




Emailing from Eos using a Template – System Steps

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Emailing from Eos using a Template – System Steps

Emailing from Eos using a Template – System Steps	
1	<p>From the ACC45 Claim, select the Email button:</p> 
2	Select option Email from Template
3	<p>Select Recipient from the Available Recipients section, then select the To button.</p> <p>IMPORTANT</p> <ul style="list-style-type: none"> You can only send emails to verified email addresses. <p>TIP</p> <p>For Purchase Order related emails:</p> <ul style="list-style-type: none"> If requesting clinical notes, use the Admin/Med Note Request email address If approving Non-

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1. Scroll down and select the **Documents Type Folder** Tab
2. Under the **Templates** folder, select the **NGCM Administration Email Templates** sub-folder
3. Scroll down and select the appropriate Template from the **Document Types** section.

NOTE: Options available to choose from are:

- Accredited Employer Email
- Cancelling Service Email
- Forward Email
- Medical Notes Request (Purchase Order) Email
- Medical Notes Request Email
- Non-Acute Rehabilitation Email
- Purchase Order Approved Email - PO
- Request and Referrals Email
- Send Letter on Behalf Email

4. Select **OK**

NOTE:

Alternatively, if you know the name of the template you wish to use (see above), search for the template:

1. Select the **Search** Tab (*Instead of the Documents Type Folder Tab*)
2. Enter the name of the Template in the **Document Type** field
3. Select **Search**
4. Select **OK**

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Outlook will open with the email template you requested

1. Check the **recipient** is correct
2. **Edit** the email

NOTES:

- **Don't remove the filing away email address in the Bcc field or the subject**
- The email **Subject line** auto-populates with the client's name, the ACC45 claim number and the client ACCID number. If the email is related to a specific Eos Task Type, include the name of the support or referra in the **Subject line**.
- The **Bcc** address should read outbound@claims.acc.co.nz

If you need to email from ...

An INDIVIDUAL Mailbox

1. When the email is ready to be sent, select the **Send** button

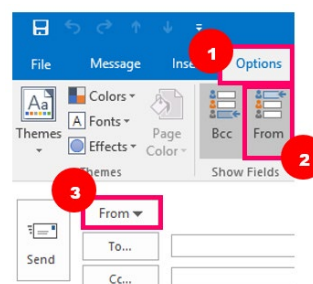
NOTE: The outbound email will be automatically filed away as a contact on the **ACC45 claim**

A GROUP / SHARED Mailbox

1. Select the **Group / Shared** email address in the **From** dropdown

NOTE: If you don't see the **From** field:

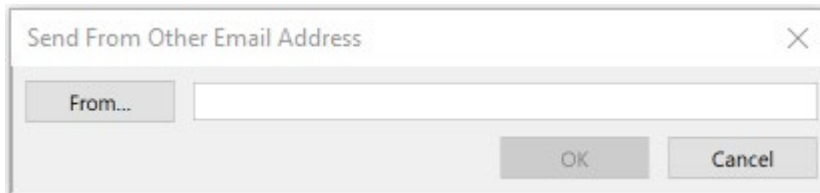
- Select **Options** (1)
- Select **From** (2)
- This will allow you to see the **From** field (3)



Emailing from Eos using a Template – System Steps

NOTE: If you can't see your team's **Group / Shared** mailbox as an option:

- Select the **Other Email Address...** option
- Select the **From...** in the window that opens to search for the email address:



2. When the email is ready to be sent, select the **Send** button

NOTE: The outbound email will be automatically filed away as a contact on the **ACC45 claim**

Email a Single Document from Eos using a Template – System Steps

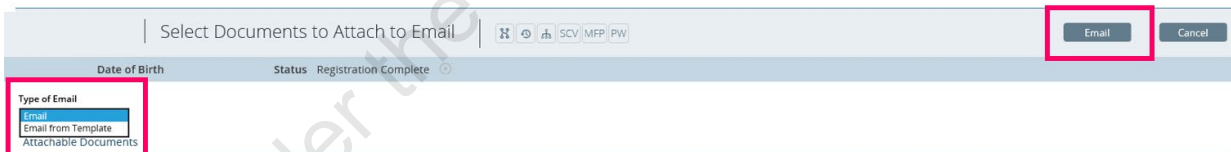
Email a Single Document from Eos using a Template – System Steps

1. Navigate to the **Documents** Tab on the relevant **ACC45 claim**.

2. 1. Select the **Email** button
2. Select the document you want to email and click **AddTo Email**

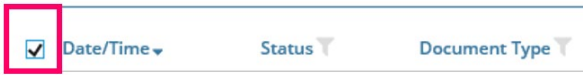

NOTE: Check the document you wish to email is visible in the **Documents to Email** section and there are **no other documents** that shouldn't be emailed present.

