

Inbound Filing Away of Emails and Email Attachments – System Steps



How to File-away Inbound Emails and Email attachments from an Individual or Shared Email Inbox

Use these steps when you need to File-away one the following into Eos:

- An email contact
- A document that you've received via email
- A document you've scanned and then emailed to yourself.

System Steps

EOS																	
1.	Open Outlook . Select Forward in the email you want to save as a Contact in Eos.																
2.	Copy and paste the ACC45 number and/or ACCID in the Subject line as shown in the following table:																
	<table border="1"> <thead> <tr> <th>Type of filing</th> <th>What to copy and paste in the 'Subject' line</th> <th>Examples</th> </tr> </thead> <tbody> <tr> <td>ACC45 Number and Party</td> <td>The ACC45 number and ACCID are required</td> <td>CLAIM: XXXXXXXXXXXX ACCID: NNNNNNNNNN</td> </tr> <tr> <td>Party only</td> <td>The ACCID is required</td> <td>ACCID: NNNNNNNNNN</td> </tr> <tr> <td>Provider Party</td> <td>The ACCID must be prefixed by 'PROV-'</td> <td>ACCID: PROV-NNNNNN</td> </tr> <tr> <td>Vendor Party</td> <td>The ACCID must be prefixed by 'VEND-'</td> <td>ACCID: VEND-NNNNNN</td> </tr> </tbody> </table>	Type of filing	What to copy and paste in the 'Subject' line	Examples	ACC45 Number and Party	The ACC45 number and ACCID are required	CLAIM: XXXXXXXXXXXX ACCID: NNNNNNNNNN	Party only	The ACCID is required	ACCID: NNNNNNNNNN	Provider Party	The ACCID must be prefixed by 'PROV-'	ACCID: PROV-NNNNNN	Vendor Party	The ACCID must be prefixed by 'VEND-'	ACCID: VEND-NNNNNN	
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	<p>NOTE:</p> <ul style="list-style-type: none"> • <i>If you have an appropriate 'quick reference guide' contact setup, you can copy the description details from that contact</i> • ACC45 claim numbers must be preceded by the phrase CLAIM: followed by the ACC45 claim number • Customer numbers must be preceded by the phrase ACCID: followed by the Party ID <p>Finding the ACCID</p> <p>If the subject line of the inbound email has not already been populated with the ACCID, locate the correct record in Eos.</p> <p>To find the ACCID of a Party</p> <ol style="list-style-type: none"> 1) Conduct a privacy check of the content of the email and attachments to ensure the information is relevant and appropriate to upload to Eos. 2) Open the Party record. The number displayed at the top left hand corner of the Eos screen is the ACCID. 3) Copy and paste this number into the Subject line and type ACCID: before it. 																

Finding a ACC45 number and ACCID

If the subject line of the inbound email has not already been populated with the **ACC45** number and ACCID, locate the correct record in Eos:

- 1) Conduct a privacy check of the content of the email and attachments to ensure the information is relevant and appropriate to upload to Eos
- 2) Open the **ACC45** claim. The **ACC45** claim number and ACCID will be shown at the top of the screen
- 3) Copy and paste the **ACC45** claim number and the ACCID from Eos into the 'Subject' line of the email you wish to save as an Eos Contact

- 3.** Check whether the body of the email contains an image, e.g. a signature logo. If it does, then **you must select Plain Text** by completing the following:

- Go to the **Format Text** tab
- Select **Plain Text**
- The **Microsoft Outlook Compatibility Checker** message will pop up
- Select **Continue** to format the email in plain text

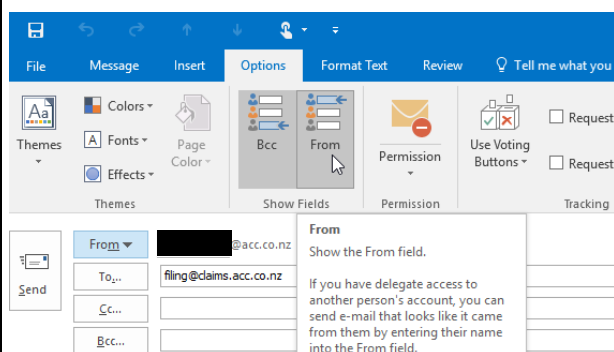
If you don't format the email as 'Plain Text', Eos will save the image and email as a separate document when you have completed 'Filing Away'. If plain 'Plain Text' is not selected, please ask your Recovery Leader to remove the document.

