or the groups to which you belong:

1. In Mail Manager, select the **Actions** tab



2. Select Incoming Mail to see all actions allocated to you and any groups to which you belong. Select your name or the required group name to see actions assigned specifically to yourself or a group.

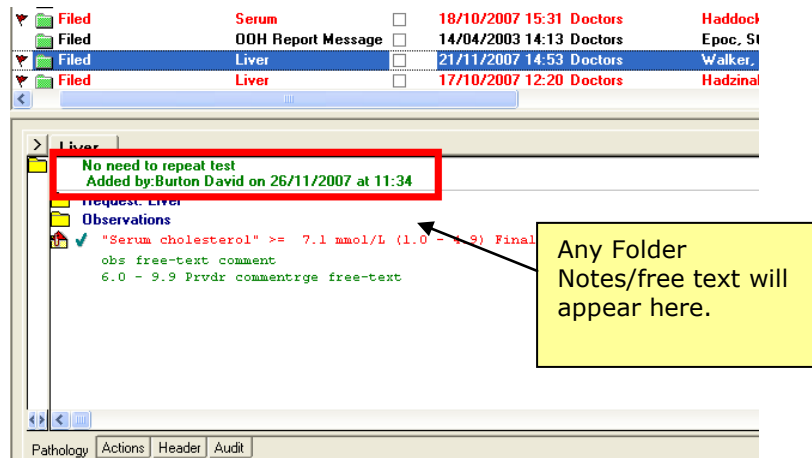


3. The messages for you and/or your groups are displayed.

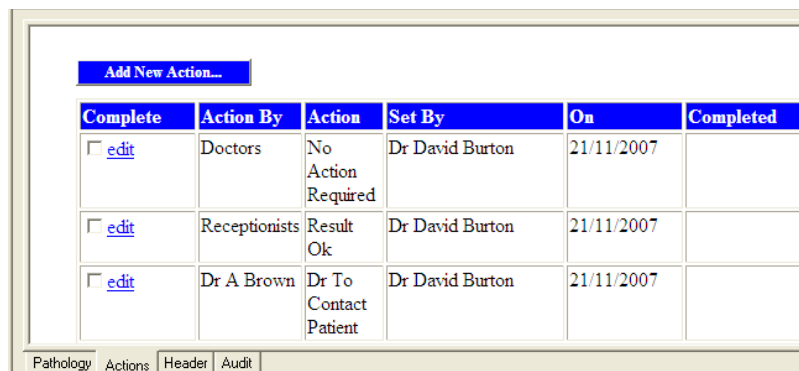
	Status	Type	Read	Date	Staff	Patient	Action/Subject	Copy
<input type="checkbox"/>	Considered filed as co...	Citrate	<input type="checkbox"/>	18/10/2007 16:06	Doctors	Facey, Patricia	Dr To Contact Patient Action	Action
<input type="checkbox"/>	Considered filed as co...	Citrate	<input type="checkbox"/>	18/10/2007 16:06	Doctors	Facey, Patricia	Dr To Contact Patient Action	Action
<input type="checkbox"/>	Partially filed	SERUM	<input type="checkbox"/>	18/10/2007 14:58	Doctors	Facey, Patricia	Dr To Contact Patient Action	Action
<input type="checkbox"/>	Filed	Serum	<input type="checkbox"/>	18/10/2007 14:58	Doctors	Facey, Patricia	Pt To Make Appoint... Action	Action
<input type="checkbox"/>	Filed	OOH Report Mes	<input type="checkbox"/>	18/10/2007 14:58	Doctors	Facey, Patricia	Dr To Contact Patient Action	Action
<input type="checkbox"/>	Filed	Liver	<input type="checkbox"/>	18/10/2007 14:58	Doctors	Facey, Patricia	No Action Required Action	Action
<input type="checkbox"/>	Filed	Liver	<input type="checkbox"/>	18/10/2007 14:58	Doctors	Facey, Patricia	No Action Required Action	Action

To sort and group the messages by action click on the Action/Subject heading.

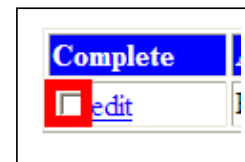
4. Select the relevant result, check for any free text that may have been added.



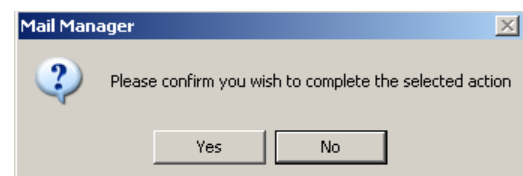
5. Click on the **Actions** tab in the message pane. This will display all the actions added to the selected message.



6. Tick the Complete box (next to [edit](#)) to complete the action.



7. When prompted to confirm you wish to complete the selected action select Yes. Upon completion, the message will disappear from your Mail Manager screen.



8. If there is only one action relevant to you, Mail Manager will tell you that the copy of message for action has been deleted. The original will be in the mailbox of the original user it was allocated to which is normally the usual GP.

