

# Email Toolset

*This section of Eos Online Help outlines the Email-related functions that can be performed in Eos. The instructions have been outlined into the following sections:*

## [Resolve email filing errors](#)

- Resolve a Review Outbound Email task
- Resolve a Review Filing Away Email task
- Other reasons for filing failures

## [File an inbound email](#)

- File an Outlook email as an Email Contact
- Find an ACCID
- Find a Claim number and ACCID
- Promote a document to a Claim or Party

## [Send an email from eos](#)

- Send an email from a Party
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- Send an email with an Eos Document
- Edit the Email Integration Contact for an Outbound email
- Use the 'Send To Me' function

## [Verify an email address in eos](#)

- Verify an email address for a Person Party
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## [Resolve email filing errors](#)

## [File an inbound email](#)

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# Resolve email filing errors

*Use these instructions when you need to deal with an email filing error.*

## How to:

- [Resolve a Review Outbound Email task](#)
- [Resolve a Review Filing Away Email task](#)
- [Other reasons for filing failures](#)
- [Tips](#)

Email filing errors occur when Eos is unable to save an Email Contact. This can happen for both outbound emails sent from Eos or when emails have been forwarded to the [REDACTED] email address for filing.

If a filing error is identified, Eos will send an email notification advising the sender that there was a problem saving the Contact in Eos. In most cases a task will also be raised in Eos. This task needs to be actioned in order for the email to be correctly saved as a Contact in Eos.

Problem type	Error scenarios	System response	Email text to user
Review Email Notification "ACCID: keyword is missing from the subject line"	<ul style="list-style-type: none"> <li>• User has sent an email for filing with a missing ACCID in subject line</li> <li>• User has removed the defaulted ACCID in the subject line of an outbound email</li> </ul>	<ul style="list-style-type: none"> <li>• Email notification sent to email address the email was sent from</li> <li>• Review task raised</li> </ul>	<p>Please review this email contact. The Claim and Party links were not able to be fully made. The following error(s) were encountered:</p> <p>No ACCID has been supplied on the subject line of the email. The ACCID is mandatory</p>
Review Email Notification "The ACCID value is invalid or is a duplicate"	<ul style="list-style-type: none"> <li>• User has sent an email for filing with an invalid ACCID</li> <li>• User has altered the defaulted ACC ID in the subject line of an outbound email</li> </ul>	<ul style="list-style-type: none"> <li>• Email notification sent to email address the email was sent from</li> <li>• Review task raised</li> </ul>	<p>Please review this email contact. The Claim and Party links were not able to be fully made. The following error(s) were encountered:</p> <p>The supplied ACCID '%ACCID_IN%' is invalid or is a duplicate ID</p>
Review Email Notification "The Claim number is invalid"	<ul style="list-style-type: none"> <li>• User has sent an email for filing with an invalid Claim number</li> <li>• User has altered the defaulted Claim number in the subject line of an outbound email</li> </ul>	<ul style="list-style-type: none"> <li>• Email notification sent to email address the email was sent from</li> <li>• Review task raised</li> </ul>	<p>Please review your email: ACCID: %ACCID_IN% Claim:%CLAIM_IN%</p> <p>Please review this email contact. The Claim and Party links were not able to be fully made. The following error(s) were</p>

Problem type	Error scenarios	System response	Email text to user
Review Email Notification "The ACCID and Claim number are both invalid"	<ul style="list-style-type: none"> <li>User has sent an email for filing with an invalid Claim number &amp; ACCID</li> <li>User has altered the defaulted Claim number &amp; ACCID in the subject line of an outbound email</li> </ul>	<ul style="list-style-type: none"> <li>Email notification sent to email address the email was sent from</li> <li>Review task raised</li> </ul>	<p>encountered:</p> <p>The supplied Claim number '%CLAIM_IN%' is invalid</p> <p>Please review this email contact. The Claim and Party links were not able to be fully made. The following error(s) were encountered:</p> <ol style="list-style-type: none"> <li>The supplied ACCID '%ACCID_IN%' is invalid or is a duplicate ID</li> <li>The supplied Claim '%CLAIM_IN%' is invalid</li> </ol>
Review Email Notification "ACCID is missing from subject line and Claim number is invalid"	<ul style="list-style-type: none"> <li>User has sent an email for filing with a missing ACCID and invalid Claim number in subject line</li> <li>User has removed the defaulted ACCID and edited the Claim number in the subject line of an outbound email</li> </ul>	<ul style="list-style-type: none"> <li>Email notification sent to email address the email was sent from</li> <li>Review task raised</li> </ul>	<p>Please review this email contact. The Claim and Party links were not able to be fully made. The following error(s) were encountered:</p> <ol style="list-style-type: none"> <li>No ACCID has been supplied on the subject line of the email. The ACCID is mandatory</li> <li>The supplied Claim number '%CLAIM_IN%' is invalid</li> </ol>
Review Email Notification  The ACCID provided has been matched to both a Vendor and Provider party and no prefix has been provided	User has sent an email for filing without the required prefix for a Provider or Vendor party.	<ul style="list-style-type: none"> <li>Email notification sent to email address the email was sent from</li> <li>Review task raised</li> </ul>	<p>Please review this email contact. The Claim and Party links were not able to be fully made. The following error(s) were encountered:</p> <ol style="list-style-type: none"> <li>The ACCID on the email subject line has been matched to more than one party and no 'VEND-' or 'PROV-' prefix has been supplied</li> </ol>
Review Email Notification  The ACCID has been prefixed incorrectly for a Provider or Vendor	User has sent an email for filing away with incorrect prefixing i.e. the ACCID belongs to a Vendor party but it has been prefixed with PROV in the subject (or vice	<ul style="list-style-type: none"> <li>Email notification sent to email address the email was sent from</li> <li>Review task raised</li> </ul>	<p>Please review this email contact. The Claim and Party links were not able to be fully made. The following error(s) were encountered:</p> <ol style="list-style-type: none"> <li>The ACCID on the email</li> </ol>