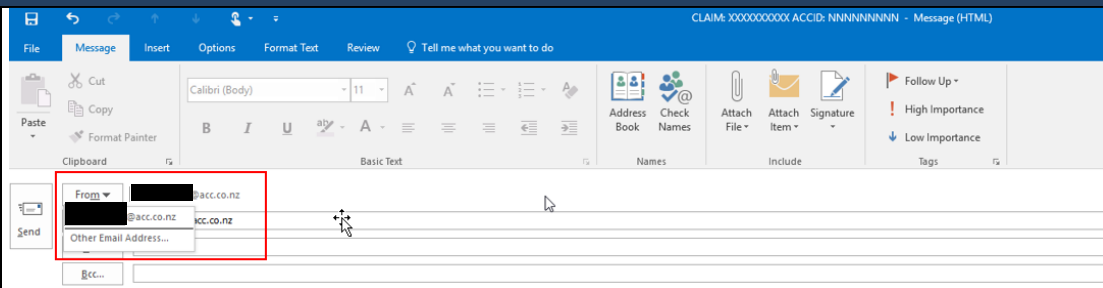
- 4.** Enter the filing@claims.acc.co.nz email address as the '**To**' recipient

- 5.** If you need to email from an **Individual** mailbox, go to step **5a** below.
If you need to email from a **Group/Shared** mailbox, go to step **5b** below.

- 5a.** Change the '**From**' field in the email to your **Individual email instead** of the shared email inbox.

- *If you don't see the **From** field go to the **Options** menu and select **From**. This will allow you to see the from field and then change this to your individual mailing address if it isn't defaulted to this already.*

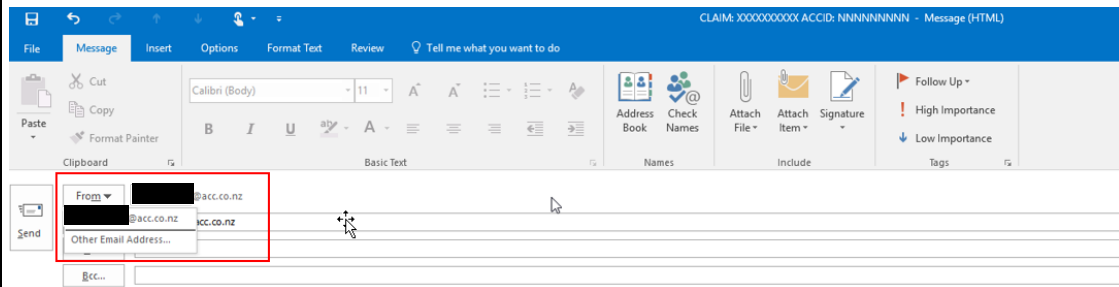
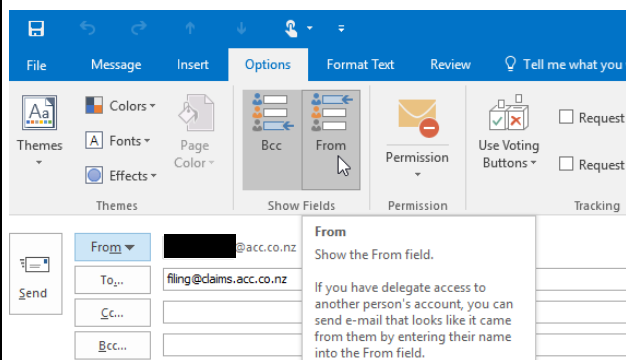




5b

Change the 'From' field in the email to the correct **Group/Shared** email address:

- If you don't see the **From** field go to the **Options** menu and select **From**. This will allow you to see the from field and then change this to your individual mailing address if it isn't defaulted to this already.



6.

Select **Send** in **Outlook**

The email will be saved in Eos and visible in the Contacts tab on the **ACC45** claim

NOTE: If the email has an attachment, the attachment will be displayed as a hyperlink. Attachments will also be automatically saved under the **Documents** tab of the **ACC45** claim.

7.

If you accidentally File Away to the Recovery Plan you will need to:

- Move these documents to the **ACC45** claim (see section 7a. below) and
- Link the document to the **Recovery Plan** (see section 7b. below)

NOTE: Only Word or Pdf documents can be moved from the Recovery Plan to the ACC45 claim. Do not move eform documents.

