

# Health First Retain Application – Frequently Asked Questions

Following is a list of Frequently Asked Questions generated and developed by the Health First Administrative Professional Network (HAPN) along with Tony Bowman from IT based on his presentation at the March 2009 HAPN meeting. These questions are meant to help you navigate your way more easily through the Retain Application. However, due to the complexity of the application, not all uses of Retain are covered in this document. If you have further questions about using Retain and how it can best work for you, please contact IT via the Online Support Center.

## 1) Why did we have to switch to Retain when archiving was so much easier?

HIPAA regulations require Health First to retain anything which has patient information on it for 7 years. Many patient communications are sent via e-mail and it is not possible to filter out only those e-mails that pertain to patients. Therefore all e-mails, incoming and outgoing, are now saved in Retain.

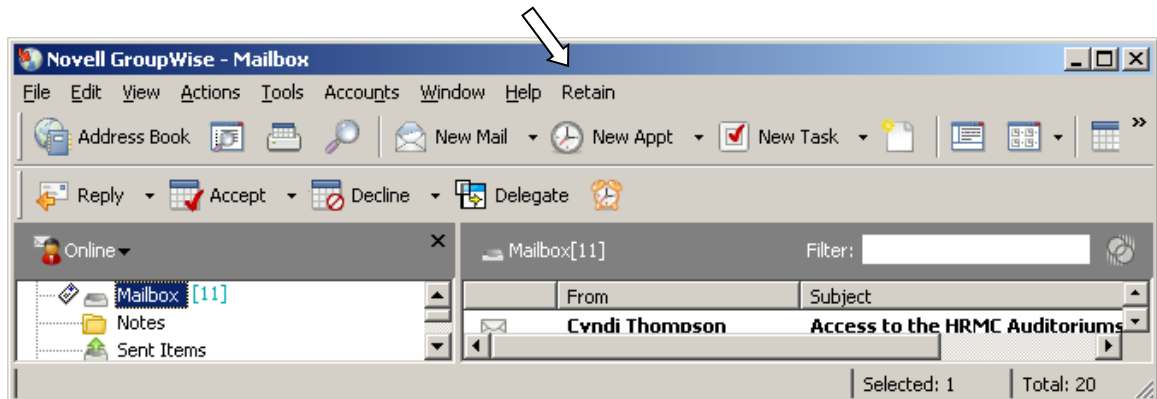
## 2) What happened to our old archived e-mails?

Old archived e-mails were converted to the Retain system. If you are unable to find older archived emails in the Retain system, please contact HIT for assistance.

## 3) How do I get to Retain?

There are 4 ways to access Retain:

- a) Click the Retain button on your GroupWise menu bar (submit a ticket to the Online Support Center if you do not have the “Retain” button on your GroupWise menu bar).



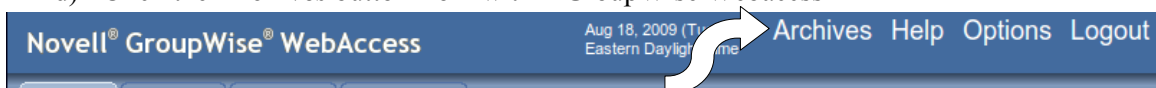
- b) From the Health First Internet site at the following page:

[http://www.health-first.org/internal\\_access/technical\\_docs/groupwise](http://www.health-first.org/internal_access/technical_docs/groupwise)

- c) From the Health First intranet, go to:

Applications > GroupWise Web E-Mail > GroupWise Retain Archive and log in using your network log in.

- d) Click the **Archives** button from within GroupWise Webaccess



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## 4) What is the best way to get started when looking for an item in Retain?

Click on the Search Tab on the top left of the screen.

## 5) How do I search for an e-mail received from a specific individual by name and/or e-mail address?

Click on the Search Tab on the top left of the screen.