Problem type	Error scenarios	System response	Email text to user
party	versa)		subject line specifies a party that does not match the type supplied by the prefix
User has incorrect permission to create the Contact against the Claim (Sensitive Claim)	User has attempted to file an email against a Claim they do not have secured actions to access	<ul style="list-style-type: none"> <li>Email notification sent back to email address the email address was sent from</li> <li>Review task raised</li> </ul>	<p>Please review this email contact. The Claim and Party links were not able to be fully made. The following error(s) were encountered:</p> <p>You do not have the appropriate secured actions to be able to link the email contact to the Claim '%CLAIM_IN%'</p>
User has incorrect permission to create the Contact against the Party (VIP Party, Staff Party)	User has attempted to file an email against a Party they do not have secured actions to access	<ul style="list-style-type: none"> <li>Email notification sent to email address the email address was sent from</li> <li>Review task raised</li> </ul>	<p>Please review this email contact. The Claim and Party links were not able to be fully made. The following error(s) were encountered:</p> <p>You do not have the appropriate secured actions to be able to link the email contact to the Party '%ACCID_IN%'</p>

## Resolve a Review Outbound Email task

When Eos is unable to file the email sent from Eos, the task raised is displayed with **Review Outbound Email** in the 'Type' column.

### Step 1

Go to **Tasks** at the top of the screen then **My Tasks**.

### Step 2

Double click the **Review Outbound Email** task to open it.

### **Step 3**

In the **Review Outbound Email** screen, view the error details in the **Description** field.

### **Step 4**

Click **Close**.

### **Step 5**

Review the sent email from your Outlook email account.

### **Step 6**

Identify the correct Claim number and/or ACCID the email should be filed against.

### **Step 7**

Click **Do Task** .

The **Review Email Contact** screen displays.

### **Step 8**

**If the error relates to the... then...**

- click the **magnifying glass** (search icon) next to the Party field

Party

Result: The **Party Search** screen displays.

- go to step 9
- click the **magnifying glass** (search icon) next to the Claim field
- find the Claim you want to link to the contact and click **OK**.

Claim

Result: The Claim will now be linked.

### **Step 9**

Choose the appropriate tab to search for the Party.

### **Step 10**

Type your search criteria into the relevant fields and click **Search**.

The search results list populates.

### **Step 11**

Select the correct Party within the search results and click **OK**.



The selected Party is now linked.

## Resolve a review filing away email task

When Eos is unable to save a Contact for an email that has been forwarded to the [REDACTED] email address, the task raised is displayed as type **Review Filing Away Email**.

The email notification will provide details of the filing error.

### **Step 1**

Go to your **Sent** emails in Outlook to review the email you sent to [REDACTED] to identify the email sent for filing

### **Step 2**

Go to **Tasks** at the top of the screen then **My Tasks**.

### **Step 3**

Double click the **Review Filing Away Email** task to open it.

### **Step 4**

In the **Review Filing Away Email** screen, view the error details in the **Description** field.

### **Step 5**

Click **Close**.

### **Step 6**

Click the **Do Task** icon.

The 'Review Email Contact' screen displays.

**Note:** The 'To' recipient will be displayed as [REDACTED]

### **Step 7**

Click the **magnifying glass** (search icon) next to Claim or Party then link to the correct Claim or Party as required.

## Other reasons for filing failures

The following scenarios will only result in an email notification being sent to the sender of the email.

A task will not be raised.

