



Direct Inbox & Provider Directory

May

2014

User & Direct Admin Guide

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Getting Started with Direct Inbox

To get started using Direct Inbox, review the topic titled Direct Inbox Overview, then request access to your own and/or a shared mailbox. To request access, perform one or more of the following:

- Request your own Direct mailbox of your own
- Request access to a shared mailbox

Direct Inbox

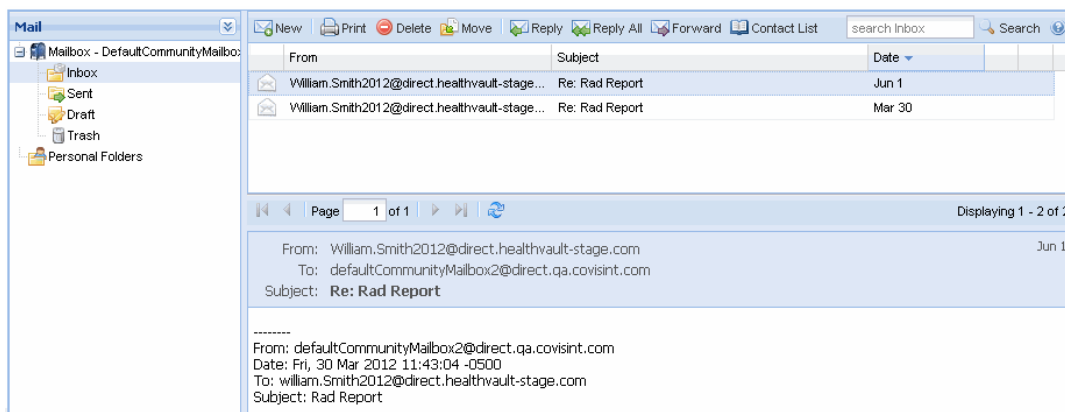
Overview

The Direct Inbox portlet is used to send and receive encrypted health information directly to and from known, trusted recipients. Use the Direct Inbox features to view and compose patient-related messages.

Each Direct Inbox message relates to one specific patient. A message can include attachments such as clinical and administrative documents. For each message, you can view the sender, subject, recipient, date sent and the attachments.

Messages are listed in the messages section of the portlet, and marked as described in the table below to help you determine which messages you need to view or act on.

Convention	Description
Bold font	Unread messages are marked with a bold font.
standard weight font	Read messages are marked with a normal font.



Message Sorting

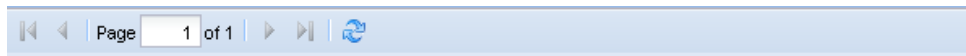
Sort messages by clicking the column heading (i.e., From, To, Subject, or Date).

Field & Menu Bar Descriptions

The following tables describe the Fields and Menu Options on the Message section of the Direct Inbox.



FIELD NAME	DESCRIPTION
From	The name of the person that sent the message.

Subject	The subject of the message.
To	The name of the person which the message was sent.
Date	The date on which the message was received or sent.
page controls	Use the page controls as required to navigate through messages that are displayed over multiple pages. Hover your cursor over an icon to view its function. Note: Click the refresh icon to display to ensure you are viewing all the available messages.



The following options display on the menu bar depending on the Mail folder you have selected (e.g., Inbox, Sent, Draft, Trash).

MENU BAR OPTIONS

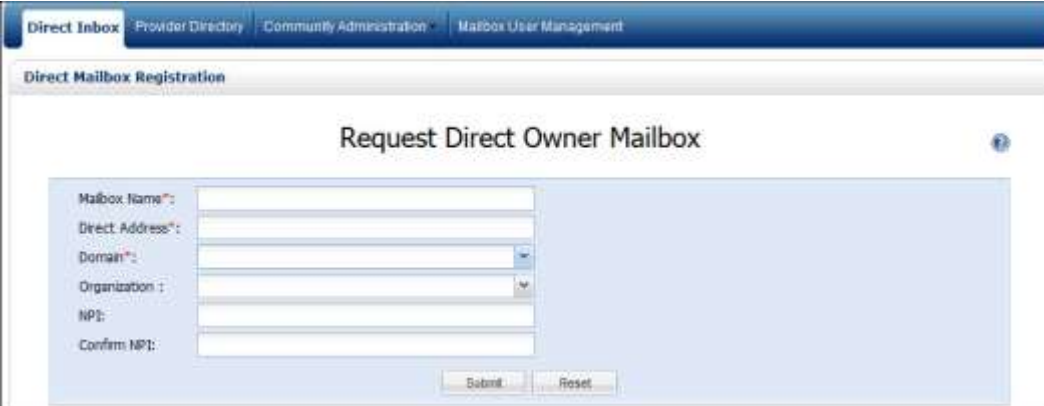
New	Click to Compose a Message.
Print	Click to print a message.
Delete	Click to delete a message.
Move	Click to move a message to a different Inbox folder (e.g., Inbox, Sent, Draft, Trash).
Reply	Click to reply to a message.
Reply All	Click to reply to all of the recipients of a message.
Forward	Click to forward a message to different recipient.
Contact List	Click to access the contact list feature.
Restore	Click to restore a deleted message.
Empty	Click to empty the Trash folder of all messages. Warning: this action cannot be undone.
 (Help)	Click  (Help) on the menu bar to display the Inbox Help topics.

Request a Direct Owner Mailbox

The Request Direct Owner Mailbox feature is used to request a Direct Inbox mailbox address.

To request a Direct mailbox address:

1. On the menu bar, click **Direct Inbox**. The *Request Direct Owner Mailbox* portlet display.
2. Complete the following fields. A red asterisk indicates a required field:



The screenshot shows a web application interface with a blue header bar containing the following tabs: Direct Inbox, Provider Directory, Community Administration, and Mailbox User Management. Below the header is a sub-header 'Direct Mailbox Registration'. The main content area is titled 'Request Direct Owner Mailbox' and contains a form with the following fields: 'Mailbox Name*' (text input), 'Direct Address*' (text input), 'Domain*' (drop-down menu), 'Organization' (drop-down menu), 'NPI' (text input), and 'Confirm NPI' (text input). At the bottom of the form are 'Submit' and 'Reset' buttons.

- a. Enter a **Mailbox Name**. This is the display name, the name by which others will view your mailbox. This name will appear in the *Display Name* column in the Approved Direct Addresses section. It will typically be the user's first and last name.
 - b. Enter the **Direct Address** (e.g., drSmith, or sally.smith, etc.), but **DO NOT** include the domain name (e.g., @domain).
 - c. Select the Direct Inbox **Domain** from the drop-down list.
 - d. Select the Organization (optional).
Note: This field is only required if an organization has decided to use the organization functionality (see Manage Direct Organizations) for reporting purposes.
 - e. Enter your provider **NPI number** (optional).
Note: If the requestor has a NPI number assigned, it should be included here. This will ensure that the user's direct mail address will be automatically added to the Provider Directory.
 - f. Re-enter your provider **NPI number** to confirm (optional if NPI field is left blank).
3. Click **Submit**. A confirmation message displays.
 4. Click **OK** to close the window.





- The system receives the request and verifies if the direct mailbox address requested is already in use.
- If the address is not in use, a confirmation message displays.
- The system places the request in the pending approval queue.
- Approved and Pending Direct addresses are displayed in the Approved Direct Addresses section of the portlet

Request Direct Owner Mailbox

Mailbox Name*:

Direct Address*:

Domain*:

Organization :

NPI:

Confirm NPI:

Submit

Reset

Approved Direct Addresses

Display Name	Direct Address	Status	Last Action Date ▲
KMcQueen	kmcqueen@direct.stg.tn.gov	APPROVED	28-Apr-2014

RESULTS:

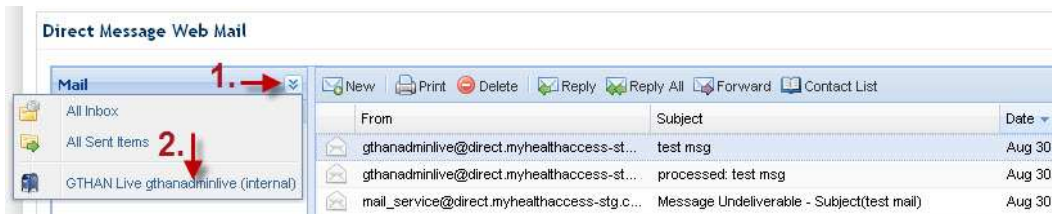
You have successfully completed and sent a request for a Direct mailbox address.

Access Your Direct Inbox

In the *Messages List* section of the *Direct Inbox* portlet, you can view and save attached documents and reply to, forward, print, delete, or move the message to a different Mail folder.

To access your Direct Inbox:

1. On the menu bar, click **Direct Inbox**. The *Direct Message Web Mail* portlet displays.
2. In the *Mail* section of the portlet, if *All Inbox* initially displays, click the **down arrows** to display a drop-down list.
3. Locate and click the **name of your Inbox** from the list.



When the screen refreshes, your *Mailbox* and *Personal Folders* display.



Note: If your default mailbox property is to "Individual Mailbox," it will display as shown below when you open your Direct Inbox. To choose your default mailbox settings, see the *Set direct Inbox Properties* topic.



RESULTS:

You have successfully accessed your Direct Inbox.

Set Your Direct Inbox Properties

The Properties feature is used to set up and manage the following properties pertaining to your Direct Inbox:

- account settings (i.e., selecting an organization and alias)
- email tracking options
- email notification options
- default mailbox options

To view your Direct Inbox properties:

1. On the menu bar, click **Direct Inbox**. The *Direct Message Web Mail* portlet displays.
2. In the *Mail* section of the Inbox, put the cursor over the Mailbox name and right click on the mouse to display the *Account Properties* box.



3. Click **Account Properties** to display the *Properties* window.

To select an organization:

1. In the *Account Setting* section, select the **organization** from the drop-down list to associate to your Inbox, if needed. **This is an optional field.**

Note: 1) This is an optional feature, which an organization may not require a user to select, 2) The greyed out fields include the values that were set when a user registered for a Direct mailbox and are not editable.

The screenshot shows a 'Properties' dialog box with three main sections: 'Account Setting', 'Tracking options', and 'Notification options'. The 'Account Setting' section includes fields for 'Mailbox Name*' (KMcQueen), 'Direct Address*' (kmcqueen@direct.stg.tn.gov), 'Domain*' (direct.stg.tn.gov), and 'Organization' (<empty>). Below these is an 'Alias' section with two radio buttons; the first is selected and corresponds to 'kmcqueen@direct.stg.tn.gov', while the second is unselected and corresponds to 'adminDept@direct.stg.tn.gov'. The 'Tracking options' section has two checked checkboxes: 'Request delivery receipt' and 'Request read receipt'. The 'Notification options' section has one checked checkbox: 'Send alert notification', followed by an 'Alternate Email Address' field containing 'omcqueen@covisint.com'. A note states: 'Note: Alert notifications will be sent to the registered email address **unless an alternate address is entered.**' The 'Default Mailbox' section is partially visible at the bottom.

Properties

Account Setting

Mailbox Name* : KMcQueen

Direct Address* : kmcqueen@direct.stg.tn.gov

Domain* : direct.stg.tn.gov

Organization : <empty>

Alias

☒ kmcqueen@direct.stg.tn.gov

☐ adminDept@direct.stg.tn.gov

Tracking options

☒ Request delivery receipt

☒ Request read receipt

Notification options

☒ Send alert notification

Alternate Email Address : omcqueen@covisint.com

Note: Alert notifications will be sent to the registered email address **unless an alternate address is entered.**

Default Mailbox

To select an email alias:

1. If you have more than one email alias, select the one you want as your primary email address by clicking on the appropriate **radio button** in the *Account Setting* section. This is the address that displays in an email.

Note: 1) Contact your Direct Administrator to request an additional email alias. 2) When you change your default alias, the system requires you to submit a reason. A dialog box will display after you click Submit.

2. Scroll to the bottom of the *Properties* window and click the **Submit** button.

The screenshot shows a 'Properties' window with the following sections:

- Account Setting**
 - Mailbox Name*: KMcQueen
 - Direct Address*: kmcqueen@direct.stg.tn.gov
 - Domain*: direct.stg.tn.gov
 - Organization: <empty>
 - Alias**
 - ☒ kmcqueen@direct.stg.tn.gov
 - ☐ adminDept@direct.stg.tn.gov
- Tracking options**
 - ☒ Request delivery receipt
 - ☒ Request read receipt
- Notification options**
 - ☒ Send alert notification
 - Alternate Email Address :
omcqueen@covisint.com
 - Note: Alert notifications will be sent to the registered email address **unless an alternate address is entered.**
- Default Mailbox**

To select email Tracking options:

1. If you want a delivery receipt when sending an email, click the **Request delivery receipt** checkbox in the *Tracking options* section.
2. If you want a read receipt from the when sending an email, click the **Request read receipt** checkbox in the *Tracking options* section.
3. Scroll to the bottom of the *Properties* window and click the **Submit** button.

The 'Properties' dialog box is shown with the following sections:

- Account Setting**:
 - Mailbox Name*: KMcQueen
 - Direct Address*: kmcqueen@direct.stg.tn.gov
 - Domain*: direct.stg.tn.gov
 - Organization: <empty>
 - Alias** section:
 - ☒ kmcqueen@direct.stg.tn.gov
 - ☐ adminDept@direct.stg.tn.gov
- Tracking options**:
 - ☒ Request delivery receipt
 - ☒ Request read receipt
- Notification options**:
 - ☒ Send alert notification
 - Alternate Email Address: omcqueen@covisint.com
 - Note: Alert notifications will be sent to the registered email address **unless an alternate address is entered.**
- Default Mailbox**: (Section header, no input fields visible)

Note: When either option is enabled, it displays as a default setting when you send a new email as shown in the example below. You may disable either option by unchecking the *Request Delivery Receipt* or *Request Read Receipt* checkbox prior to sending an email.

The 'Direct Message Web Mail' interface shows the 'Mail' composition window with the following elements:

- Mailbox - KMcQueen** (selected in the left sidebar):
 - Inbox
 - Sent
 - Draft
 - Trash (1)
 - Delivery Notification
 - Personal Folders
- Compose Bar**:
 - Buttons: Send, Save, Cancel, Attachments, Request Delivery Receipt (checked), Request Read Receipt (checked)
 - To: [Empty text box]
 - Cc: [Empty text box]
 - Subject: [Empty text box]
 - Mark as Important?: ☐
 - Font:Tahoma, Size:12, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink

To select email Notification options:

1. Select the email notification option by clicking the **Send alert notification** checkbox in the *Notifications options* section.
2. Optionally, enter an alternate email address in which to receive the notifications.
Note: Alert notifications will be sent to the registered email address unless an alternate address is entered.

3. Scroll to the bottom of the *Properties* window and click the **Submit** button.

The screenshot shows the 'Properties' window with the following sections:

- Account Setting**:
 - Mailbox Name*: KMcQueen
 - Direct Address*: kmcqueen@direct.stg.tn.gov
 - Domain*: direct.stg.tn.gov
 - Organization: <empty>
 - Alias**:
 - ☒ kmcqueen@direct.stg.tn.gov
 - ☐ adminDept@direct.stg.tn.gov
- Tracking options**:
 - ☒ Request delivery receipt
 - ☒ Request read receipt
- Notification options**:
 - ☒ Send alert notification
 - Alternate Email Address: omcqueen@covisint.com
 - Note: Alert notifications will be sent to the registered email address **unless an alternate address is entered.**
- Default Mailbox**: (This section is partially visible at the bottom of the window.)

4. When the Info window displays, click **OK**. You will be sent a system generated email with a link to verify the alternate email address you listed. When you receive the email, click on the link to confirm the email address.



To select your Default Mailbox:

1. Scroll to the bottom of the window to view the *Default Mailbox* section,
2. Select your default mailbox by clicking the appropriate **radio button**.