3. Change the **Type of Email** selection to **Email from Template** then select the **Email** button:



4. Go to [Emailing from Eos Using a Template – System Steps](#) and follow **Steps 3 to 5**.

Email Multiple Documents from Eos using a Template – System Steps

Email Multiple Documents from Eos using a Template – System Steps	
1	Navigate to the Documents Tab on the relevant ACC45 claim .
2	<ol style="list-style-type: none"> 1. Select Document Group with the documents you want to email <i>The first document in this Document Group is automatically selected by default</i> 2. Select the Email button
3	<p>In the next Select Documents to Attach to Email screen:</p> <ol style="list-style-type: none"> 1. From the General section, select the documents you want to email <p>TIP: You can select all the documents at the same time by selecting the field indicated below:</p> <p>General</p>  <ol style="list-style-type: none"> 2. Select the AddTo Email button 3. Check the documents you wish to email are visible in the Documents to Email section and remove documents that shouldn't be present. 4. Change the Type of Email selection to Email from Template then select the Email button:  <ol style="list-style-type: none"> 5. Go to Emailing from Eos Using a Template – System Steps and follow Steps 3 to 5.

Emailing from an Eos Purchase Order – System Steps

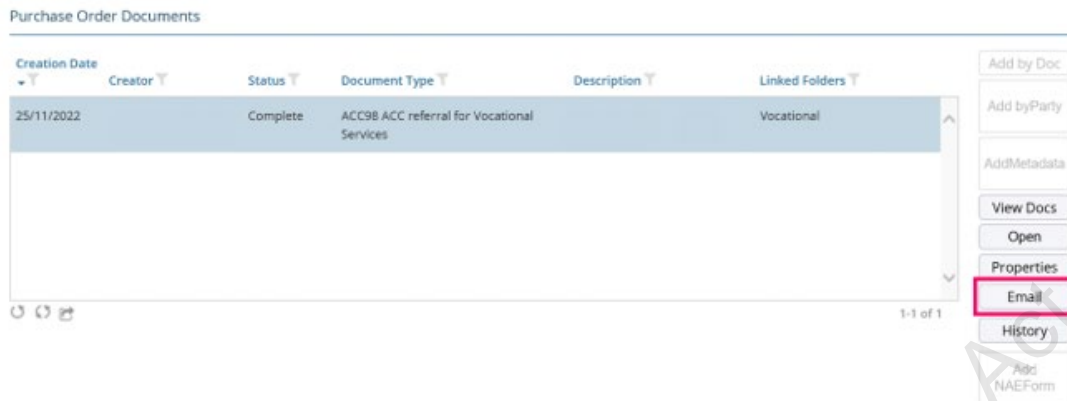
IMPORTANT:

The following extra fields and functionality is only available when the **Purchase Order Email** button is used:

- **Select Documents To Attach To Email** Screen:
 - Auto-population of Purchase Order documents into the **Documents to Email** section
 - **Attachable Documents** section > **Document Groups** column
- **Choose Recipient and Document Type For Email** Screen:
 - **Filter by Purchase Order Vendor and Provider** tick-box field

This means you can't access this extra functionality using **Email** buttons available elsewhere in Eos e.g., *the ACC45 Documents Tab, ACC45 Claim Email shortcut*

1. From the Eos **Purchase Order Details** screen ► **Purchase Order Documents** section select **Email**:



NOTE: The **Email** button is only enabled after the Purchase Order is **Authorised**
 The *'Select Documents to Attach to Email'* screen is displayed

2 SELECT DOCUMENTS TO ATTACH TO EMAIL SCREEN

When this screen is accessed from the **Email** button on a Purchase Order, the Purchase Order documents are automatically prepopulated into the **Documents to Email** section at the bottom of the screen.

1. Check all the documents you wish to email are visible in the **Documents to Email** section and **remove documents that shouldn't be present**.
2. Ensure the **Type of Email** field is showing **Email from Template** then select the **Email** button:



The *'Choose Recipient and Document Type for Email'* screen is displayed

3 CHOOSE RECIPIENT AND DOCUMENT TYPE FOR EMAIL SCREEN

When this screen is initially loaded, a **Filter by Purchase Order Vendor and Provider** tick-box will be displayed:

Choose recipients for email

Available Recipients

Filter by Purchase Order Vendor and Provider

IMPORTANT:

If the Vendor and/or Provider used in the Purchase Order **are not linked** as a Participant on the claim, they won't be able to be filtered or displayed as an **Available Recipient**.

NOTES:

- The **Available Recipients** will be automatically filtered to **only show** the Vendor and/or Provider associated with the Purchase Order.
- Unticking the **Filter by Purchase Order** tick-box and selecting the **Refresh Available Recipients** button will enable all Available Recipients linked to the claim to be displayed. You can reapply the filter ticking the **Filter by Purchase Order** tick-box and selecting the **Refresh Available Recipients** button

1. Go to [Emailing from Eos Using a Template – System Steps](#) and follow **Steps 3 to 5**.