Under the “Core” section:

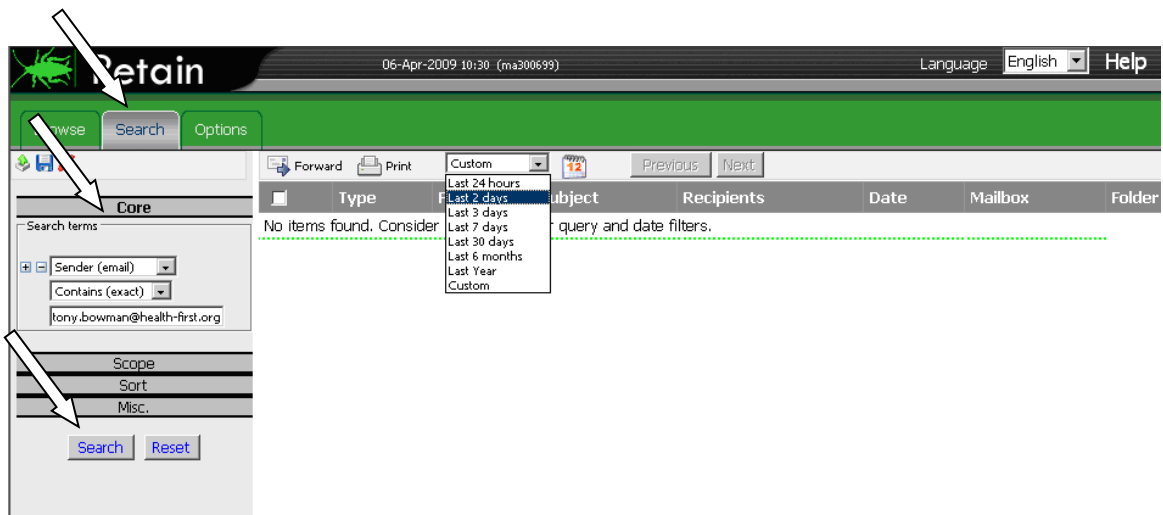
If you know the exact e-mail of the person:

- > Choose Sender (e-mail)
- > Contains (exact)
- > Type in the full e-mail and domain. For example: john.smith@health-first.org
- > Click on Search

***OR***

If using a partial name:

- > Choose Sender (display)
- > Contains (exact)
- > Type in the partial name. For example: Sandy
- > Click on Search



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## 6) How do I search for an e-mail sent to an individual?

In the Core section:

If you know the exact e-mail of the person:

- > Choose Recipient
- > Contains (exact)
- > Type in the full e-mail and domain.

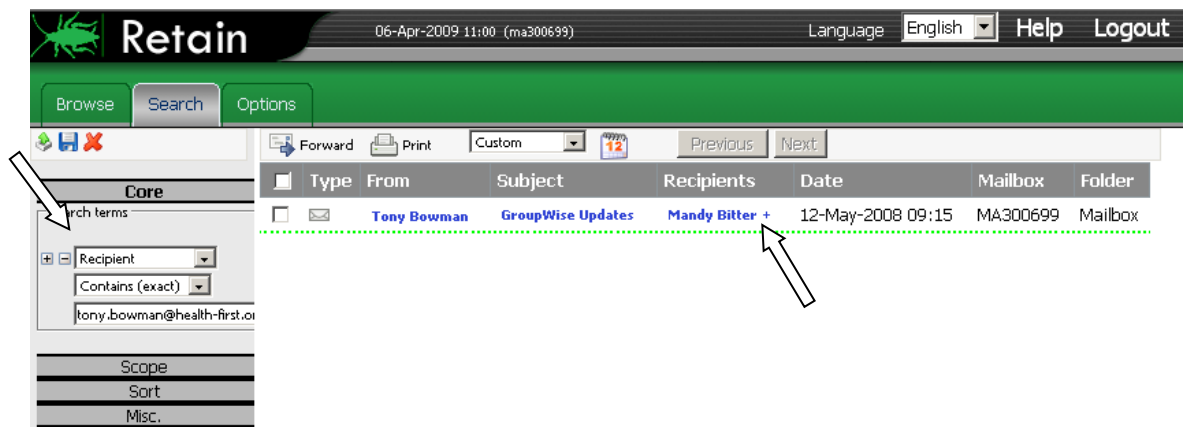
For example: john.smith@health-first.org