Problem type	Error scenarios	System response	Email text to user
<p>Filing Failure</p> <p>An email message has completely failed filing in Eos</p>	<ul style="list-style-type: none"> <li>• User has sent an email for filing with an attachment type not recognised by Eos</li> <li>• User has sent an email for filing with an attachment that is &gt;10MB</li> <li>• Technical error</li> </ul>	<ul style="list-style-type: none"> <li>• Email notification sent back to the email address the email was sent from</li> <li>• Email notification also sent to Failure Mailbox</li> </ul>	<p>Subject: ACTION REQUIRED: Email '&lt;Email Subject Text&gt;' Failed Processing in Eos</p> <p>The email 'text from subject line...' you tried to send has failed processing in Eos.</p> <p>Please review your sent items for one of the following issues and if necessary resolve the issue before sending the email to the filing away mailbox. Please note that if the email was sent from Eos then it has been sent to the external recipient.</p> <ol style="list-style-type: none"> <li>1. One or more of the attachments is of a file type that is not one of the following: pdf, doc, dot, xls, ppt, wri, rtf, vsd, ps, htm, html, jpg, jpeg, bmp, gif, png, tif, txt, docx, dotx, xlsx, pptx</li> <li>2. One or more of the attachments exceeds the maximum attachment size allowed (10MB)</li> </ol>
<p>Invalid Eos User</p> <p>User email address has not been mapped to 'External User Mapping Table' in Eos</p>	<ul style="list-style-type: none"> <li>• User has sent an inbound email to file away</li> <li>• User is sending an email from Eos, but user is not mapped to table</li> </ul>	<p>Email notification sent back to email address the email was sent from</p>	<p>Subject: ERROR – invalid user for email: '&lt;Email Subject&gt;'</p> <p>The email address &lt;insert email address&gt; does not represent a valid Eos user.</p> <p>If you are attempting to File Away from a Group Mailbox please ensure that the "From" email address selected is your personal email address and</p>

Problem type	Error scenarios	System response	Email text to user
			<p>resend to the Eos Filing Away mailbox.</p> <p>If you are attempting to File Away from your own personal mailbox then please contact the Service Desk for assistance</p>

## Tips

- Use the Column headers to filter for the **Review Filing Away Email** and **Review Outbound Email** tasks.
- Click the **magnifying glass** (search icon) next to 'Type'.
- Filter by Type: Review and Apply.

# File an inbound email

*Use these instructions to file an inbound email as an email Contact in Eos*

## How to: File an inbound email

- [File an Outlook email as an Email Contact](#)
- [Find an ACCID](#)
- [Find a Claim number and ACCID](#)
- [Promote a document to a Claim or Party](#)
- [Tips](#)
- [Related content](#)

Contacts are used to record details of communications with external parties, such as emails, phone calls, letters and faxes. It is important to record contacts so that other staff members are able to see all of the communications relating to a Claim or Party.

Email Toolset enables an incoming email to be forwarded to Eos, which creates an Email Contact. If the email has an attachment, it will also be visible in the Documents tab.

## File an Outlook email as an Email Contact



You can choose to file an Outlook email to an Eos Claim and Party or to a Party only. The Email Contact must always be associated with a Party. If the Claim is sensitive, the Contact will only be visible at Claim level and not visible on the Party.

### Step 1

Open Outlook and click 'Forward' in the email you want to save as a Contact in Eos.

### Step 2

Type the Claim number and/or ACCID in the 'Subject' line as shown in the following table.

Type of filing	What to type in the 'Subject' line	Examples
Claim and Party	The Claim number and ACCID are both required	CLAIM: ██████ ACCID: ██████
Party only	The ACCID is required	ACCID: ██████
Provider Party	The ACCID must be prefixed by 'PROV-'	ACCID: PROV-10FKAE
Vendor Party	The ACCID must be prefixed by 'VEND-'	ACCID: VEND-AA4435

#### Note:

- Customer numbers must be preceded by the phrase ACCID: followed by the Party ID
- Claim numbers must be preceded by the phrase CLAIM: followed by the Claim number.

### Step 3

Check whether the **body** of the email contains an image, eg a signature logo.

If...	then...
yes	<p>format the email as 'Plain Text':</p> <ul style="list-style-type: none"> <li>• go to the 'Format Text' tab</li> <li>• select 'Plain Text'</li> <li>• the 'Microsoft Outlook Compatibility Checker' message will pop up</li> <li>• click 'Continue' to format the email in plain text</li> </ul> <p>If you don't format the email as 'Plain Text', Eos will save the image and email as a separate document when you have complete 'Filing Away' <a href="#">Back to top</a></p>

## Find an ACCID

If the subject line of the inbound email has not already been populated with the ACCID, locate the correct record in Eos.

To find the ACCID of a Party:

### **Step 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.

### **Step 2**

Open the party record.

The number displayed at the top left hand corner of the Eos screen is the ACCID.

### **Step 3**

Copy and paste this number into the 'Subject' line and type 'ACCID:' before it.

### **Step 4**

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

### **Step 5**

Click 'Send' in Outlook.

The email will be saved in Eos and visible in the Contacts tab.

**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.

## **Find a Claim number and ACCID**

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

### **Step 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.

### **Step 2**

Open the claim.

The Claim number and ACCID will be shown at the top of the screen.

### **Step 3**

Copy and paste the Claim number and the ACCID from Eos into the 'Subject' line of the email you wish to save as an Eos Contact.

### **Step 4**

Enter the [REDACTED] email address as the 'To' recipient.

### **Step 5**

Click 'Send' in Outlook.

The email will be saved in Eos and visible in the Contacts tab.

