

Revision History

Version	Date	Author	Change summary
1	2023-11-22	Tony Ridler	First version
2	2023-12-01	Susan Bell	Updates

1. Introduction

This document describes the protocol for use of the I & E shared email box to be followed for multiple users dealing with incoming emails.

The **general principles** are that:

- Mail to be dealt with on same-day basis (to whatever stage is possible), with 'same day' meaning 'within 24 hours';
- Team members process their own **Work in Progress / Pending** items if possible before taking a fresh item from the Team Inbox;
- Any 'intractable' cases be brought to the attention of the team leader.

2. How to decide who deals with what emails

2.1. If mail is addressed to an individually named I & E team member: leave it in the I & E Team Inbox for 24 hrs. Then:

- If follow-up action seems obvious: any other I & E team member should process it:
 - 'Move' it into own **Work in Progress / Pending** folder (right click, 'move', choose folder from list, or click, hold, drag & drop)
 - Message named team member that it's now being handled by X);
 - Take appropriate actions;
- If the follow-up action is not obvious: then leave it for the named team member if we know they'll be back within another 24hrs.
- 48hrs after initial receipt: if the named person is not back (as expected, above), any other team member should process it by investigating further & taking appropriate action as per 2.2 below.

2.2. For everything else:

- Work is divided between team members according to Task:
 - **WM Notifications Forms – Susan Bell**
 - **Zoom Booking Notification – ??**

- Xx -
- Xx -

- For all 'Zoom Booked' & 'WMs Form' notifications: move the earliest one to your own Work in Progress / Pending mail folder and process in accordance with the relevant I & E process (WMs Forms Notifications, Beacon, OP, EB etc.). When finished, move it to Zoom Booked Comp or WMs Form Comp folder.
- For all other mail: move the earliest message to your own Work in Progress / Pending mail folder and then, once you've taken appropriate actions on it, either:
 - If matter resolved: using standard template Beacon messages where possible, advise originator of action taken and move thread to relevant 'Comp' (Completed) folder;
 - If matter not yet resolved: send 'holding' reply to originator, incorporating follow-up questions as necessary; make other enquiries, as necessary, with appropriate person / org, and take action as determined by all your enquiries; once resolved, and action taken, notify originator of outcome & file thread in relevant 'Comp' folder.