Vision 3

Quick Reference to Mail Manager for Clinical Staff

INPS

Table of Editions and Contents

Date	Version	Contents	Output
24.10.06	DLM 240	Quick Reference Mail Manager	pdf
07.11.06		Edited JTHO	
31.10.06		Edited ESTU	
05.02.07		Edited JTHO	
04.04.07		Edited ESTU – Quick Reference to Mail Manager for Clinicians and Staff.	
14.05.07		Edited JTHO to include GP2GP	pdf
18.07.07		Edited ESTU	
23.08.07		Edited ESTU to include to include how to re-action a message.	
21.11.07 05.12.07	DLM 260-1578	Edited ESTU to include 260 changes JTHO	
28.02.08	DLM 260 - 1684	Patient Specific ESTU	
25.03.08	DLM 260 – 1740	Workflow and general edit ESTU	Pdf
20/08/09	DLM 260	Tools –Option screenshot	PDF
18/11/10		Style updated	Docx & PDF

Contents

Quick Reference to Mail Manager for Clinical staff

What this Quick Reference Guide Covers

This **Mail Manager Quick Reference Guide for Clinical Staff** is aimed to assist Clinicians who are using Mail Manager, in particular to receive pathology results in XML format. It deals with some of the tasks that clinical staff might deal with such as accessing and viewing messages, actioning messages and the general management of results.

Other Mail Manager User Guides include:

- **Quick Reference to Mail Manager for Administrative Staff;**
- **Quick Reference to Mail Manager Setup** (for System Managers) which covers Control Panel - Mail Maintenance, Staff Groups and Action Maintenance.
- **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 the Training section.
- **On-screen help** within the Mail Manager module.

All the Quick Reference Guides are provided by INPS Training 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, PDS Updates 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?

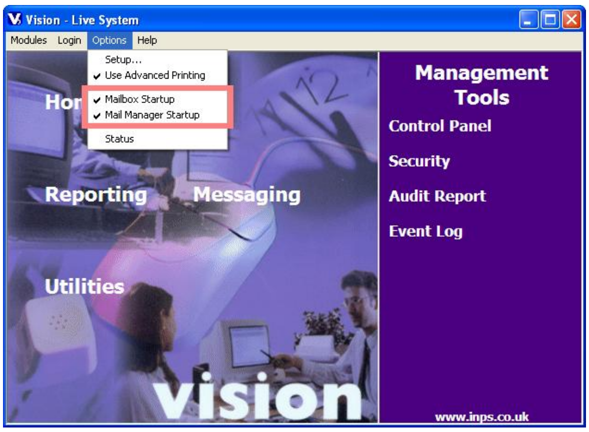
Mail Manager is accessed from the Messaging Menu on the front screen of Vision. **There is no separate Mailbox module for Mail Manager.** All messages are viewed from the Mail Manager interface, whether you are a receptionist, administrator, nurse or GP.

Click on **Messaging – Mail Manager** to access XML Pathology Messages

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 start-up

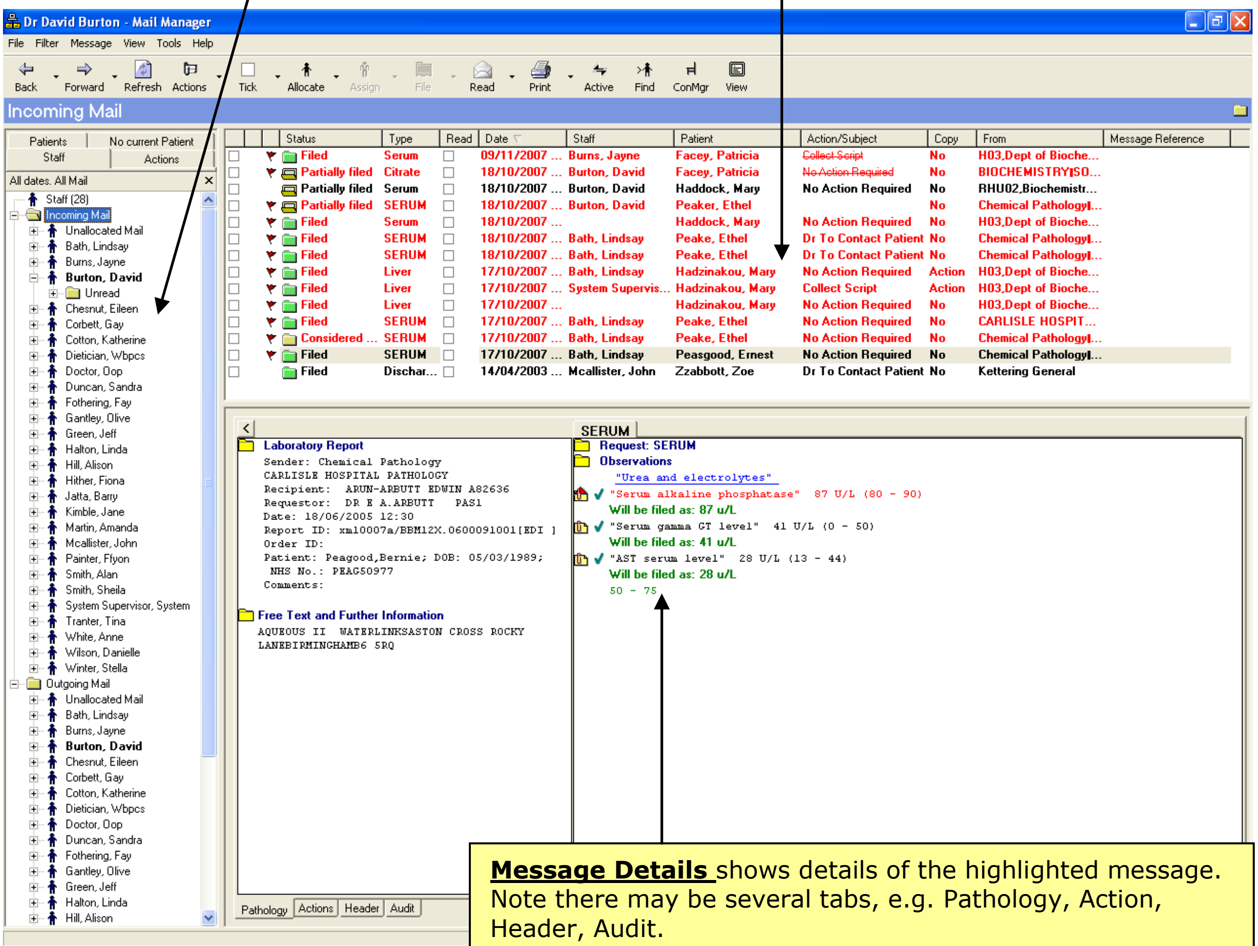
The Mail Manager Interface

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.

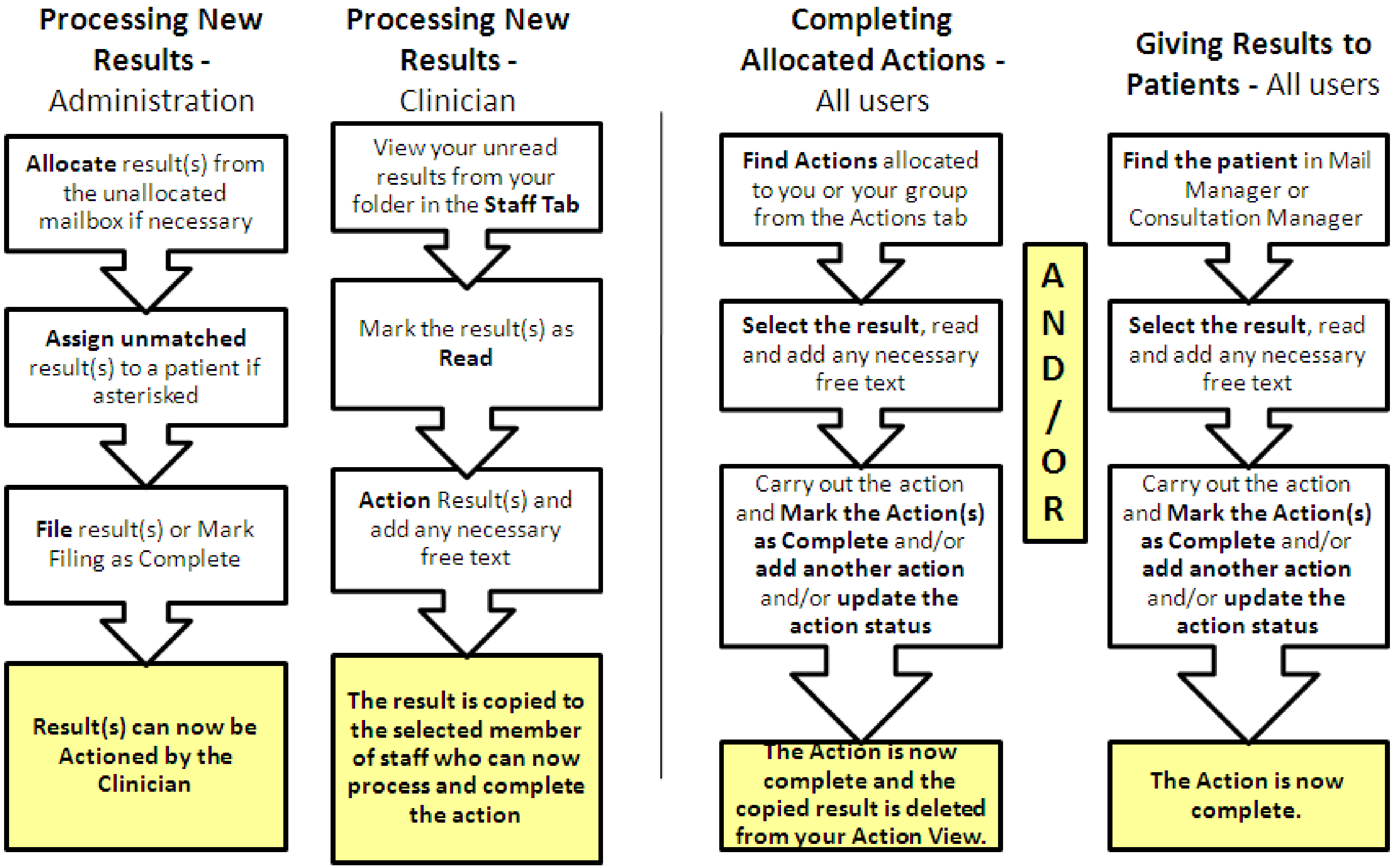
There are ways to view messages on four tabs: **Staff** (messages by staff), **Actions** (messages with actions), **Patients** (messages by patient name), **Current** (selected) Patient.

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.



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 with red triangles.
Right clicking gives several options.

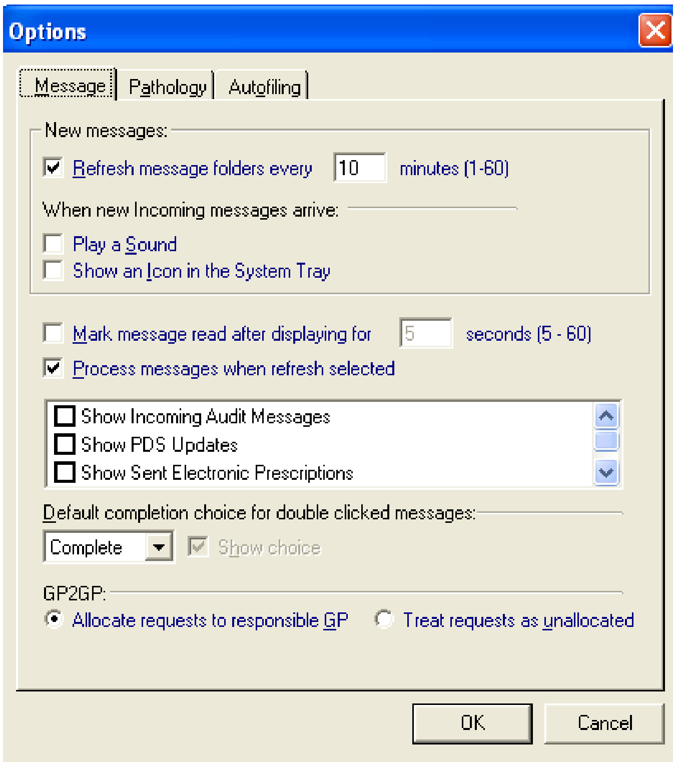
Mail Manager Workflow



Options (Tools)

Message tab

From the **Tools** menu, select **Options** and customise as required. These options apply only to the person currently logged on.



