# CLINICIAN USER GUIDE

## ALABAMA ONE HEALTH RECORD

### Unify™ Data Management Platform 2012/2013
### Software Build 5.15

**April 2015**

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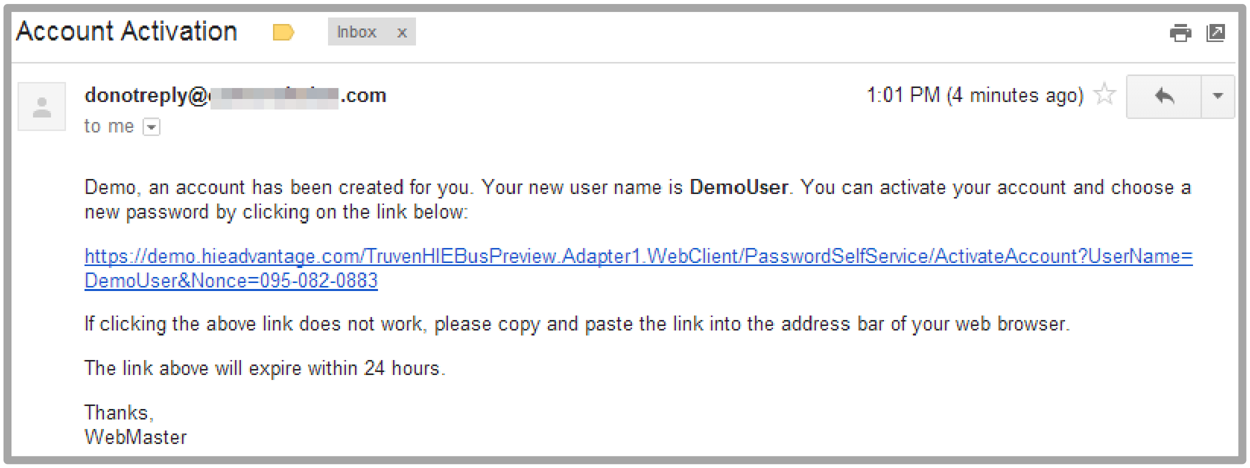
# INTRODUCTION

The purpose of this document is to provide clinical users with a basic guide to essential information necessary for navigating patient data within the clinical portal. The clinical portal organizes longitudinal patient data into episodes of care. Depending on available data from participating providers, users are able to view all of a patient's clinic visits, hospitalizations, labs, reports, and medications.

# ACCOUNT ACTIVATION

New users will receive an email similar to the one below with a link to set up security questions and choose a password. Click on the link to begin account activation.


Account Activation Inbox x

**donotreply@**[redacted]**.com** 1:01 PM (4 minutes ago)

to me

Demo, an account has been created for you. Your new user name is **DemoUser**. You can activate your account and choose a new password by clicking on the link below:

https://demo.hieadvantage.com/TruvenHIEBusPreview.Adapter1.WebClient/PasswordSelfService/ActivateAccount?UserName=DemoUser&Nonce=095-082-0883

If clicking the above link does not work, please copy and paste the link into the address bar of your web browser.

The link above will expire within 24 hours.