3. Scroll to the bottom of the *Properties* window and click the **Submit** button.

The screenshot shows a 'Properties' window with the following sections:

- Email Addresses:** A list containing 'kmcqueen@direct.stg.tn.gov' and 'adminDept@direct.stg.tn.gov'.
- Tracking options:** Two checked checkboxes: 'Request delivery receipt' and 'Request read receipt'.
- Notification options:** One checked checkbox: 'Send alert notification'. Below it is a text field for 'Alternate Email Address' containing 'omcqueen@covisint.com'.
- Note:** 'Alert notifications will be sent to the registered email address **unless an alternate address is entered.**'
- Default Mailbox:** Two radio buttons: 'All Inbox' (unselected) and 'Individual Mailbox' (selected). Below 'Individual Mailbox' is a checked checkbox: 'Make this Mailbox as Primary'.
- Footer:** A red text message: '(Mailbox KMcQueen is the current Primary Mailbox)' and a 'Submit' button.

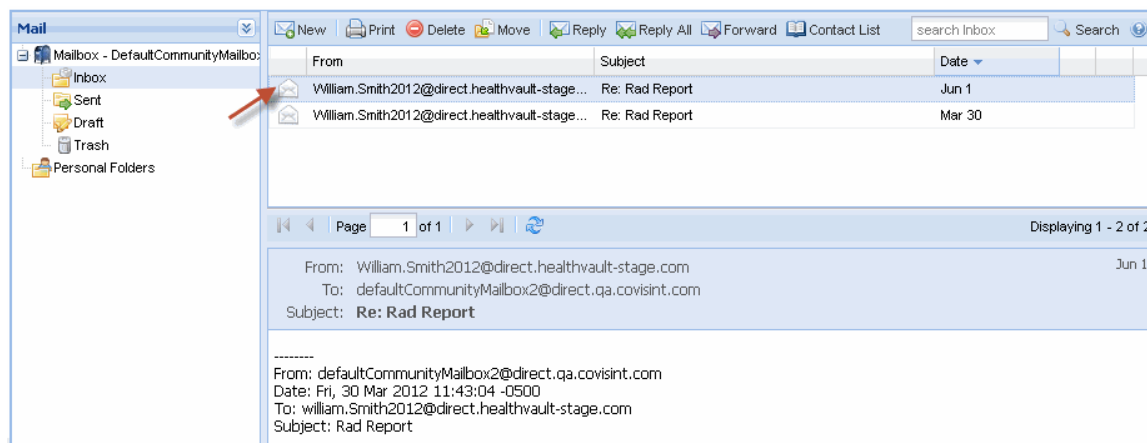
RESULTS:

You have successfully set the properties for your Direct Inbox.

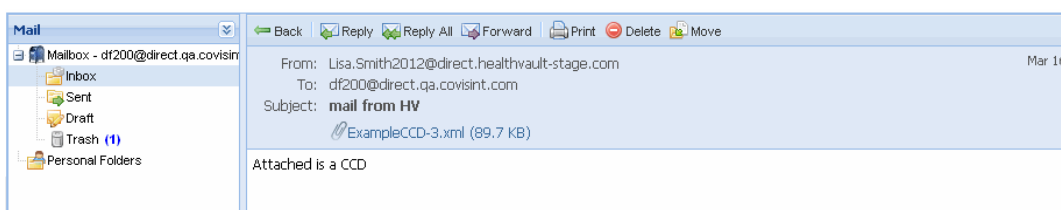
View Your Messages

In the *Messages List* section of the *Direct Inbox* portlet, you can view and save attached documents and reply to, forward, print, delete, or move the message to a different Mail folder.

To view a message:



1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. Sort (i.e., From, Subject, Date) the list as needed to view messages. For details, go to Direct Inbox Overview.
3. In the list of messages, double click on the **message** you want to view. The portlet refreshes displaying the entire message. From this view, you can reply to, forward, print, delete, or move the message. Click **Back** to return to the message list section.



Field & Menu Bar Descriptions

The following table describes the Fields and Menu Options on the Messages List view.

FIELD NAME	DESCRIPTION
message date	The message date displays in the upper right corner of the screen. The “Sent date/time” or “Received date/time” is displayed in the viewing user’s time zone.
From	Displays the name of the facility or practice that sent the message.
To	Displays the message recipients.
Subject	Displays the subject of the message.

Attachments	Displays the list of documents attached to the message. You can click individual attachments to view or save them.
message area	Displays the message.

MENU BAR OPTIONS	
Back	Click to return to the messages section.
Reply	Click to reply to a message.
Reply All	Click to reply to all of the recipients of a message.
Forward	Click to forward a message to different recipient.
Print	Click to print a message.
Delete	Click to delete a message and move it to the Trash folder.
Move	Click to move a message to a different Inbox folder (e.g., Inbox, Sent, Draft, Trash).

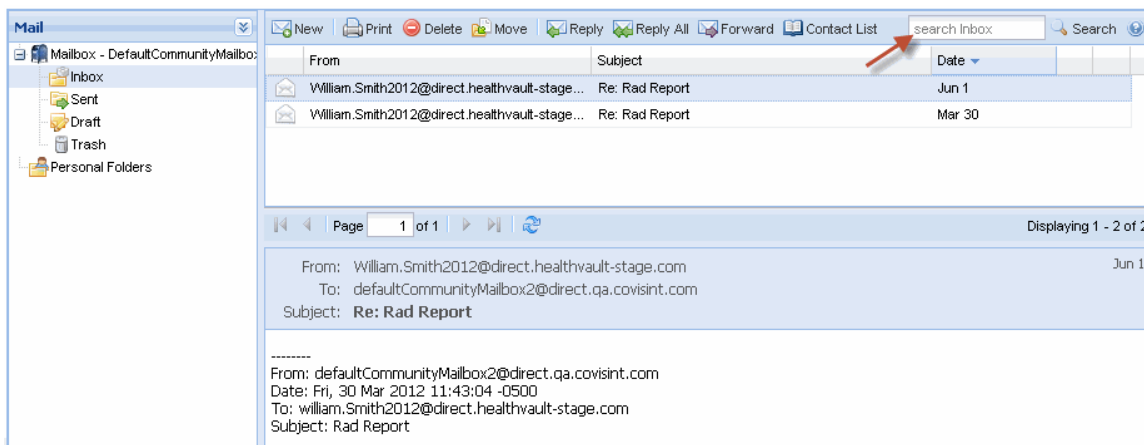
RESULTS:
You have successfully opened a message for viewing.

Search Messages List

The Direct Inbox *Search* feature is used to search sent and received messages in the Inbox. The feature is located on the menu bar in the *Messages List* section.

To search messages:

1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. In the *Messages List* section enter the **search** information in the **search Inbox** field located on the menu bar.
3. Click **Search**. The results display in the messages list section.
4. In the *search results* section, click a **message** to view it. For details, refer to *View Messages*.



Message search results are listed in the messages section of the portlet, and marked as described in the table below to help you determine which messages have been read or are unread.



Convention	Description
Bold font	Unread messages are marked with a bold font.
standard weight font	Read messages are marked with a normal font.

Field & Menu Bar Descriptions

The following table describes the Fields and Menu Options on the Messages List view, which includes the search Inbox feature.

FIELD NAME	DESCRIPTION
search Inbox	Enter the search information.

MENU BAR OPTIONS	
New	Click to Compose a Message .
Print	Click to print a message.

Delete	Click to delete a message and move it to the Trash folder.
Move	Click to move a message to a different Inbox folder (e.g., Inbox, Sent, Draft, Trash).
Reply	Click to reply to a message.
Reply All	Click to reply to all of the recipients of a message.
Forward	Click to forward a message to different recipient.
Contact List	Click to access the contact list feature.
Search button	Click to search for a message.
 (Help)	Click  (Help) on the menu bar to display the Inbox Help topics.

RESULTS

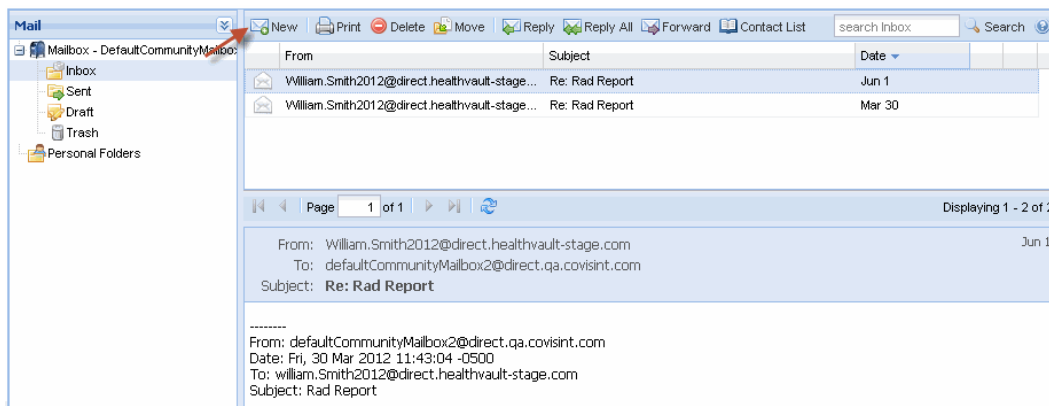
You have successfully searched for and found messages.

Compose a Message

The *Compose Message* section of the Direct Inbox portlet is used to create and send patient-related messages to other facilities or practices. A message can be sent to multiple recipients (i.e., facilities or practices) along with one or more attached documents.

To compose a message:

1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. On the Messages List section of the Direct Inbox portlet, click **New** in the menu bar. The portlet refreshes displaying the *Compose a Message* view.



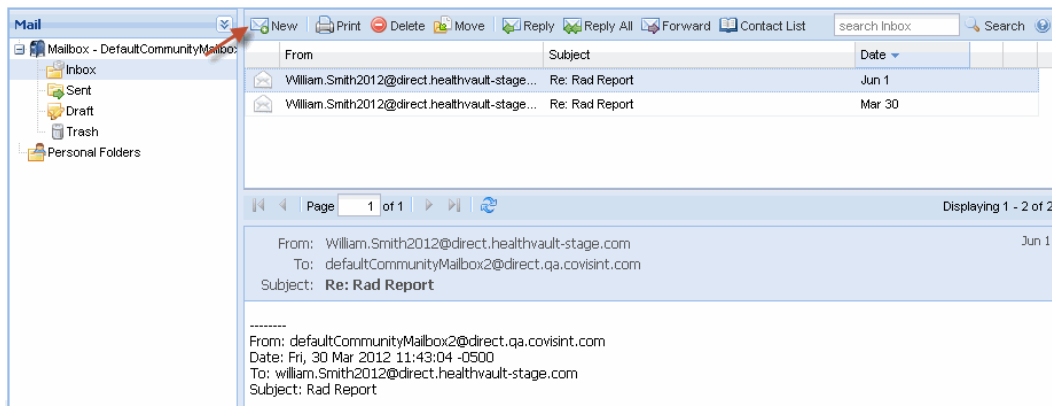
3. Select the recipients:
 - a. Click **To**. The *Search* window displays.
 - b. On the *Search* window, select either the **Contacts**, **Provider**, or **Entity** tab. Enter or select search criteria field. The *Search* window closes and the selected recipients display in the *To* field of the *Compose Message* view.
4. Select additional recipients to send a copy of the message:
5. Click **Cc**. The *Search* window displays.
 - a. On the *Search* window, select either the **Contacts**, **Provider**, or **Entity** tab. Enter or select search criteria field.
 - b. Click the **Search** button.
6. If needed, add the selected recipient to your contact list:
7. In the *Search Results* section, click the **checkbox** in front of the name of the recipient.
8. Click the **Add To** button to add the recipient to your contact list.
9. Click the **Back To Email** button. The *Search* window closes and the selected recipients display in the *To* field of the *Compose Message* view.
 - a. Enter a **subject** in the *Subject* field.
 - b. Optional - Enter a **message** in the *Message* field.
 - c. Attach documents (optional):
 - d. Click **Attachments**. The *Attachments* window displays.
 - e. Click **Add** to select an attachment:
 - f. When the *File Upload* window opens, select the **file** you want to attach to the message.
 - g. Click **Open**. The *File Upload* window closes, and the selected document displays in the *Attachments* window.
 - h. Repeat steps b through d until you are finished selecting attachments.
 - i. Click **Close**. The *Attachments* window closes, and the selected documents display in the *Compose Message* screen *Attachments* section.
10. Click **Send**.

Search for a Contact

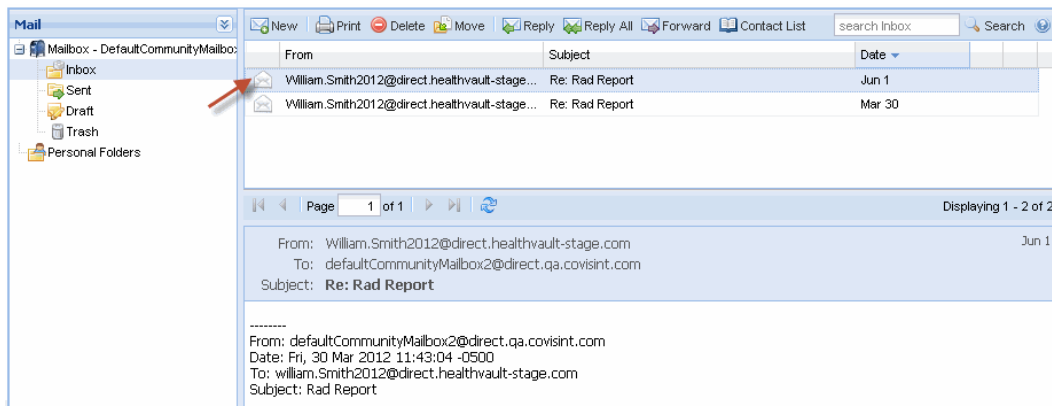
You have the ability to search for a specific contact when creating a new message or replying or forwarding a message using the Search feature.

To search for a contact:

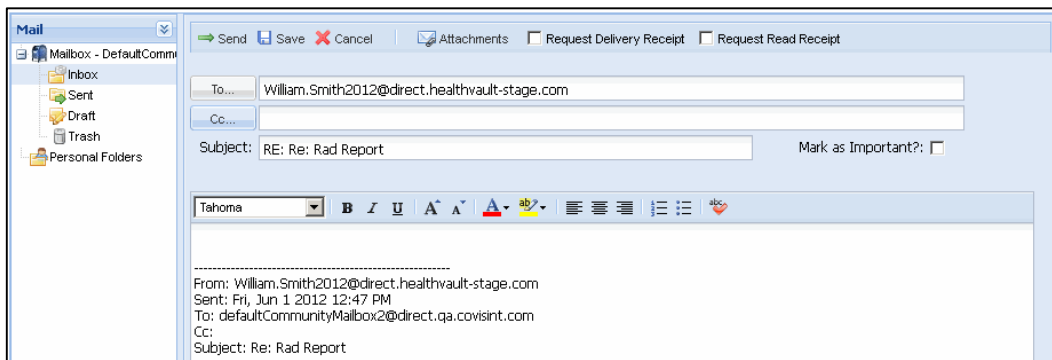
1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. Click **New** in the menu bar. The portlet refreshes displaying the *Compose a Message* view. If you are replying or forwarding a message, in the messages list, click on the **message** you want to send a reply or forward.



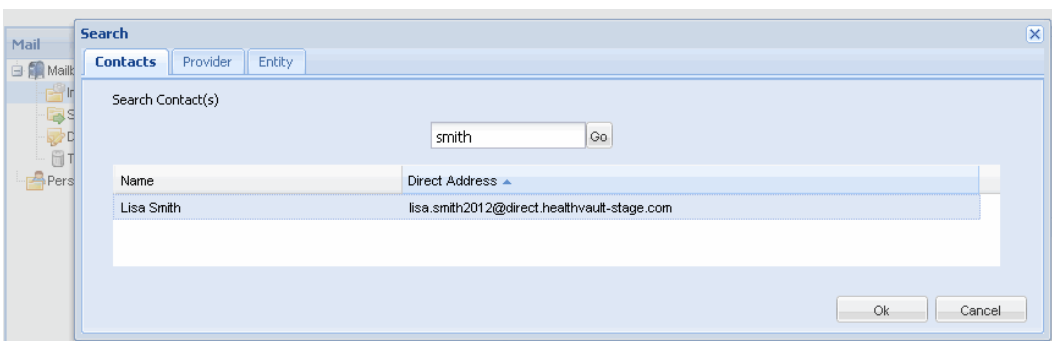
3. Click **Reply**, **Reply All**, or **Forward** on the menu bar. The portlet refreshes displaying the *Compose a Message* view



4. Click **To**. The *Search* window displays.



5. On the *Search* window, select the **Contacts** tabs, enter the contact's name in the search criteria field and click **Go**. (You can also select the contact's name from the list). The search results displays at the bottom of the *Search* window.