**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.

## **Promote a document to a Claim or Party**

If an Email Integration Contact has an attachment, the 'Promote document' icon will be displayed next to it. This means you can add a copy of the document to a Claim or Party.

### **Step 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.

### **Step 2**

Open the claim or party record and go to the **Contacts** tab. Click **Promote document**.

The 'Copy Attachment' window displays.

### **Step 3**

Click the **magnifying glass** (search icon) to search for a Claim or Party.

### **Step 4**

Enter your search criteria and click **Search**.

## Step 5

Select the Claim or Party you want to attach a copy of the document to.

## Step 6

Click **Copy**.

The document will be copied to the selected Party and/or Claim.

## Tips

- Emails must be filed from an individual ACC email account, e.g. person1@acc.co.nz and not a group email address, e.g. abcteam@acc.co.nz
- Party IDs and Claim numbers that contain letters must be in upper case, e.g. [REDACTED]
- There should not be any spaces within the customer number or within the claim number
- There may be additional information in the subject line but the Claim number and /or the ACCID must be populated
- If you're sending attachments with the email (e.g. pdf), open them first and make sure they're rotated the right way up. If not:
  - edit and rotate them the right way up
  - re-save the image(s) and re-attach them to the email.
- When forwarding emails for filing remember the attachments must be file types that are currently recognised by Eos:
  - pdf, doc, dot, xls, ppt, wri, rtf, vsd, ps, htm, html, jpg, jpeg, bmp, gif, png, tif, txt, docx, dotx, xlsx, pptx
- Each attachments must be <10MB

## Related content

- [Manage document properties](#)
- [Edit a contact](#)
- [Contact reasons and recommended use](#)

# Send an email from Eos

*Use these instructions to find and attach appropriate documents, privacy check the email and send it to the appropriate party directly from Eos.*

## How to:

- [Send an email from a Party](#)

- [Send an email from a Claim](#)
- [Send an email with an Eos Document](#)
- [Edit the Email Integration Contact for an Outbound email](#)
- [Use the 'Send To Me' function](#)
- [Tips](#)
- [Related](#) content

An email can be launched directly from within Eos to a Party provided the email address is verified. Eos documents can also be attached directly to a new email from Eos.

An email can also be launched from a Claim in Eos. Possible recipients are any Participants associated with that Claim. The email addresses must be verified.

# Send an email from a Party

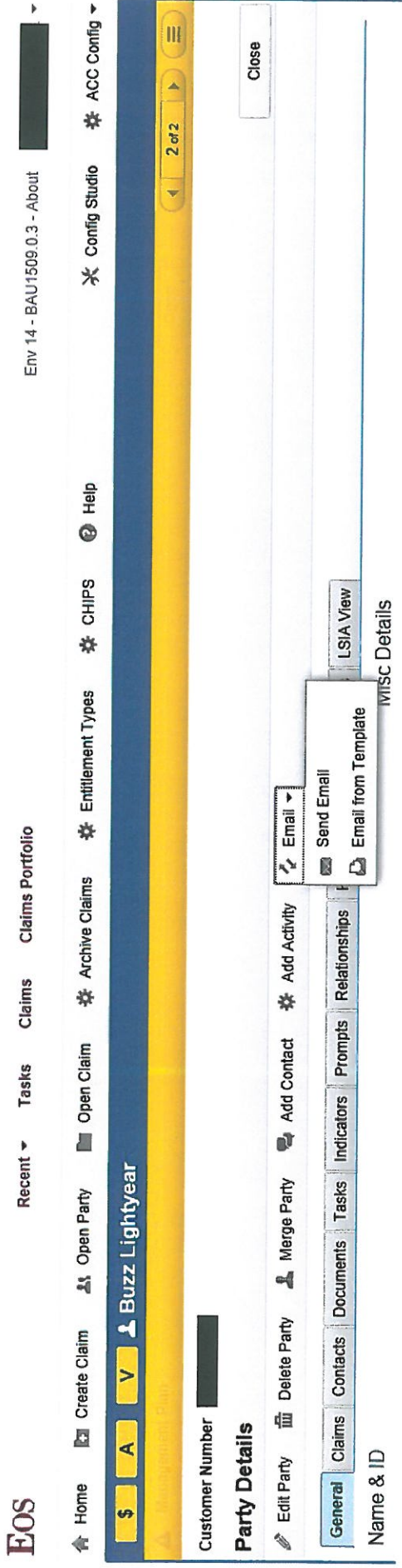
## Step 1

Open the Party record of the person you want to email.

## Step 2

Click Email on the context menu and select Send Email from the dropdown list.



Party - Send Email TS [REDACTED]



**Note:** If the email address is unverified, an error message will be presented in the top right hand corner of the screen.



Unverified Email Address - Error Message TS [REDACTED]

 • ERROR This email address is unverified and cannot be used as a recipient for an email sent from Eos 

Note: If more than one email address exists, select the correct one.

