

Emailing Tip Sheet

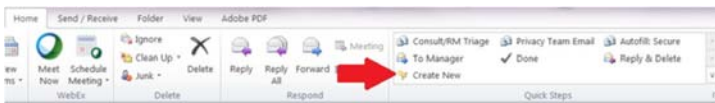
Best Practices



- Verify the spelling and domain name (i.e. Gmail, Yahoo, etc.) of the intended recipient's email address. Don't rely on Outlook auto-populate.
- Before responding to a group thread with any sensitive/confidential information, ensure that each person on the thread is authorized to receive that information.
- When emailing confidential/sensitive information, encrypt the email using secure command codes ("ePHI:."; "Secure:."; "PHI:.") in the email subject line. Trigger codes must include the colon, but are not case-specific.
- If you need to transmit lots of PHI to collaborate with UCSF colleagues, consider using a UCSF share drive or UCSF Secure Box where the information can be encrypted and shared among internal collaborators. *More information:* <http://tiny.ucsf.edu/6RaREm>.

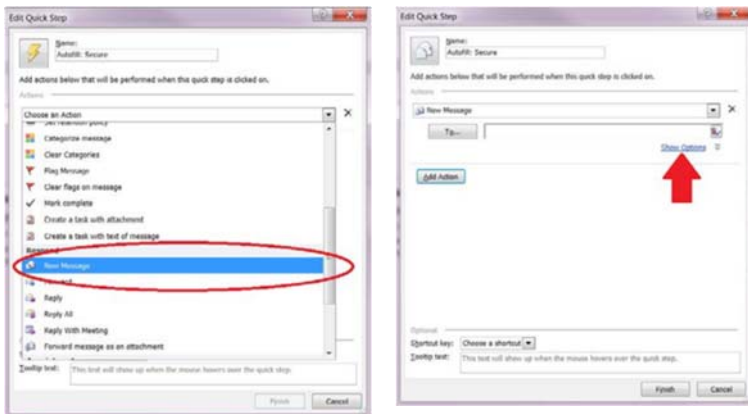
How to Create an Outlook Quick Step for Secure Email

1. In the Outlook header, click on the **Create New** in the Quick Steps bar.

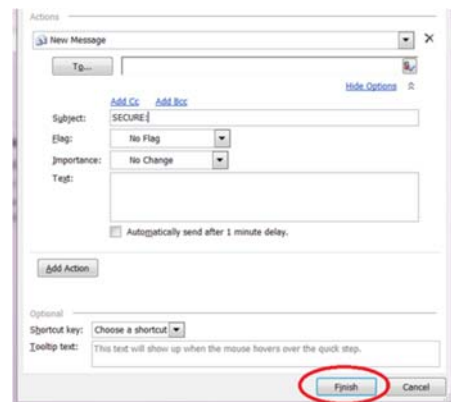


2. In dropdown menu "Choose an Action," select **Respond – New Message**.

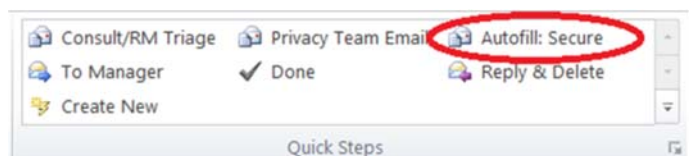
3. Click **Show Options**.



4. Type "SECURE:" or any other secure trigger ("ePHI:.", "PHI:.") in Subject. Don't forget the colon. Then click the "Finish" button in the bottom right hand corner of the box.



5. To send an email with PHI or other confidential/sensitive information, go to your Quick Steps bar and click on your Quick Step for Secure Email.

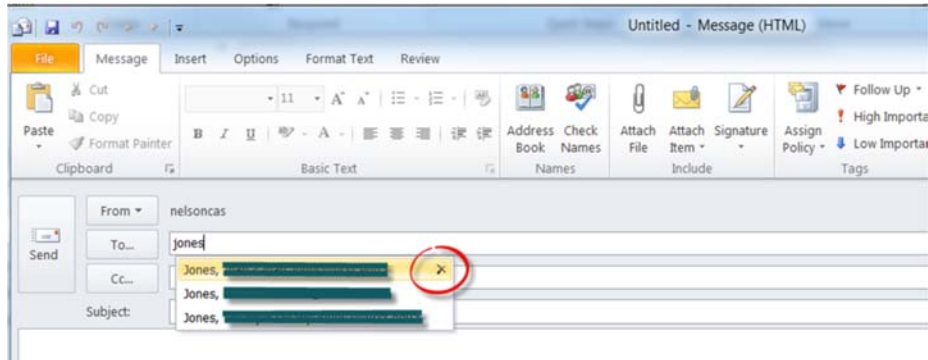


Emailing Tip Sheet (Cont.)