Thanks,
WebMaster

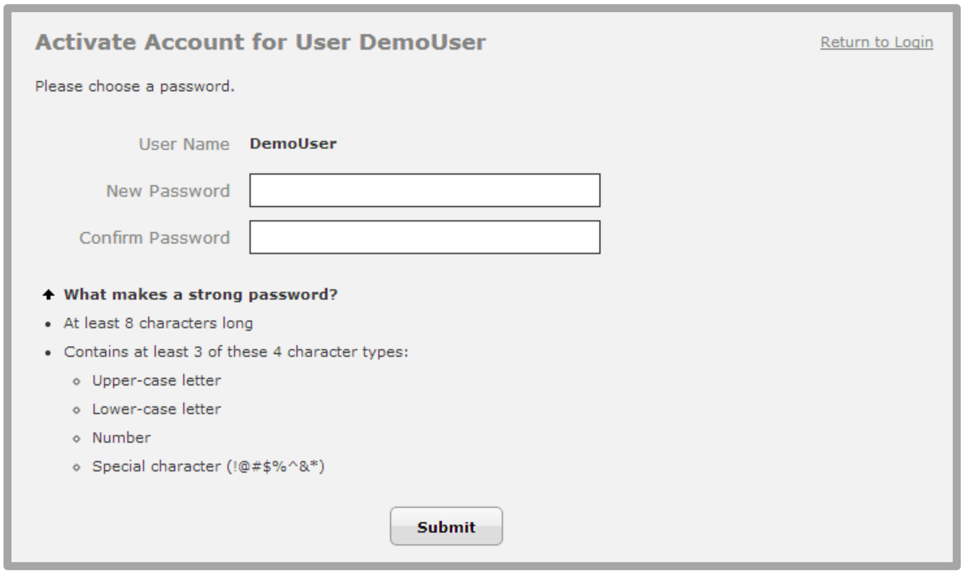
Note: The Clinical Web portal supports the latest versions of the following browsers:

- Google Chrome
- Internet Explorer
- Mozilla Firefox
- Safari

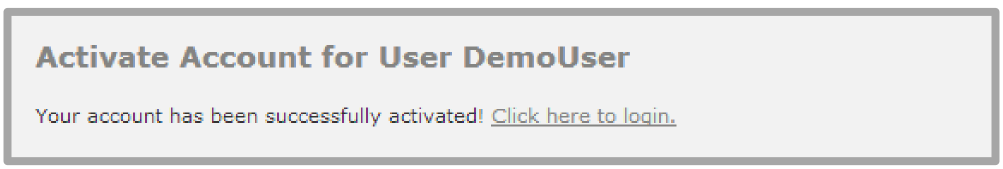
Once you click on the link to begin account activation, you will be directed to the following screen in your default Web browser.

Create a new password. To view the minimum requirements for your system, click the arrow beside **What makes a strong password?**. Enter your password and confirm, then click **Submit**.

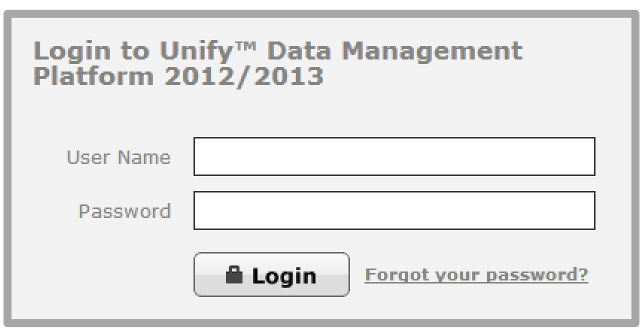
Note: Passwords are case-sensitive.




After your new password is accepted, you will see a confirmation screen. Make note of your user name before proceeding (the user name is "DemoUser" in the example below). Select **Click here to login**.