6. Click the **contact name** and then click **OK** to select the message recipient.

RESULTS:

You have successfully searched and selected a contact as a message recipient.

Search for a Default Community Mailbox Contact

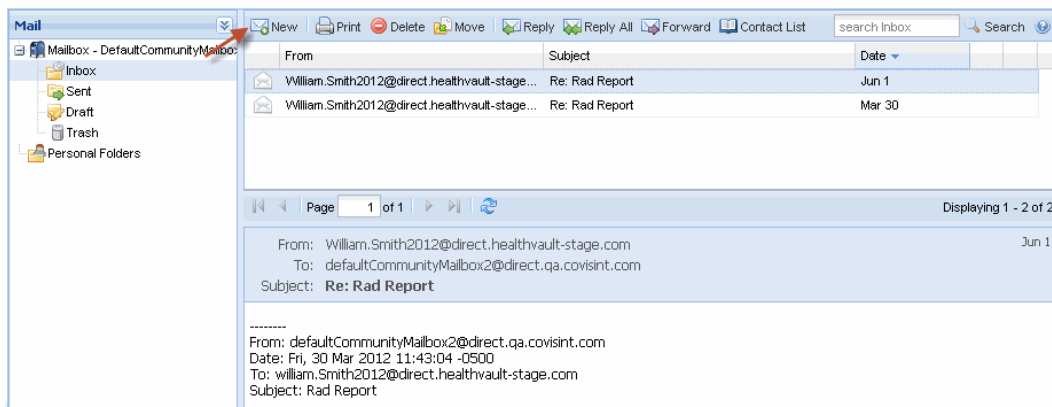
When selecting message recipients from your default community mailbox, the Contact Search feature only searches for members within your community. You can select multiple contacts from the search results to copy contact email addresses in the TO or CC message fields



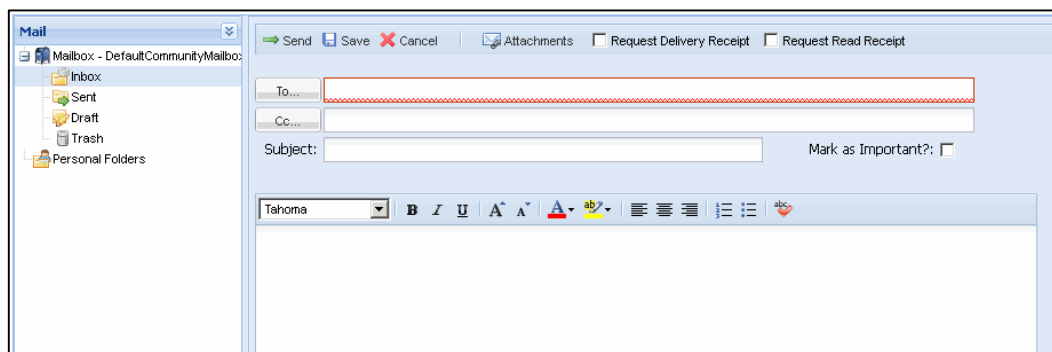
Note: The Community search feature is only available if you have selected your default community mailbox from the drop-down list in the Mail section on the Message screen. The Contact List option on the menu bar will be disabled when conducting a contact search from a default community mailbox.

To search for Community Mailbox contacts:

1. Go to your **Direct Inbox**. For details, go to [Access Your Direct Inbox](#).
2. Select your **default Community Mailbox** from the drop-down list in the *Mail* section of the screen.
3. Click **New** in the menu bar. The portlet refreshes displaying the *compose message* view.



4. Click **To**. The *Search Contacts* window displays.



5. On the *Search Contacts* window, enter either the contact's first or last name in the search criteria field and click **Search**. (You can also leave both fields blank to return all contacts within your default Mailbox community). The search results displays below the *Search* button.



Note: Special characters (e.g., @, ! #) are not allowed in either the first or last name fields.

6. Select one or more **contact names** from the list and then click **Add "To"** to select the message recipients.
7. You can also click **Add "CC"** to select recipients to receive a copy of the message.
8. Use **Delete** button on your keyboard, if you need to delete any recipients from either the Add "To" or Add "CC" fields.
9. Click **Done** to allow the selected contacts to be copied to the *compose message* view, or click **Cancel** to cancel the searching activity and return to the *compose message* view.

Search Contacts

First Name:

Last Name:

Search

First Name	Last Name	Address
Default	Community	1 Campus Martius Detroit MI
AllPrivs	User	1 Campus Martius Detroit MI

Add "To" Default.Community@direct.qaprev.covisint.com; sysadmin@direct.qaprev.covisint.com

Add "CC" Default.Community@direct.qaprev.covisint.com; sysadmin@direct.qaprev.covisint.com

Done Cancel

RESULTS:

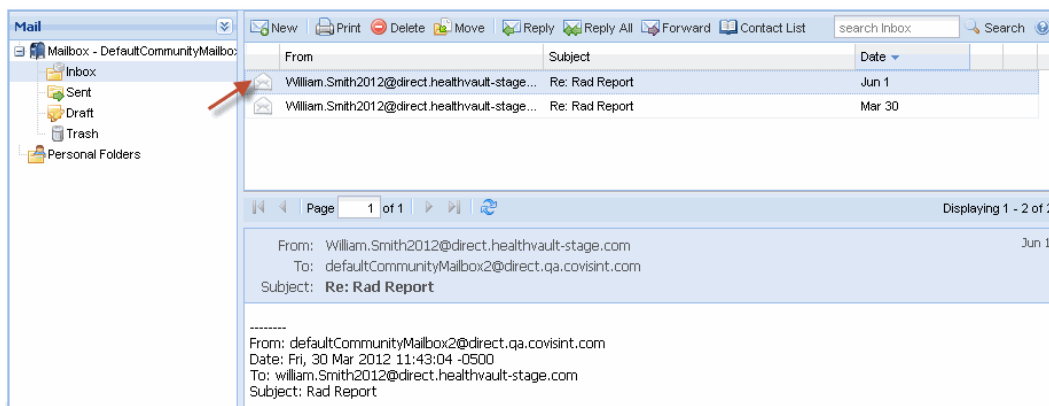
You have successfully searched and selected default mailbox community contacts as message recipients.

Reply to a Message

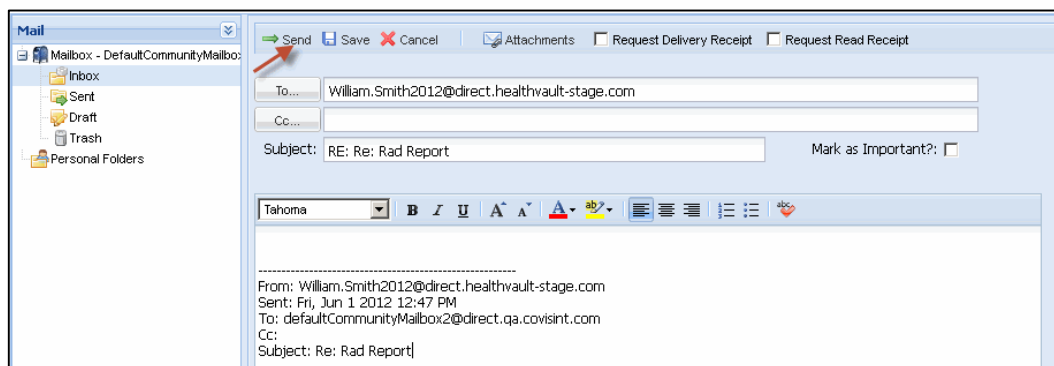
The *Compose Message* view includes an option on the menu bar used to reply to messages from other facilities or practices. A reply can be sent to multiple recipients (i.e., facilities or practices) along with one or more attached documents.

To reply to a message:

1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. In the messages list click on the **message** you want to send a reply.
3. Click **Reply** or **Reply All** on the menu bar. The *Compose Message* screen displays.



4. Add or remove recipients as required in the *To* field.
5. Edit the **Subject** and **Message** fields as needed.
6. Attach documents (optional):
 - a. Click **Attachments**. The *Attachments* window displays.
 - b. Click **Add** to select an attachment. The *File Upload* window opens.
 - c. Select the **file** you want to attach to the message.
 - d. Click **Open**. The *File Upload* window closes, and the selected document displays in the *Attachments* window.
 - e. Repeat steps b through d until you are finished selecting attachments.
 - f. Click **Close**. The *Attachments* window closes, and the selected documents display in the *Compose Message* screen *Attachments* section.
7. Click **Send** on the on the menu bar to send the reply.



Field & Menu Bar Descriptions

The following describes the Fields and Menu Options on the Compose Message view when replying to a message. An asterisk * indicates a **required field**.

FIELD NAME	DESCRIPTION
To *	Displays the recipients for the message. Click the To button to search for and select recipients.
Cc	Displays additional recipients for the message. Click the Cc button to search for and select recipients.
Subject	Enter the subject of the message.
Message	Displays the message. Enter a message, if needed. Text can be typed, or pasted from another application.
Mark as Important?	Check to mark the message as important.

MENU BAR OPTIONS	
Send	Click to send the message.
Save	Click to save the message.
Cancel	Click to cancel the message.
Attachments	Displays the list of documents attached to the message. Click Attachments to attach documents stored on your computer, or patient documents.
Request Delivery Receipt	Check to request a delivery receipt from the recipient.
Request Read Receipt	Check to request a receipt when the message is read by the recipient.

RESULTS:

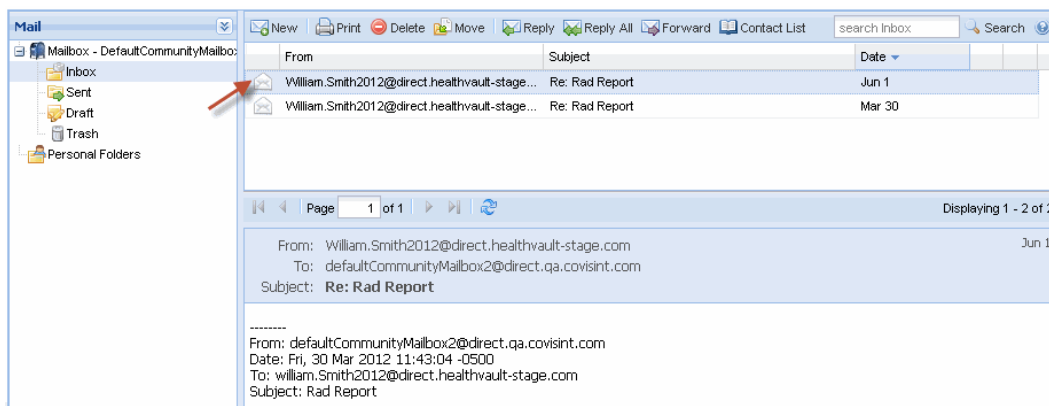
You have successfully replied to a message.

Forward a Message

The *Compose Message* view includes an option on the menu bar used to forward a message from other facilities or practices. A reply can be forwarded to multiple recipients (i.e., facilities or practices) along with one or more attached documents.

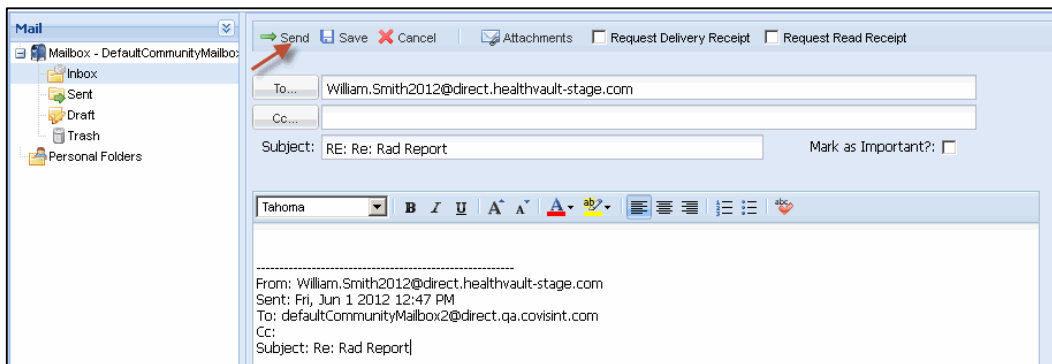
To forward a message:

1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. In the messages list click on the **message** you want to forward.
3. Click **Forward** on the menu bar.



4. Select recipients:
 - a. Click **To**. The *Search* window displays.
 - b. On the *Search* window, select either the **Contacts**, **Provider**, or **Entity** tab. Enter or select search criteria field. The *Search* window closes and the selected recipients display in the *To* field of the *Compose Message* view.
5. Edit the **Subject** and **Message** fields as needed.
6. Attach documents (optional):
 - Click **Attachments**. The *Attachments* window displays.
 - a. Click **Add** to select an attachment:
 - When the *File Upload* window opens, select the **file** you want to attach to the message.
 - Click **Open**. The *File Upload* window closes, and the selected document displays in the *Attachments* window.
 - Repeat steps b through d until you are finished selecting attachments.
 - Click **Close**. The *Attachments* window closes, and the selected documents display in the *Compose Message* screen *Attachments* section.

7. Click **Send** on the on the menu bar to send the reply.



Field & Menu Bar Descriptions

The following describes the Fields and Menu Options on the Compose Message view when forwarding a message. An asterisk * indicates a **required field**.

FIELD NAME	DESCRIPTION
To *	Displays the recipients for the message. Click the To button to search for and select recipients.
Cc	Displays additional recipients for the message. Click the Cc button to search for and select recipients.
Subject	Enter the subject of the message.
Message	Displays the message. Enter a message, if needed. Text can be typed, or pasted from another application.
Mark as Important?	Check to mark the message as important.

MENU BAR OPTIONS	
Send	Click to send the message.
Save	Click to save the message.
Cancel	Click to cancel the message.
Attachments	Displays the list of documents attached to the message. Click Attachments to attach documents stored on your computer, or patient documents.
Request Delivery Receipt	Check to request a delivery receipt from the recipient.
Request Read Receipt	Check to request a receipt when the message is read by the recipient.

RESULTS:

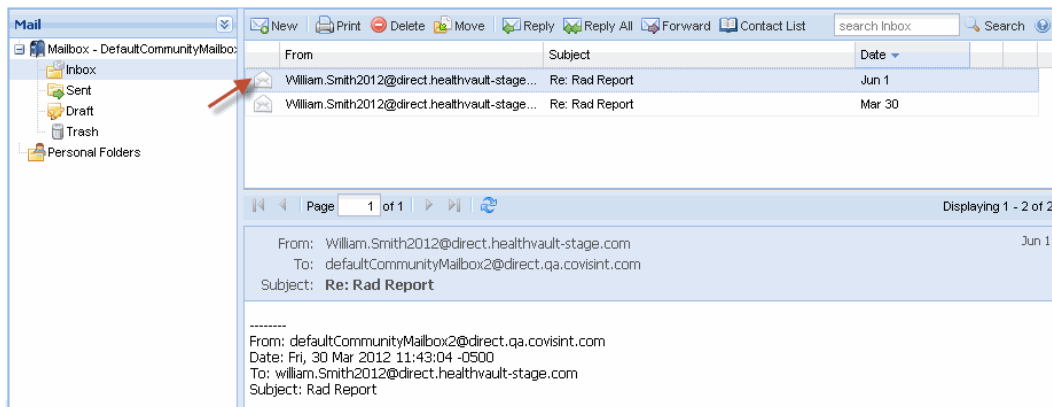
You have successfully forwarded a message.

Move a Message to a Different Folder

The *Compose Message* view includes an option on the menu bar used to move a message from one mailbox folder to another.

To move a message to a different folder:

1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. In the *Direct Inbox* portlet, a list of all of the messages are displayed in the *messages list section*.
3. In the messages list click on the **message** you want to move.
4. Click **Move** on the menu bar.