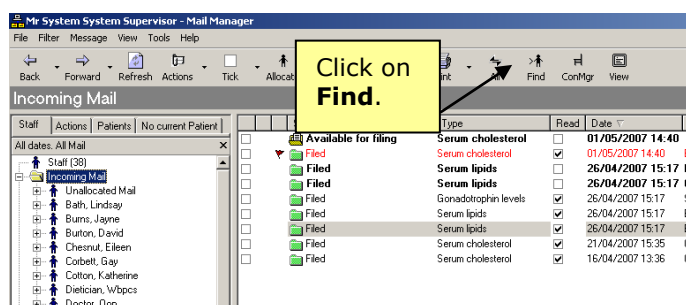
Message has been deleted

Note You cannot apply date filters to the Actions view.

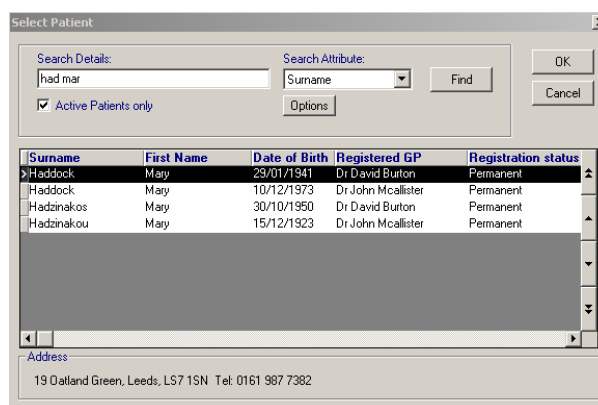
How do I search for a specific patient result in Mail Manager and complete the action?

You can also search for results for a specific patient in Mail Manager which saves you from searching through the list in the Actions tab:

1. Click on the **Find** button.

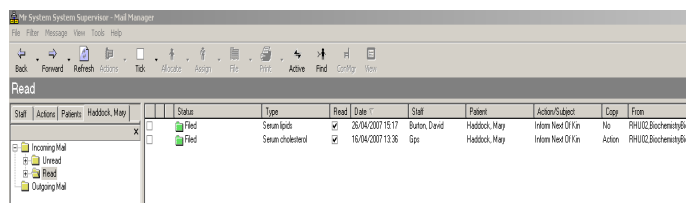


2. Type in the search details and click Find.



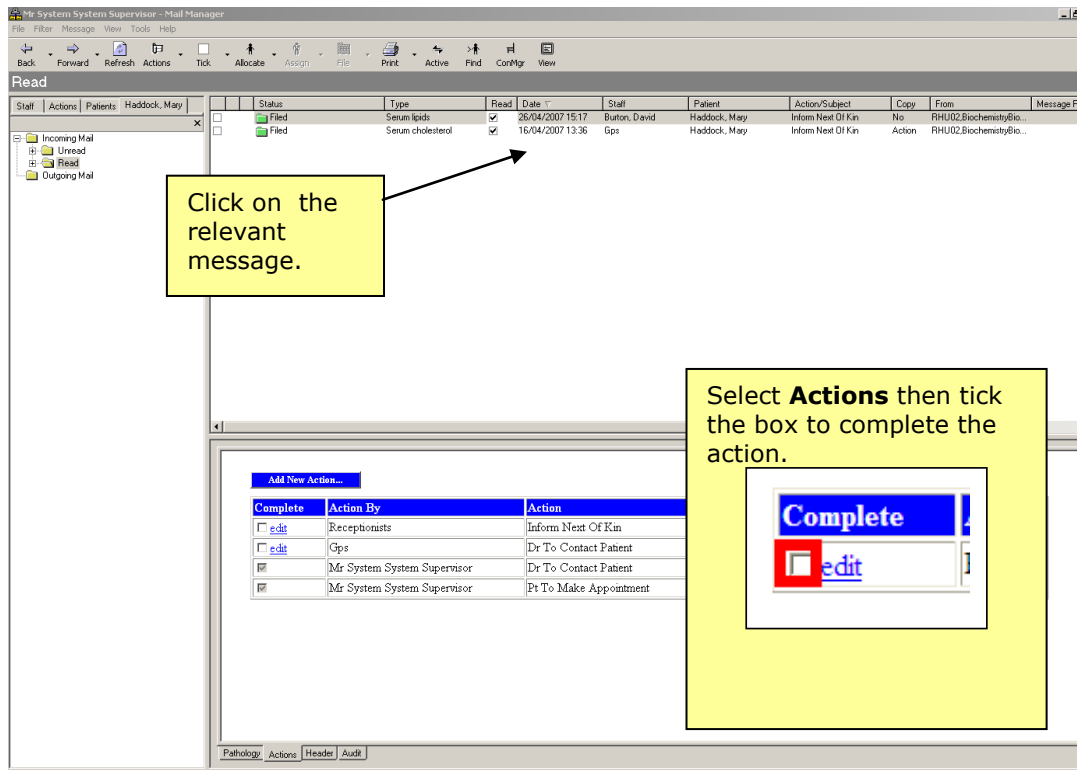
3. Click on the required patient name and click OK

4. All the results for the patient will be displayed. A tab is also created specifically for the patient which separates **ALL** results for the patient into read and unread.