Choose recipient for emails TS [REDACTED]

Customer Number

### Choose recipient for email

Choose recipients for email

Available Recipients

- Buzz Lightyear (invalid@invalid.invalid)
- Safe Contact - Ikikikikikid (invalid@invalid.invalid)

To

CC

#### To Recipients

<input type="checkbox"/>	Name	Role	email address
		No Records To Display	

Remove

#### CC Recipients

<input type="checkbox"/>	Name	Role	email address
		No Records To Display	

Remove

The following information will be auto-populated:

- The "To" recipient will display the email address of the Eos Party

- The "Bcc" field will display the [REDACTED] email address
- This email address must not be edited or deleted otherwise a copy of the sent email won't be saved automatically as a contact record in Eos
- The 'Subject' line will auto-populate with the name and ACCID of the Eos Party
- The defaulted ACCID must not be edited or deleted otherwise a copy of the sent email won't be saved automatically as a contact record in Eos.

### **Step 3**

Compose the email and conduct a privacy check of the content of the email and attachments to ensure the information is relevant and appropriate to upload to Eos.

### **Step 4**

Click **Send** in Outlook.

## **Send an email from a Claim**

### **Step 1**

Open the Claim record of the person you want to email.

### **Step 2**

Click **Email** on the context menu and select **Send Email** from the dropdown list.

## Claim - Send Email TS [REDACTED]

Home Create Claim Open Party Open Claim Archive Claims Entitlement Types CHIPS Help Config Studio ACC Config

Client Has An Active Claim

ACC45 # LM [REDACTED] Date of Birth 14/07/1980

**Case Details**

ACC32 QE Surgery QE General QE General + QE Add Activity Add Document Add Sub Case

General Entitlements Plan Managing Contacts Documents Tasks Injury Medical Employment Transactions

Cover Details Edit History

Email Send Email Email from Template

Status Registration Complete Close

The 'Choose recipients for email' selection box will display all potential recipients for the email. The recipients for selection will be the Participants linked to the Claim.

Choose Recipient for Email - Available Recipients TS [REDACTED]

[Home](#)
[Create Claim](#)
[Open Party](#)
[Open Claim](#)
[Archive Claims](#)
[Entitlement Types](#)
[CHIPS](#)
[Help](#)
[Config Studio](#)
[ACC Config](#)

ACC45 # LM: [redacted] Date of Birth 14/07/1980  
 ACC45 Claim Buzz Lightyear

**Choose recipient for email**  
 Choose recipients for email

**Available Recipients**

<input type="checkbox"/>	Claimant - Buzz Lightyear (invalid@invalid.invalid)
<input type="checkbox"/>	Safe Contact - Iklikiklikk (Invalid@Invalid.Invalid)
<input type="checkbox"/>	Claim Lodgement - Provider - Dr [redacted] (invalid@invalid.invalid)

**To Recipients**

Name	Role	email address
No Records To Display		

**CC Recipients**

Name	Role	email address
No Records To Display		

Status Registration Complete

**Step 3**

Click the name(s) from the list you want to email then click To to add them as a recipient, or Cc to send to them as a copy.

#### Step 4

Click OK.

An email window is launched in Outlook.

**Note:** If the email address is unverified, an error message will be presented in the top right hand corner of the screen.

Unverified Email Address - Error Message TS [REDACTED]



The following information will be auto-populated:

- The "To" field with the email addresses of the selected recipients
- The "Cc" field with the email addresses of the selected recipients
- The "Bcc" field with the [REDACTED] email address
- This email address must not be edited or deleted otherwise a copy of the sent email won't be saved automatically as a contact record in Eos
- The 'Subject' line with the Client name and Claim number as well as the ACCID of the first 'To' recipient
- The defaulted Claim number and/or ACCID must not be edited or deleted otherwise a copy of the sent email won't be saved automatically as a contact record in Eos.

#### Step 5

Compose the email and conduct a privacy check of the content of the email and attachments to ensure the information is relevant and appropriate to upload to Eos.



**Step 6**

Click 'Send' in Outlook.

**Send an email with an Eos Document**

**Step 1**

Open the Party or Claim record of the person you want to email.

**Step 2**

Go to the Documents tab, then Documents for Claim sub tab.

Email with Document TS [REDACTED]

Home Create Claim Open Party Open Claim Archive Claims Entitlement Types CHIPS Help Config Studio ACC Config

ACC45 Claim Oliver Overthere

ACC45 # LM Date of Birth 07/08/1956

**Case Details**

ACC32 QE Surgery QE General QE General + QE Add Contact Add Activity Add Document Add Sub Case Email

General Entitlements Plan Managing Contacts Documents Tasks Injury Medical Employment Transactions

Documents for Claim Document Groups

Documents

Display Sub-Case Documents  Display Removed Documents

Date/Time	Creator	Status	Document Type	Description
22/09/2015 08:31		Complete	ENT07 Request for medical information	Letter to client re injury
21/09/2015 14:29	ZUser Two	Complete	ACC45 Claim Form Document	

Add Open

Properties Print Doc(s) Move Email History

Status Registration Complete Close

**Step 3**

Click Email on the right hand side of the screen.

**Step 4**

Select the document(s) from the Attachable Documents section of the Select Documents to Attach to Email screen.