- > Click on Search

**OR**

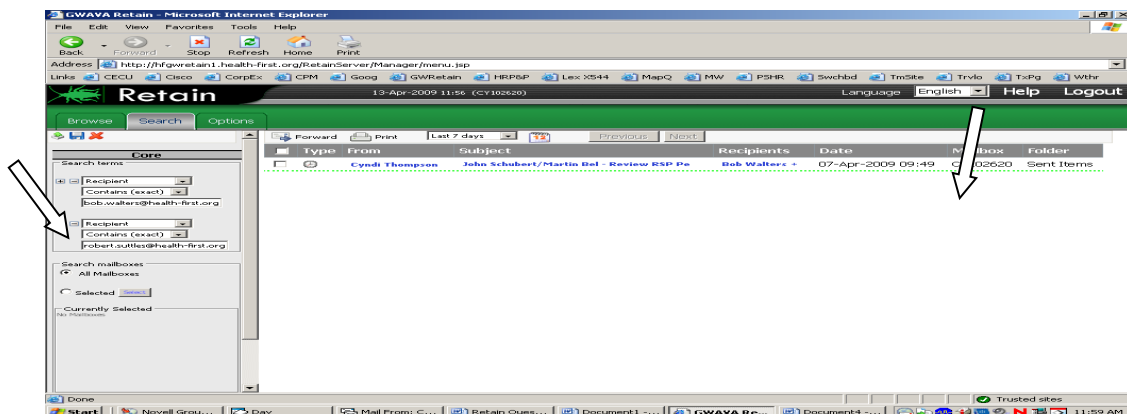
If using a partial name:

- > Choose Recipient
- > Contains (exact)
- > Type in the partial name. For example: John
- > Click on Search



## 7) How do I search for an e-mail that was sent to more than one person?

Use the same selection criteria as in question 6 and search for one or more of the individuals who received the e-mail. If there was more than one recipient there will be a plus sign (+) next to the recipient name. If you scroll over the plus sign, a list of the other recipient's names will appear.

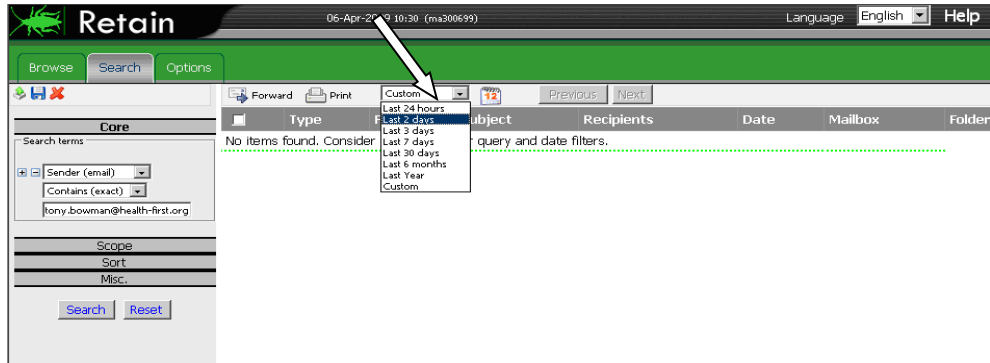


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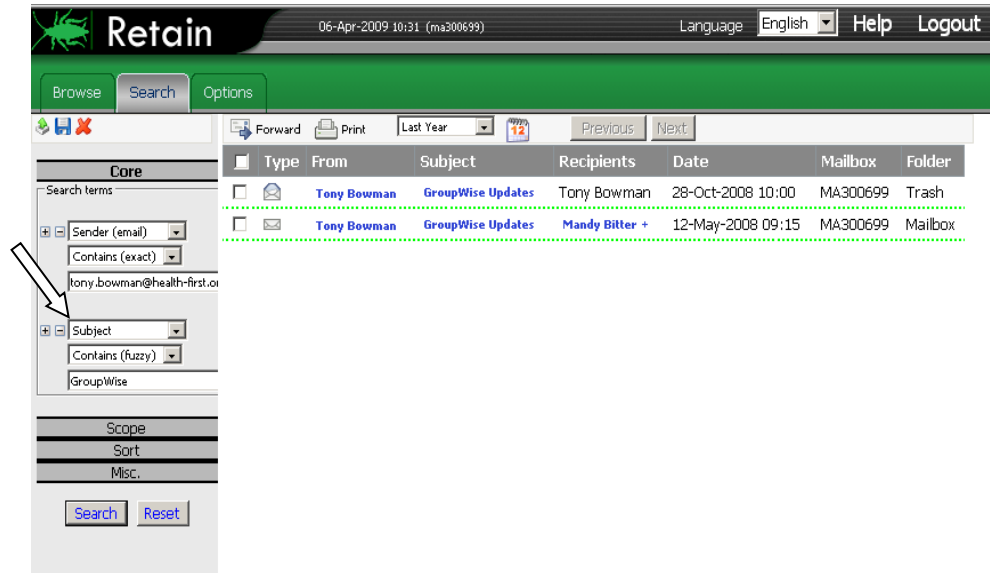
## 8) What are some tips for refining searches?