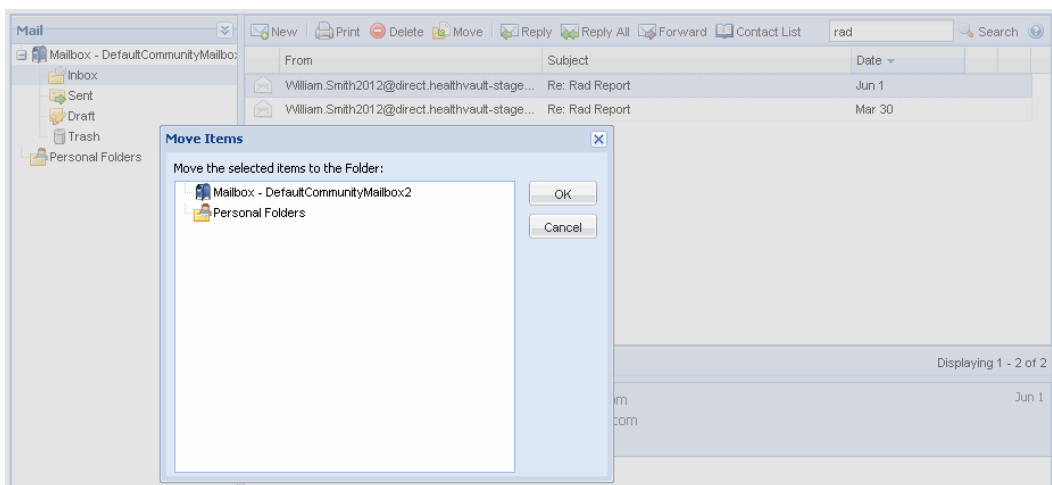


5. When the *Move Items* window display, select the **folder** in which to move the message.



A message cannot be moved to its original folder, Trash or Sent folders.

6. Click **OK**.



RESULTS:

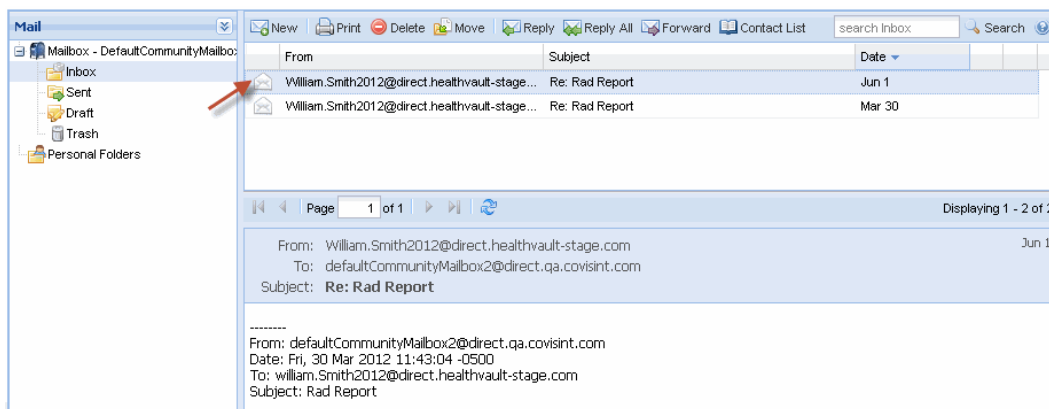
You have successfully moved a message to another folder.

Delete/Restore a Message

The *Compose Message* view includes options on the menu bar used to delete and/or restore a message from other facilities or practices.

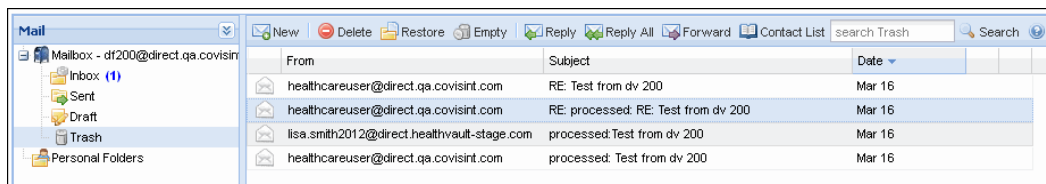
To delete a message:

1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. In the messages list click on the **message** you want to delete.
3. Click **Delete** on the menu bar.



To restore a message:

1. In the *Direct Inbox* portlet, click the **Trash** folder in the *Mail* section (see image above). The portlet refreshes, displaying the *Restore* feature in the menu bar.
2. In the messages list, click on the **message** you want to restore.
3. Click **Restore** on the menu bar.





Menu Bar Descriptions

The following describes the Fields and Menu Options on the Compose Message view when **deleting** a message from folders other than Trash such as Inbox or Sent.



MENU BAR OPTIONS

New	Click to Compose a Message .
Print	Click to print a message.
Delete	Click to delete a message and move it to the Trash folder.
Move	Click to move a message to a different Inbox folder (e.g., Inbox, Sent, Draft, Trash).

Reply	Click to reply to a message.
Reply All	Click to reply to all of the recipients of a message.
Forward	Click to forward a message to different recipient.
Contact List	Click to access the contact list feature.
Search button	Click to search for a message.
 (Help)	Click  (Help) on the menu bar to display the Inbox Help topics.

The following describes the Fields and Menu Options on the Compose Message view when **restoring** a message from the *Trash* folder.

MENU BAR OPTIONS

New	Click to Compose a Message .
Delete	Click to delete a message. IMPORTANT!: If deleting a message within the Trash folder, this is a permanent delete and cannot be undone.
Restore	Click to remove a message from the Trash folder to the Inbox folder.
Empty	Click to empty the Trash folder. IMPORTANT! This will permanently delete all the messages in the Trash folder and cannot be undone.
Reply	Click to reply to a message.
Reply All	Click to reply to all of the recipients of a message.
Forward	Click to forward a message to different recipient.
Contact List	Click to access the contact list feature.
Search button	Click to search for a message.
 (Help)	Click  (Help) on the menu bar to display the Inbox Help topics.

RESULTS:

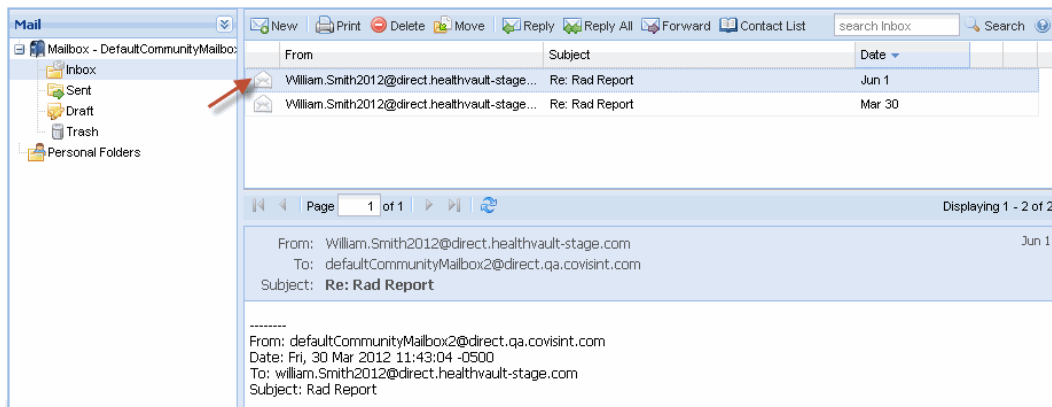
You have successfully deleted and/or restored a message.

Print a Message

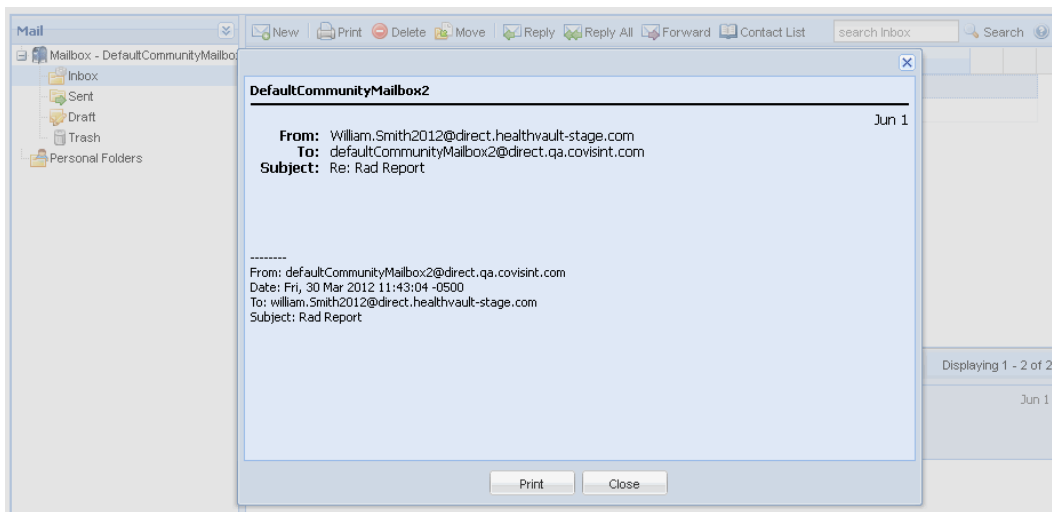
The *Compose Message* view includes an option on the menu bar used to print a message from other facilities or practices.

To print a message:

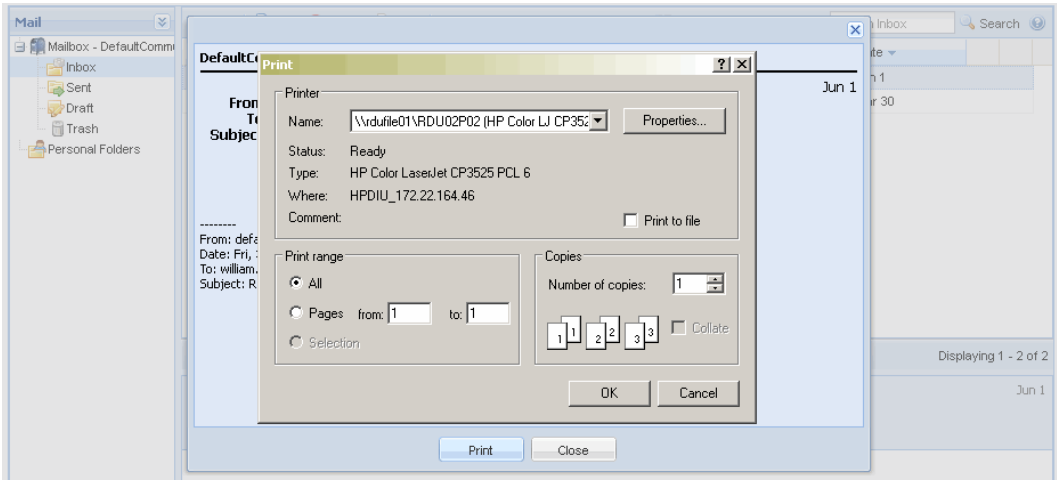
1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. In the *Direct Inbox* portlet, a list of all of the messages are displayed in the *messages list section*.
3. In the messages list click on the **message** you want to send a reply.
4. Click **Print** on the menu bar.



5. When the *message window* opens, click **Print**.



6. When the *Print* window opens, select a **printer**.
7. Click **OK**. The *Print* window closes and the message is sent to the selected printer. The *message* window displays.



8. Click **Close** on the *message* window.

RESULTS

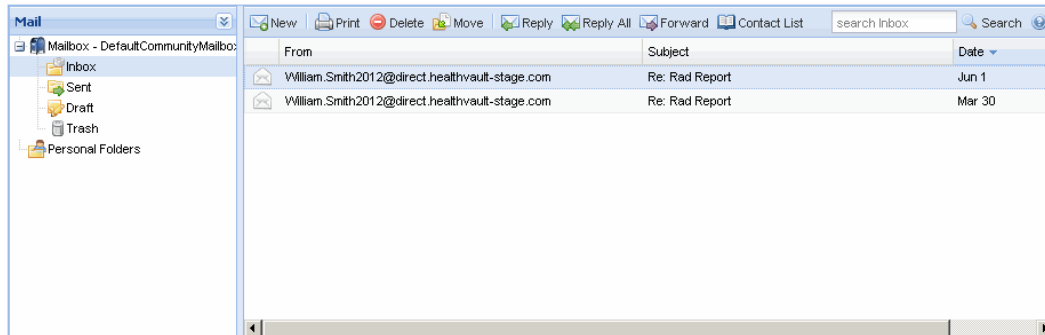
You have successfully printed a message.

Add a Contact

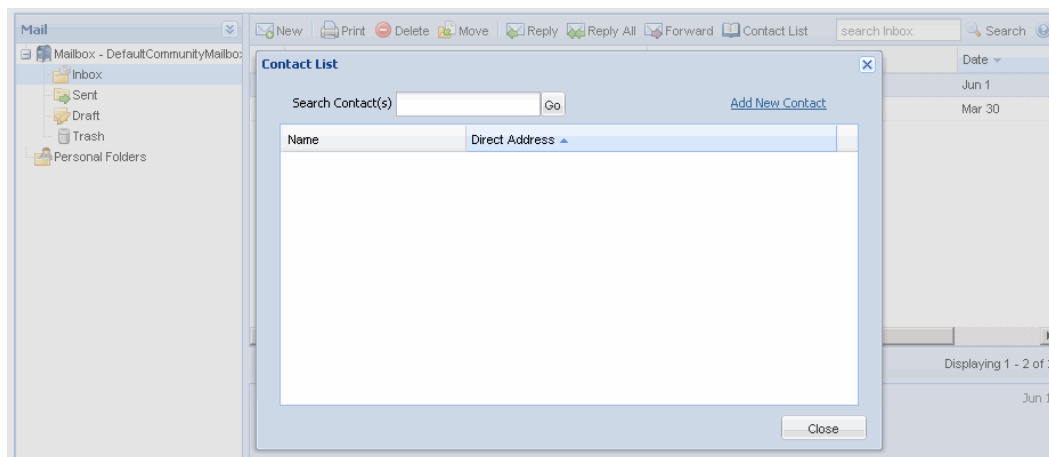
The Direct Inbox *Contact List* feature is used to add contacts. The feature is located on the menu bar in the *Messages List* section.

To add a contact:

1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. On the *Messages List* section click **Contact List** located on the menu bar.

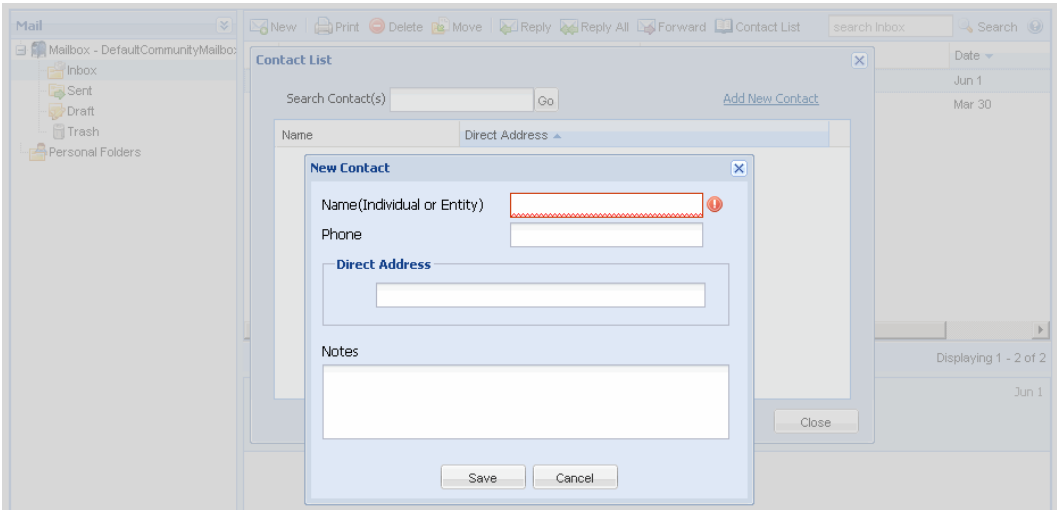


3. When the *Contact List* window displays, click **Add New Contact**.



4. When the *New Contact* window displays:
 - a. Enter the individual's or entity's name.
 - b. Enter the individual's or entity's name phone number.
 - c. Enter the direct address.
 - d. Enter, if needed, additional notes.