Refresh message folders - This brings in and processes any incoming message. Decide the frequently. The

Refresh icon refreshes the screen manually

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

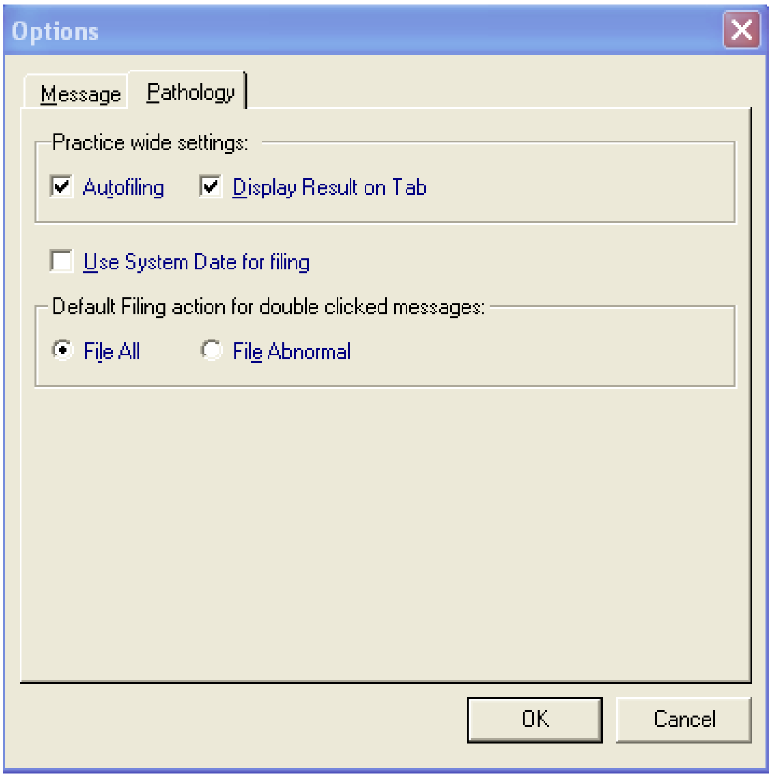
Note that you can also filter the display of messages from the Filter menu (by date and type of mail) and View menu (completed or sent messages).

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.

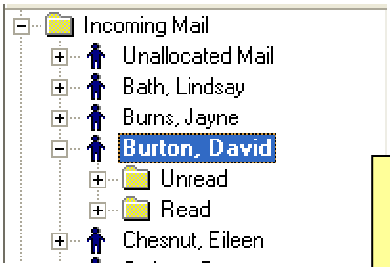
Use System date for filing - If this is unchecked, then the date of collection of the specimen is the preferred date that the system uses when filing the result. If checked, then the system date is used

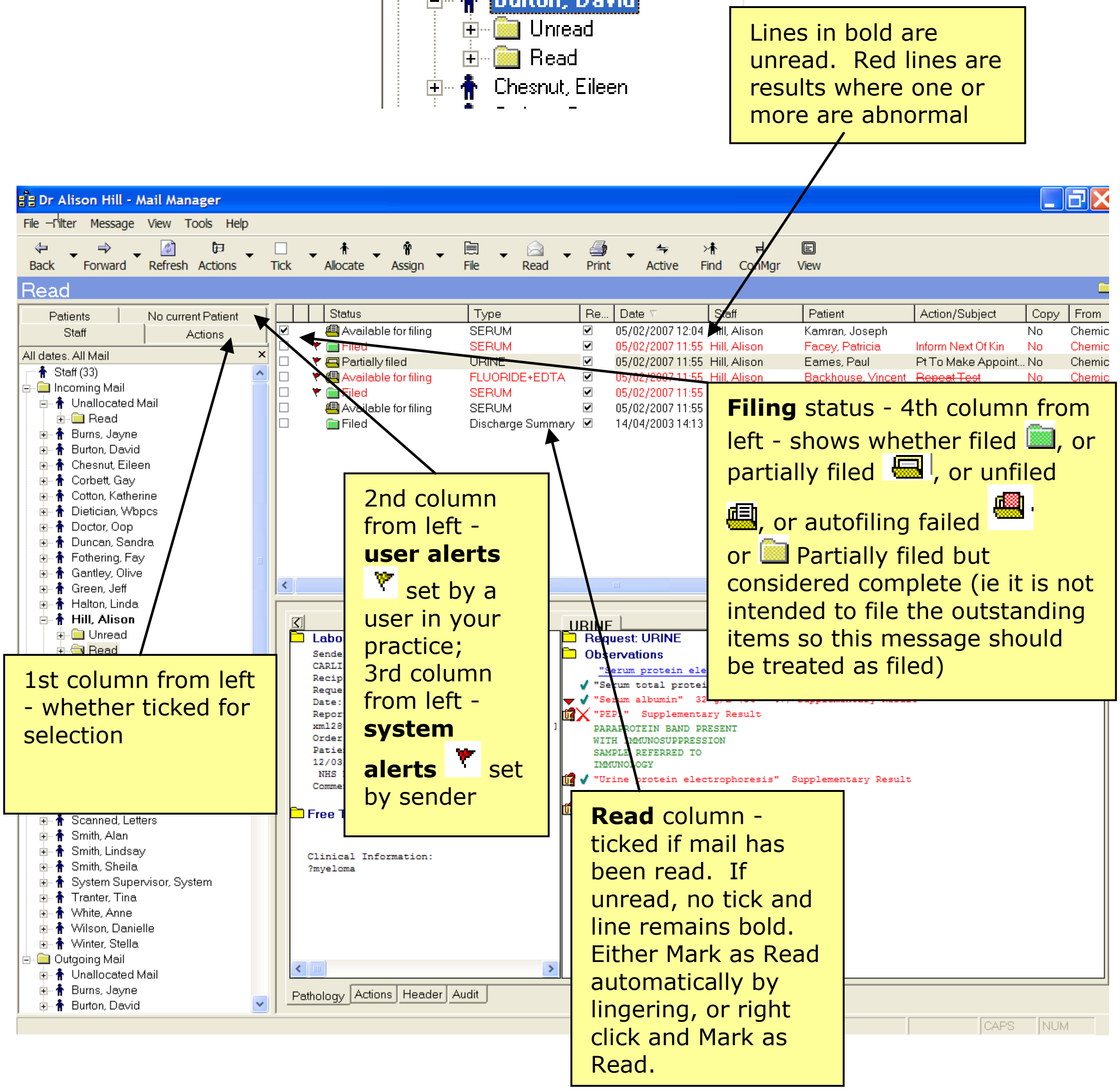
Viewing messages

Staff Tab

Messages are normally viewed and processed from the **Staff Tab** in Mail Manager. By selecting the **Incoming Mail** 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 clinicians 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.

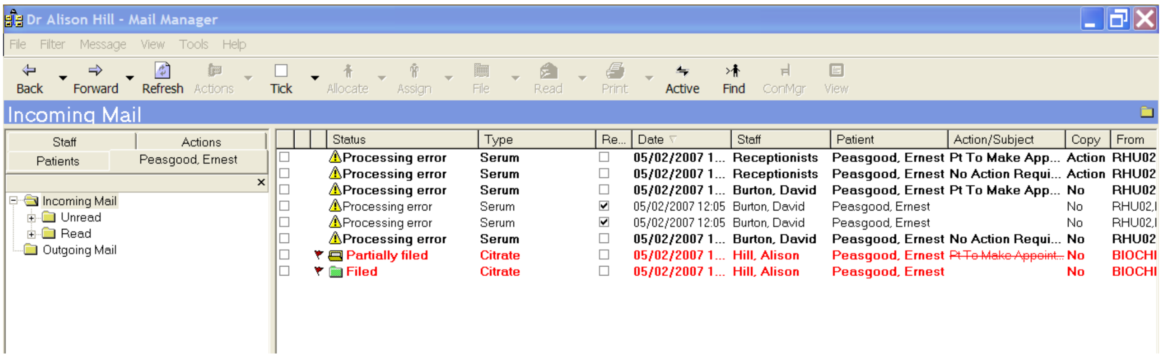




Show Patient Mail

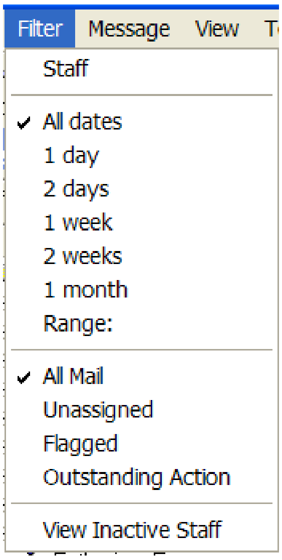
To list an individual patient's messages, right click while pointing to a selected message in the Message List view, and select **View Messages for Patient.** This switches from the Staff tab to the tab previously titled No Current Patient, but now temporarily headed with the patient's name, and the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

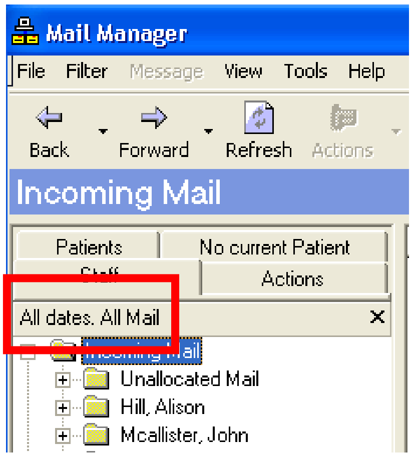
You can also use the Find icon to select an individual patient's messages.



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.





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

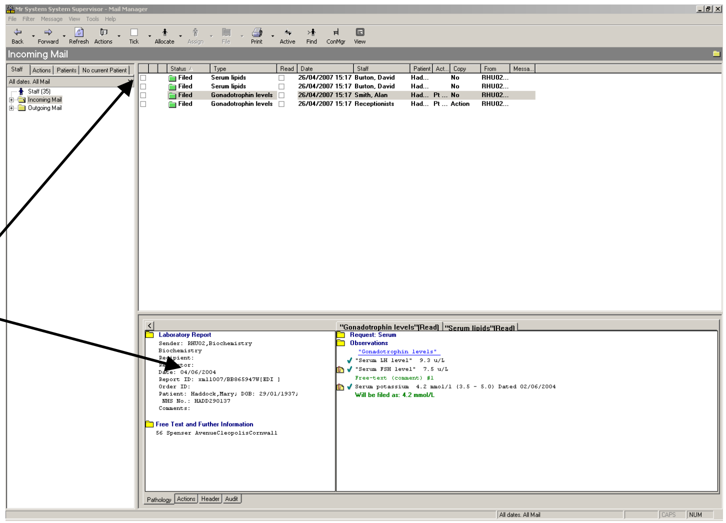
By selecting the Active 

or 

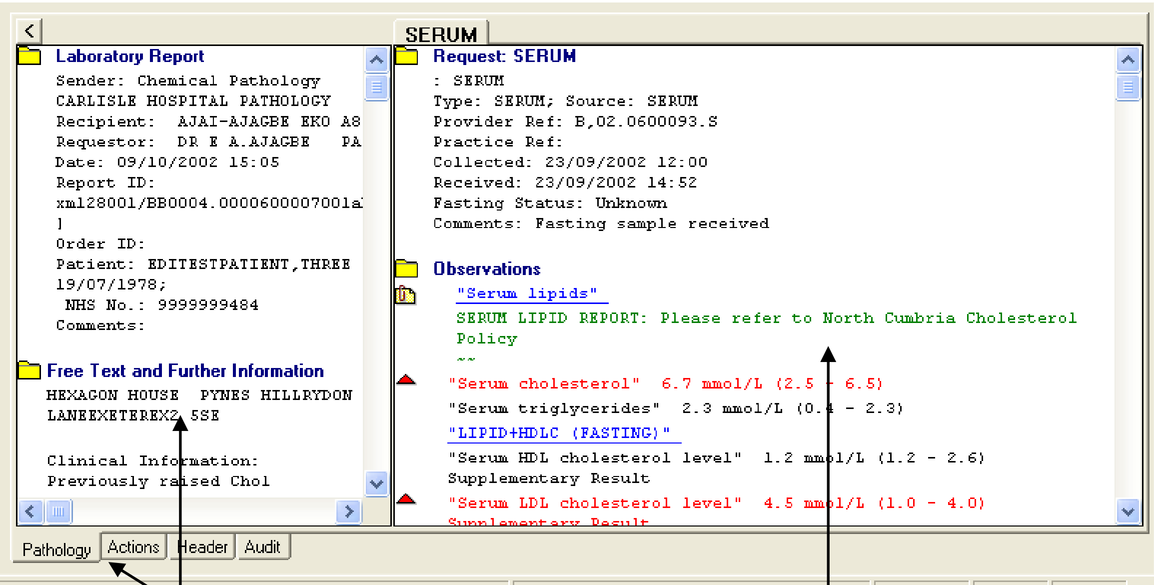
icons, you can also filter between displaying just active messages (i.e. those not yet completed), or both active and inactive messages which will also display messages that have been completed and marked as read.

Viewing pathology results

The Message Details pane is on the bottom right underneath the Message list. It shows the details of the message currently highlighted in the Message List.



Click on the required result. The details will appear in the Message Details pane.



The left-hand pane gives details about the message - the recipient, the requestor, the provider etc.
Note that there are several tabs at the bottom: Pathology (the result details), Actions (any actions added); Header (message details) and Audit.

The right-hand pane shows the actual result or results. The tab headings depend on your choice under Display Result on tab in Tools - Options - Pathology.
Each result is an individual line in the Observations folder.