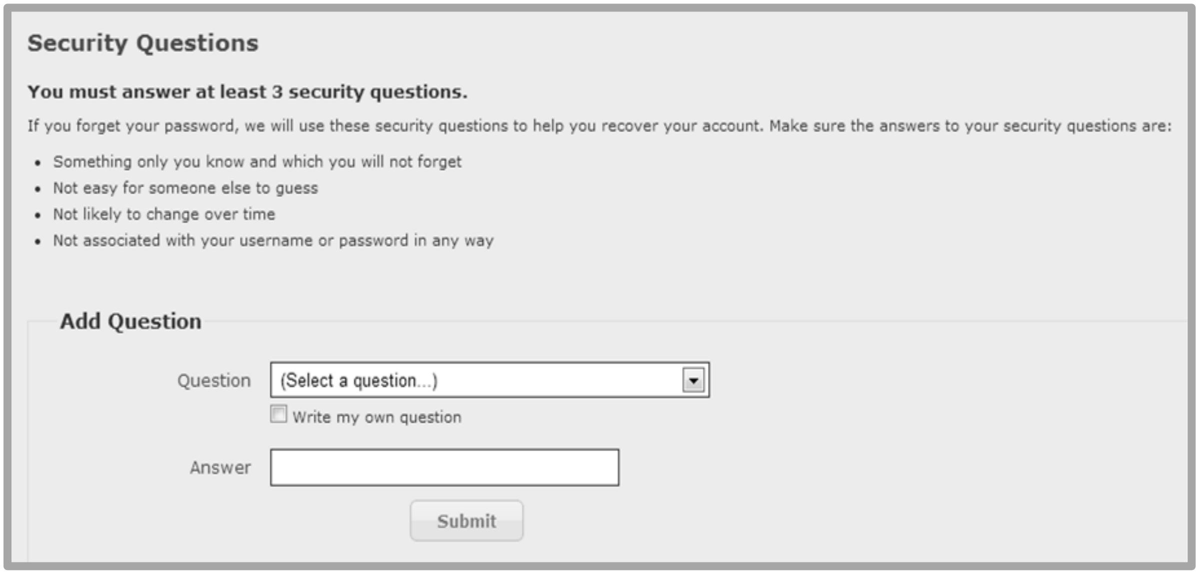

You will be taken to the login screen. Enter your username and password and click the **Login** button.




If you attempt login using the incorrect password too many times, your account will become locked out. Locked accounts will become unlocked after a certain amount of time. If you are having difficulties logging into your account, click the **Forgot your password?** link, or contact your system administrator.

Follow the directions to add at least three security questions. You may edit these later, after completion of the account activation steps, by clicking **My Profile** in the top right-hand corner of the screen.

Note: Prior to arriving on the *Security Questions* page, you may need to read and accept some terms and conditions, if they have been set by your HIE.