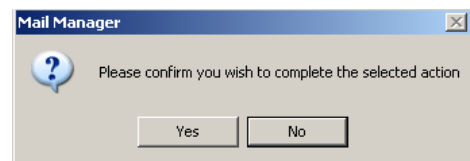


5. Select the relevant result, check for any free text that may have been added and click on the **Actions** tab in the message pane. This will display all the actions that have been added to the message.

6. Tick the complete box (next to [edit](#)) to complete the action.



- When prompted with a confirmation screen, select Yes to complete the action. Upon completion, the message will disappear from your Mail Manager screen.

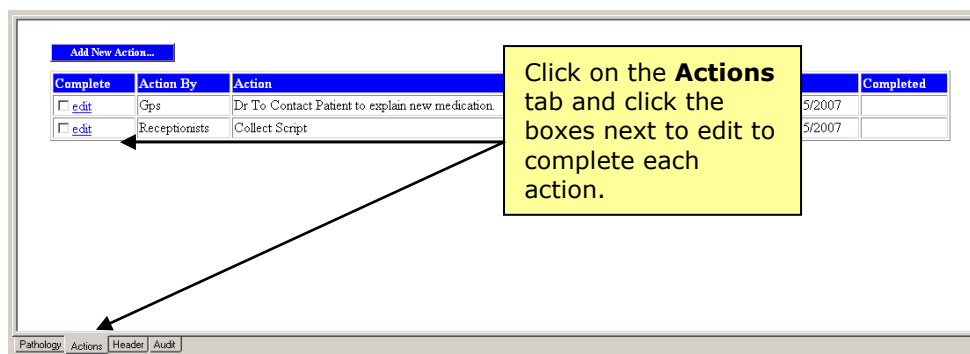


- If there is only one action relevant to you, Mail Manager will tell you that the copy of message for action has been deleted. The original will be in the mailbox of the original user it was allocated to which is normally the usual GP.

Message has been deleted

Results with multiple actions

If a result has more than one action you will be able to see this from the action tab in the bottom pane of the selected message Mail Manager. You can complete or edit the required action(s) by ticking the box next to edit:




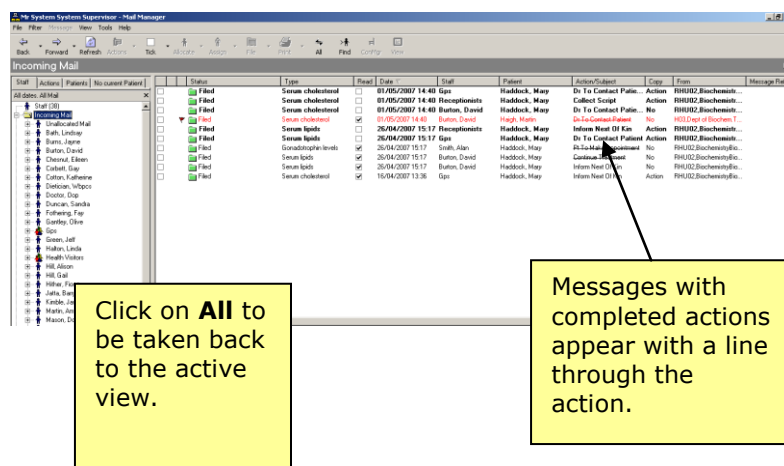
What happens to the result when I complete the action?

When an action is completed, the action text is crossed through.

When an action is completed, provided that all other process requirements have been met, the message is considered to be inactive and immediately disappears from the message list.

If you would like to view the inactive messages:

1. From the **Staff** tab, click on the **Active** button  which toggles between an active and all message view. Check the filter menu for date and other filter preferences.

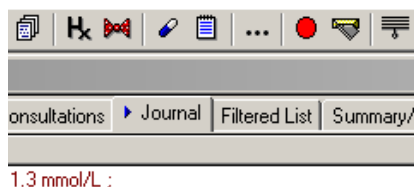


Note If you are looking for a completed message but cannot find it, select View-Archive View to view archived messages between a specific date range.