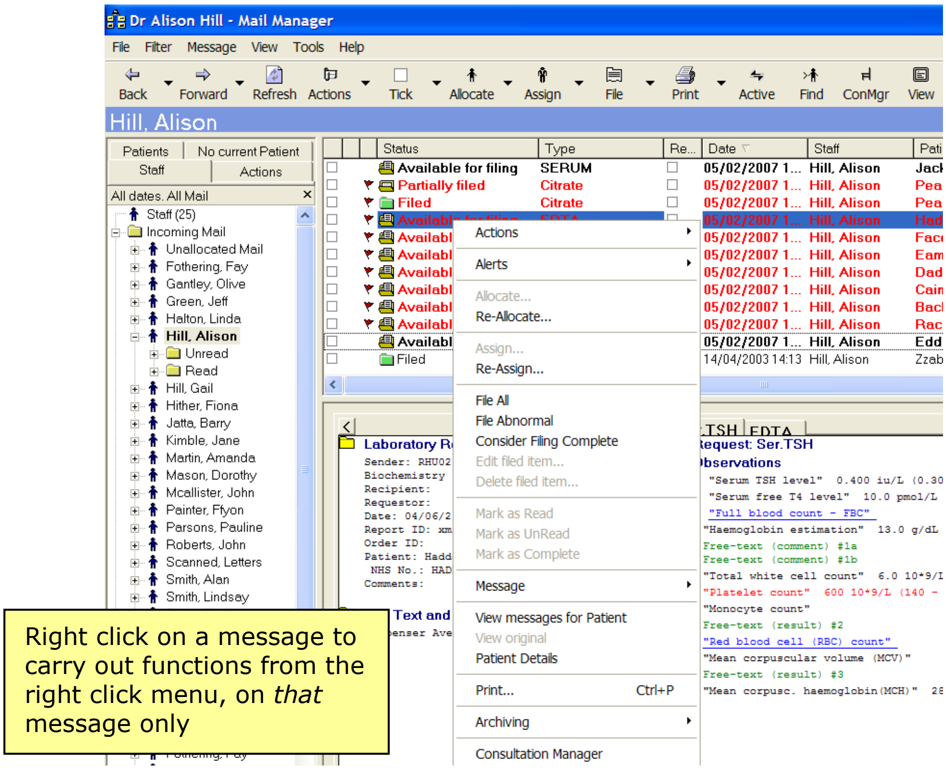
Abnormal results, outside the normal range, are shown in red and have either a red triangle in the left-hand margin (either if the result value is lower than the normal range, or if above the normal range) or a red question mark if the lab have highlighted the result as Potentially abnormal.

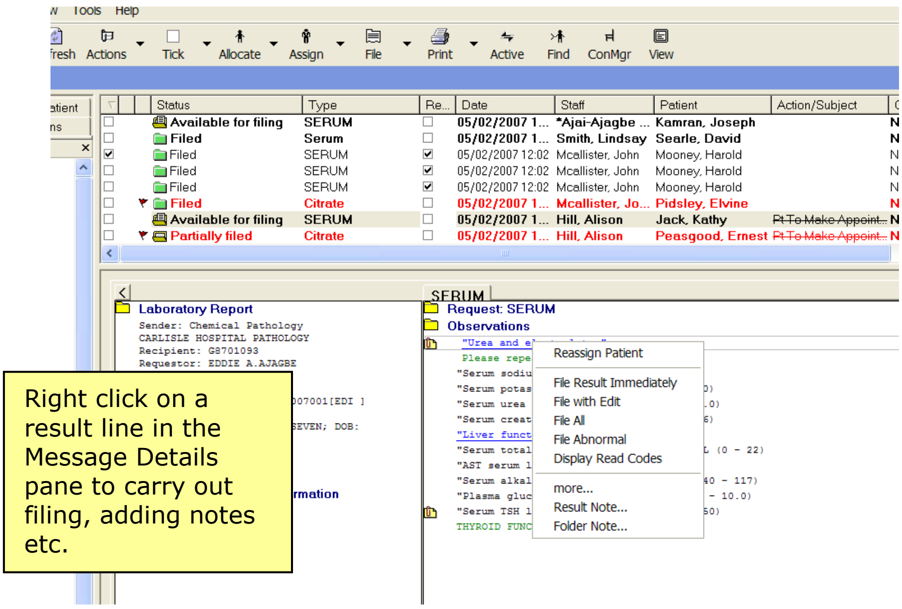
"Serum cholesterol" 6.7 mmol/L (2.5 - 6.5)

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.





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.**

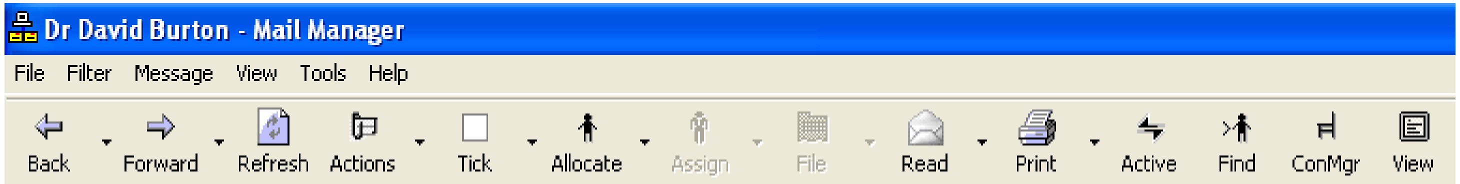
Allocate – allows you to allocate messages that haven't been addressed to a Clinician.

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 is selected, you are only viewing active messages (ie, those that are not complete). 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 a patient.

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 results in five steps

The following five steps show how each result should be initially processed. See page 16 for details of how to bulk process messages and page 33 for details on how to complete actions.

> **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. You will only see unallocated mail if you have access rights to do so.

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**) <u>AND</u> 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**. See page 15. Note that for multi-tabbed specimens, you must view EACH tab.

5. **Then action if required:**

   - Either add one or more actions - see page 16.
   - Or if no action is required, you are able to mark the result as complete using 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 functions. Note that this will only apply to the currently highlighted message. To apply a function to more than one message, see Processing Multiple Messages on page 23.

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).

Re-Assign - Re-assign a message already assigned to a patient, to another patient. You will be warned if the message has patient specific actions.

Filing

File All (see page 21) - File all the result lines in a message manually.

File Abnormal - Only files only those pathology messages with results highlighted in red as being abnormal. These 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 only the abnormal ones), 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.

Mark

Mark as Read - Mark a message as having been read by the recipient (see page 15)

Mark as UnRead – Mark a read item as unread.

Mark as Complete – Mark a message as complete if you are not adding any action.

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 (see How do I Copy Mail? on page 31)

Delete Copy – Delete a copy of a message.

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, marked as read, 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.

Mark as Read

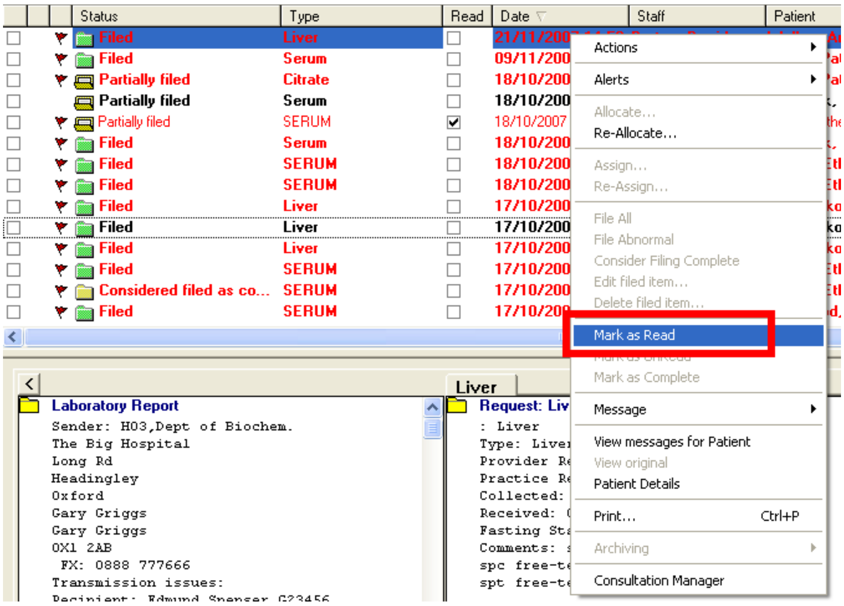
As a clinician, you must actively mark each message as read so that the message can be further processed. This can be done on a per message basis or in bulk. You can set an option (see page 5) which if you linger with the cursor on a message for more than a few seconds, it becomes automatically marked as read (we do not recommend that admin staff have this option switched on).

See page 23 - Processing Multiple Messages for instructions on marking as read more than one message at a time.

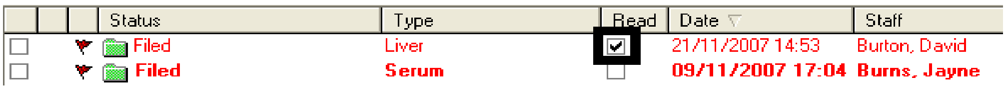
Before you can Mark a pathology result(s) as Read, you must ensure that the message has been fully viewed. This includes viewing <u>each</u> of the result tabs if there is more than one.

To mark a single message as read:

1. From Mail Manager, right click on the message and select **Mark as Read**.



2. The message displays with a tick in the Read column and no longer in bold text. The Audit tab will also state that the message has been Marked as Read.



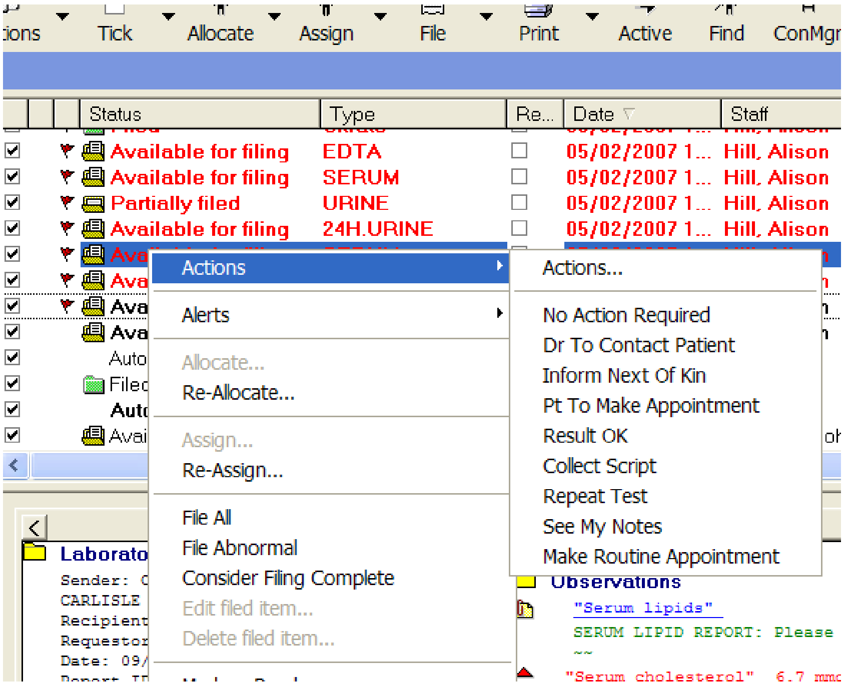
Mark as Unread

If you have Marked as Read in error, you are able to change the message status back to unread. To do this right click on the message and select **Mark as Unread**.

Add new action

Actions can be added to a result to convey information or request a particular action to be carried out. An action can be directed at an individual or to a group (e.g. receptionists, GPs, nurse etc).

1. Right click on the relevant result and select **Actions**.



2. You can either select your required action from the Frequent Actions list or select the Actions option to make a selection from all possible actions.

3. Once you have selected from the action menu, the **Add Action** form appears for you to complete. The Add Action form must contain as a minimum:

   - **The action**. If you selected a specific Action from the right click menu, this will be filled in automatically. If you selected the Add Action option from the right click menu, you can select an action from the dropdown list.
   - **Action By** i.e. who the action should be completed by (either a group or individual). Bear in mind that whilst being able to assign an action to a group of staff is a positive and useful software function, the responsibility of who is to complete the action is not as explicit as assigning an action to an individual person.
   - **The action status** (this will probably read Newly Actioned by default).

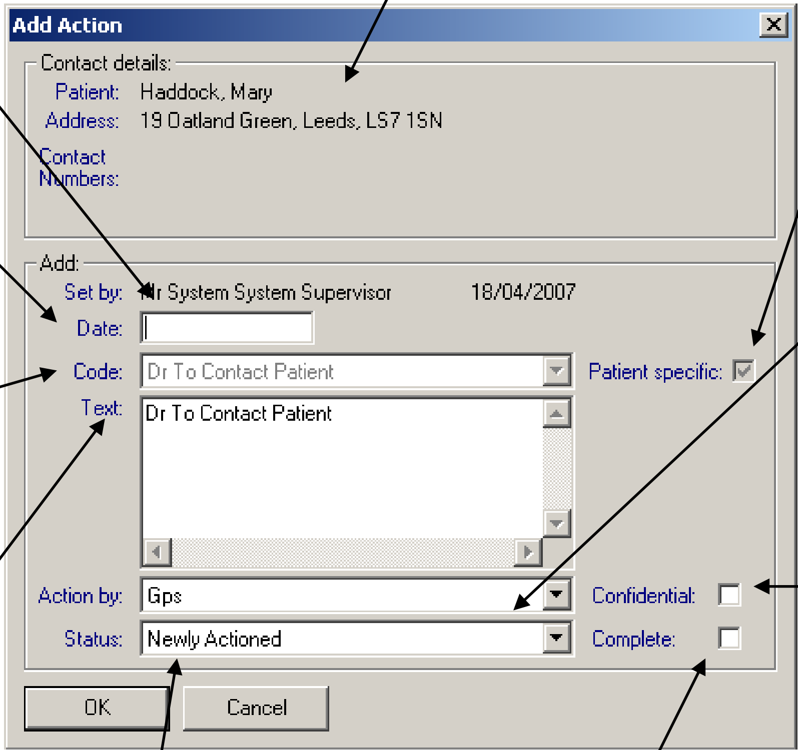
Set by - the person adding the action and the date the action was set.

Date - This is optional - type in the expected date of the action.

Code - If you selected a specific Action 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.

