Managing Emails and Folders

Email is accessed using the Outlook icon  **on the computer desk top**

Inbox Folder - contains new questions, emails with additional information/photos, and thank you emails.

Unresolved Folder – contains emails with active questions.

Emails for Justine to Approve Folder – contains emails written by MGs that are ready for Justine to review/approve prior to being sent to client.

Sent Folder – contains emails that have been sent by the coordinator, and MGs asking for further information. The Sent Folder is an archive, and its contents should never be deleted. MGs can search this folder.

Deleted Folder – contains deleted emails. If an MG deletes an email from any other folder, it can be found here. The contents of this folder will be permanently deleted periodically by Justine or Helpline Co-Chairs only.

Please do not use any other folders

New email question

- Complete Helpline Form (HLF).
- Move new email from Inbox Folder to Unresolved Folder indicating question is now active.
- When HLF is fully completed and you are ready to answer the client, open client's email from Unresolved Folder and select Forward function as this allows for the automatic inclusion of attachments in the reply.
- Enter client's email address, add your researched information – do not send email.
- Move email to Emails for Justine to Approve Folder**.**
- **Email replies must be completed and moved to Emails for Justine to Review Folder prior to leaving shift.** Please do not leave half-finished emails.
- Place the completed HLF in the Emails for Justine to Review Bin
- Justine will review the email, amend it as necessary and send to the client then place HLF in Enter into Logbook Bin for entry into the electronic Helpline logbook.
- Enter into Helpline Logbook and add HLF to Helpline Form Binder.
- The Helpline form must **always** be **fully** completed before entry into the logbook. DO NOT print the email or attachments.

Emails with additional information/pictures/thank yous: these may come from email/phone/or walk in questions where the client needed to supply more information.

- Find the matching HLF from the Unresolved Bin.
- If the original question came by email that email will be in the Unresolved Folder.
- Update the HLF.
- If able to complete the question and a reply by email is needed, create an email reply then move to Emails for Justine to Approve Folder.
- The Helpline form must **always** be **fully** completed before entry into the logbook. DO NOT print the email or attachments.
- Thank-you emails - No need to reply, delete the email**.**

Unresolved questions

- Start with OLDEST one. Find matching HLF in Unresolved Bin.
- When HLF is fully completed and you are ready to answer the client, open client's email from Unresolved Folder and select Forward function as this allows for the automatic inclusion of attachments in the reply and write email reply.
- Enter client's email address.
- Move completed email to Emails For Justine to Approve Folder.
- Place the Helpline Form in the For Justine to Approve Bin.
- The Helpline form must **always** be **fully** completed before entry into the logbook. DO NOT print the email or attachments.

Additional information needed

- Reply to the client by pulling up email and selecting Forward function as this allows for the automatic inclusion of attachments in the reply.
- Enter client's email address; send email to client requesting more information.
- Amend the HLF to indicate more information was requested, and place HLF in the Unresolved Bin.
- **Asking for additional information in an email does not need Justine's approval. Do not give any advice or links in this type of email or approval will be required**

Phone call to client to answer the question.

- Update the HLF.
- Delete email and place completed HLF in Enter into Logbook Bin.
- If there is a need to send information to a client, create email and move to Emails for Justine to Approve Folder.
- Place the Helpline Form in the For Justine to Approve Bin.
- Helpline form must **always** be **fully** completed before entry into the logbook. DO NOT print the email or attachments.