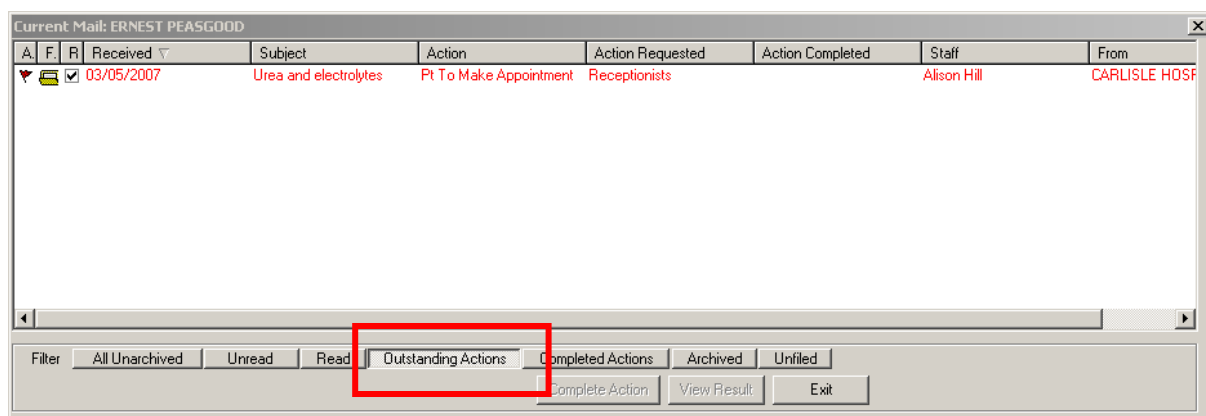
How do I view a result and complete an action in Consultation Manager?

Although we recommend that actions are completed from Mail Manager as this is much quicker, you can still view and complete actions from Consultation Manager.

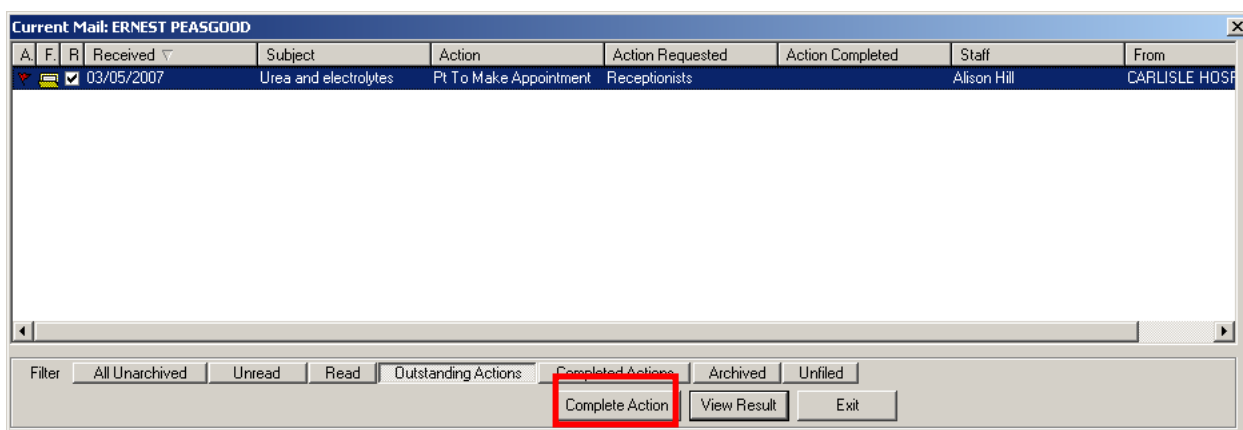
1. Click on **View Mail for Patient**  in Consultation Manager.



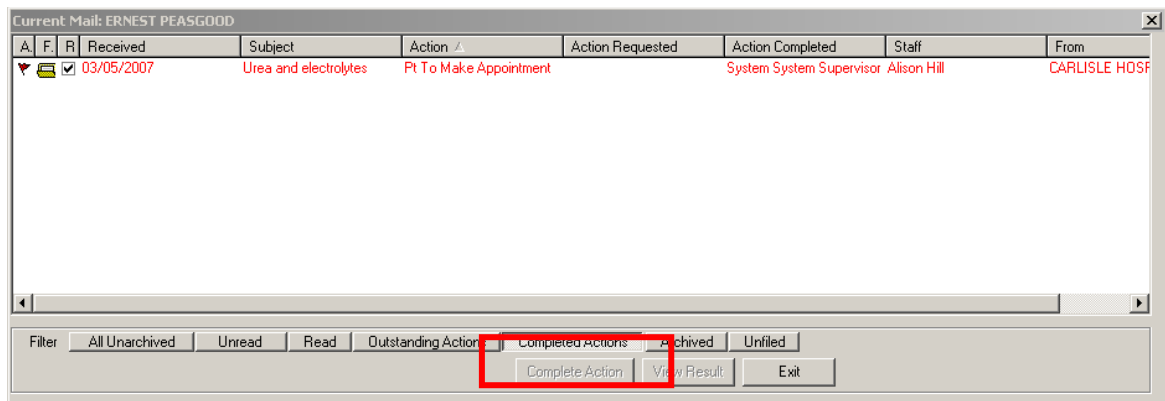
2. Click on the **Outstanding Actions** tab. All results with outstanding actions will be displayed.