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.

Patient name, address and contact numbers are shown here.



Patient Specific - This box is checked if the action is patient specific, e.g. *Patient to make an appointment.* Most actions are patient-specific.

Action By - This means Action *to be performed* by, i.e. the person or group responsible for carrying out the action.

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.

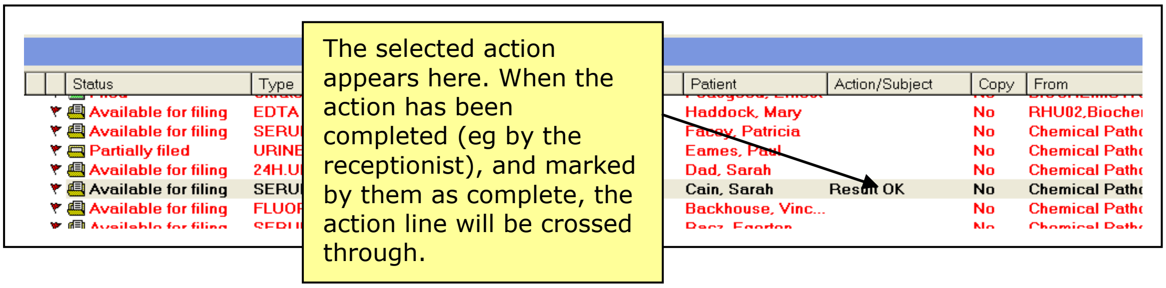
Status - Select the current status, e.g. initially Newly Actioned.

Complete - This box is unchecked until the action is edited and the person carrying out the action checks it.

4. When you have filled in the action form, click **OK**.

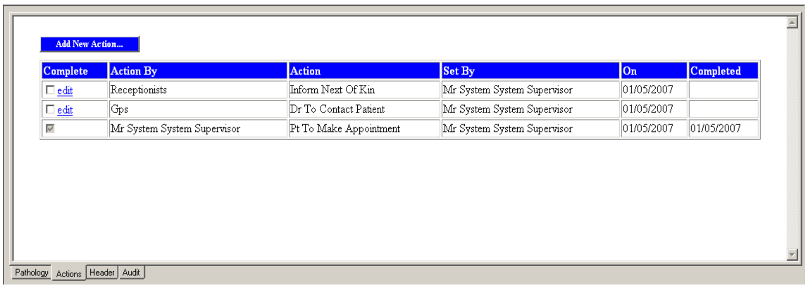
   If you selected the Add Action option from the right click menu rather than a specific frequent action, on clicking OK, you will see the Actions screen which will display all the actions for this message. Close this screen to be taken back to the main Mail Manager screen.

5. The action text is displayed in the Action column in the main Message List. A copy of the actioned message is automatically sent to the person or group to whom it is actioned.



How do I add more than one action?

Mail Manager allows you to enter one or more actions against a message. This can be allocated to different individuals or groups. To add more than one action, repeat the same process as adding an action. All of the actions attached to the message are shown in the Actions tab at the bottom of the screen:



Note Actions can also be edited to record the action status which records the process of the actions - see page 42.

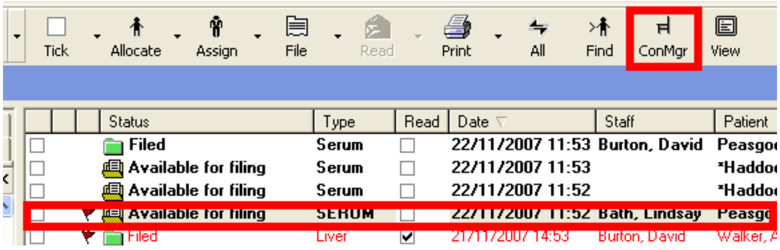
What should I do if add an action by mistake?

If you add an action to a message by mistake (because you can add multiple actions in Mail Manager), re-selecting the correct action will result in the message having two actions. It is advisable that a completing Action Status of "Action Added by Mistake" is created in Control Panel; this is normally accessible to System Administrators. If this is selected when you have selected an action by mistake, the action will be completed and recorded, then you can right click on the message and select another action.

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 look at.
2. Select the **Consultation Manager** icon from the toolbar**.**

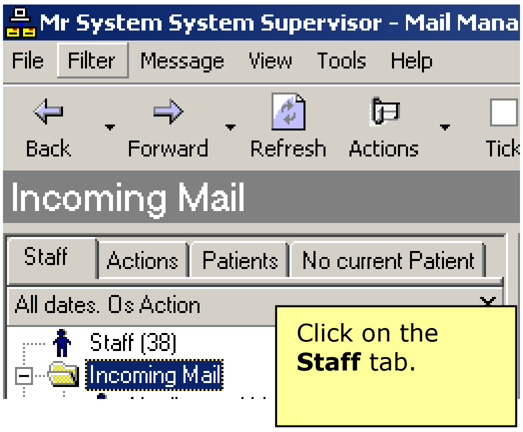


3. You are taken to the patient record in Consultation Manager. When you have finished with the selected patient record, close the consultation and click back to Mail Manager.

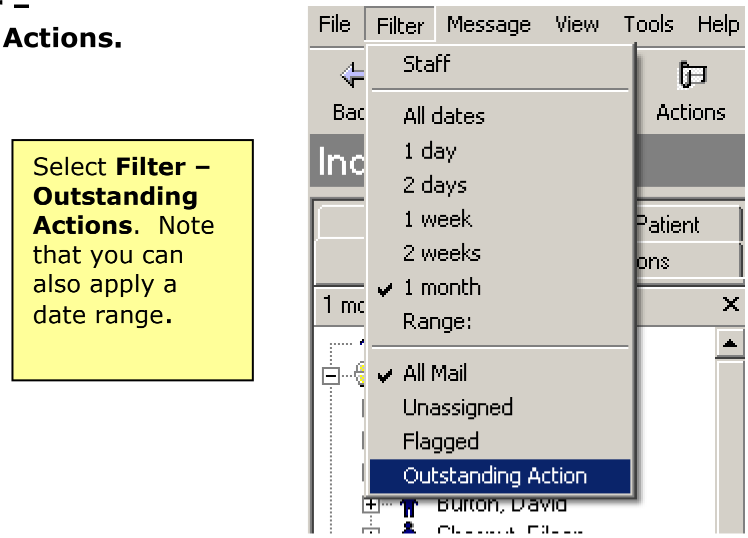
How do I check if the actions I have added are still outstanding?

You can check if the actions which you have assigned to a message are still outstanding:

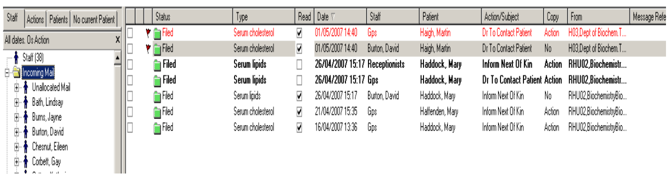
1. Click on the **Staff** tab in the left hand pane.



2. Click on **Filter – Outstanding Actions.**



3. The actions you have created that have not been completed are displayed.



Tip You can also change the date range from the Filter menu to show All Mail. This will allow you to view all actions that you have created that are outstanding. This should be done on a regular basis.

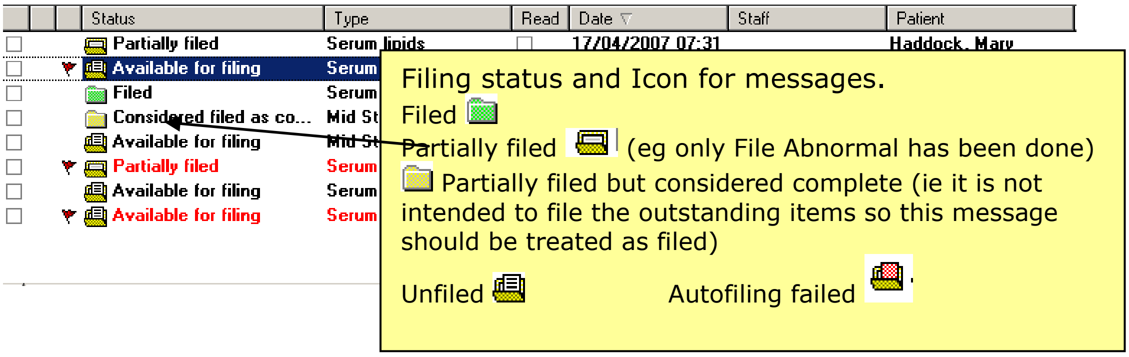
Filing

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.

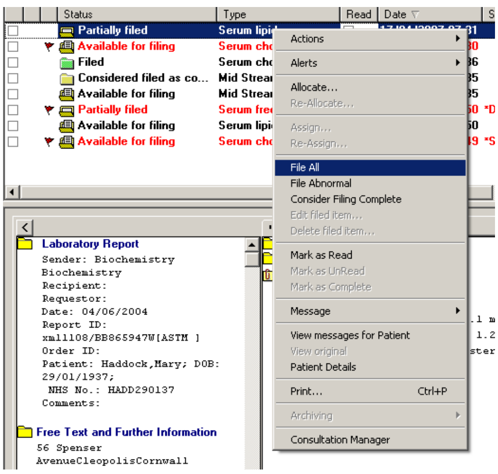
Any unfilled or partially filed items are normally dealt with by administrative staff, although you are able to file the result yourself at any stage. If filed, you can still carry out functions such as Mark as Read, Add Action, Copy Mail etc.



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 Abnormal** (only the abnormal (red) result lines). This files all the result lines in that message into the patient's record in Consultation Manager.

To manually file, right click on the message, select File all.



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.

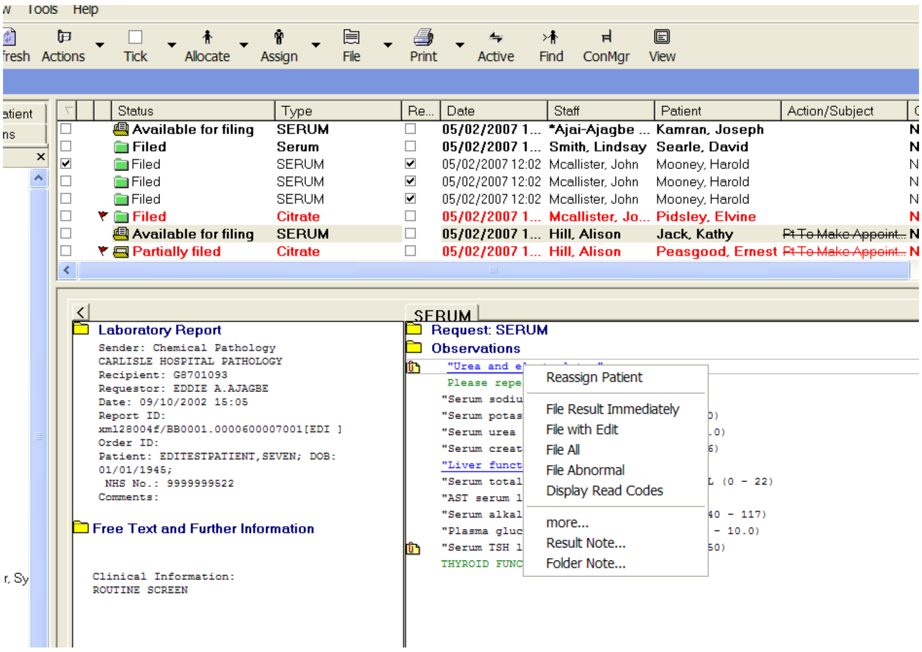
File with Edit files the result but stop at an update screen in case you want to add your own free text notes.

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).

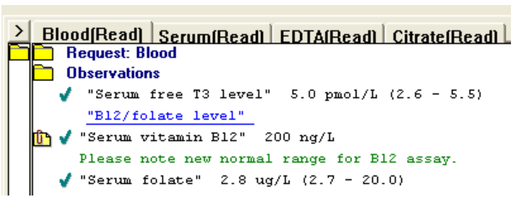
If partially filed (e.g., after using File Abnormal), then select **Consider Filing Complete** so that the message is completed and eventually archived.



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

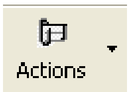
Filing Multi-specimen Messages

When you select to File All for a multi-specimen message, Vision will attempt to file all the results found within the selected message i.e. you do not need to individually file the contents of each tab.

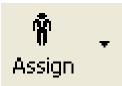


Processing Multiple Messages

Within Mail Manager you are able to apply the following processes to multiple messages at the same time.