Select documents to Attach to Email TS102863

ACC45 Claim **Oliver Overthere** Status Registration Complete

ACC45 # LM **07/08/1956** Date of Birth

**Select Documents to Attach to Email**

Type of Email

Attachable Documents

Date/Time	Status	Document Type	Description	Claim Number	Updated	Creator	Current Party	Last Updated By
22/09/2015	Complete	ENT07 Request for medical information	Letter to client re inju	ACC45 Claim	22/09/2015		[No Party linked]	

Add To Email

**Step 5**

Click Add to Email. The document(s) to be emailed will now display in Documents to Email.

Documents to Email TS

Add To Email

Documents to Email

Date/Time	Status	Document Type	Description	Claim Number	Updated	Creator	Current Party	Last Updated By
22/09/2015	Complete	ENT07 Request for medical information	Letter to client re inju	ACC45 Claim	22/09/2015		[No Party linked]	

**Step 6**

Click Email. The Choose recipient for email will display with the available recipients for the email. The recipients for selection will be the Participants linked to the Claim.

### **Step 7**

Click **OK**.

An email window is launched in Outlook.

Compose the email and conduct a privacy check of the content of the email and attachments to ensure the information is relevant and appropriate to upload to Eos.

### **Step 8**

Click 'Send' in Outlook.

## **Edit the Email Integration Contact for an Outbound email**

- Emails sent from a Party in Eos will automatically save an **Email Integration Contact** against the Party.
- Emails sent from a Claim in Eos will automatically save an **Email Integration Contact** against the Claim and the first 'To' email recipient unless it is a sensitive Claim.
- Emails relating to Sensitive Claims will be saved against the Claim only.

To edit an Email Contact:

### **Step 1**

Select the **Email Integration Contact** you want to edit and click **Open**.

### **Step 2**

Edit the properties as required. Update the 'Contact Description' and 'Reason' fields to reflect the purpose of your email.





## Related content

- [Manage document properties](#)
- [Edit a contact](#)
- [Contact reasons and recommended use](#)

# Verify an email address in Eos

*Use these instructions to verify an email address in Eos.*

## How to:

- [Verify an email address for a Person Party](#)
- [Verify an email address for the Other Organisations Party](#)
- [Verify an email address for a Contact Person linked to an Employer Party](#)
- [Verify an email address for a Business Group Party](#)

Email addresses can be verified in Eos for Person Party records, Other Organisations, Business Groups and any Contact Persons associated with an Employer party.

## Verify an email address for a Person Party

The email address for a Person Party is shown in the 'Contact Information' section of their Party record.

To input or edit Contact Information:



**Step 1**

Open the party record and click Edit Party.

Party - General - Contact Information TS [REDACTED]

Home Create Claim Open Party Open Claim Archive Claims Entitlement Types CHIPS Help Config Studio ACC Config

Open 1 of 2

**Customer Number** [REDACTED]

**Party Details**

General Claims Contacts Documents Tasks Indicators Prompts Relationships Health and Living Complaints LSIA View

Name & ID

Name Buzz Lightyear  
Preferred Name [REDACTED]  
Person ID [REDACTED]

Misc Details

Staff  High Profile Client  
 Preferred Language  Interpreter Required

Contact Information History

Preferred Contact Method Not Selected  
Email Invalid@invalid.invalid Preferred Contact Time Anytime

Close

Edit Party TS [REDACTED]

## Party Details

Edit Party Delete Party Merge Party Add Contact Add Activity Email

General Claims Contacts Documents Tasks Indicators Prompts Relationships Health and Living Complaints LSIA View

### Step 2

When the Edit Person screen displays, select the 'Awaiting Verification' option box. Awaiting Verification TS [REDACTED]

### Edit Person

\*Mandatory Fields

#### Personal Information

Person ID	[REDACTED]	Title	Not Selected	Last Name	Lightyear
First Name	[REDACTED]	Middle Name	Buzz	Preferred Name	Flash
Date of Birth	14 JUL 1980	NHI Number	999 - 999 - 999	Gender	Male
IRD Number	No	Deceased Status	No	NHI Verification Status	Unverified
				ACC Self Employed Number	
				Date of Death	

#### Misc Details

Staff  
Preferred Language -

High Profile Client  
 Interpreter Required

#### Contact Information

Preferred Contact Method Not Selected  
Email Invalid@invalid.invalid

Preferred Contact Time Anytime Awaiting Verification

Unverified  Verified  Awaiting Verification

### Step 3

Click OK to return to the Party record.

OK Cancel

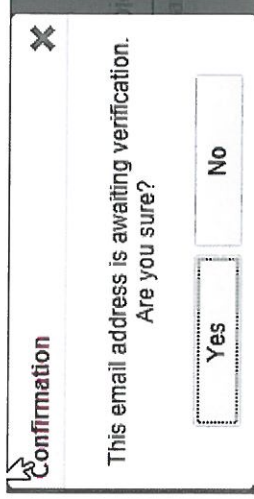
#### Step 4

Click **Email** in the Context menu. Select **Email from Template**.