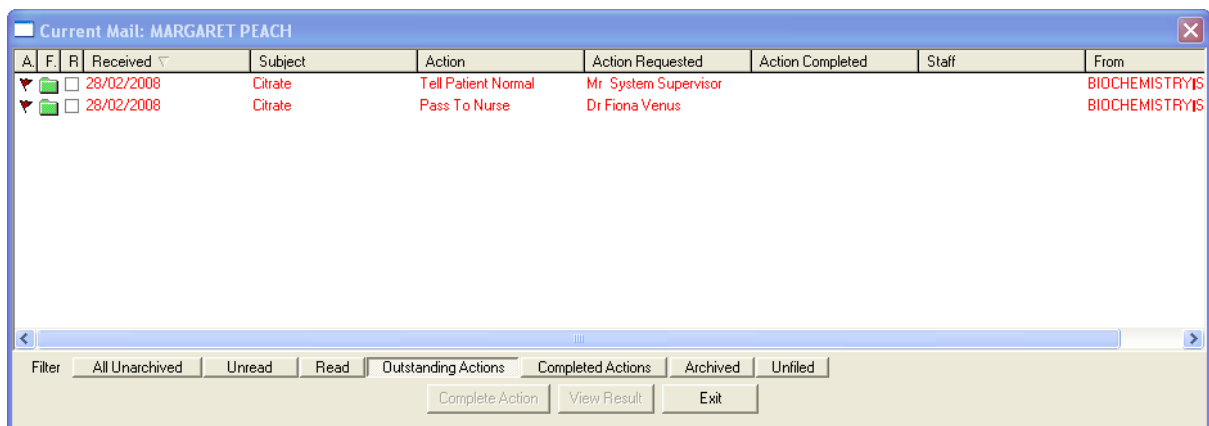
3. Click on the appropriate result, then click on the **Complete Action** button. The action is completed and the result is removed from the Outstanding Actions view.



4. The newly completed action can now be seen under the **Completed Actions** tab.




If there are multiple actions for a single result, they will list as separate entities in View Mail for Patient and will need to be completed individually.
 In the example below the patient two actions for the same result:

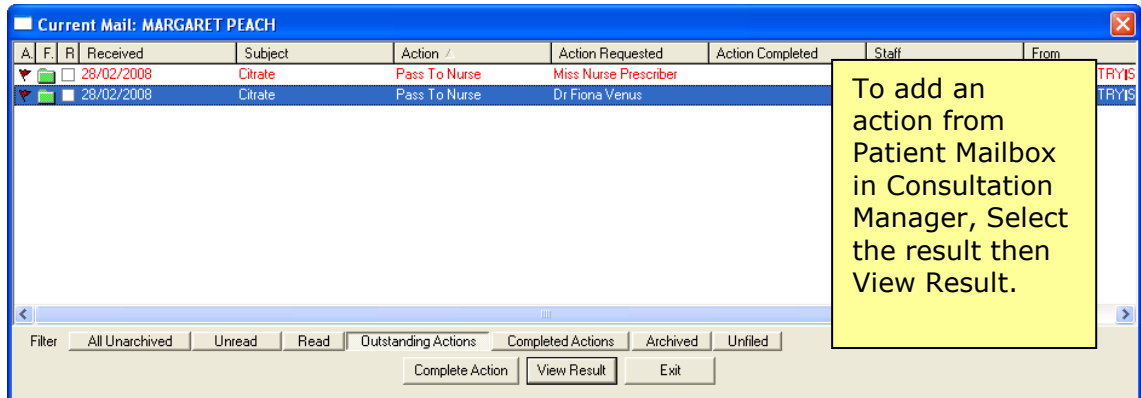


Note Clicking on the **Complete Action** button will complete any action on the currently highlighted result; you will be unable to read any extra free text that the person setting the action might have added. This text can only be read by looking at the full result (View Result).