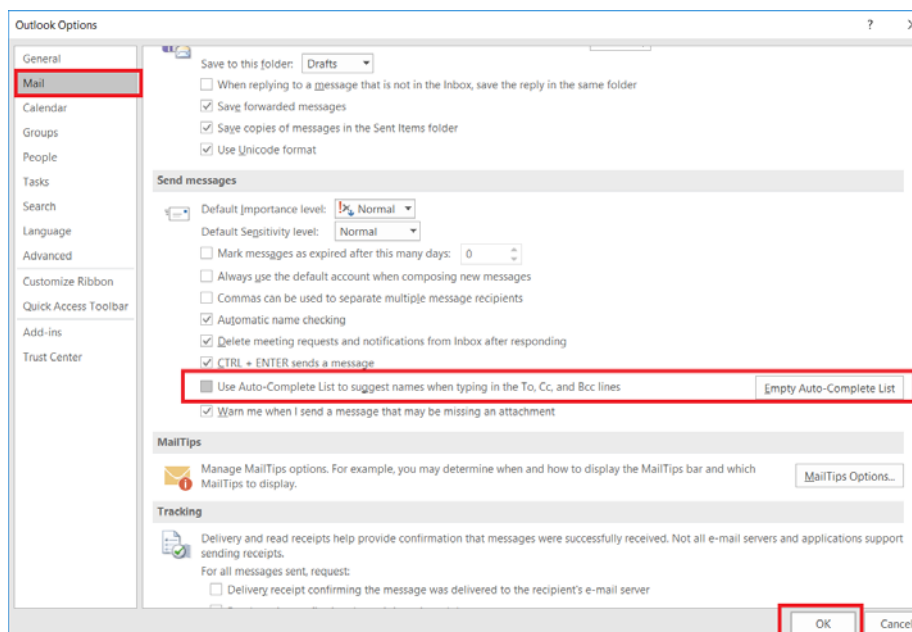
How to Delete Auto-Populated Email Addresses

1. Create a new email message in Outlook.
2. Type the name or address you want to remove.
3. Delete the undesired email address by hovering over the entry you want to remove, and either click the “X” to the right, or press the delete button.



How to Deactivate Outlook Auto-Populate

1. Click **File** in Outlook, then **Options**, then **Mail** on the left column.
2. Scroll to header **Send Messages**.
3. Uncheck **Use Auto-Complete List to suggest names when typing in the To, Cc, and Bcc lines**.
4. Click **Ok**.



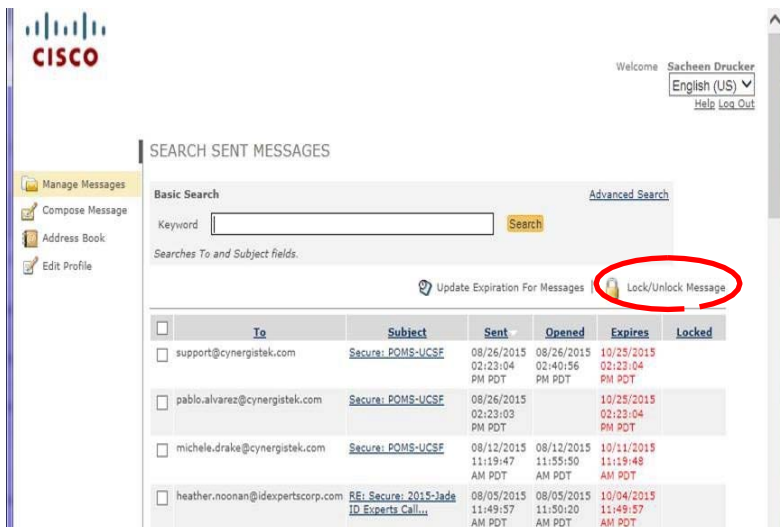
Emailing Tip Sheet (Cont.)

How to Recall and Lock Misdirected Emails

Externally Misdirected (Non-UCSF Recipient) - Cisco Secure Email

1. Log into your Cisco account and enter your email address and Cisco password. UCSF Cisco Secure Email: <https://res.cisco.com/websafe/>
2. Select **Manage Messages** in the left-hand navigation menu.
3. Click **Search** to retrieve all sent envelopes, or run a basic or advanced search to retrieve specific envelopes.
4. In the results list, select the check boxes for the messages you want to lock.

Note: If you sent a message to multiple recipients, the same message might appear in several rows. Select the check box for each recipient you want to prevent from opening the message.



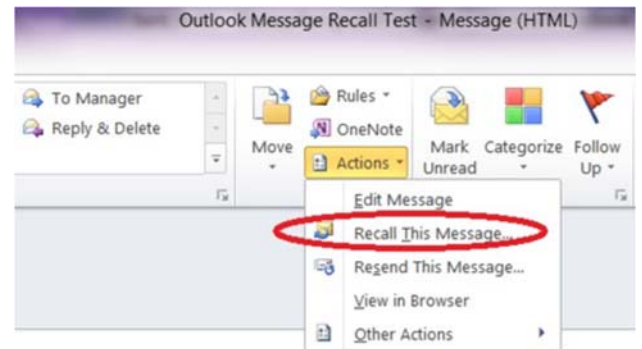
5. Click the Lock/Unlock Message icon above the results list. The Update Sent Messages page is displayed.
6. Verify that "Lock all selected messages" option is selected.
7. Optionally, enter your reason for locking the messages. *Note — If you specify a reason for the lock, it is displayed to recipients when they view the Registered Envelope. To change the lock reason notification, follow the steps to lock the message, and enter a new reason before you click Update.*
8. Click **Update**.



Internally Misdirected (UCSF Recipient) - Outlook Recall

Please be aware that the Outlook recall feature is limited and will not be successful if the recipient is not using Outlook, is not logged on to the mail service provider, or has moved and/or read the message. Thus, please do not rely on this feature as a guarantee.

1. Open the message in your Outlook/Sent Folder.
2. In the toolbar at the top of your screen, select **Actions**.
3. From the drop-down menu, select **Recall This Message**.



4. Select **Delete unread copies of this message**, and click **Ok**.
5. If the UCSF recipient has already opened and read the message, it is still important to contact them to let them know the email was misdirected to their inbox. Instruct them to delete the message from both their inbox and their email trash bin.