#### Step 5

When the 'Confirmation' pop-up displays asking you to confirm that you're aware of this status, click **Yes**.

Confirmation - address verification TS [redacted]



The Choose recipient and document type for email screen displays with **Verify Client Email Address** in the 'Document Types' list.

Choose Recipient and document type for email TS [redacted]

Customer Number **Buzz Lightyear**

### Choose recipient and document type for email

Choose recipients for email

Available Recipients

- Buzz Lightyear (Invalid@Invalid.Invalid)
- Safe Contact - lklklklklkl (Invalid@Invalid.Invalid)

#### To Recipients

<input type="checkbox"/>	Name	Role	email address
<input checked="" type="checkbox"/>	Buzz Lightyear		Invalid@Invalid.Invalid

To

CC

Remove

#### CC Recipients

<input type="checkbox"/>	Name	Role	email address
No Records To Display			

Remove

Document Type Folder Search Recent

#### Document Type Folders

- Branch
- Complaints
- Contact Centre
- Elective Surgery Unit
- Inquiry Service Centre
- Processing Centre
- Sensitive Claims
- Service Centre
- Service Centre - Accidental Death
- Service Centre - Dental

OK Cancel




## Step 6

Click OK.

An email window will be launched with the email address and subject line pre-populated.

### Email Address Verification TS [REDACTED]

 Send	To...	Invalid@Invalid.Invalid
	Cc...	
	Bcc...	
	Subject:	Buzz Lightyear - ACCID: [REDACTED]

**Hello,**

We have recently received a request to use this email address for correspondence.

Before we can start using it we need you to verify that this is the address you'd like ACC to use!

**How to confirm your email address**  
If it was you that requested the change simply reply to this email with the following information in the body of the email:

- \* your full name
- \* your claim number or date of birth
- \* your phone number and/or postal address.

Once you've confirmed your email address, we'll record your contact information in our system for future use. All information you provide by email will be used and stored in the same way as written correspondence.

**Making changes to how we keep in touch**  
It's important to keep your contact information with us up-to-date. Please let us know if your email address changes or you no longer wish us to use this email address.

**A word about communicating safely via email**  
Like all channels, there are certain risks associated with communicating by email. It's important that you keep your email secure from other people who may have access to your computer to help prevent information from being intercepted, read, edited or copied.

The Electronic Transactions Act 2002 applies to sending and receiving emails.

Note: If the subject line does not populate with "Please confirm your email address", followed by the ACCID you will need to edit this manually.

#### **Step 7**

Populate the email and when ready, click **Send**.

#### **Step 8**

When the recipient returns the email, change the option box to 'Verified' (see steps 1 and 2).

### **Verify an email address for Other Organisations**

The email address for the Other Organisations Party is shown in the **General** tab.  
Party Details for Other Organisations TS [REDACTED]



**ABC Child Care Facility**

Customer Number [REDACTED]

**Party Details**

[Edit Party](#)
[Delete Party](#)
[Merge Party](#)
[Add Contact](#)
[Add Activity](#)
[Email](#)

[General](#)
[Claims](#)
[Contacts](#)
[Documents](#)
[Tasks](#)
[Contact Persons](#)
[Indicators](#)
[Complaints](#)

**Name & ID** [History](#)

Organisation Type: Unregistered Vendor  
 Organisation Name: ABC Child Care Facility  
 ACC Identifier: [REDACTED]

Individual  
 Individual First Name: -  
 Individual Last Name: -  
 Individual Date of Birth: -

**Address**

Type	From	To	Address Details	Method	Detail
Business	03/03/2006	-	Omahu Road Hastings	Email	email@email.com

\*\* Unknown \*\*

[Close](#)

To input an email address or edit an existing one:

**Step 1**

Click Edit Party.

# Edit Organisation TS

## ABC Child Care Facility

Customer Number [REDACTED]

### Add/Edit Organisation

\*Mandatory Fields

Party Information

Organisation Type *	Unregistered Vendor
Organisation Name *	ABC Child Care Facility
ACC Identifier	10549214
IRD Number	

Address Details

Type	From	To	Address Details	Method	Detail	Change
Business	03/03/2006	-	Omahu Road Hastings	Email	email@email.com	New

\*\* Unknown \*\*

Individual

Individual First Name *	
Individual Last Name *	
Individual Date of Birth	

Unset Default

OK Cancel

### Step 2

In the Address Details screen, click Change, New, or Edit.

### Step 3

In the 'Edit Address' screen, add or edit the email you want to verify in the 'Email' field, then select the 'Awaiting Verification' option box.