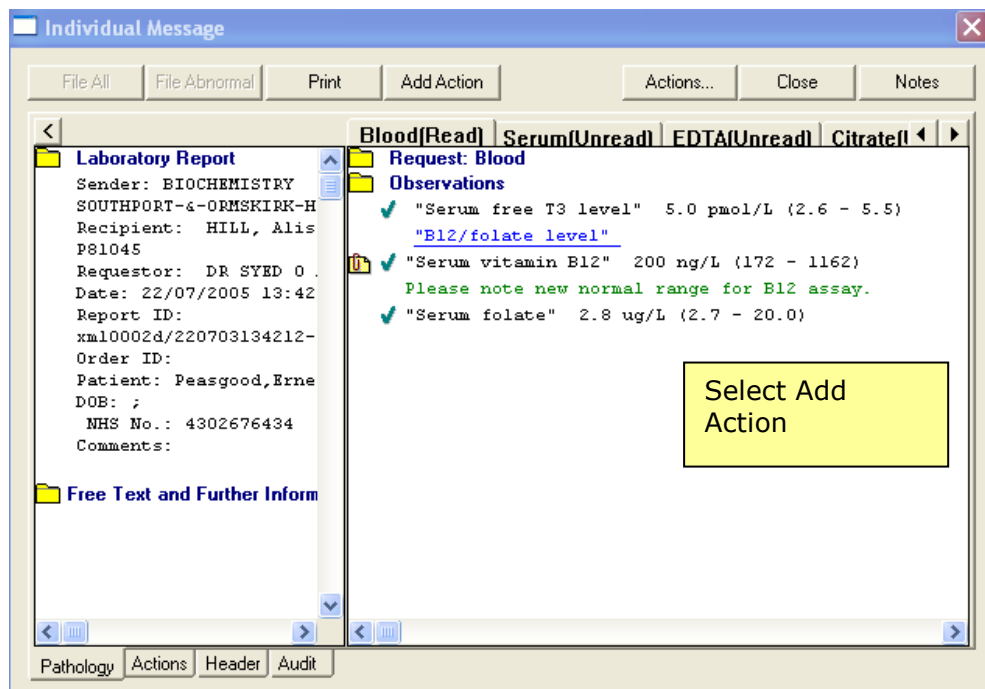
Add Action from Consultation Manager

If you would like to add another action rather than complete an existing action:

1. Select the patient in Consultation Manager.
2. Select the patient and click on the **Mail for Patient** icon .
3. Click on the result and select view result.



4. From the View Result Screen, select Add Action.



5. Select the required action and the person to carry out the action. See [Add Action Screen](#) on page 40.
6. Click **OK**.

Add Action Screen

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

- Contact details:**
 - Patient: Haddock, Mary
 - Address: 19 Otland Green, Leeds, LS7 1SN
 - Contact Numbers:
- Add:**
 - Set by: Mr System System Supervisor
 - Date: 18/04/2007
- Action:**
 - Code: Dr To Contact Patient
 - Text: Dr To Contact Patient
 - Patient specific:
- Action by:** Gps
- Status:** Newly Actioned
- Confidential:**
- Complete:**

Buttons: OK, Cancel


Callout Boxes:

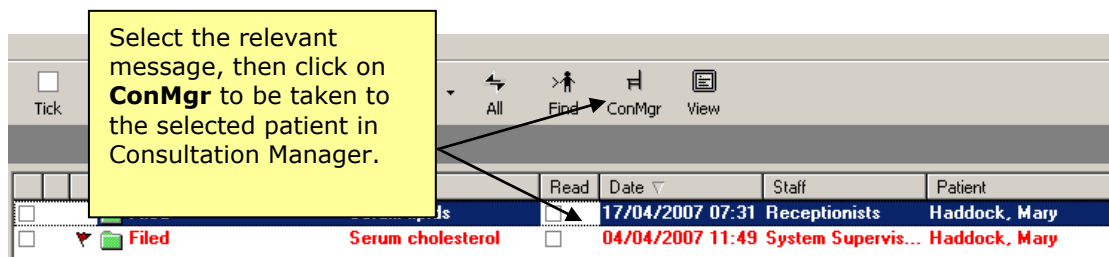
- Patient name, address and contact numbers are shown here.** (Points to Contact details)
- Patient Specific** - This box is checked if the action is patient specific, e.g. *Patient to make an appointment*. Most actions are patient-specific. (Points to Patient specific checkbox)
- Action By** - This means *Action to be performed by*, i.e. the person or group responsible for carrying out the action. (Points to Action by field)
- Action copies can be marked as either confidential or non-confidential.**
 - Confidential** - anyone viewing that action copy will not be able to see the right-hand side of the message details,
 - Non-confidential** - anyone viewing that action copy will be able to see all of the message details, including the Request and Observations folders. Such action copies can be filed.
- Set by** - the person adding the action and the date the action was set. (Points to Set by field)
- Date** - This is optional - and is the expected date of the action. (Points to Date field)
- Code** - If a specific Action was selected from the right click menu, this will be filled in automatically. If blank, select from the dropdown list. Additional actions can also be chosen from here. (Points to Code field)
- Text** - This repeats the text of the action, e.g., *Pt to make Appointment*. When the person carrying out the action returns to edit the Action they can also add free text here. (Points to Text field)
- Status** - Select the current status, e.g. initially Newly Actioned. (Points to Status field)
- Complete** - This box is unchecked until the action is edited and the person carrying out the action checks it. (Points to Complete checkbox)

How do I generate patient correspondence?

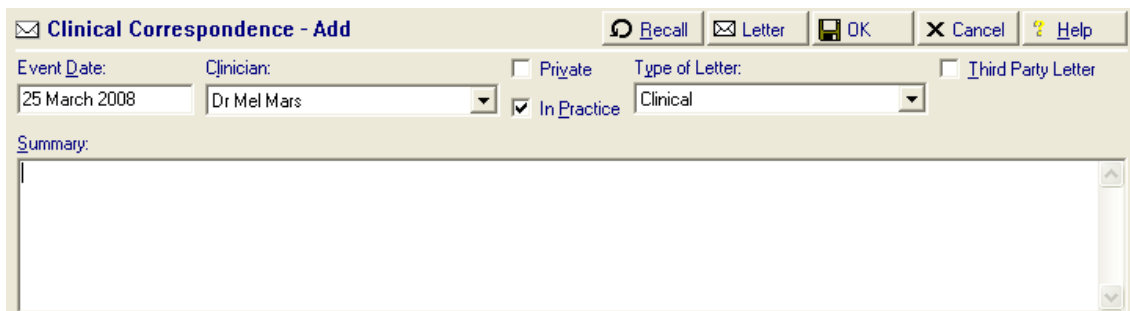
Unlike Mail Administrator, where you were able to generate correspondence directly from the action mode, Mail Manager allows you to quickly jump to the patient record where you can generate correspondence

