

# CareAlign Shared Mailboxes: A Quick Guide

CareAlign’s Direct messaging system allows multiple users to access a shared mailbox. Clinicians can share a mailbox with their staff or create a shared mailbox for all lab results, referrals, etc. This document outlines the processes for creating, managing, and using shared mailboxes.

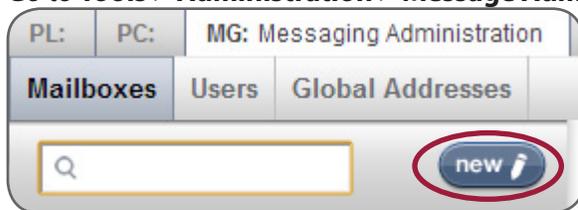
## Creating a Shared Mailbox

There are two ways to create a shared mailbox: A Message Administrator can **create a new shared mailbox** and designate the owner and users, or the mailbox owner can **add users** to a mailbox.

### Create a New Shared Mailbox

Message Administration allows Super Users and Message Administrators to create and manage mailboxes. If you are a Message Administrator, follow the steps below to create a shared mailbox.

1. Go to **Tools > Administration > Message Administration** and click the **Mailboxes** tab. Click **new**.



2. Enter **General** information, including the mailbox Name, Address, and Specialties.
3. Scroll to **Access** to identify the shared mailbox owner and users. Enter the mailbox **Owner** (required) and all **Users** who should have access to the mailbox.

**General**

Name

Address  @icadirect.com is available.

Specialties

Provider Type

NPI

Publish?

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**Access**

Owner

Users

 The mailbox owner and users must already have a CareAlign login. All users must have the same home vault as the vault in which the mailbox is created.

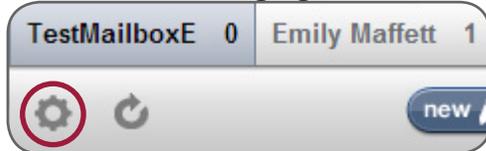
4. Enter **Address** and **Forwarding** information, if desired. All auto-forwarding recipients must have the same home vault as the vault in which the mailbox is created.

 Note that mailboxes are searchable by City, State, Specialties, mailbox name, and mailbox owner name. A shared mailbox is not searchable by a mailbox user (not owner) name. However, mailbox users can add their own specialty—if different from the mailbox owner's specialty—and that will be searchable.

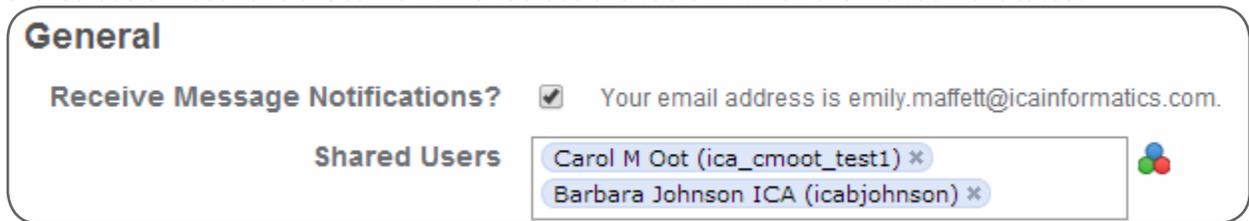
### Add Users to a Mailbox

If you are the owner of a mailbox, you can share access to that mailbox with other users in your home vault at any time. Note that these settings are mailbox specific, not user specific.

1. Go to **Secure Messaging** in the side navigation. Select the correct mailbox tab and click the gear icon.



2. Enter user names into the **Shared Users** field. You can add or remove users here as necessary. Any shared users must have the same home vault as the vault in which the mailbox is located.



3. Click **Save** at the bottom of the screen to ensure that the changes to your mailbox are saved.

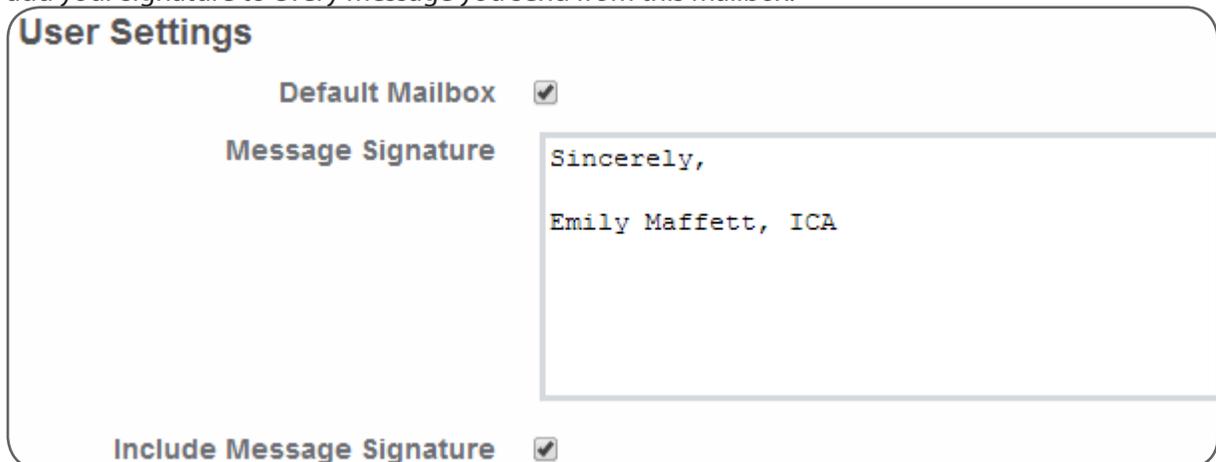
 If you are a mailbox user, and not the mailbox owner, your settings will only allow you to change your Message Notification, Signature, and Specialty settings.