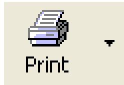
- 

Action
- 

Allocate
- 

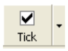
Assign
- 

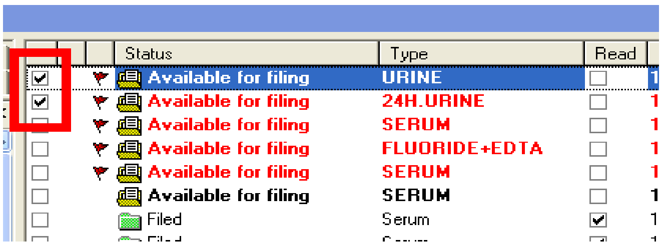
File All /File Abnormal/Consider filing complete
- 

Mark as read
- 

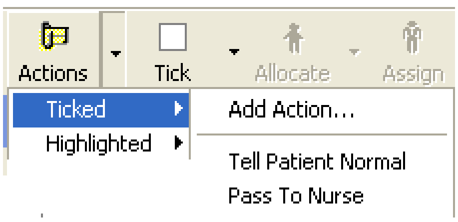
Print
- Recover from Archive (from Archive View)

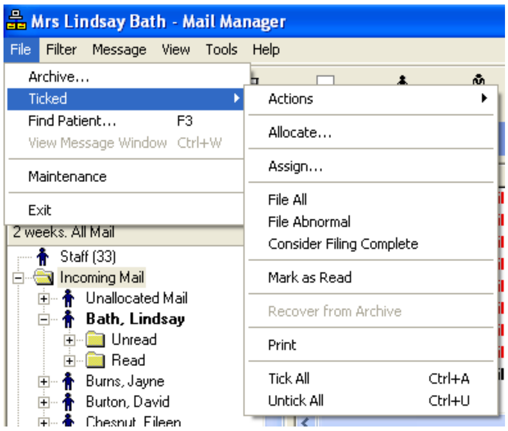
Note You should use the bulk action facility with caution and restrict it to messages that have been read. Adding a bulk action does NOT itself mark a message as read. There is a clinical risk of actioning items that have not been viewed, let alone, read.

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

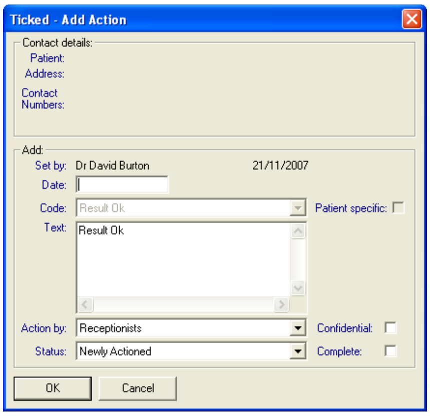


2. Click on **File – Ticked** and select the required function you would like to perform on the selected results or select **Ticked** from the relevant icon on the toolbar e.g.





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.



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.

Other functions

How do I add a note to a result?

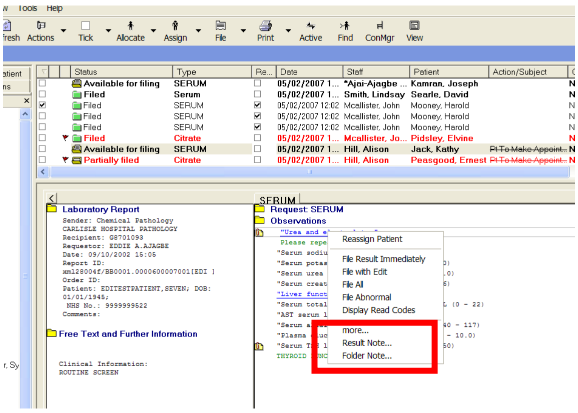
In effect there are two types of free text notes which can be added to messages in Mail Manager. These are known as Folder Notes and Result Notes.

Note If Result or Folder notes are added to an result after it has been filed, the note will not appear on the Journal in Consultation Manager, although the notes are accessible through the View Mail for Patient icon .

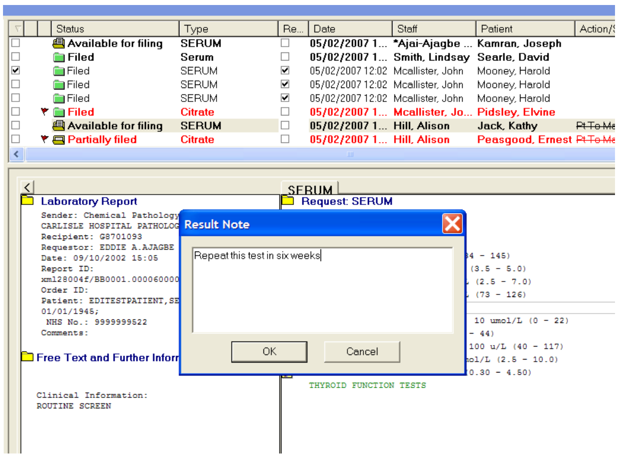
Result Note

A Result Note is free text which can be added to an individual result line. The text added is shown beneath the result line together with the author, date and time.

1. With the Pathology tab showing, point to the result line which needs the note. Right click and select **Result Note**.



2. Type the note in free text in the **Result Note** window and click OK.

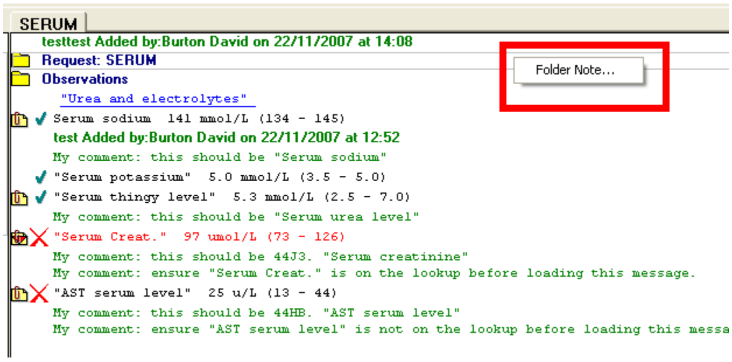


3. The note appears in green with a full audit trail.

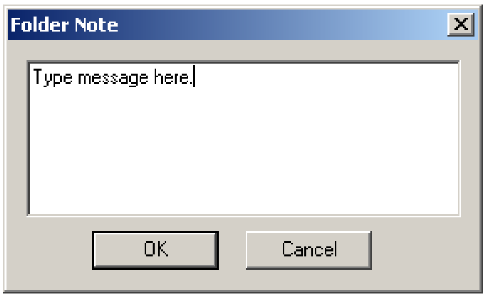
Folder Note

A Folder Note is a free text note which is added to the entire result.

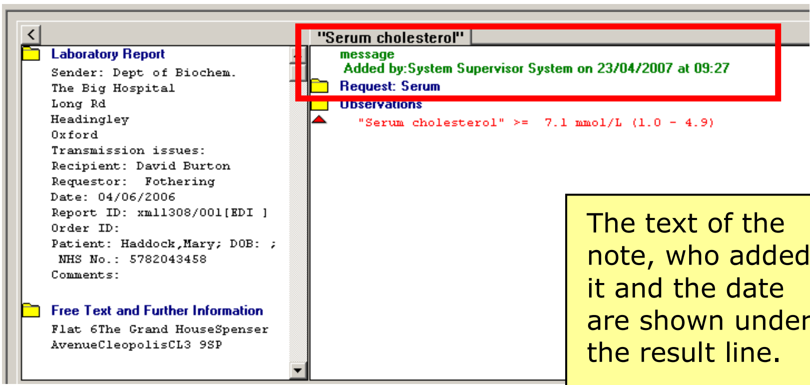
1. Right click on the pathology result in the bottom pane and select **Folder Note.**



2. Type the note in free text in the **Folder Note** window and click OK.



3. The text of the Folder note is displayed at the top of the right-hand pane of the message details, with a full audit trail.

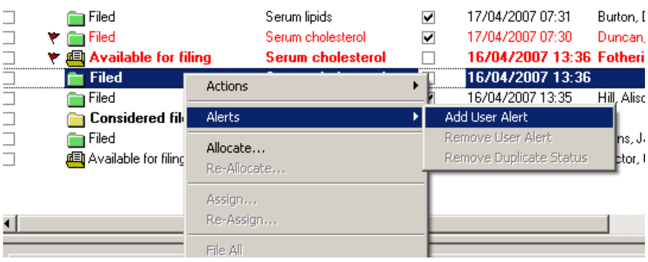


The text of the note, who added it and the date are shown under the result line.

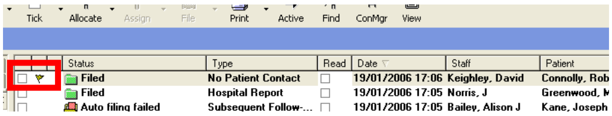
How do I set a user Alert?

User alerts mark the result with yellow flags which shows the result is important. To set a User Alert:

1. Right click on the result and select **Alerts - Add User Alert**.

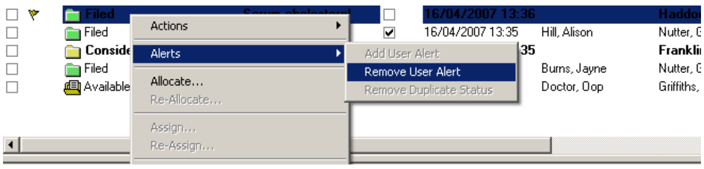


2. The result is now marked with a yellow flag.



Removing a user alert

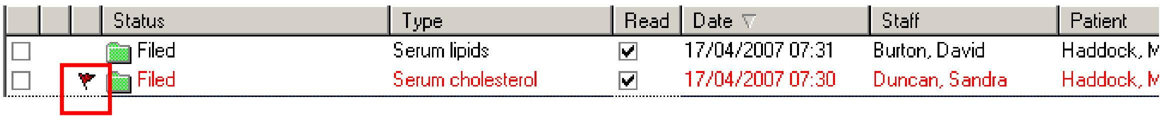
You are free to set and clear the user alert as you see fit with a simple menu option right click **Message - Remove User Alert**.



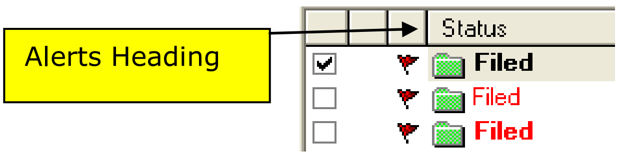
Note Users have no rights to edit alert flags on messages other than their own and those for which they have the relevant Staff Access rights.

What are System Alerts?

System alerts**,** often with red flags . System alerts are created by the pathology laboratory, for example, abnormal or high/low pathology results and may carry different coloured flags. These are set by the sender and cannot be removed.



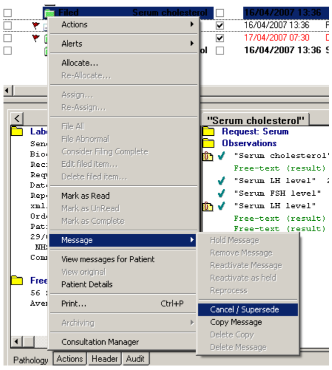
Results can be sorted by alerts by selecting the alerts heading from the main Mail Manager view:



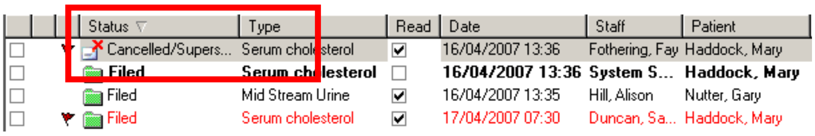
How do I Cancel/Supersede?

An original message such as an XML Pathology result can be marked as **Cancel/Superseded** if a subsequent message has updated the original.

1. Right click on the result select **Message – Cancel/Supersede**



2. The status will show as cancelled / superseded 



Cancel/Supersede is available providing:

- The result is not a copy/action message
- The result is an incoming message
- The result is not an archived message
- The result filing status is not already cancelled or a withdrawn message
- The Staff has rights to the result

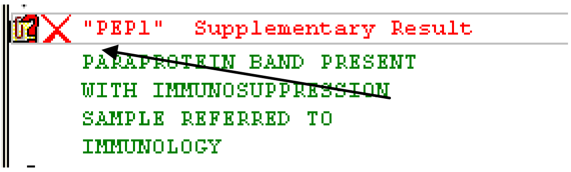
Cancel / Supersede will:

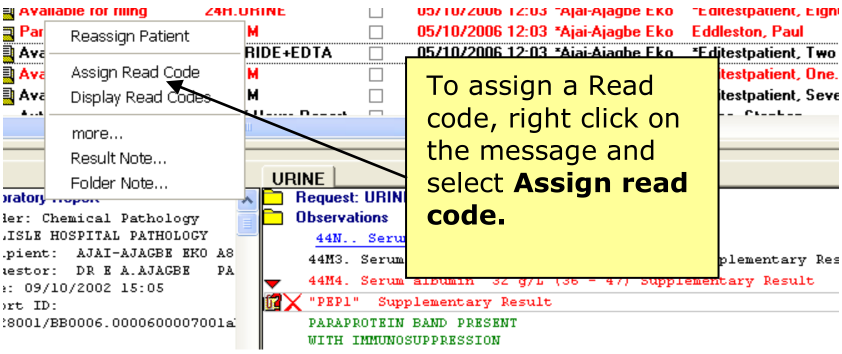
- Delete all copy results for the selected result
- Set the filing status to Cancelled / Superseded
- Mark the result as read
- Mark the result as actioned and not as outstanding Action
- A Cancelled / Superseded result that has been read with no outstanding Action will be treated as completed result (regardless of whether it has a staff or patient allocated)

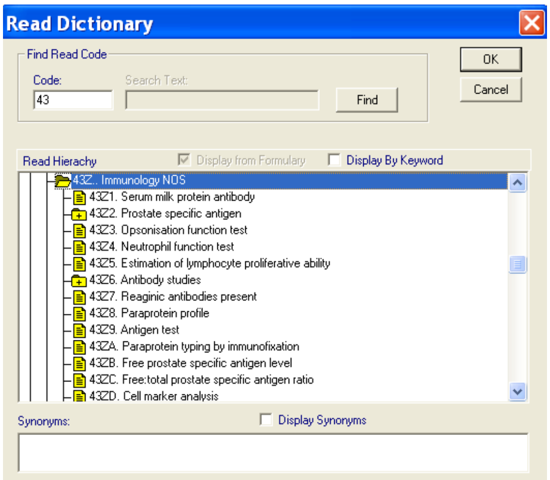
Although the result is marked as complete, if the user amends the result so that it is no longer actioned (e.g. Mark as unread), then the result will no longer be deemed complete.