- 5. Click **Save**.



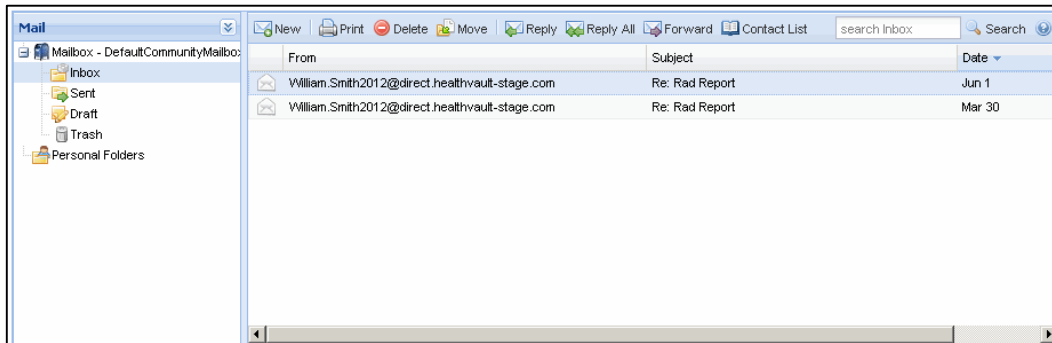
RESULTS:
You have successfully created a new contact.

Edit a Contact

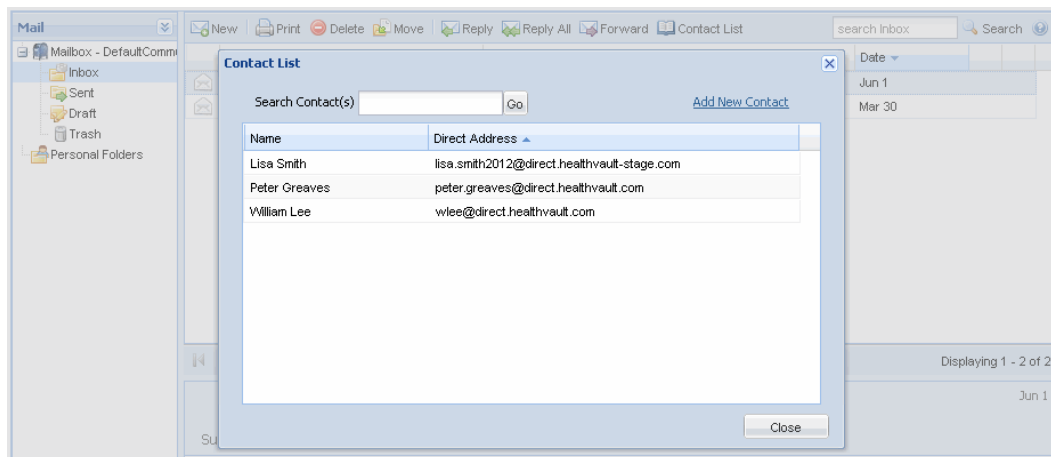
The Direct Inbox *Contact List* feature is used to edit contacts. The feature is located on the menu bar in the *Messages List* section.

To edit a contact:

1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. On the *Messages List* section click **Contact List** located on the menu bar.

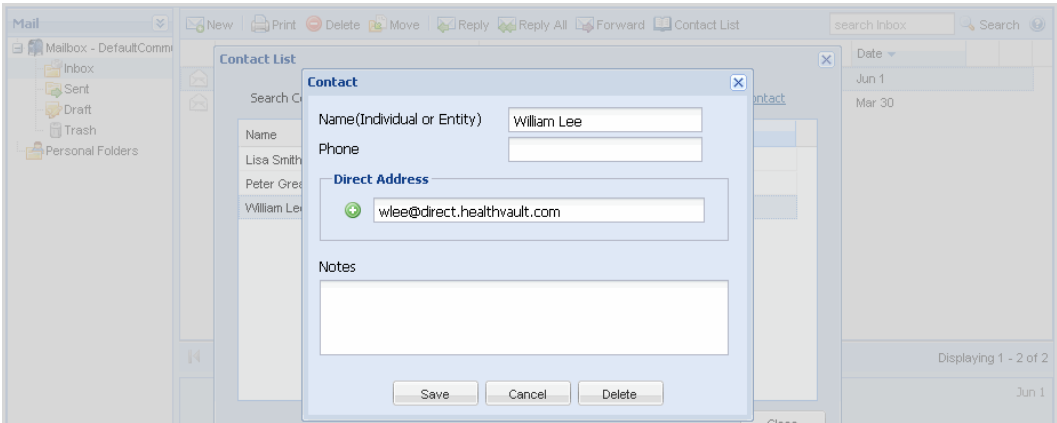


3. When the *Contact List* window displays, double click on the **name of the contact** you want to edit.



4. When the *Contact* edit window displays, make the necessary changes.

5. Click **Save**.



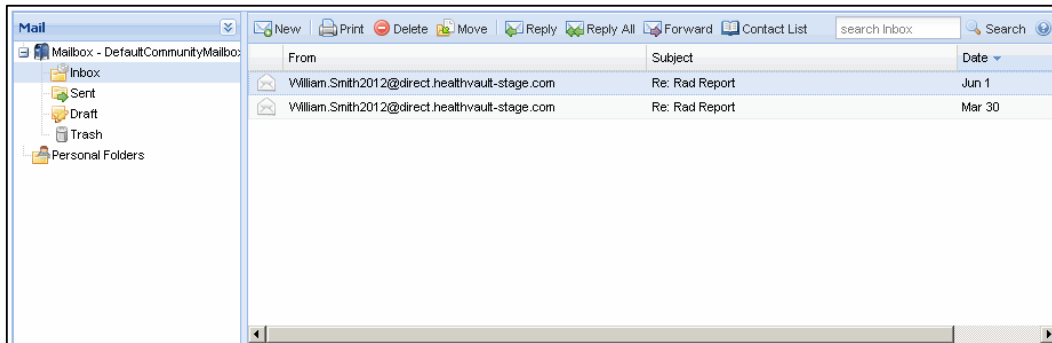
RESULTS:
You have successfully edited a contact.

Delete a Contact

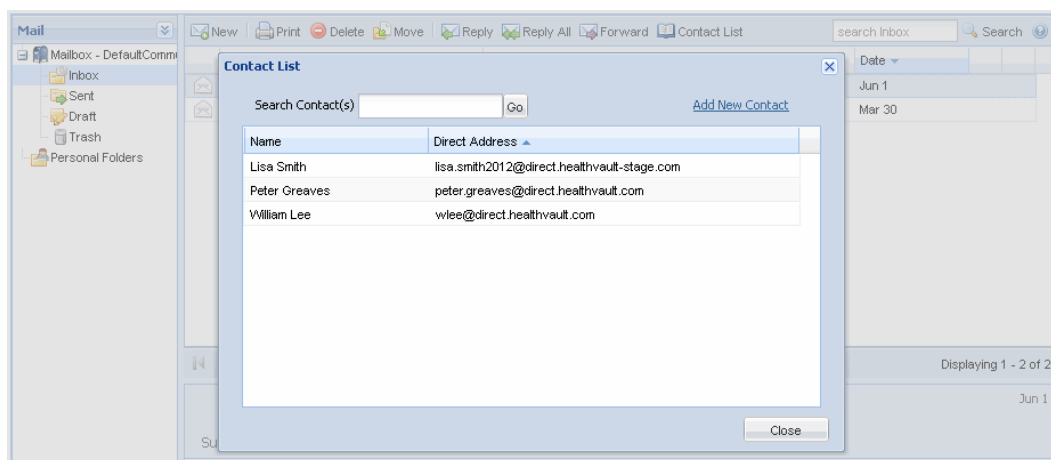
The Direct Inbox *Contact List* feature is used to delete contacts. The feature is located on the menu bar in the *Messages List* section.

To delete a contact:

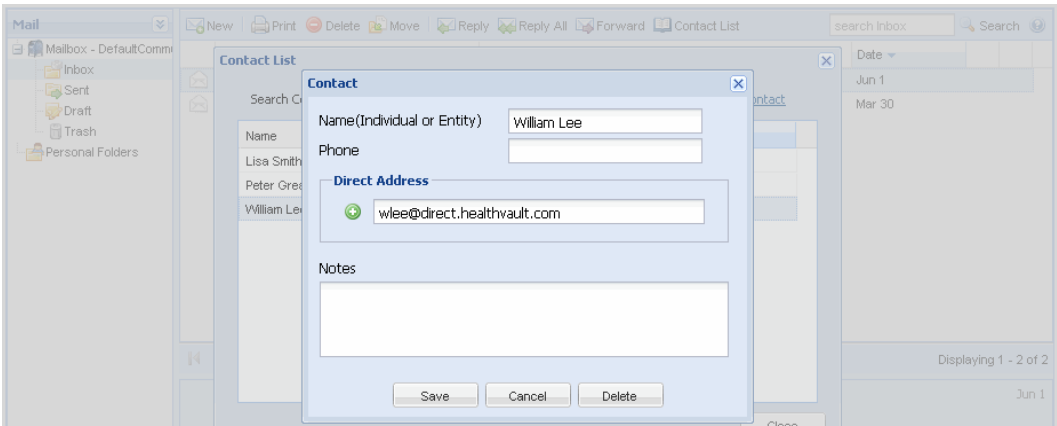
1. Go to your **Direct Inbox**. For details, go to Access Your Direct Inbox.
2. On the *Messages List* section click **Contact List** located on the menu bar.



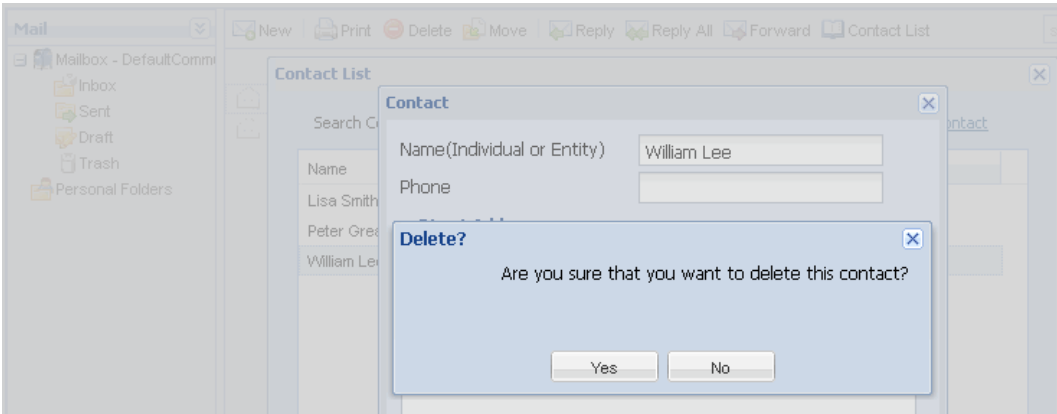
3. When the *Contact List* window displays, double click on the **name of the contact** you want to delete.



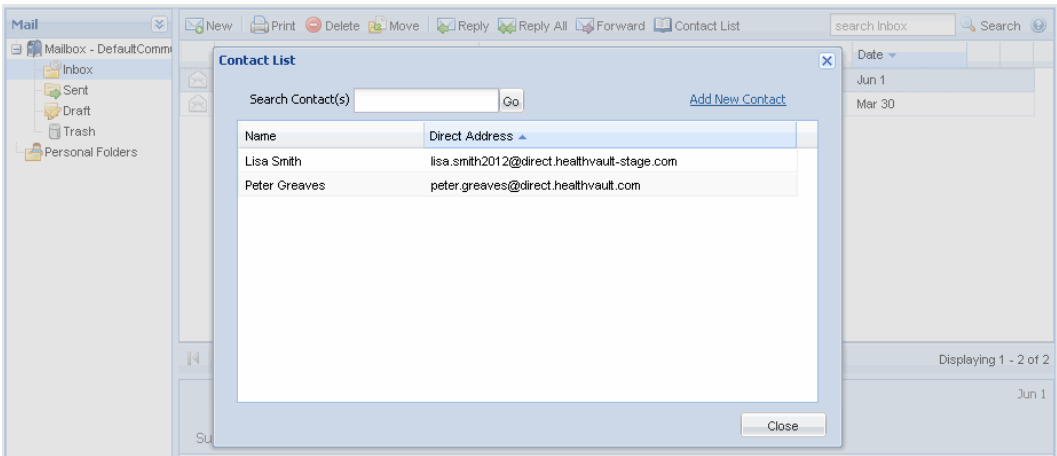
4. When the *Contact* edit window displays, click **Delete**.



5. When the *Delete* confirmation window displays, click **Yes**. The *Delete* confirmation window closes and the contact is now removed from the *Contact List* window



6. . Click **Close** on the *Contact List* window.



RESULTS:
You have successfully deleted a contact.

DIRECT MAILBOX USER MANAGEMENT

View Shared Mailboxes I Have Access

The *Shared Mailboxes I Have Access To* feature is used to view the list of shared mailboxes to which you have been granted access. In this view of the screen, you are also able to discontinue your access to a shared mailbox.

To view the shared mailboxes list:

1. Click the **Mailbox User Management** tab to display the menu options.
2. Click *Shared Mailboxes I Have Access To* to display the shared mailbox list.



To discontinue access to a shared mailbox:

1. Click the **Mailbox User Management** tab to display the menu options.
2. Click *Shared Mailboxes I Have Access To* to display the list.
3. Click the **Discontinue** button at the end of the row of the mailbox in which you no longer need to access.
4. When the dialog window displays, enter the **reason** for discontinuing access to the shared mailbox.
5. Click **OK**.



6. When the *Info* window displays, click **OK**. The shared mailbox is removed from the list in the *Shared Mailboxes I Have Access* view.



RESULTS:

You have successfully viewed the list of shared mailboxes in which you have access. You also know how to discontinue access to a shared mailbox.

Request Access to a Mailbox

The *Request Access to a Mailbox* feature is used to request access to an existing Direct mailbox. This view includes a feature which allows you to search for existing mailboxes, as well as a listing of the Addresses.

To request access to an existing Direct mailbox:

1. Click the **Mailbox User Management** tab to display the menu options.
2. Click *Request Access to a Mailbox* to display the feature.
3. If needed, search for an existing address by keying in full or partial **owner's name** or **Direct address** in the *Search Requests* field.
4. Click **Go**.
5. When the search results display, enable the checkbox of the **address** for which access is requested.
6. Click **Submit**.

My Mailbox Management

Shared Mailboxes I Have Access To

Request Access to a Mailbox

Search Request(s)

Owner	Shared Address	
Melanie Latin	melenie.latin@direct.slg.in.gov	<input checked="" type="checkbox"/>
Melanie Latin	melenie.a.latin@direct.slg.in.gov	<input type="checkbox"/>



Note: If you have already submitted a request, the following error message displays.



RESULTS:

You have successfully requested access to an existing Direct shared mailbox.

View Status of My Access Requests

After the system processes a request to access an existing Direct mailbox, the information (i.e., Shared Address, Status, and Last Action Date) now displays in the *Status of Access Requests I have Made* section. This section is located below the *Request Access to a Mailbox* section. The request will display with a *Pending* status. The system receives the request and places the request in the pending approval queue for the user who is the Owner of the Direct Address for which shared access was requested. The system also sends an email to the user (Owner) mailbox.

To view a request status:

1. Click the **Mailbox User Management** tab to display the menu options.
2. Click *Status of Access Requests I Have Made* to display the status information. The request status (i.e., Pending, Rejected, or Revoked) is displayed in the *Status* field.



The screenshot shows the 'Mailbox User Management' tab selected in the top navigation bar. Below it, the 'My Mailbox Management' section is visible. Under this section, there are three expandable options: 'Shared Mailboxes I Have Access To', 'Request Access to a Mailbox', and 'Status of Access Requests I Have Made'. The 'Status of Access Requests I Have Made' option is expanded, showing a table with the following data:

Shared Address	Status	Last Action Date
melanie.latin@direct.sls.nj.gov	PENDING	28-Apr-2014

RESULTS:

You have successfully viewed the status of the request you have made to access an existing Direct mailbox.