1. In Mail Manager, Select the result needing correspondence.

2. Click on the ConMgr  icon to be taken to the selected patient record.



3. Once in an open consultation for the required patient, click **Add – Correspondence** to generate a letter.
4. Complete the **Clinical Correspondence - Add** form. Select type of letter and enter a brief description of the letter in the Summary section.



Clinical Correspondence - Add Recall Letter OK Cancel Help

Event Date: 25 March 2008 Clinician: Dr Mel Mars Private Type of Letter: Clinical Third Party Letter

In Practice


Summary:

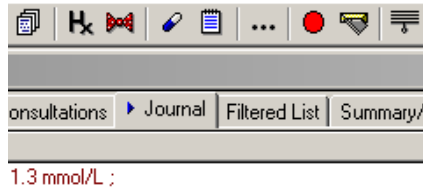
5. Click on the Letter icon and select the relevant template letter.
6. Fill in any further information on the letter, Print and Close.
7. Click OK.
8. Don't forget to return to Mail Manager and complete any relevant actions.

For further instructions on generating Correspondence please refer to on-screen help or the Vision Training Guide.

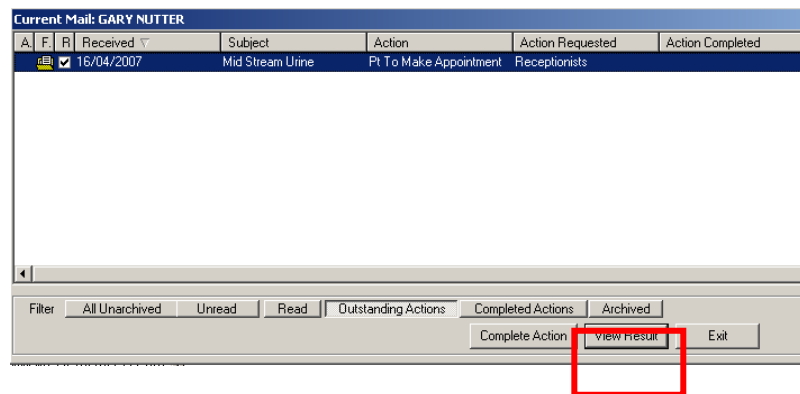
How do I print a result/result from Consultation Manager?

Unlike Mail Administrator, you are able to print XML results direct from Consultation Manager.

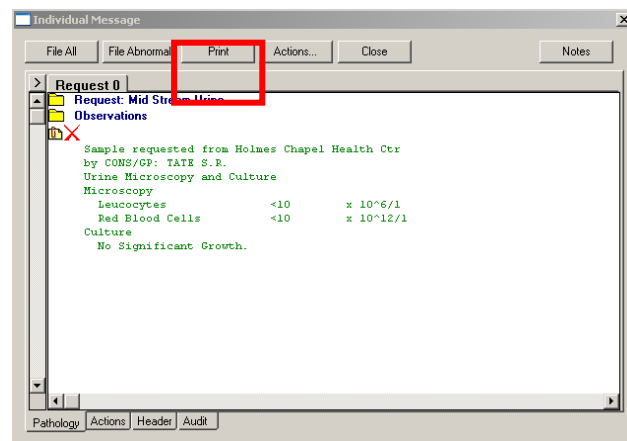
1. Click on **View Mail for Patient**  in Consultation Manager.



2. Click on the result you would like to print and select **View Result**.



3. Press the **Print** button for the result to print.



Archiving

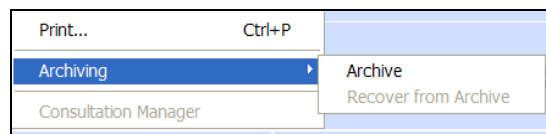
Depending on how many messages you are receiving in Mail Manager, you will need eventually to adopt an archiving strategy to declutter your screen. We advise that in the early days, you should archive at least once a week and as time goes on, possibly daily. Individual users can archive their own messages but, depending on Staff Access rights, you are also able to archive other users messages.

Depending on your practice business processes for managing messages in Mail Manager, your Systems Administrator might archive your completed messages on your behalf. If you would like to bulk archive your own messages, please see the on screen help for further instructions.

How Do I archive an individual result?



To archive a result it must first be filed, all actions must be completed and there must be no user alerts.