Results with no Read Code

On the Message Details pane, under Observations, any result line which does not have a Read code associated with it will be marked with a red cross. This cannot be filed into Vision until it has been assigned a correct Read code.

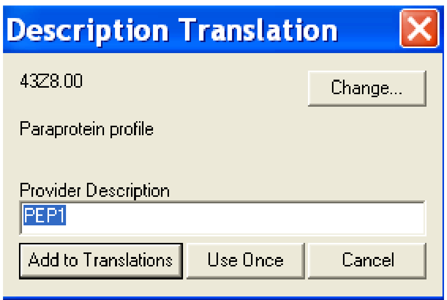






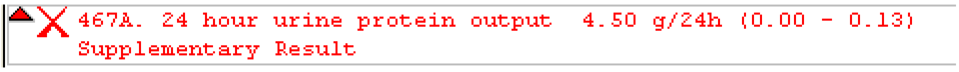
A Read Dictionary select screen is shown for you to select an appropriate Read code. Click OK.

At the **Description Translation** screen, the Read code you selected is shown at the top - use the **Change** button if you want to change the selected Read code. The provider description is shown in the window. If you choose **Add to Translations**, this mapping will be placed permanently in the **Tools - Lookup Table** so that that Provider Description is always mapped in future to that Read code.

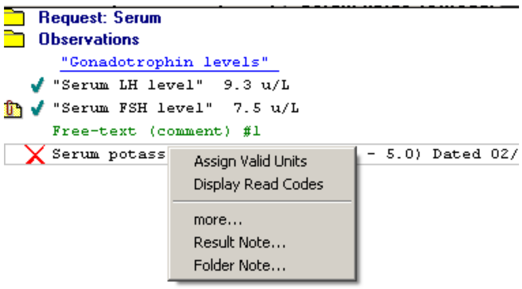


How do I Assign Valid Units?

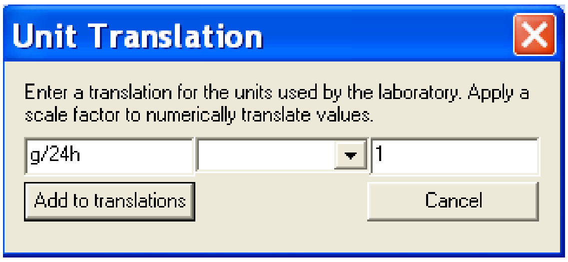
Some results are sent from the provider with units that do not match valid Vision units. These lines will have a red cross in the left-hand margin.



1. Right click on the result line under Observations, select **Assign Valid Units.**



2. At the **Unit Translation** screen, select a valid Vision unit.



3. Click on **Add to Translations**. Whenever this unit is used in future by the provider, it will be mapped to the Vision unit you have just selected. You can lookup the mapping of all units done by your practice in **Tools - Lookup Table.**

How do I Copy Mail?

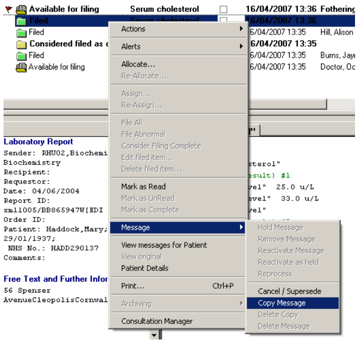
Mail for a particular user can be copied to one or more other users. You can either copy a result from your own mailbox or from a mailbox to which you have rights. The copy can go to a member of staff or a group of staff members that would not normally have rights to see the result.

Any actions you effect on the copied result will be applied to the original result and be visible on all other copies of the result. The exception to this is purely local actions such as marking as read, and applying a user alert.

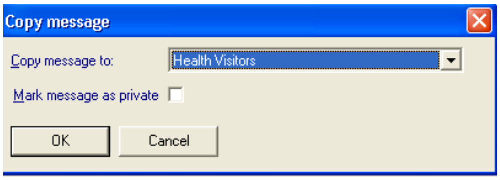
Rather than copying messages to another users mailbox, your system administrator can allocate the required user rights for another user to access your entire mailbox on a permanent or temporary basis

Copying a result

1. Right click on the result and select **Copy Message**



2. On the **Copy Message** screen, select the group or individual to whom you want to copy the result. Click OK.

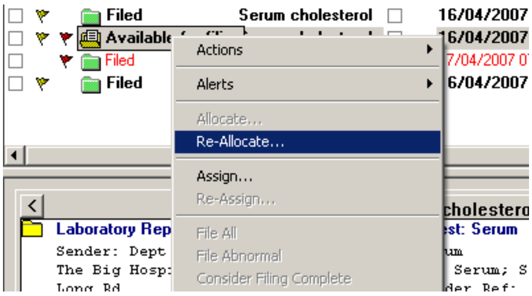


This message will now display in the specified user(s) Mail Manager screen.

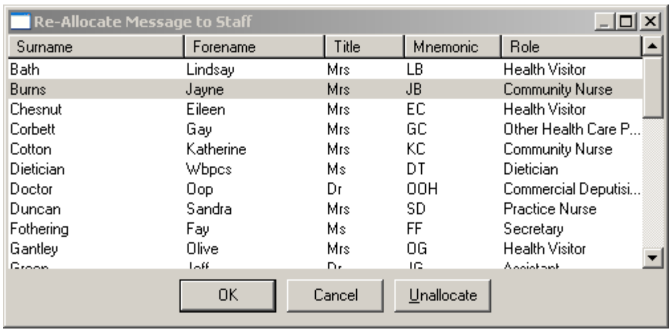
How do I Reallocate Mail?

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.

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



2. Choose the individual or group you would like and 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' and all reallocations are audited.

Managing Actioned Messages

As well as administrative staff, clinicians should also be aware that they must complete actions directed at themselves if they have been carried out.

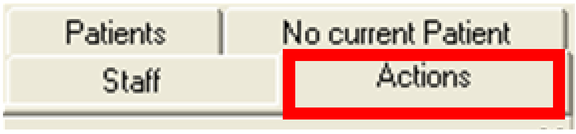
Action(s) can be completed from within Mail Manager, either from the **Actions** tab or by using **Find Patient**, and also from Consultation Manager **View Mail for Patient.** It is important that Actions are completed when they are carried out so that they are no longer listed as outstanding this ensures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

Finding and Completing Actions directed at me or my Staff Group

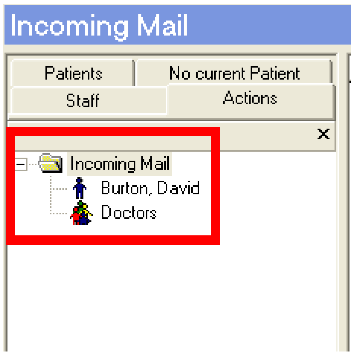
If you switch to the Actions tab in the left-hand pane, this displays only the incoming messages with an outstanding action directed at you as the current user or to a group to which you belong, e.g. GPs, Nurses etc. It does not display all results that have been actioned for the whole practice unless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

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

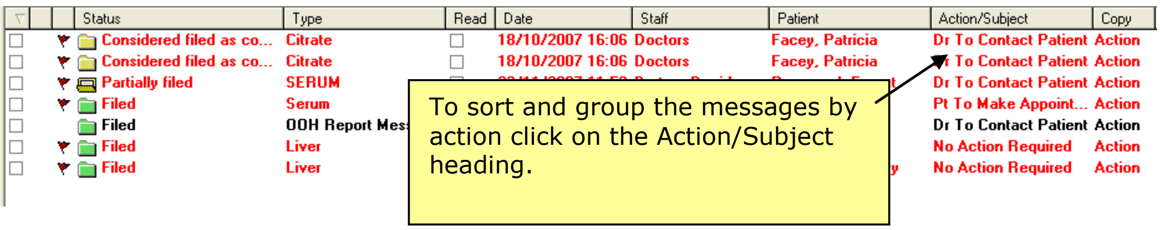
1. In Mail Manager, select the **Actions** tab



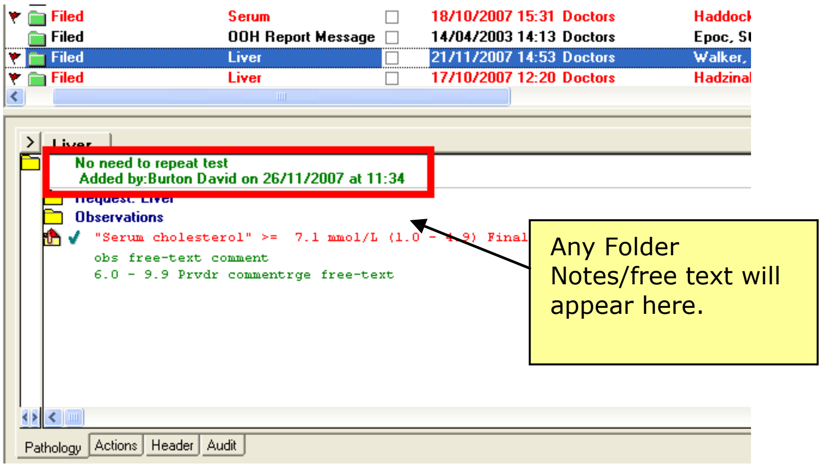
2. Select Incoming Mail to see all actions allocated to you and any groups to which you belong. Select your name or the required group name to see actions assigned specifically to yourself or a group.



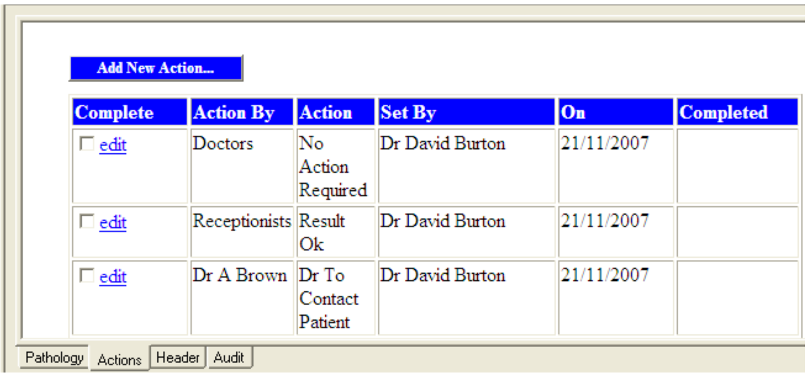
3. The messages for you and/or your groups are displayed.



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.



Complete	Action By	Action	Set By	On	Completed
edit	Doctors	No Action Required	Dr David Burton	21/11/2007	
edit	Receptionists	Result Ok	Dr David Burton	21/11/2007	
edit	Dr A Brown	Dr To Contact Patient	Dr David Burton	21/11/2007	

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.

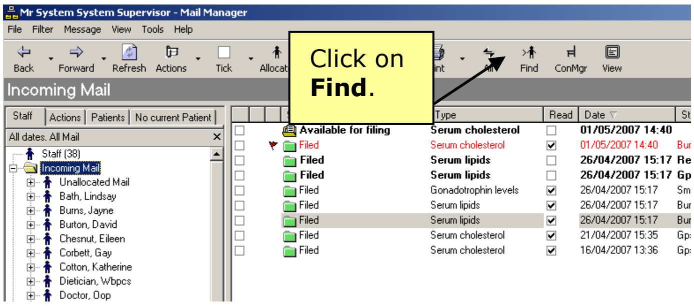
8. If there is only one action relevant to you, Mail Manager will tell you that the copy of message for action has been deleted. The original will be in the mailbox of the original user it was allocated to which is normally the usual GP.

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?