Approve/Reject a Request to My Mailbox

Users may request access to your Direct mailbox. The *Approve a Request to My Mailbox* feature is used to approve/reject shared mailbox access requests placed when the user is the owner of the Direct mailbox to which access is requested. You will receive a system generated email alerting you of a pending request.

To approve a request for access to your Direct mailbox:

1. Click the **Mailbox User Management** tab to display the menu options.
2. Click *Approve a Request to My Mailbox* to display the feature.



3. Select a request using one of the following procedures:
 - a. Select the request from the list.
 - i. To select all requests, click the **checkbox** at the end of the header row.
 - ii. To select one or more requests, click the **checkbox** at the end of the row of that request.
 - b. Or search for a request by using the *Search Request(s)* feature. Enter part or all of the **Direct address** in *Search Request(s)* field.
 - i. Click **Go**.
 - ii. When the search results display, click the **checkbox** to select a request.
4. Click the **Approve** button. System receives the approval and creates the mailbox for the Direct address.

Direct Inbox | Provider Directory | Community Administration | **Mailbox User Management**

My Mailbox Management

- Shared Mailboxes I Have Access To
- Request Access to a Mailbox
- Status of Access Requests I Have Made
- Approve a Request to My Mailbox**

Search Request(s)

User Name	Direct Address Requested	Date of Request	
Kim B. McQueen	kmoqueen@direct.stg.tn.gov	28-Apr-2014	<input checked="" type="checkbox"/>

To reject a request for access to your Direct mailbox:

1. Click the **Mailbox User Management** tab to display the menu options.
2. Click *Approve a Request to My Mailbox* to display the feature.
3. Select a request using one of the following procedures:
 - a. Select the request from the list.
 - i. To select all requests, click the **checkbox** at the end of the row.
 - ii. To select one or more requests, click the **checkbox** at the end of the row of that request.
 - b. Or search for a request by using the *Search Request(s)* feature. Enter part or all of the **Direct address** in *Search Request(s)* field.
 - i. Click **Go**.
 - ii. When the search results display, click the **checkbox** to select a request.
4. Click the **Reject** button.
5. When the *Reject Access* window displays, enter a **reason** for the rejection in the *Reason* field.
6. Click **Done**. The requestor will be provided the reason for the rejection via an email.

Reject Access

Direct Address	Reason
adminDept@direct.stg.tn.gov	

RESULTS:

You have successfully approved or rejected another user's request for access to your Direct mailbox.

View Users With Access to My Mailbox

The *Users Who Have Existing Access to My Mailbox* feature is used to view the list of users that you have granted access to your Direct mailbox. You may also use this view of the screen to discontinue a user's access to your Direct mailbox.

To view the users who have access to your mailbox:

1. Click the **Mailbox User Management** tab to display the menu options.
2. Click *Users Who Have Existing Access to My Mailbox* to display the list.
3. If needed, search for an existing user's address by keying in full or partial **Direct address** in the *Search Requests* field.
4. Click **Go**. The search results display beneath the *Search Request* field.

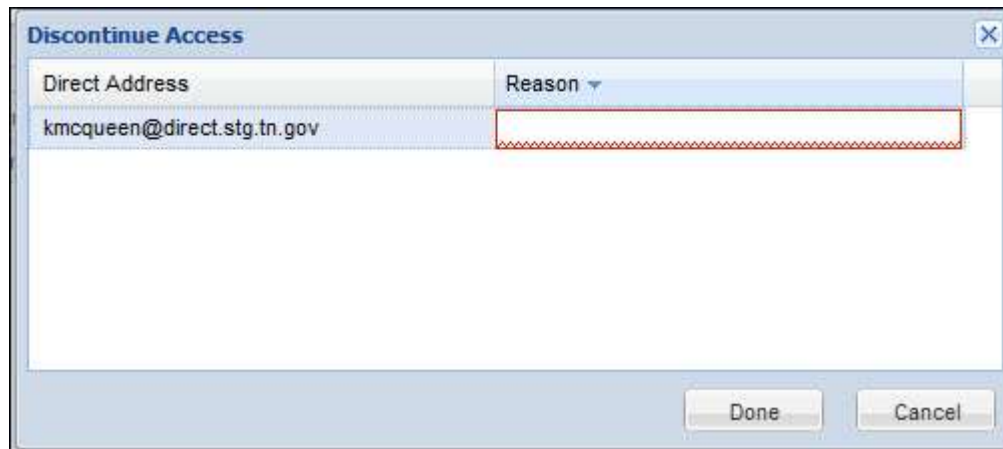
The screenshot shows the 'Mailbox User Management' interface. Under the 'My Mailbox Management' section, the 'Users Who Have Existing Access to My Mailbox' option is selected. A search bar contains 'kmo' and a 'Go' button. Below the search bar is a table with the following data:

User Name	Direct Address Requested	Date of Approval	
Kim B McGuire	kmoqueen@direct.stg.in.gov	29-Apr-2014	<input type="checkbox"/>

At the bottom right of the interface are buttons for 'Discontinue Access' and 'Reset'.

To discontinue a user's access to you Direct mailbox:

1. Click the **Mailbox User Management** tab to display the menu options.
2. Click *Users Who Have Existing Access to My Mailbox* to display the list.
3. Select the user by clicking the **checkbox** at the end of the row.
4. Click the **Discontinue Access** button,
5. When the *Discontinue Access* window displays, you may enter a reason for discontinuing access in the *Reason* field.
6. Click the **Done** button.



7. When the *Info* window displays, click **OK**.



RESULTS:

You have successfully viewed the list of users who have access to your Direct mailbox. You also know how to discontinue a user's access to your Direct mailbox.

Request an Additional Direct Mailbox

The *Request Additional Direct Mailbox* feature is used to request access for an additional Direct mailbox.

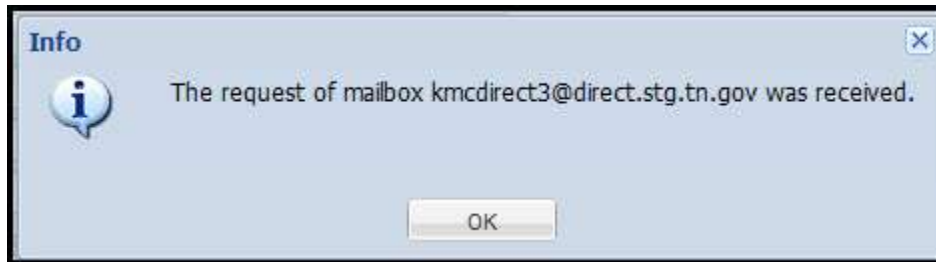
To request access for an additional Direct mailbox:

1. Click the **Mailbox User Management** tab to display the menu options.
2. Click *Request Additional Direct Mailbox* to display the feature.
3. Complete the following fields. A red asterisk indicates a required field:
 - a. Enter your **Full Name**. This is the display name, the name by which others will view your mailbox. This name will appear in the *Display Name* column in the Approved Direct Addresses section. It will typically be the user's first and last name.
 - b. Enter the **Mailbox Name** (e.g., drSmith, or sally.smith, etc.), but **DO NOT** include the domain name (e.g., @domain).
 - c. Select the Direct Inbox **Domain** from the drop-down list.
 - d. Select the Organization (optional).
Note: This field will only be required if an organization has decided to use the organization functionality (see Manage Direct Organizations) for reporting purposes.
 - e. Click the **Yes** checkbox if you want to add this email address to your existing entry in the Provider Directory.
4. Click **Submit**.

The screenshot shows the 'Mailbox User Management' interface with the 'Request an Additional Direct Mailbox' option selected. The form contains the following fields and controls:

- Full Name***: A text input field.
- Mailbox Name***: A text input field.
- Your Domain***: A dropdown menu.
- Your Organization**: A dropdown menu.
- Do you want to add this email address to your existing entry in Provider Directory ***: Radio buttons for 'Yes' and 'No'.
- Submit** and **Reset** buttons at the bottom right.

5. When a confirmation message displays, click **OK** to close the window.



- The system receives the request and verifies if the direct mailbox address requested is already in use.
- If the address is not in use, a confirmation message displays.
- The system places the request in the pending approval queue.
- Approved and Pending Direct addresses are displayed in the Approved Direct Addresses section of the portlet.

Request an Additional Direct Mailbox

Full Name*:

Mailbox Name*:

Your Domain*:

Your Organization:

Do you want to add this email address to your existing entry in Provider Directory*: ☐ Yes ☐ No

Approved Direct Addresses

Display Name	Direct Address	Status	Last Action Date ▲
KMcQueen	kmcqueen@direct.stg.tn.gov	APPROVED	28-Apr-2014
K McQueen	kmcdirect3@direct.stg.tn.gov	PENDING	29-Apr-2014

RESULTS:

You have successfully requested an additional Direct mailbox.

PROVIDER DIRECTORY

Search for a Local Provider

You have the ability to search for local providers' (i.e., providers using Covisint Healthcare solutions) information and Direct and regular email address using the Provider Directory search feature. When searching for a provider, you can refine the search by the provider's name, location, specialty, gender, or language spoken.



Note: You must enter search criteria in the following sections using a combination of:

- 1) *Search by Location* and *Provider Last Name* OR
- 2) *Search by Location* and *Search by Specialty*.

The Advanced Options allow you to further refine your search.

To search for a local provider:

1. On the menu bar, click **Provider Directory**. The *Provider Directory* portlet displays.
2. Click the **Provider** tab.
3. Enter the **search criteria** in the appropriate fields.
 - a. *Search by Name* section:
 - i. Enter the provider's **last name**.
 - ii. Optionally, enter the provider's **first name**.
 - b. *Search by Location* section: Enter search criteria in at least one of the following fields regarding the provider's location:
 - i. Select the **address type** by clicking the drop-down list.
 - ii. Enter the **city**.
 - iii. Select the **state** from the drop-down list.
 - iv. Enter the **zip code**.
 - c. *Search by Specialty* section:
 - i. Select the specialty from the list and click the **>>** arrows. You can remove a selection by selecting it and clicking the **<<** arrows.
 - d. *Advanced Options*:
 - i. *Gender*: Select the provider's gender by clicking the **radio box** in front of either Male or Female.
 - ii. *Language Spoken*: Select the provider's language spoken from the list and click the **>>** arrows. You can remove a selection by selecting it and clicking the **<<** arrows.
4. Click **Search**.



Note: You can clear all of the data entry fields by clicking **Clear**.

Provider Directory

Provider **Entity**

Search by Name

Last Name:

First Name:

Search by Specialty

Acute Care
Addiction (Substance Use)
Addiction Medicine
Addiction Psychiatry
Administrator

>>
<<

Search by Location

Address Type:

City:

State:

Zipcode:

Advanced Options

Gender: ☒ Male ☐ Female

Languages Spoken:

English
English- Middle (1100-1500)
English- Old (ca.450-1100)
Erzya
Esperanto

>>
<<

Search **Clear**

The screen refreshes displaying the search results.

- Click on any of the **links** in the search results in either the *Name*, *Address*, *Specialty*, or *Direct Address* columns to view all of the available provider information.

Provider Directory

Search Criteria

Last Name: cross City: State: Michigan Specialty: Gender: Languages:

First Name: Zip Code:

Search Results

Name	Address	Specialty	Direct Address
David Cross	1570 Meadow Creek Rd, Detroit, Michigan, 48225	Acute Care	david.cross@direct.email.com,jam@co

1 record(s) found.

Back To Search

- Click **Return to List** to return to the search results screen.

Provider Directory

Provider Information

Full Name :	David Cross
Gender :	Male
AddressLine1 :	1570 Meadow Creek Rd
AddressLine2 :	
City :	Detroit
State :	Michigan
ZipCode :	48226
Phone :	313-212-2121
Fax :	
Email :	david.cross@gmail.com
Direct :	david.cross@direct.email.com,jan@covant.dhw.com.test.domain,covaint.jan@covant.dhw.com.test.domain,d300@direct.qa.covaint.com,TestH
Medical Specialty :	Acute Care

Return to List

RESULTS:

You have successfully searched for a local provider.

Search for a Local Entity

You have the ability to search for local entities (e.g., clinic, center, practice, etc. using Covisint Healthcare solutions) information and Direct and regular email address using the Provider Directory search feature. When searching for an entity, you can refine the search by the entity's name, location, specialty, or language supported.

Note: You must enter search criteria in the following sections using a combination of:

- 1) *Search by Location* and *Search by Name* OR
- 2) *Search by Location* and *Search by Specialty*.

The Advanced Options allow you to further refine your search.

To search for a local entity:

1. On the menu bar, click **Provider Directory**. The *Provider Directory* portlet displays.
2. Click the **Entity tab**.
3. Enter the **search criteria** in the appropriate fields.
 - a. *Search by Name* section:
 - i. Enter the entity's **name**.
 - b. *Search by Location* section: Enter search criteria in at least one of the following fields regarding the entity's location:
 - i. Select the **address type** by clicking the drop-down list.
 - ii. Enter the **city**.
 - iii. Select the **state** from the drop-down list.
 - iv. Enter the **zip code**.
 - c. *Search by Specialty* section:
 - i. Select the specialty from the list and click the >> arrows. You can remove a selection by selecting it and clicking the << arrows.
 - d. *Advanced Options*:
 - i. *Languages Supported*: Select the language supported by the entity from the list and click the >> arrows. You can remove a selection by selecting it and clicking the << arrows.
4. Click **Search**.



Note: You can clear all of the data entry fields by clicking Clear.

Provider Directory

Provider Entity

Search by Name
Entity Name:

Search by Location
Address Type:
City:
State:
Zipcode:

Search by Specialty
 Adolescent and Children M...
 Adult Care Home
 Adult Day Care
 Adult Mental Health
 Air Transport
 >> <<

Advanced Options
 Languages Supported:
 Abkhazian
 Achinese
 Acoll
 Adangme
 Aalyghe
 >> <<

Search Clear

The screen refreshes displaying the search results.

- Click on any of the **links** in the search results in either the *Name*, *Address*, *Specialty*, or *Direct Address* columns to view all of the available entity information.

Provider Directory

Search Criteria
 Entity Name: grey
 City:
 State: Michigan
 Zip Code:
 Specialty:
 Languages:

Search Results

Name	Address	Specialty	Direct Address
Grey Medical Center	3000 Ste Catherine, Detroit, Michigan,	Customized Equipment	myhealth01@direct, myhealthaccess-stg.covant.com

1 record(s) found

Back To Search

- Click **Return to List** to return to the search results screen.

Provider Directory

Entity Information

Name :

Gray Medical Center

AddressLine1 :

1000 Ste Catherine

AddressLine2 :

City :

Detroit

State :

Michigan

ZipCode :

Phone :

313-260-1111

Fax :

Email :

Direct :

myhealth01@direct.myhealthaccess-stg.covbitt.com

Return to List

RESULTS:

You have successfully searched for a local entity.

Search for a Remote Provider

You have the ability to search for remote providers' (i.e., providers not associated with the Covisint Healthcare community) information and Direct and regular email address using the Provider Directory search feature. When searching for a provider, you can refine the search by remote provider directory and the provider's name and location.

To search for a remote provider:

1. On the menu bar, click **Provider Directory Outbound Search**. The *Provider Directory Outbound Search* portlet displays.
2. Click the **Provider tab**.
3. Enter the **search criteria** in the appropriate fields.
 - a. *Search by Remote Provider Directory* section:
 - I. Select a **provider** from the drop-down list.
 - b. *Search by Name* section:
 - I. Enter the provider's **last name**.
 - II. Optionally, enter the provider's **first name**.
 - c. *Search by Location* section: Enter search criteria in at least one of the following fields regarding the provider's location:
 - I. Select the **address type** by clicking the drop-down list.
 - II. Enter the **city**.
 - III. Select the **state** from the drop-down list.
 - IV. Enter the **zip code**.
4. Click **Search**.



Note: You can clear all of the data entry fields by clicking **Clear**.

The screen refreshes displaying the search results.

- Click on any of the **links** in the search results in either the *Name*, *Address*, *Specialty*, or *Direct Address* columns to view all of the available provider information.