## Managing Sent and Received Messages

### Using Message Signatures

Mailbox owners and users can manage their own message signature for each mailbox they have access to. For example, if two users share the same mailbox, they can each have different signatures for that mailbox. In addition, if one user has access to two mailboxes, that user can have a separate signature for each mailbox.

1. Go to **Secure Messaging** in the side navigation. Select the correct mailbox tab and click the gear icon.
2. Enter your signature in the box provided under **User Settings**. Check **Include Message Signature** to add your signature to every message you send from this mailbox.



- Once you send a message, all shared mailbox users will be able to see the message in the **Sent** folder. You will notice that the message includes signature you created. Additionally, your name will appear in the From field as "sent by."



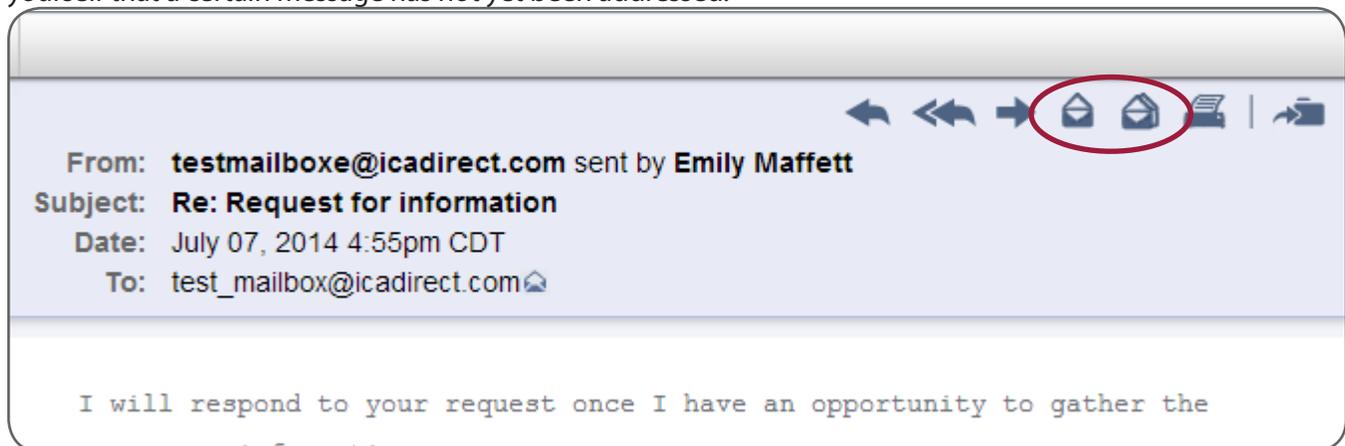
- If another shared mailbox user sends a message from the mailbox, the "sent by" name and message signature will reflect that change.

sent by icacarol oot

### Reading and Replying to Messages

When a message is received in a shared mailbox, that message will appear in each user's mailbox as unread until the mailbox owner, or another user, opens and reads the message. Each new message will also generate an email notification for all mailbox users, including the owner.

Once you have opened, or read, a message in a shared mailbox, you can use the icons in the reading pane to mark the message as unread or to mark the entire message thread as unread. For example, you could use one of these options to ensure that other users will see the message when they access the mailbox, or to remind yourself that a certain message has not yet been addressed.



When a shared mailbox user replies to a message, all users will see the reply (as a thread) along with the original message in the inbox.

**From:** testmailbox@icadirect.com sent by Emily Maffett  
**Subject:** Re: Request for information  
**Date:** July 07, 2014 4:55pm CDT  
**To:** test\_mailbox@icadirect.com

I will respond to your request once I have an opportunity to gather the necessary information.

Sincerely,  
Emily Maffett, ICA

▲ On 07/07/2014 16:54:57, "icacarol oot" <test\_mailbox@icadirect.com> said:  
Please respond to the request for information I sent this morning at your earliest convenience.

icacarol oot sent by Emily Maffett to testmailbox@icadirect.com  
Request for information

Inbox  
July 07, 2014 4:54pm CDT

### Creating and Using Folders

When a shared mailbox user moves a message to an existing folder or creates and moves a message to a new folder, that change impacts all mailbox users. For example, if a user moves a message to the Archive folder, all other mailbox users will only be able to see that message in the Archive folder. Therefore, users should work together when creating and using folders to ensure that they are organizing and addressing messages in a way everyone understands.

The screenshot shows a mailbox folder list with the following items:

Folder Name	Count	Icon
Inbox	0 / 16	1 (unread)
Sent	0 / 25	
Archive	0 / 3	
Barbara's folder	0 / 0	✎ (new)
Drafts	9	

At the bottom of the list is an "Add Folder" button.