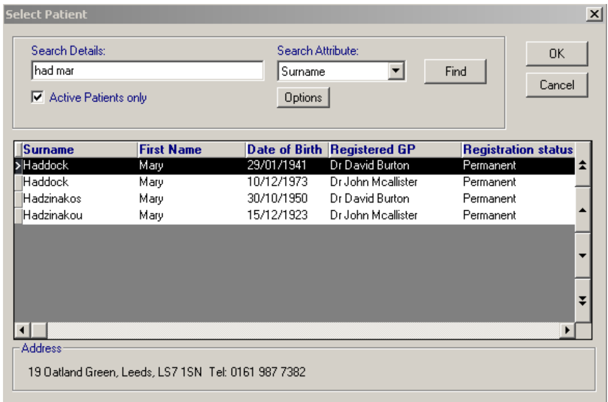
You can also search for results for a specific patient in Mail Manager which saves you from searching through the list in the Actions tab:

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

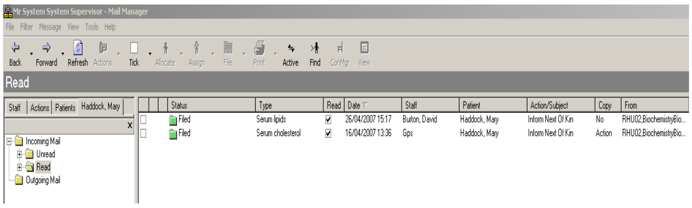


2. Type in the search details and click Find.

3. Click on the required patient name and click OK

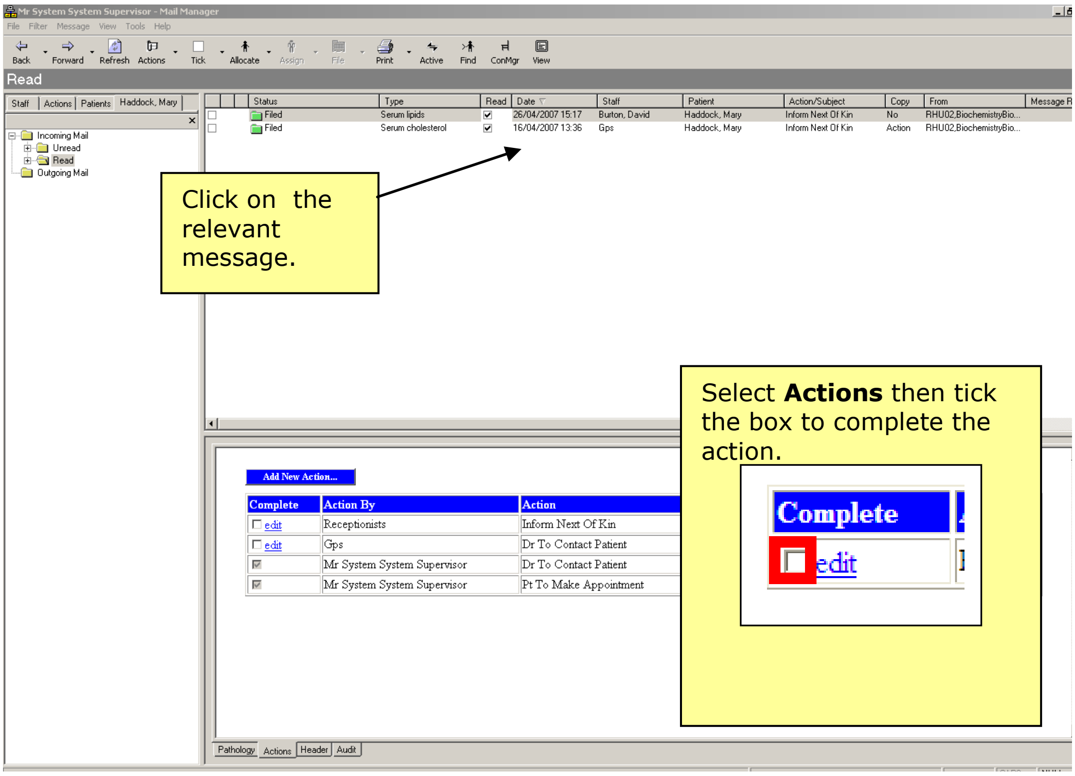


4. All the results for the patient will be displayed. A tab is also created specifically for the patient which separates **ALL** results for the patient into read and unread.



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.

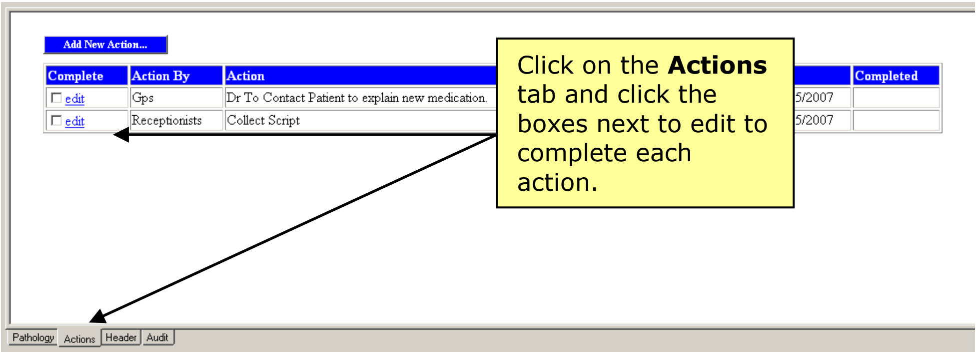


7. When prompted with a confirmation screen, select Yes to complete the action. Upon completion, the message will disappear from your Mail Manager screen.

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.

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:



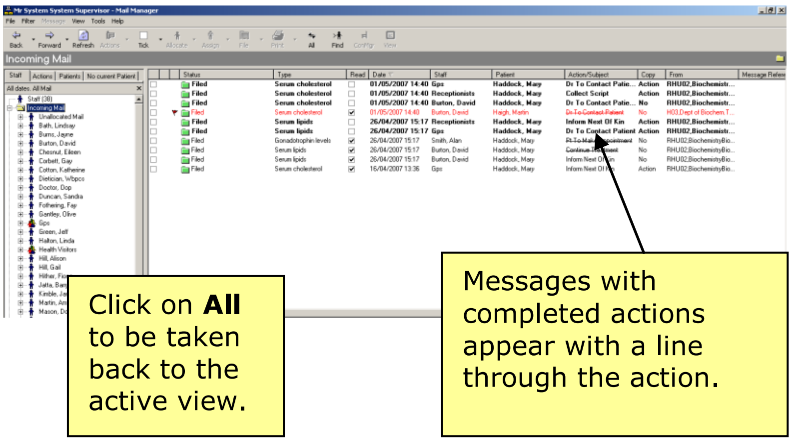
What happens to the result when I complete the action?

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.



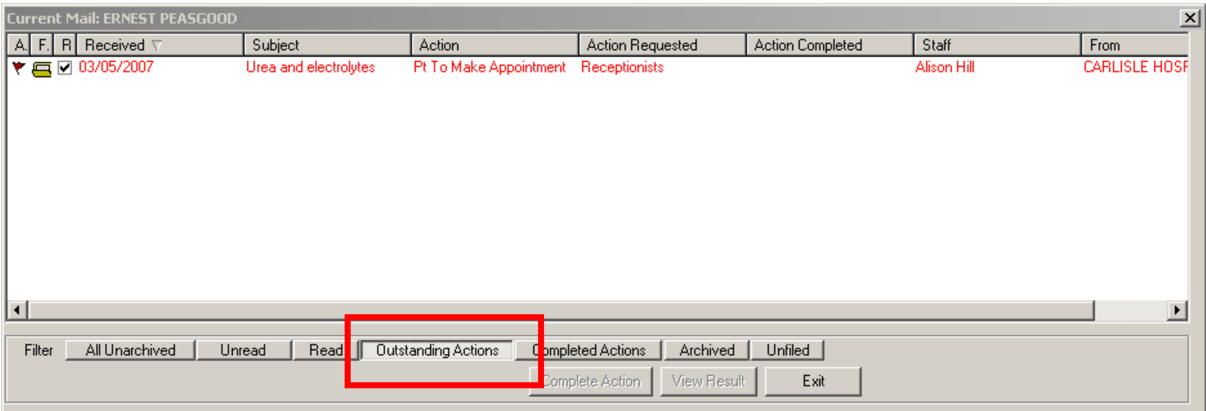
Note If you are looking for a completed message but cannot find it, select View-Archive View to view archived messages between a specific date range.

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

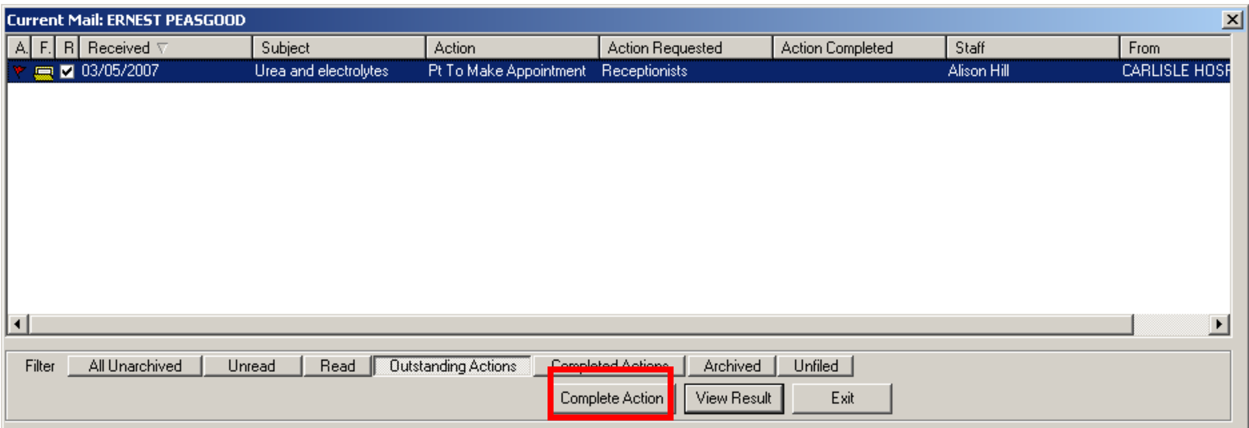
Although we recommend that actions are completed from Mail Manager as this is much quicker, you can still view and complete actions from Consultation Manager.

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

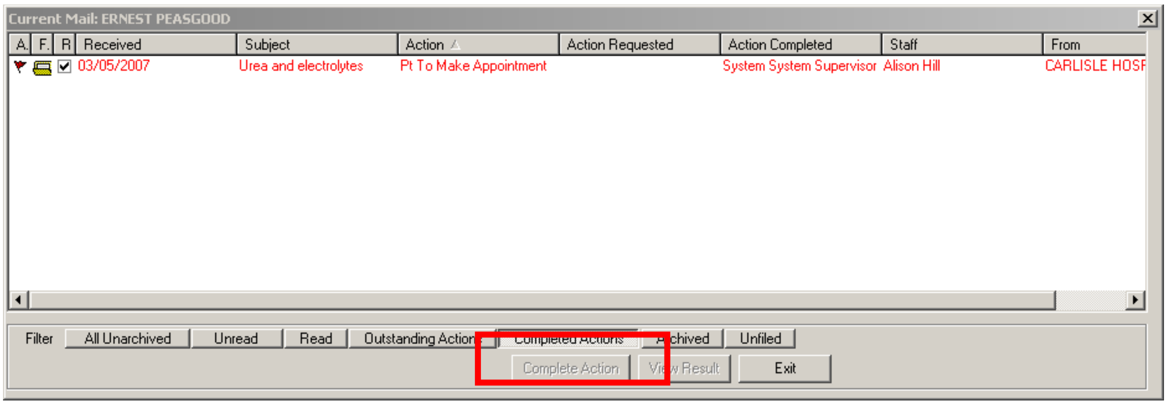
2. Click on the **Outstanding Actions** tab. All results with outstanding actions will be displayed.



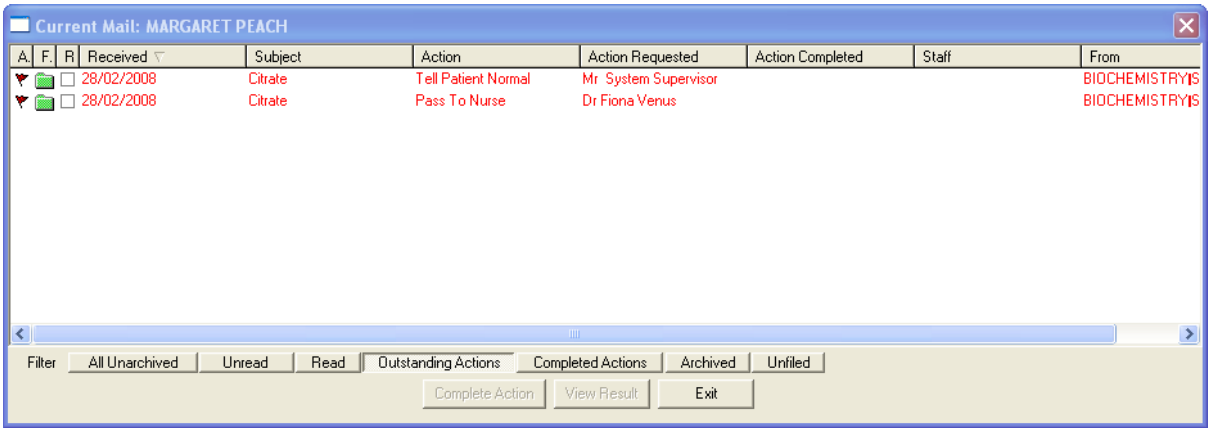
3. Click on the appropriate result, then click on the **Complete Action** button. The action is completed and the result is removed from the Outstanding Actions view.



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:

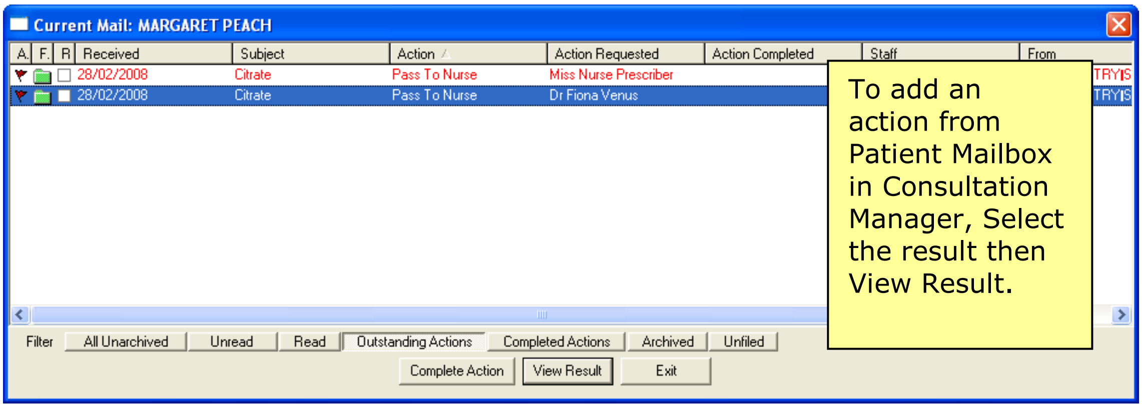


Note Clicking on the **Complete Action** button will complete any action on the currently highlighted result; you will be unable to read any extra free text that the person setting the action might have added. This text can only be read by looking at the full result (View Result).