Provider Directory Outbound Search

Provider **Entity**

Search Criteria

Last Name: City: Provider Directory: Health Linc
 First Name: State:
 Zip code:

Search Results

Name	Address	Specialty	Direct Address
BETH MUNDY	primary -402 NORTH ROGERS STREET -BLOOMINGTON -IN -...	--	beth.mundy@directhealthinc.org

- Click **Return to List** to return to the search results screen.

Provider Directory Outbound Search

Provider **Entity**

Provider Information

Full Name: BETH MUNDY

Gender:

AddressLine1: 402 NORTH ROGERS STREET

AddressLine2:

City: BLOOMINGTON

State: IN

ZipCode: 47404

Phone:

Fax:

Email:

Direct: beth.mundy@directhealthinc.org

Medical Specialty:

[Return to List](#)

RESULTS:

You have successfully searched for a remote provider.

Search for a Remote Entity

You have the ability to search for remote entities (e.g., clinic, center, practice, etc. using Covisint Healthcare solutions) information and Direct and regular email address using the Provider Directory search feature. When searching for an entity, you can refine the search by remote provider directory and the entity's name and location.

To search for a remote entity:

1. On the menu bar, click **Provider Directory Outbound Search**. The *Provider Directory Outbound Search* portlet displays.
2. Click the **Entity** tab.
3. Enter the **search criteria** in the appropriate fields.
 - a. *Search by Remote Provider Directory* section:
 - I. Select a **provider** from the drop-down list.
 - b. *Search by Name* section:
 - I. Enter the entity's **name**.
 - c. *Search by Location* section: Enter search criteria in at least one of the following fields regarding the entity's location:
 - I. Select the **address type** by clicking the drop-down list.
 - II. Enter the **city**.
 - III. Select the **state** from the drop-down list.
 - IV. Enter the **zip code**.
4. Click **Search**.



Note: You can clear all of the data entry fields by clicking **Clear**.

Provider Directory Outbound Search

Provider Entity

Search by Remote Provider Directory

Health Bridge

Search by Name

Entity Name:

Search by Location

Address Type: Practice Address

City:

State:

Zipcode:

Search Clear

The screen refreshes displaying the search results.

- Click on any of the **links** in the search results in either the *Name*, *Address*, *Specialty*, or *Direct Address* columns to view all of the available entity information.

Provider Directory Outbound Search

Provider Entity

Search Criteria

Entity Name: City: Provider Directory: HealthBridge
 State:
 Zip code:

Search Results

Name	Address	Specialty	Direct Address
Eagle Software	primary -2312 Far Hills Avenue -Dayton -OH -45419 -US ...	--	brianbreneman@direct.healthbridge.org
Caregivers	--	--	caregivers@direct.healthbridge.org
CHAS Admin	primary -3333 Burnett Avenue -Cincinnati -OH -45227 -...	--	chas.admin@direct.healthbridge.org
COA Admission...	primary -175 Tri County Parkway -Cincinnati -OH -45246...	--	coa.admalerts@direct.healthbridge.org
Crossroad Liberty	primary -5 East Liberty Street -Cincinnati -OH -45102 -U...	--	crossroad.liberty@direct.healthbridge.org
Customer Service	--	--	customer.service@direct.healthbridge.org
Episcopal	--	--	episcopal@direct.healthbridge.org
Greater Cincinn...	primary -150 Madison Road 2nd Floor -Cincinnati -OH -...	Mental Health (...)	gcbhs@direct.healthbridge.org

Found: 27 results

Back To Search

- Click **Return to List** to return to the search results screen.

RESULTS:

You have successfully searched for a remote entity.

DIRECT ADMINISTRATOR

Approve Direct Mailbox Requests

A user who is granted a Direct Administrator role is able to approve or reject user's mailbox requests for access to a Direct mailbox between users and within their organization.



Note: This portlet is only available to users that have been granted the *Direct Approver* role by their portal administrators.

To approve a user's request for a Direct Mailbox:

1. Click the **Mailbox User Management** tab to display the *Direct Address Approval* portlet.
2. Select a request using one of the following procedures:
 - a. Select the request from the list.
 - i. To select all requests, click the **checkbox** at the beginning of the header row.
 - ii. To select one or more requests, click the **checkbox** at the beginning of the row of that request.
 - b. Or search for a request by using the *Search Request(s)* feature. Enter part or all of the **Direct address** in *Search Request(s)* field.
 - i. Click **Go**.
 - ii. When the search results display, click the **checkbox** to select a request.
3. Click **Approve**.

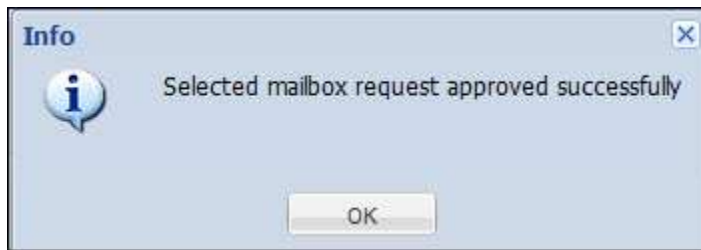
Direct Address Approval Portlet

Direct Address Approval

Search Request(s) Go

<input type="checkbox"/>	User Name	Direct Address Requested	Date of Request
<input type="checkbox"/>	ThiefHealthAdminW1 Wei	summer@direct.stg.tn.gov	27-Apr-2014
<input checked="" type="checkbox"/>	Kim McQueen	kimdirect3@direct.stg.tn.gov	29-Apr-2014

4. When the *Info* window displays, click **OK**. System receives the approval and creates the mailbox for the Direct address.

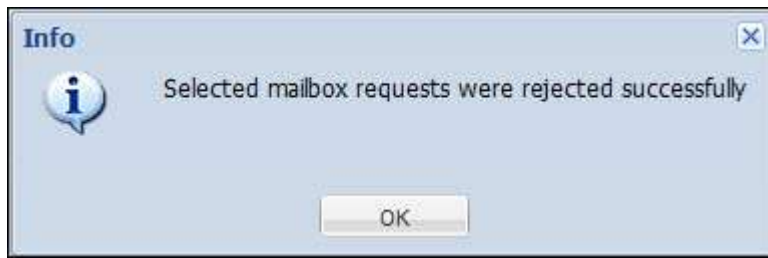


To reject a user's request for a Direct Mailbox

1. Click the **Mailbox User Management** tab to display the *Direct Address Approval* portlet.
2. Select a request using one of the following procedures:
 - a. Select the request from the list.
 - i. To select all requests, click the **checkbox** at the beginning of the header row.
 - ii. To select one or more requests, click the **checkbox** at the beginning of the row of that request.
 - b. Or search for a request by using the *Search Request(s)* feature. Enter part or all of the **Direct address** in *Search Request(s)* field.
 - i. Click **Go**.
 - ii. When the search results display, click the **checkbox** to select a request.
3. Click the **Reject** button.
4. When the *Reject Request* window displays, enter a **reason** for the rejection.
5. Click the **Done** button.

 A "Reject Request" dialog box with a blue header bar and a close button (X) in the top right corner. It contains two input fields: "Direct Address" and "Reason". The "Direct Address" field contains the text "kmdirect3@direct.stg.tn.gov". The "Reason" field is empty and has a red dashed border. At the bottom right are "Done" and "Cancel" buttons.

6. When the *Info* window displays, click **OK**. A system generated email is sent to the user to let him/her know the request has been rejected and why.



RESULTS:

You have successfully approved or rejected a user's request for a Direct mailbox.

Create an Email Alias Address or Change a User's Organization

As a Direct Administrator, you are able to create an alias address for a Direct mailbox and change the user's organization.



Note: The ability to use this functionality via the Direct Dashboard Portlet is only available to those users of the portal that have been granted the "Direct Administrator" service package and is not available to the typical user.

To create an email alias address or change a user's organization:

1. Click the **Community Administration** tab to display the *Direct Dashboard* portlet.
2. If needed, search for a Direct address by using the *Search* feature. Enter part or all of the **Direct address** or **Mailbox Name** in *Search Direct Addresses* field.
 - a. Click **Go**.
 - b. When the search results display, double click the anywhere in the row to select a mailbox.
 - c. Or you may also display all the users by selecting the domain from the *Domain* drop down list and then click **Go**.

Direct Dashboard Portlet

Domain :

Search Direct Addresses :

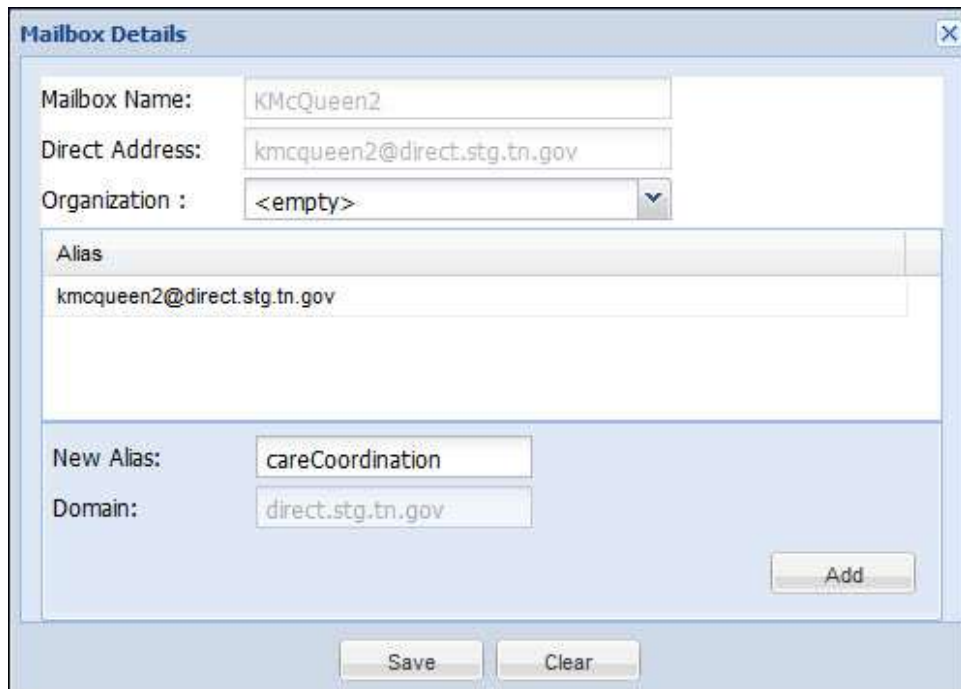
Mailbox Name	Primary Direct Address	Type of Inbox	Status	Created by User (CU)	Created D.	Last Updated Date
KMcQueen2	kmcqueen2@direct...	Individual	Active	NS05LUC1		30 Apr 2014 11:12:49
KMcQueen	adminDept@direct.s...	Individual	Active	BKZJU452		1 May 2014 07:59:51
KMcQueen3	kmcDirect3@direct.s...	Individual	Active	NS05LUC1		30 Apr 2014 09:10:37

Page 1 of 1

Displaying 1 - 1 of 3

3. When the *Mailbox Details* window displays:
 - a. Enter only the **mailbox alias name** in the *New Alias* field. The system will append the remaining information once the process is completed.

- b. Click the **Add** button.



The **Mailbox Details** window contains the following fields and controls:

- Mailbox Name:** Text box containing "KMcQueen2".
- Direct Address:** Text box containing "kmcqueen2@direct.stg.tn.gov".
- Organization :** Dropdown menu showing "<empty>".
- Alias:** A list box containing "kmcqueen2@direct.stg.tn.gov".
- New Alias:** Text box containing "careCoordination".
- Domain:** Text box containing "direct.stg.tn.gov".
- Buttons:** "Add", "Save", and "Clear" buttons are located at the bottom right of the window.

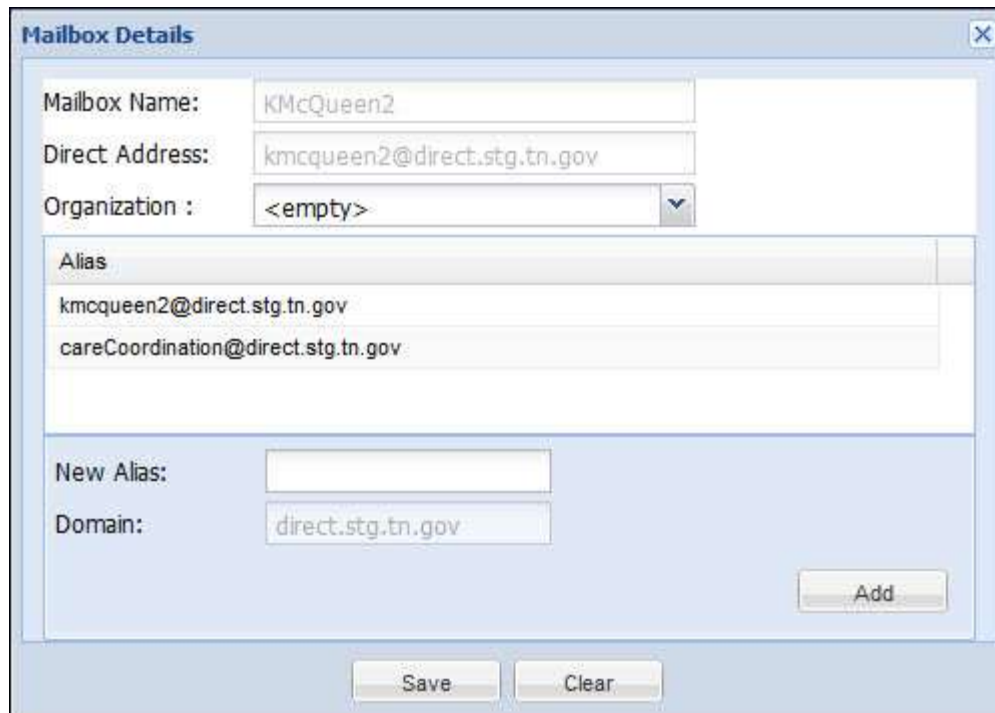
- c. When the *New Alias Reason* window displays, enter a **reason** for creating the new email alias address.
- d. Click **OK**.



The **New Alias Reason** window contains the following elements:

- Title:** "New Alias Reason".
- Text:** "Please enter reason for new alias:".
- Text Box:** A large empty text box for entering the reason.
- Button:** "OK" button at the bottom center.

- e. The *Mailbox Details* window redisplay, showing the new alias. Click **Save**.

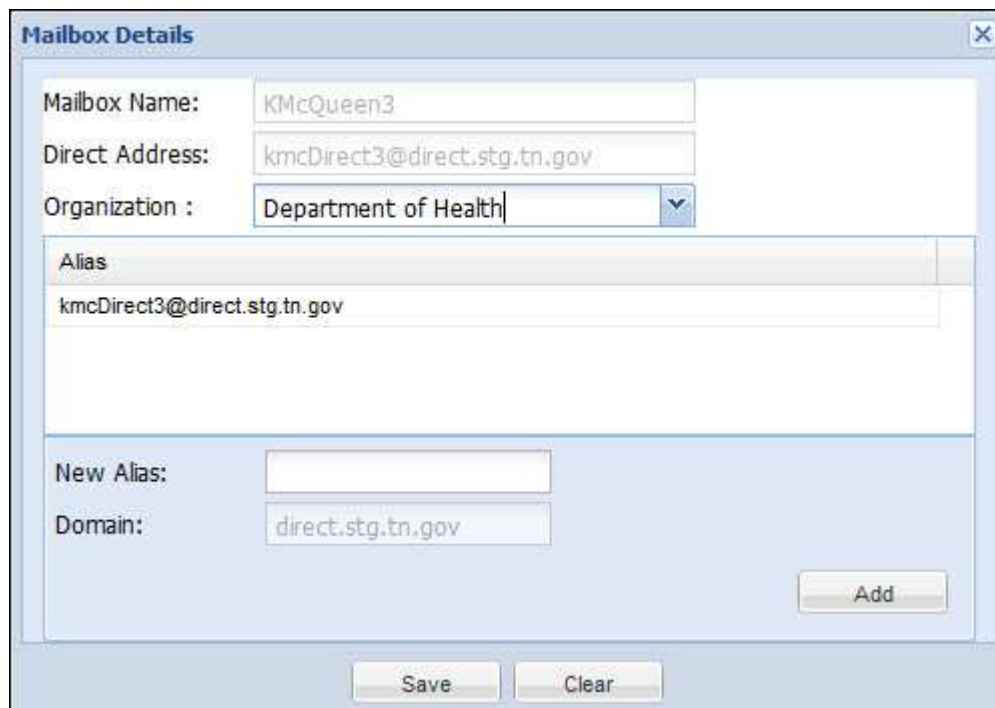


The **Mailbox Details** window displays the following information:

- Mailbox Name:** KMcQueen2
- Direct Address:** kmcqueen2@direct.stg.tn.gov
- Organization :** <empty>
- Alias:** A list containing kmcqueen2@direct.stg.tn.gov and careCoordination@direct.stg.tn.gov.
- New Alias:** An empty text input field.
- Domain:** direct.stg.tn.gov
- Buttons:** Add, Save, and Clear.