To further refine your search, use any combination of the following:

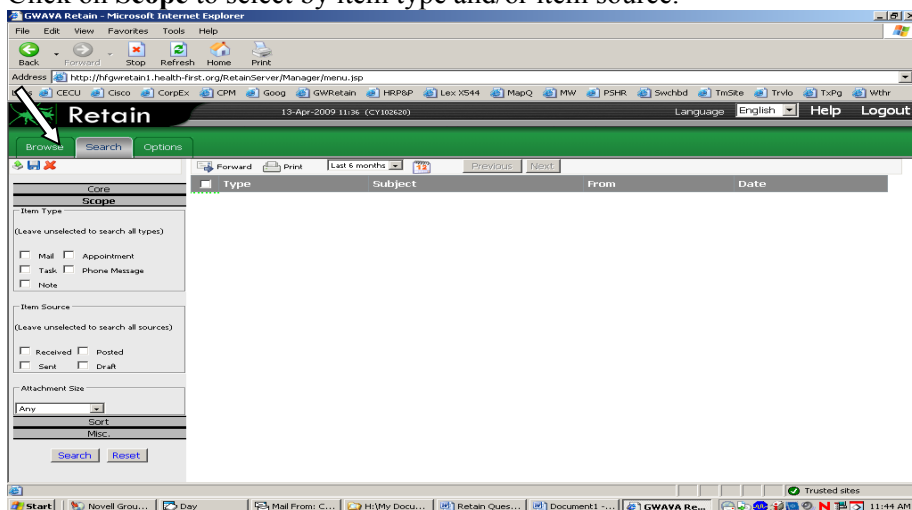
- Use the date options to narrow the timeframe to be searched.



- Use more than one Core search criteria.



- Click on Scope to select by item type and/or item source.



