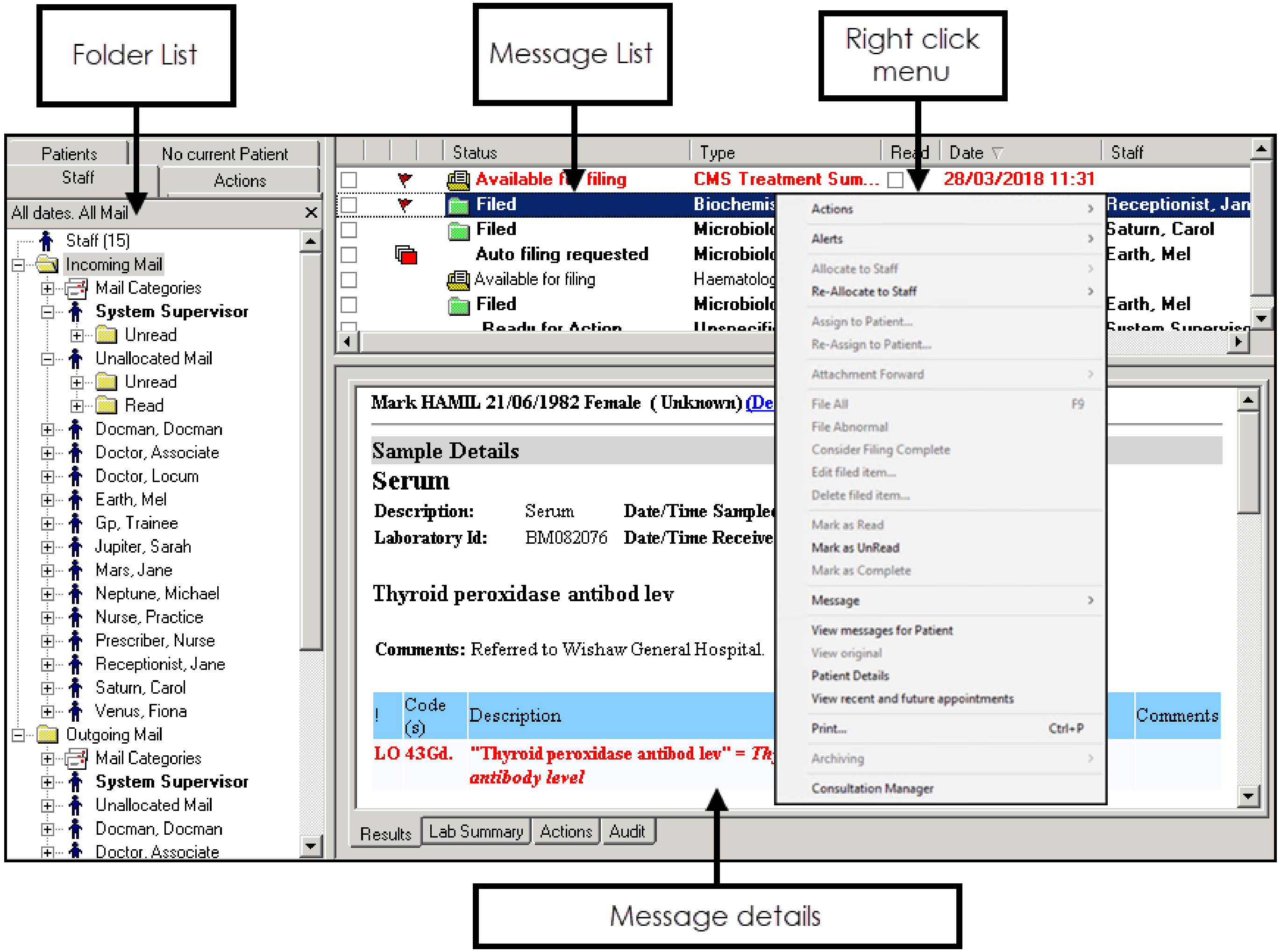
Mail Manager Desk Aid

Mail Manager for Clinicians



Results Workflow from Mail Manager

1. Select your **Mail Folder** and view your unread messages.
2. Optionally, right click and select **Consultation Manager** to open the patient record.

Training Tip - Remember you can send a text message to a patient directly from the patient record.

3. Optionally, right click and select **View recent and future appointments** to display appointments or get the patient contact details.
4. Right click and select **Action** to add an **Action** to the result.

Results Workflow from Consultation Manager

If you are with a patient:

1. From **Consultation Manager**, select **View Mail for Patient**.
2. Give the patient their results and add an **Action** if required.

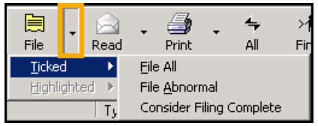
Training Tip - Highlight the result required and select **View Result** to see the full details.

3. Perform the action, if not already actioned.
4. Select **Complete Action** if appropriate.

Mail Manager Desk Aid

Mail Manager for Administrators

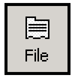
The following options are commonly used from the **Mail Manager** toolbar:



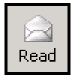
Down arrow - To action more than one message at a time, tick all those required, select the arrow next to the appropriate option and select **Ticked**.

Refresh - Select to manually update your messages.

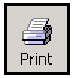
Actions - Select to attach pre-defined actions to the selected message(s).



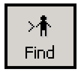
File - Select to file the selected message(s) into the patient record.



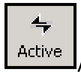
Read - Select to mark the selected message(s) as read.

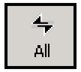


Print - Select to print the selected message(s).



Find - Select to locate a patient's message(s).



/ 

Active/All - Select to hide/display completed messages.

Appoint - Select to display any booked appointments for the selected patient.

Results Workflow from Mail Manager

Unmatched Patients

If any results have failed to file to the correct patient:

1. Select the **Patient** column heading to sort, **Unmatched** patients start with a *
2. Check the patient's address and details on the lab result (bottom pane) and then either:
    - Right click on the result, select **Assign to Patient** and select the correct patient, or
    - If this is not your patient, select **Print** and contact the lab. Now right click on the message and select **Delete**.
3. Right click on the message and select **File**.

Missing Staff

If the **Staff** entry on a message is blank:

1. Right click on the message and select **Allocate to Staff**.
2. Select the staff member required and then select **OK**.
3. Finally, right click on the message and select **File**.

See Troubleshooting Lab Results in Scotland in the **Mail Manager Help Centre** for more details.

Completing a Result from Mail Manager

To complete a result that has been actioned:

1. Highlight the result required.
2. Select Actions from the bottom section of the screen.
3. Select **update** to display the **Update Action** screen.
4. Complete the **Update** section as required, only tick **Complete** if appropriate.
5. Select **OK**.

Archiving

Archiving messages maximises the performance of **Mail Manager** and enables you to locate and process messages quickly.

You should ideally run an archive daily.

To run an archive:

1. From **Mail Manager**, select **File - Archive**.
2. The **Archive Messages** screen displays, select **Archive all the messages to which I have rights**.
3. Select **Archive**.