To change a users' organization:

1. Complete steps 1 - 2 above.
2. When the *Mailbox Details* window displays, change the user's organization by selecting a different organization from the drop-down list.
3. Click **Save**.



The **Mailbox Details** window displays the following information:

- Mailbox Name:** KMcQueen3
- Direct Address:** kmcDirect3@direct.stg.tn.gov
- Organization :** Department of Health
- Alias:** A list containing kmcDirect3@direct.stg.tn.gov.
- New Alias:** An empty text input field.
- Domain:** direct.stg.tn.gov
- Buttons:** Add, Save, and Clear.

RESULTS:

You have successfully created a new email address alias and changed a user's organization.

Using the Direct Administrator Dashboard

The Direct Dashboard portlet provides a Direct Administrator information regarding all of the Direct mail accounts within a domain. If an organization has more than one domain, the Direct Admin has the ability to select a specific domain. The dashboard includes a feature to search for a Direct address. A Direct Admin is able to view the following information on the dashboard:

- mailbox name
- primary Direct address
- type of Inbox (i.e., community or individual)
- status of the Inbox
- ID of the user who created the Direct mailbox
- date the Direct mailbox was created
- date the information was last updated

The dashboard information within a column may be sorted, and the Direct Admin can select which column to display per session. The screen reverts to the default column view when a session ends by the Admin logging out of Direct Inbox application.



Note: The ability to use the functionality of the Direct Administrator Dashboard is only available to those users of the portal that have been granted the “Direct Administrator” service package and is not available to the typical user.

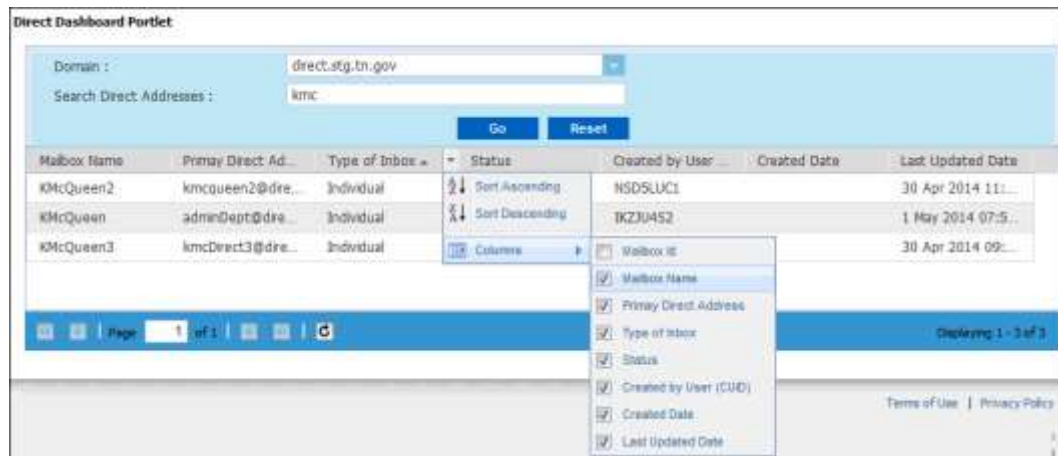
To select a domain to view Direct address information:

1. Click the **Community Administration** tab. The Direct Dashboard Portlet displays.
2. Select the **domain** from the drop-down list.
3. Click **Go**. The screen refreshes displaying the Direct address information for each mailbox user.

To sort column information or select columns to display:

1. After completing the steps above, click the **down arrow** to the right of a column title in the header row to display the selection pop-up window.
2. Select the sorting order by clicking one either **Ascending** or **Descending**.
3. Select which columns to display by clicking the **checkbox** beside the column name.

- Click **outside** of the pop-up window to close it.



RESULTS:

You have successfully displayed and viewed Direct address information.

Manage Boilerplate Features

The Manage Boilerplate features allow an organization to 1) manage the content of the alert mailers sent to users within its community, 2) the content of an email disclaimer, 3) to designate virus scan report recipients, 4) to manage the default mailbox view.



Note: The ability to use the boilerplate functionality via the Manage Boilerplate portlet is only available to those users of the portal that have been granted the “Direct Administrator” service package and is not available to the typical user.

The Manage Boilerplate portlet is used by a Direct Administrator to:

- Set up an alert mailer template, which sends a notification to users within a community when they receive a Direct email message. This message can be sent to a user's alternate email address, but only if the user has enabled the Notification options on the Properties portlet.
- Set up an email disclaimer. The disclaimer is automatically attached to every outgoing Direct email message within a community's portal. The user (i.e., sender) does not see this message.
- Set up a virus report administrator and to add other recipients to receive virus scan reports. The report is a summary which includes the type of virus, when it was detected, etc. The system will automatically generate and send out a report to the designated recipients if a virus is detected.
- Set the default mailbox view for a community.

To create an alert mail notification:

1. Click the **Community Administration** tab and then select Manage Boilerplate from the drop-down list. The *Manage Boilerplate* portlet displays.
2. In the *Community* field, select a **community** from the drop-down list.
Note: An error message will display if a community is not selected prior to selecting the *Disclaimer View* option.
3. Click the **Alert Mailers** option.
4. In the *Subject* field, enter the **subject** of the alert mail.
5. In the *Body* text field, enter the **alert mail message**.

6. Click **Save**.

Manage Boilerplate Portlet

Direct Configurations for Community

Community*: Blue Ridge Health

Alert Mailers

Subject*:

Body:

Save Delete

To set up an email disclaimer:

1. Click the **Community Administration** tab.
2. In the *Community* field, select a **community** from the drop-down list.
Note: An error message will display if a community is not selected prior to selecting the *Disclaimer View* option.
3. Click the **Disclaimer** option.
4. In the text field, enter the **disclaimer message**.
5. Click **Save**.

Manage Boilerplate Portlet

Direct Configurations for Community

Community*: Blue Ridge Health

Disclaimer

Disclaimer*: Blue Ridge Health: The information contained in this message may be privileged and confidential. If you are NOT the intended recipient, please notify the sender immediately and delete this message.

Save Delete

To set up a virus report administrator and add other recipients to receive virus scan reports:

1. Click the **Community Administration** tab.
2. In the *Community* field, select a **community** from the drop-down list.
Note: An error message will display if a community is not selected prior to selecting the *Default Mailbox View* option.

3. Click the **Virus Scan Report Recipients** option.
4. If an administrator has not been assigned, first select the user for this role.
 - a. In the *Virus Report Admin* field, enter the **email address** of the designated virus report administrator.
 - b. Click **Save**.

Note: The user's email address will display in the *Virus Scan Report Recipient* section.

Manage Boilerplate Portlet

Direct Configurations for Community

Community*: Trenton Health

☒ **Alert Mailers**

☒ **Disclaimer**

☒ **Verification URL**

☒ **Virus Scan Report Recipients**

Virus Report Admin * Save Delete Add New Recipients

Virus Scan Report Recipient

5. After an administrator has been assigned, additional recipients may be added.
 - a. Click the **Add New Recipients** button.
 - b. When the *Add Recipient* window displays, enter the **recipient's email address**.
 - c. Click **Save**.

Note: The user's email address will display in the *Virus Scan Report Recipient* section.

Add Recipient

Save

To set the default mailbox view for a community:

1. Click the **Community Administration** tab.
2. In the *Community* field, select a **community** from the drop-down list.

Note: An error message will display if a community is not selected prior to selecting the *Default Mailbox View* option.
3. Click the **Default Mailbox View** option.
4. Select the default mailbox view (i.e., All Inbox or Individual Mailbox) by clicking the appropriate **radio button**.

5. Click **Save**.

Manage Boilerplate Portlet

Direct Configurations for Community

Community*: ▼

- ☒ **Alert Mailers**
- ☒ **Disclaimer**
- ☒ **Verification URL**
- ☒ **Virus Scan Report Recipients**
- ☒ **Default Mailbox View**
 - ☒ All Inbox
 - ☐ Individual Mailbox

RESULTS:

You have successfully set up and used the Boilerplate features.

Manage Direct Organizations

The Direct Organization portlet is used for creating organizational structures and assign users' mailboxes for reporting purposes. When a report is generated, users are grouped by their assigned organization. The report includes the total number of messages sent and received by organizations (i.e., groups of users) and individual users. The Direct Organization portlet also includes a feature to search for an organization and the ability to add, edit, or delete organizations.

While creating an organizational structure is not required to use the reporting feature, it is available if needed to group users for reporting purposes.



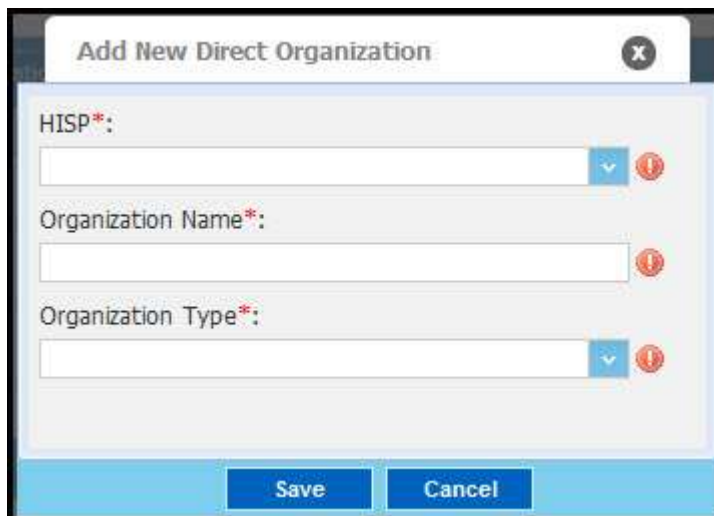
Note: The ability to manage Direct organizations via the Direct Organization portlet is only available to those users of the portal that have been granted the “Direct Administrator” service package and is not available to the typical user.

To search for an organization:



1. Click the **Community Administration** tab and then select the *Direct Organization* portlet from the drop-down list. The *Direct Organization* portlet displays.
2. If needed, search for an organization by using the *Search* feature. Enter part or all of the **organization name** in *Search Organization* field.
 - a. Click the **Search Organization** button.
 - b. When the search results display, **double click** the anywhere in the row to select to select the organization to view.


To add an organization:



1. Click the **Community Administration** tab and then select the *Direct Organization* portlet from the drop-down list. The *Direct Organization* portlet displays.
2. Click the **Add Organization** button. The *Add New Direct Organization* window displays.
3. In the *HISP* (Health Information Service Provider) field select an **entity** from the drop-down list
4. In the *Organization Name* field, enter the **name** of the organization.
5. In the *Organization Type* field, select the **type** from the drop-down list.
6. Click **Save**. The *Add New Direct Organization* window closes the new organization is added to the list in the *Direct Organization* portlet.



Add New Direct Organization

HISP*:  

Organization Name*: 

Organization Type*:  

Save **Cancel**

- When the *Confirm* window displays, click **Yes**. The *Confirm* window will close.

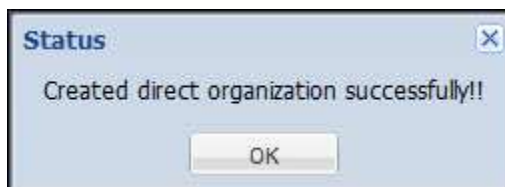


Confirm

 Are you sure to add this Direct Organization?

Yes **No**

- When the *Status* window displays, click **OK**. The *Status* window will close and the new organization will display in the *Direct Organization Portlet* list.



Status

Created direct organization successfully!!

OK

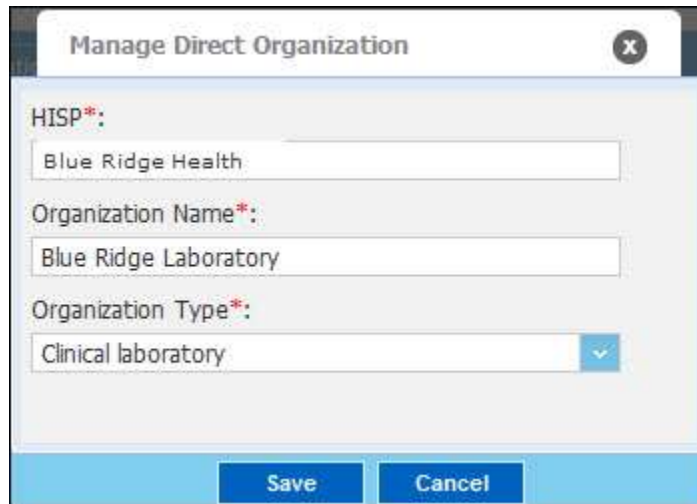
To edit an organization:

- Click the **Community Administration** tab and then select the *Direct Organization* portlet from the drop-down list. The *Direct Organization* portlet displays.
- Click the **Action** button and then select **Edit** from the drop-down list. The *Manage Direct Organization* window displays.



Direct Organization Portlet			
<input type="text" value="blue"/> <input type="button" value="Search Organization"/> <input type="button" value="Add Organization"/>			
Action	HISP	Organization Name	Organization Type
Action  Edit Delete	Blue Ridge Health	Blue Ridge Laboratory	Clinical laboratory

3. Make the necessary changes and click **Save**. The *Manage Direct Organization* window closes.



The **Manage Direct Organization** dialog box contains three required fields, each marked with a red asterisk (*):

- HISP*:** A text box containing "Blue Ridge Health".
- Organization Name*:** A text box containing "Blue Ridge Laboratory".
- Organization Type*:** A dropdown menu with "Clinical laboratory" selected and a blue checkmark icon to its right.

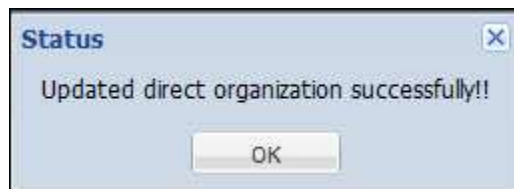
At the bottom of the dialog are two buttons: **Save** and **Cancel**.

4. When the *Confirm* window displays, click **Yes**. The *Confirm* window will close.



The **Confirm** dialog box features a blue information icon (i) on the left. The text reads: "Are you sure to modify this Direct Organization?". At the bottom, there are two buttons: **Yes** and **No**.

5. When the *Status* window displays, click **OK**. The *Status* window will close and the changes will display in the *Direct Organization* portlet list.



The **Status** dialog box displays the message: "Updated direct organization successfully!!". At the bottom, there is a single button labeled **OK**.

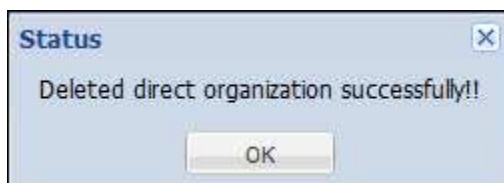
To delete an organization:

1. Click the **Community Administration** tab and then select the *Direct Organization* portlet from the drop-down list. The *Direct Organization* portlet displays.

2. Click the **Action** button and then select **Delete** from the drop-down list.



3. When the *Confirm* window displays, click **Yes**. The Confirm window displays.
4. When the *Status* window displays, click **OK**. The *Status* window will close and the organization will no longer display in the *Direct Organization* portlet list.



RESULTS:

You have successfully used the Direct Organization Portlet feature to search, add, edit, or delete an organization.