7a.	<p>How to move a document from the Recovery Plan to the ACC45 claim:</p> <ul style="list-style-type: none">• From the ACC45 claim copy the ACC45 Claim number• Select Linked Cases (to the right of the ACC45 Tabs).• Select Open (the Personal Injury Claim opens in a separate window)• From the Personal Injury Claim > Case Summary select Recovery Plan• In the Recovery Plan select the Contact Tab• Select the Contact with associated Document you wish to move• Select the Move button• In the Move Contacts screen in the Claim section select Move to another Case and then select the Magnifying Glass icon to the right of this field• In the Claim Number / ACC45 Number field paste the ACC45 number• Select Search• Select OK• Select OK <p><i>The Contact and associated Document has now been moved to the ACC45 claim</i></p>
7b.	<p>How to link the document to the Recovery Plan:</p> <ul style="list-style-type: none">• In the Recovery Plan select the Document Tab:<ul style="list-style-type: none">– If the Document Group is not displayed, then in the Document Groups section select Add. From the Name field dropdown select the most appropriate Document Group, Select OK.– If the appropriate Document Group has been created select the appropriate Document Group. Select Link. In the Claim Number / ACC45 Number field paste the ACC45 Claim number. Select Search. Select the document created that needs to be linked to the Recovery Plan. Select OK.

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Version 1.8

Customer Communication Guide

Channels and Technologies

March 2020

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Out of scope

2.2. Email

What it is

We engage with our customers using emails in two ways:

- Sending emails from Eos from the client's ACC45 claim - These can be as automatic notifications, or manual notifications by using the Eos Email toolkit. You can also use Outlook to respond to emails but claim related emails should be sent from Eos.
- Eos contains blank and pre-populated templates which once selected, open in Outlook for you to populate the message content. Once the email has been sent; it is recorded as a contact in Eos.
- Sending and receiving emails directly via Outlook – Admin and Assisted teams will receive emails via group email addresses, while Supported and Partnered teams may receive emails directly. If an email is sent via a response in Outlook, File Away needs to be Bcc'd in order to show as a contact on the client record.

To learn how to [File an Outlook email as an Email Contact](#), see the Eos Online Help information.

How we use it

Supported, Partnered and Claims Assessment teams

Staff working in the Supported, Partnered and Claims Assessment teams have their own individual ACC email addresses for receiving communications from customers. The Eos toolkit should still be used for responding to customers where possible, and the same templates can be accessed.

Administration and Assisted teams

Administration and Assisted teams use shared email addresses for inbound and outbound communication. These are:

- Recovery Admin (sensitive claims): recoveryadmin1@acc.co.nz
- Recovery Admin (non-sensitive claims): recoveryadmin@acc.co.nz
- Recovery Assistants (sensitive claims): assistedrecovery1@acc.co.nz
- Recovery Assistants (non-sensitive claims): assistedrecovery@acc.co.nz
- Enabled recovery: enabledrecovery@acc.co.nz

Administration - Inbound Document Management

The Inbound Document Management team uploads and tasks documents sent to the claimsdocs@acc.co.nz address. This address receives emailed documents that have been:

- redirected from transitioned branch email addresses
- sent from providers and clients when they are unsure of what team or individual is managing the claim.

Business Customers

- General Business queries: business@acc.co.nz
- Claims queries: claims@acc.co.nz

Managing team inboxes

For teams working in a task-based way (eg Assisted Recovery and Recovery Administration), Salesforce will assign email tasks which are generated based on emails that reach the shared inbox. When you're assigned an email task in Salesforce, you will then navigate to the appropriate inbox and use the 'Copy Search' string from Salesforce to find the email you need to action. This will include responding to customers, filing away emails, creating action tasks and reviewing and releasing Smartgate emails.

Sending safe emails using Smartgate

When using your ACC email account, you are responsible for ensuring your emails and attachments are accurate and contain only relevant content for the intended recipient(s). Emails to non-ACC email addresses with attachments are checked by Smartgate for privacy, client information, and profanity.

Once an email has been screened, you will receive a quarantined email from Smartgate prompting you to re-check the contents and recipients. The email will only be sent once you've confirmed this

by replying to the Smartgate email. **You must open the original email and fully check the content and addresses are correct.**

For teams working in a task-based way (Recovery Administration and Assisted Recovery), team members managing the group Outlook inbox are responsible for appropriately reviewing and responding to Smartgate emails. Refer to the [Sending safer emails process](#) on The Sauce.


For more on replying to Smartgate quarantine emails, please see the [Complete Inbound Client Related Emails \(Shared Inbox\)](#) process in Promapp.