1. Right click on the message
2. Select Archiving – Archive



3. When prompted to confirm archive click Yes.
4. The message is removed from the current view.

Automatic Archiving - England

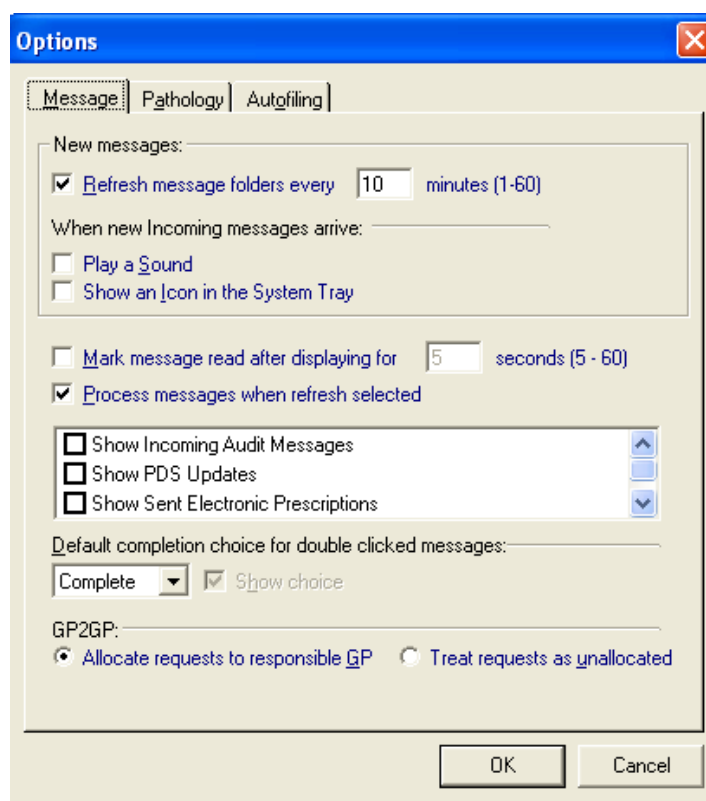
Mail Manager will automatically archive the following incoming messages as long as they have been successfully acknowledged (i.e. with a status of  **Sent** or  **Complete**).

- ETP Messages
- Choose and Book/E-booking Messages
- PDS Update Messages
- GP Summary Messages

Options (Tools)

Message and Pathology tabs

From the **Tools** menu, select **Options** and customise as required. The settings on the Message tab are on a per login basis. Those on the Pathology tab are practice wide.



Refresh message folders - Decide how frequently to refresh the screen automatically for new



mail etc. The Refresh icon refreshes the screen manually

Mark Message as Read - if ticked, then the message will automatically be marked as read if the cursor rests on it for a number of seconds.

We do not recommend that admin staff tick the Mark message read option - this should be ticked only by clinical staff

Note . We strongly advise that the automated Mark Messages as Read function is only used by clinicians and not administrative staff.

Filtering messages

We recommend the options to show National Service messages are left unticked. This means successful completed messages will be hidden and thus your screen will remain less cluttered.

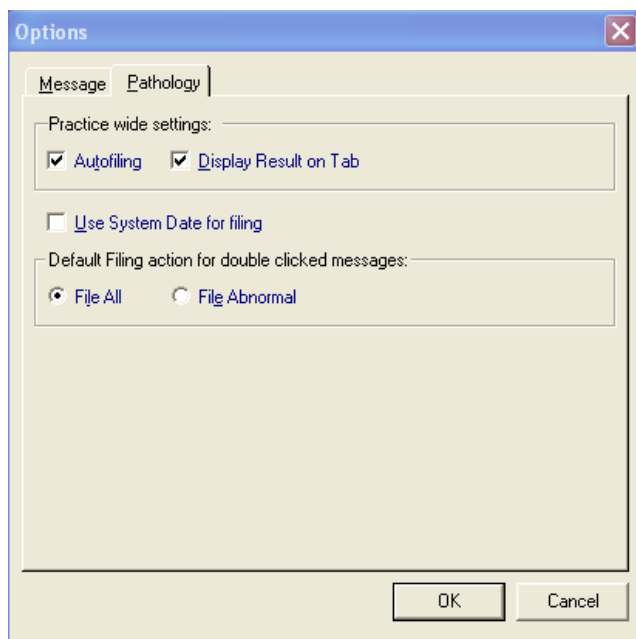
Note that you can also filter the display of messages from the Filter menu (by date and type of mail) and View menu (completed or sent messages).

Default completion choice

When you double click on a message, you can decide here whether the next function is either Add an Action, or Complete the Message. Show Choice, if ticked, allows you to swap your choice.

Pathology tab

These settings are practice wide and can only be changed by a System Manager.



Autofiling - Tick to switch on the automatic filing of results into patients' records.

Even after automatic filing, they can still be marked as read, actioned etc within Mail Manager. This option is greyed out if you are not a system manager. The setting is practice wide.

If you are double clicking on a message, the default is either:

File All - files all result lines in a message; or

File Abnormal files only result lines that are outside the normal range (in red).

Display Result on Tab lets you choose what is displayed on the tabs for pathology results, so if ticked, the tab title takes the first result line (haemoglobin). If unticked, the specimen header is shown, eg Blood.

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