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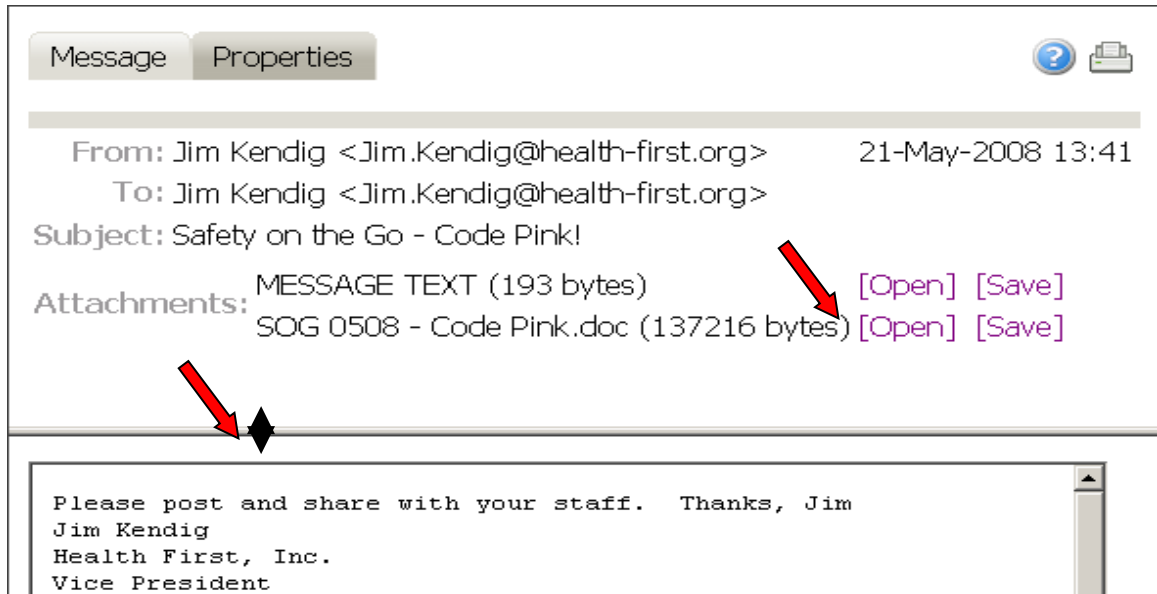
- 9) **How exact do I have to be when using the "Contains (Exact)" filter?**  
It must be EXACT, no partial words or e-mail addresses.
- 10) **The sub-folders I have set up in my Cabinet do not exist in Retain and, therefore, I am not able to extract any of my e-mails.**
- a) If you want e-mails to be housed in specific folders, you must move them into those folders within five days of receiving them to have them appear in the same folders in Retain. If you do not move them within five days of receipt into GroupWise, they will appear in your Mailbox folder in Retain.
  - b) You will also continue to have access to your e-mails in GroupWise for 60 days. After 60 days, they are automatically moved into your Trash folder, where they remain for seven days.
- 11) **When I open Retain, I see Mar 08 - May 08 and nothing else. Where are all the e-mails, especially the ones I have in my Cabinet or Check list folder?**  
Check the date selection at the top of the screen. It may be that there is a custom date range set up that is restricting your search, click the calendar icon to see custom date range.
- 12) **The search method is not finding all of my e-mails. In fact, it sometimes shows empty so where are they?**  
Double check your search criteria, particularly your date selection and Core search items. Also, click on the Reset button at the bottom. This clears any criteria you may have selected for other searches and starts you off with a clean slate. If you still have problems, log a ticket with IT on the Online Support Center.
- 13) **Can I use "wildcards" in Retain searches?**  
Wildcards are not used in Retain.
- 14) **Why would I choose to use the "Does not contain" filter?**  
This filter provides an additional way to narrow down your search. For example, if you want to search for e-mails with "Invitations" as the subject, but want to exclude e-mails with the subject of "October" invitations.
- 15) **How can I re-sort my search? For instance, I sorted originally by date, and now I want to rearrange those results by subject?**  
Click on the "Sort" heading and select the option for how you want your results to appear.

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## 16) How do I access attachments in Retained e-mails?

When you open an e-mail in Retain, the attachments will be listed in the e-mail header (you may need to mouse over the divider and when you see a double arrow, left click and drag the divider down to see the attachments).

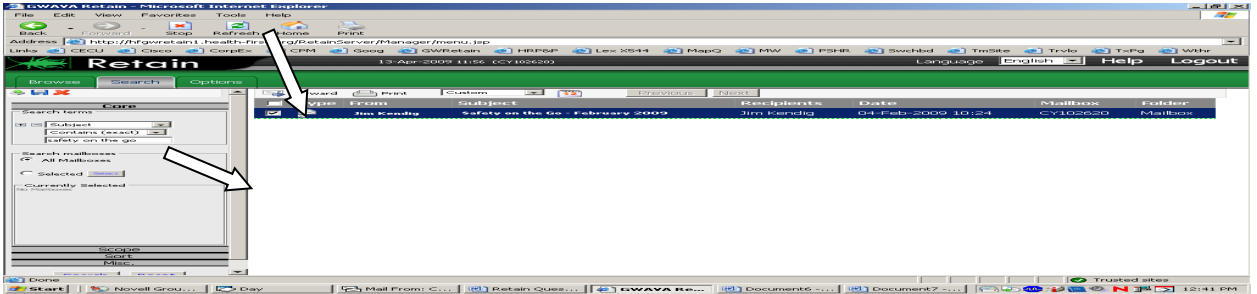
You also have the option of opening and/or saving each attachment by clicking on either [OPEN] or [SAVE]. If those do not work, you can simply forward the e-mail back to yourself.