Email signatures

The signatures below show you what your email signature in Outlook should look like.

Important: Team members working in a many-to-many way (e.g. Assisted, Payments, Recovery Administration) do not include a name or location in their signature for now.

For example, a Recovery Administrator in the Hamilton Hub would have this signature:



Recovery Administration | Kaiāwhina
recoveryadmin@acc.co.nz
Fax 0800 222 890
PO Box 952 / Hamilton 3240 / New Zealand www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

Recovery Coordinators, Recovery Partners and other CSD staff not working in many-to-many support teams should review the [Client Centred Language and use of Te Reo](#) information and include the Maori terms for your role and hub/site location in your signature.

For example, a Recovery Coordinator based at Wellington Site would have this signature:



John Mystery, Recovery Coordinator | Kaiārahi
Wellington Site | Whare Manaaki o Te Whanga-nui-a-Tara
Tel 0800 222 435 Ext <Case owner extension>
<Case Owner email address>
www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you..

Guidance on how to [Create an email signature](#) in Outlook is available on The Sauce

All email signatures

Recovery Administration | Kaiāwhina

recoveryadmin@acc.co.nz

Fax 0800 222 890

PO Box 952 / Hamilton 3240 / New Zealand

www.acc.co.nz

Or (remove one)

PO Box 408 / Dunedin 9054 / New Zealand

www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

**To be used when supporting Sensitive claims only
– note the different email and address details**

Recovery Administration | Kaiāwhina

recoveryadmin1@acc.co.nz

Fax 0800 222 890

SCU / PO Box 1426 / Wellington 6140 / New Zealand

www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

Client Information Team (CIT)

Recovery Administration | Kaiāwhina

Client Information Requests

<Individual email address>

Tel 0800 101 996

Fax 0800 222 890

CIT / PO Box 952 / Hamilton 3240 / New Zealand

www.acc.co.nz

Or (remove one)

CIT / PO Box 408 / Dunedin 9054 / New Zealand

www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

Document Management Team (DMT)

Recovery Administration | Kaiāwhina

Document Management

<Individual email address>

Tel 0800 101 996

Fax 0800 222 890

DMT / PO Box 952 / Hamilton 3240 / New Zealand

www.acc.co.nz

Or (remove one)

DMT / PO Box 408 / Dunedin 9054 / New Zealand

www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

**To be used when supporting Sensitive claims only
– note the different email address and extension**

Assisted Recovery | Kaitautoko

Tel 0800 222 435 Ext 12

assistedrecovery@acc.co.nz

www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

Assisted Recovery | Kaitautoko

Tel 0800 222 435 Ext 13

assistedrecovery1@acc.co.nz

www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

Enabled Recovery | Kaitautoko

Tel 0800 222 435 Ext 11
enabledrecovery@acc.co.nz
www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

Case owner name, Recovery Coordinator | Kaiārahi

<Site or Hub in English | Te Reo Translation>

Tel 0800 222 435 Ext <Case owner extension>
<Case Owner email address>
www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

Case owner name, Recovery Partner | Kaihāpai

<Site or Hub in English | Te Reo Translation>

Tel 0800 222 435 Ext <Case owner extension> |
<Case Owner direct dial number>
<Case Owner email address>
www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

Payments | Kairuruku

Tel 0800 101 996 Ext 84597
Fax 0800 222 890
clientpayments@acc.co.nz
www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

Cover Assessment | Kairuruku

Tel 0800 101 996 Ext <Team extension>
Fax 0800 222 890
<Team or individual email address>
www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

Treatment & Supports | Kairuruku

Tel 0800 101 996 Ext <Team extension>
Fax 0800 222 890
<Team or individual email address>
www.acc.co.nz

ACC cares about the environment – please don't print this email unless it is really necessary. Thank you.

Team Leader name, Team Leader | Kaiwhakahaere

<Site or Hub in English | Te Reo Translation>

Client Service Leader name, Client Service Leader | Kaitātaki

<Site or Hub in English | Te Reo Translation>

Tel 0800 222 435 Ext < Team Leader extension>
<Team Leader email address>
www.acc.co.nz

ACC cares about the environment – please don't print
this email unless it is really necessary. Thank you.

Tel 0800 222 435 Ext < Client Service Leader
extension>
< Client Service Leader email address>
www.acc.co.nz

ACC cares about the environment – please don't print
this email unless it is really necessary. Thank you.

Out of scope