# Edit Address - Awaiting Authorisation TS



Customer Number

**Edit Address**

\* Mandatory Fields

Address Type

OK

Cancel

Business Recent List

Address Details

Country

Address Line 1 \*

Address Line 2

Address Line 3

Address Line 4

Postcode

Unverified  Verified  Gone No Address

Contact Method Details

	Area Code	Tel. No.	Extn. No.	
Home Phone	( )	-		<input type="radio"/> Unverified <input type="radio"/> Verified <input type="radio"/>
Work Phone	( )	-		<input type="radio"/> Unverified <input type="radio"/> Verified <input type="radio"/>
Mobile	( )	-		<input type="radio"/> Unverified <input type="radio"/> Verified <input type="radio"/>
Fax	( )	-		<input type="radio"/> Unverified <input type="radio"/> Verified <input type="radio"/>
Email	email@email.com			<input type="checkbox"/> Awaiting Verification <input type="radio"/>

Effective Date Range

Effective From Start Of

OK

Cancel

**Step 4**

Click OK.

**Step 5**

Follow steps 4 - 8 of Verify an email address for a Person Party to verify the email address.

**Verify an email address for Employer Contact Persons**

**Step 1**

Go to the **Contact Persons** tab within the main **Employer** record.

Party Details - Employer - Contact Persons TS [REDACTED]

Customer Number [Redacted]

### Party Details

Add Contact Add Activity Documents Tasks Email

- General Claims Contacts Documents Tasks Contact Persons Payroll Cycle Prompts Indicators Party Roles Relationships

#### Contact Persons For Party

Role	Contact Name	Effective From	Effective To	
ACC Relationship Manager	[Redacted]	07/01/2014		Add Open Remove

1-1 of 1

#### Contact Person Details

Position Account Manager

#### Address and Contact Details

Type	Contact Details
Work Phone	[Redacted]
Email	Invalid@Invalid.Invalid

Refresh Refresh

1-2 of 2

### Step 2

Select the Contact Name from the list and click Open.

## View Employer Contact Person TS [REDACTED]

Customer Number [REDACTED]

### View Employer Contact Person

\* Mandatory Fields

Role \* ACC Relationship Manager

Contact Name \* [REDACTED]

Position Account Manager

Effective From Start Of \* 07/01/2014

Effective To End Of -

Address -

Edit

Remove

Close

#### ☯ Contact Methods

Type

▲ Work Phone

▲ Email

#### Contact Details

[REDACTED]  
Invalid@Invalid.Invalid

Add

Edit

View

Remove



#### Additional Information

1-2 of 2

### Step 3

On the 'Edit Employer Contact Person' screen, select the email and click **Edit**.

### Step 4

Add or edit the email you want to verify in the 'Email' field, then click the 'Awaiting Verification' option box.

### Step 5

Click OK.



### Step 6

Follow steps 4 - 8 of Verify an email address for a Person Party to verify the email address.

## Verify an email address for a Business Group Party

The email address for the Business Group Party will be shown in the **General** tab under Business Group Contact Details.

Party Details for Business Group TS [REDACTED]

General | **Contacts** | Documents | Relationships | Indicators | Complaints

Business Group History

---

ACC Business Group Number: 101229  
Group Status: Confirmed

---

Business Group Contact Details

VE	Role	Contact Name	Pref Contact Details	Effective From	Effective To	
	Group Administrator	[REDACTED]	Invalid@Invalid Invalid	22/06/2012	-	<div style="display: flex; flex-direction: column; align-items: flex-end;"><div>Add</div><div>Edit</div><div>View</div><div>Remove</div><div>History</div></div>

1-1 of 1

To input an email address or edit an existing one:

### Step 1

Click Edit Party.

**Step 2**

In the 'Add/Edit Business Group' screen, click **Edit**.

Add Edit Business Group TS [REDACTED]

**Business Group - 101229**

Customer Number

**Add/Edit Business Group**

Business Group

ACC Business Group Number 101229  
Group Status

Business Group Contact Details

VE	Role	Contact Name	Pref Contact Details	Effective From	Effective To
	Group Administrator	[REDACTED]	Invalid@Invalid.Invalid	22/06/2012	-

**Step 3**

Select the email address you want to verify and click **Edit**.

Edit Business Group Contact TS [REDACTED]

Customer Number

### Edit Business Group Contact

\* Mandatory Fields

Role \*    
Contact Name \*    
Position \*    
Effective From Start Of  2012   
Effective To End Of

Address

James Cook Hotel Grand Chancellor  
PO Box 2429  
Wellington  
6140  
New Zealand  
\*\* Unknown \*\*

#### Contact Methods

Type	Contact Details	Pref
<input type="button" value="Add"/> Work Phone	<input type="text"/>	
<input type="button" value="Add"/> Fax	<input type="text"/>	
<input type="button" value="Add"/> Email	Invalid@Invalid.Invalid	Yes



### Step 4

Add or edit the email you want to verify in the 'Email' field, then click the 'Awaiting Verification' option box.

Edit Email Contact Details - Awaiting Verification TS

Business Group - 101229

Customer Number

**Edit Email Contact Details**

	OK	Cancel
	Preferred <input checked="" type="checkbox"/>	Verified <input type="checkbox"/>
	Unverified <input type="checkbox"/>	Awaiting Verification
Email	Invalid@invalid.invalid	
	OK	Cancel

**Step 5**

Click OK.

**Step 6**

Follow steps 4 - 8 of Verify an email address for a Person Party to verify the email address.