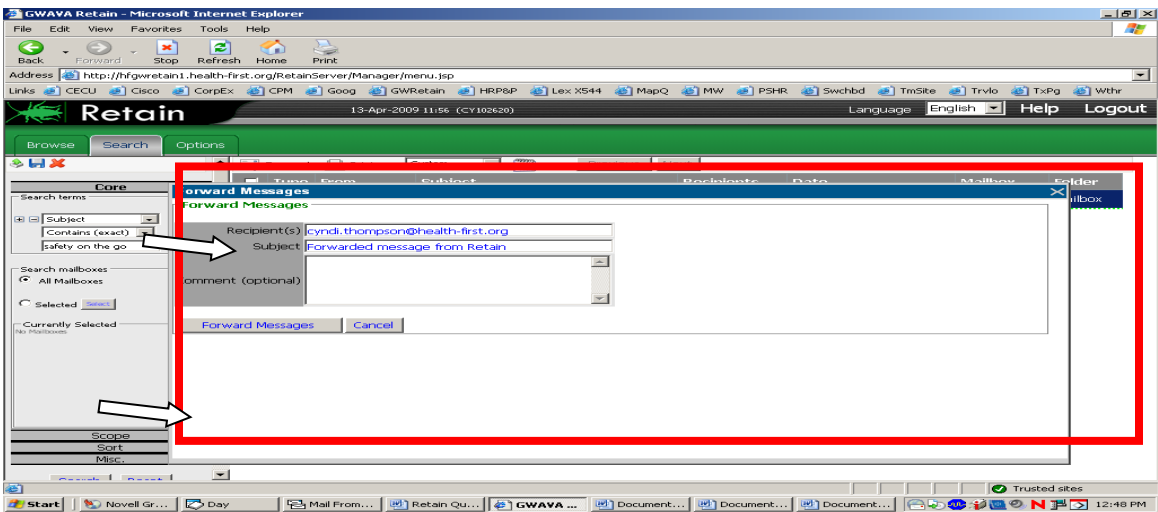
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## 17) Can I forward an e-mail from Retain?

Yes, you can send the e-mail back to yourself and/or to another recipient. To do so, mark the check box by the item(s) you want to forward and click on the Forward icon.



The "Forward Messages" box will pop up and allow you to enter the e-mail addresses of the recipient(s) to whom you wish to forward the e-mail. You must type in the full name and domain of each recipient (i.e., [john.smith@health-first.org](mailto:john.smith@health-first.org)), or you can type in the UID. Once you have made any desired customization to the Subject and Comment sections, click on Forward Messages to send.

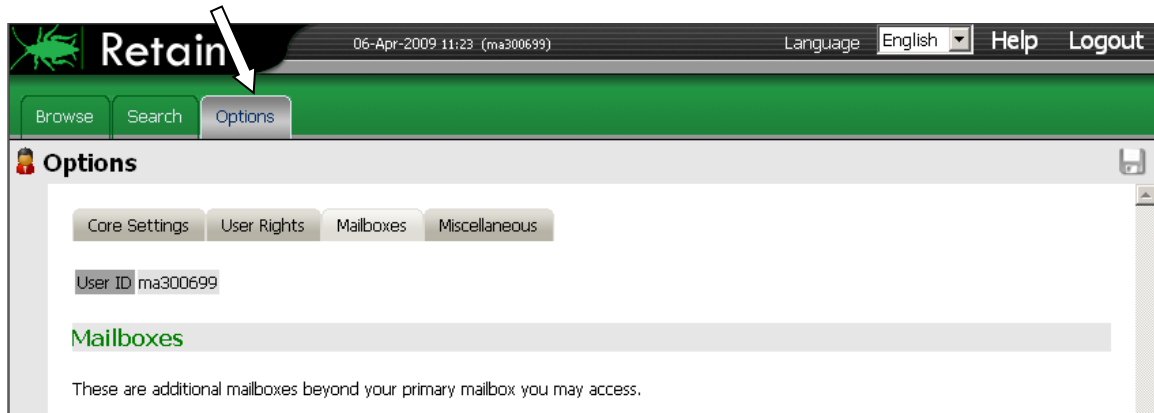


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## 18) I have proxy access to my boss's e-mail in GroupWise. Can I proxy his/her Retain to do searches?

Your boss will need to submit a request through the IT Online Support Center requesting that you have proxy access to his/her Retain files.

When access has been granted you will be able to move between authorized mailboxes by clicking on the **Options** tab to obtain a list of accessible mailboxes and selecting the one you want.



## 19) What if I still have questions?

Submit your question to IT via the Online Support Center for assistance.

*Special Thanks to Tony Bowman (IT), Dee Lenoir-Cannon (HRMC), and Mandy Bitter (HFCL) for their contributions to the development of this document.*