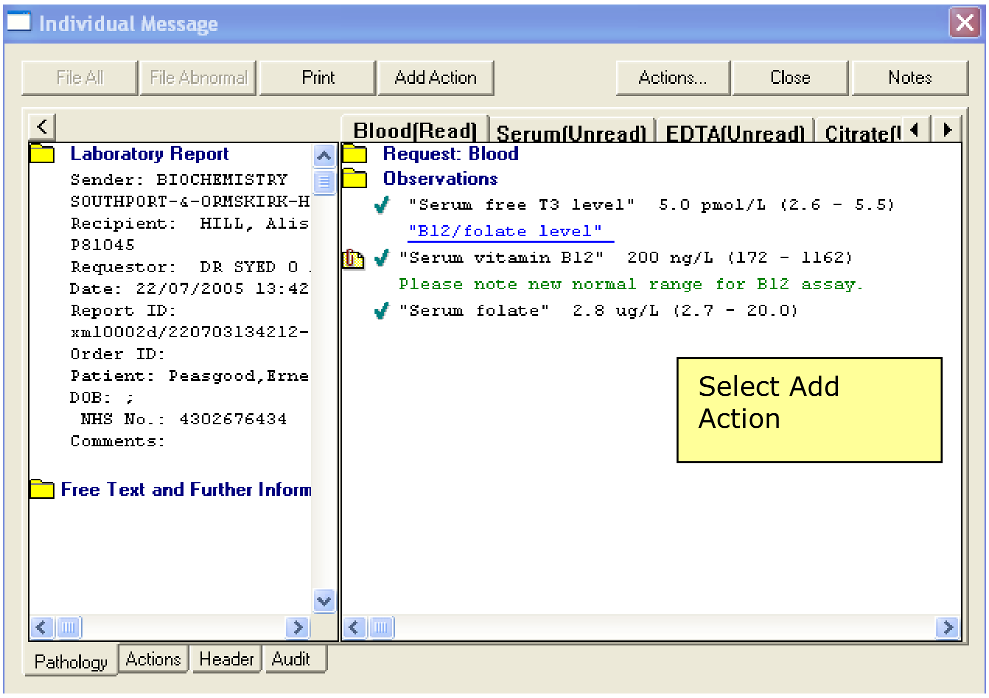
Add Action from Consultation Manager

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.
6. Click OK.

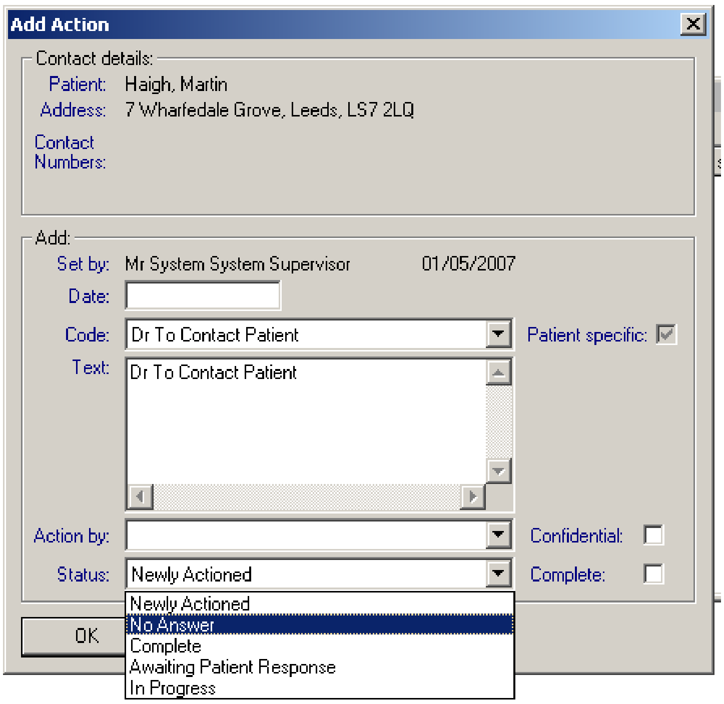
Action Status

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.

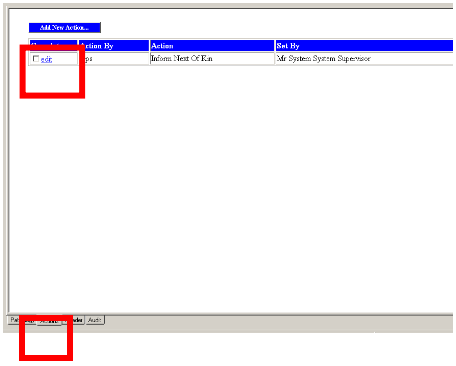
How do I record an action status?

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. The Quick Reference to Mail Manager Setting Up explains setting up Action Status.

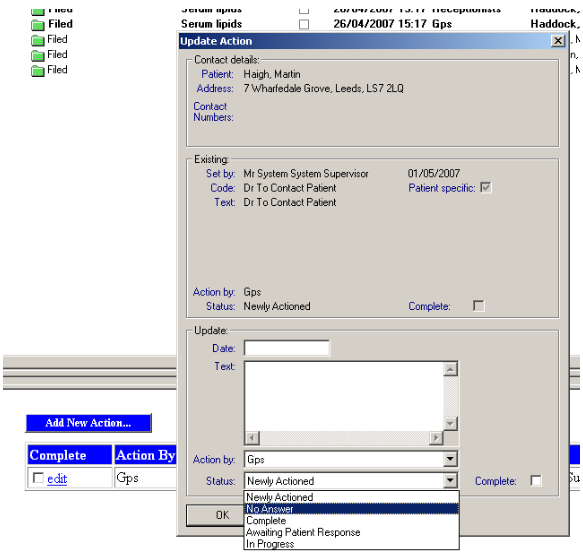


To record an action status:

1. Click on the **Actions** tab. In the bottom pane of a selected message. Click on **edit** which will display the **Update Action** screen.



2. From the drop down list, select a relevant action status. Click OK.

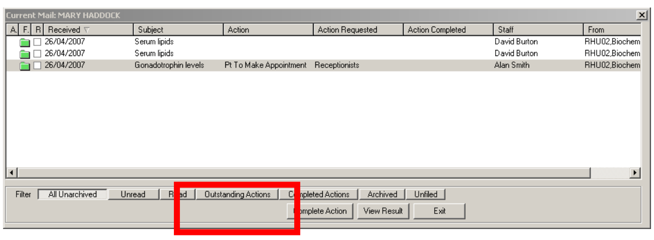


Adding Action Status result from Consultation Manager

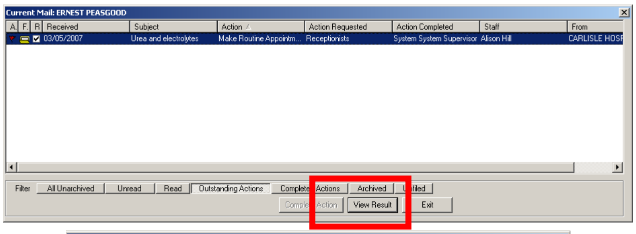
To add an action status to a result from Consultation Manager:

1. From Consultation Manager, select the patient
2. Click on the **View Mail for Patient**  in **Consultation Manager**.

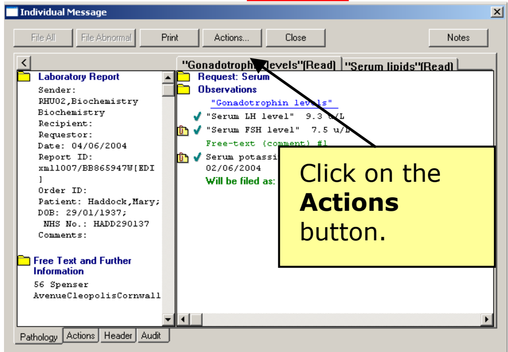
3. Click on the **Outstanding Actions** tab. All results with outstanding actions will be displayed.



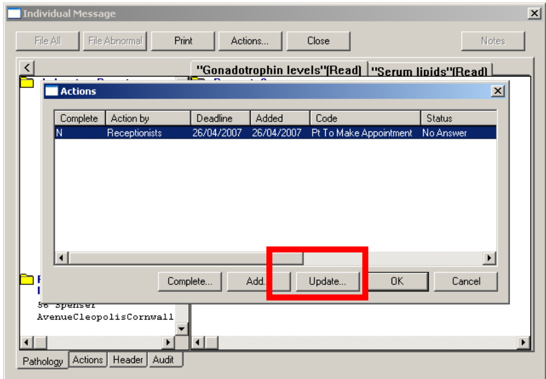
4. Click on the appropriate result, then click on the **View Result** button.



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

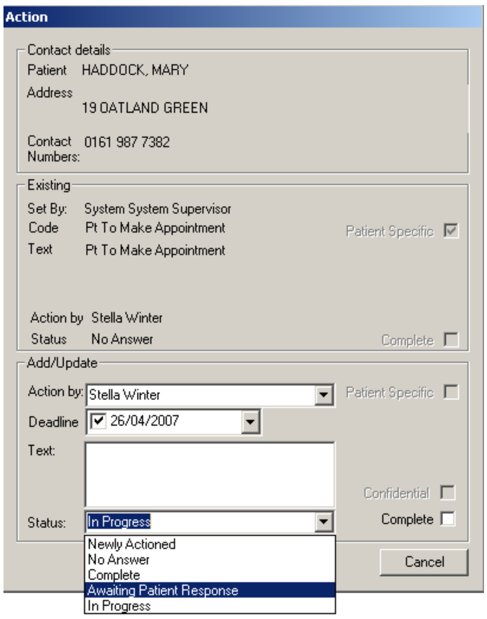


6. Click on **Update**.



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

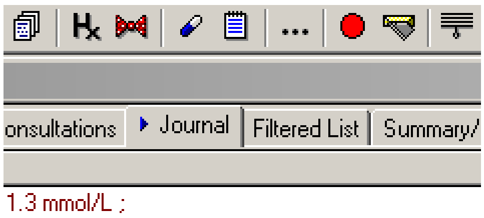
8. Click OK to save.



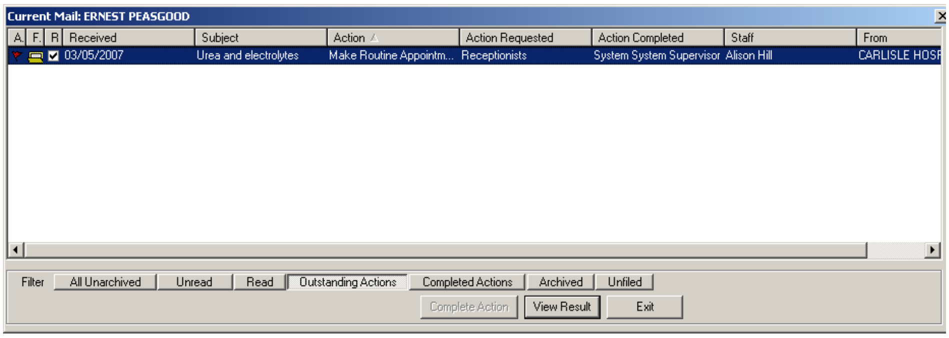
How do I view action status?

To view action status in Consultation Manager:

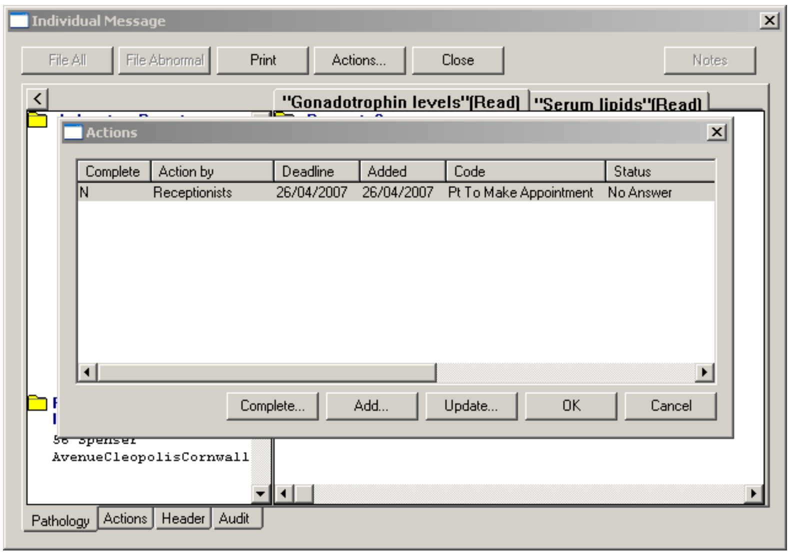
1. Select the patient, click on **View Mail for Patient**  .



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”.



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 (using File - Archive) and as time goes on, possibly daily.

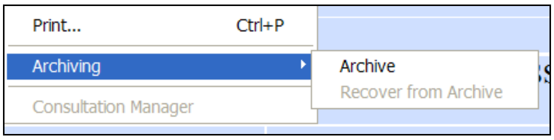
Individual users can archive their own messages (see below) but, depending on Staff Access rights, you are also able to archive other users' messages.

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 if the message is a Pathology result it must be older than 30 Days.

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



3. When prompted to confirm archive, click Yes.

Note Only electronic prescription messages can be archived if they have an error message.

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

Note You can access archived messages within a certain date range from **View – Archive.**