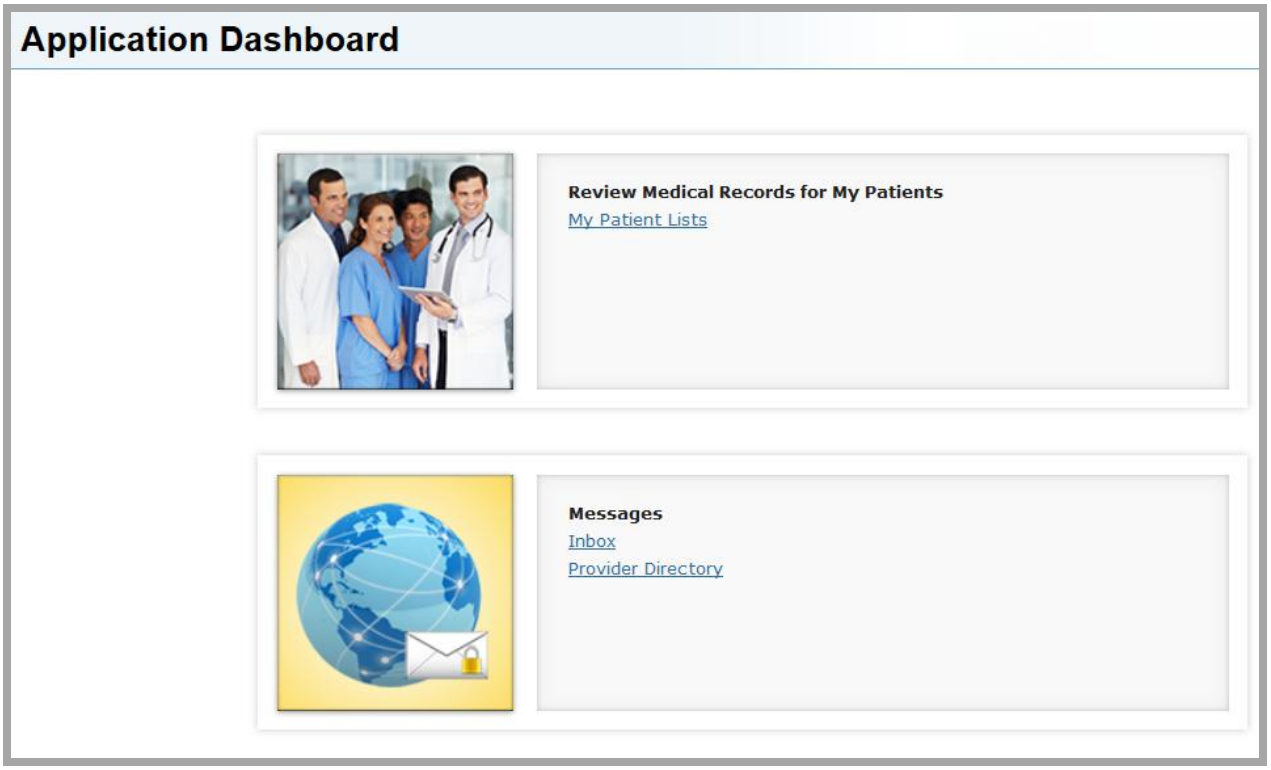

After adding your third security question, your account will be active and you will be redirected to the Application Dashboard “home” screen.

Note:  Users with the Clerk role will be redirected to the *Census* screen.

# APPLICATION DASHBOARD

After login, you will see the Application Dashboard, which functions as a “main menu” or “home page” of options. Depending on the permissions associated with your account, you may see different applications from those listed below.

Users with the Clinician role will have access to links for **My Patient Lists** and **Provider Directory.** A link for **Inbox** will also be available if users have access to the Direct secure messaging application; contact your administrator for more information.



# NAVIGATING IN THE WEB CLIENT

The HIE platform's navigation bar allows for quick streamlined navigation through the various screens available within the Web client.

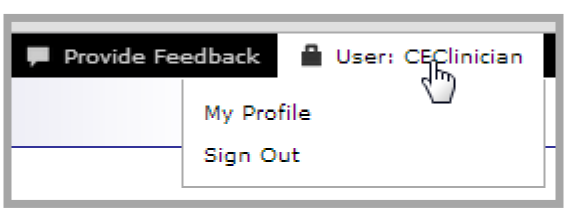
The menu links across the left-hand side correspond to the applications that are available to the user and reflect the permissions associated with the user's account.  Depending on what those permissions are, different applications from those included in the screenshots below may appear on the navigation bar.


After a user has moved from the Application Dashboard "home" screen, a **Dashboard** button will appear, along with a "home" icon, at the left-most side of the navigation bar.  This will provide access to the Application Dashboard from anywhere in the Web client.  Note that the **Dashboard** button will not appear while a user is on the Application Dashboard.


After a user has accessed additional applications, a link to the most recently accessed application will appear next to the **Dashboard** button.  This **Back** button is indicated by a back arrow with the name of that screen.

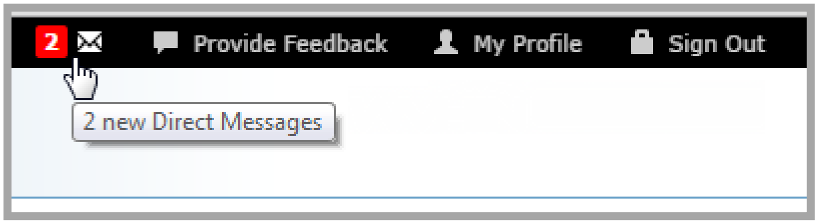

Hovering over any of the menu links, not including the **Dashboard** button or the **Back** button, will display a dropdown menu containing menu options, again corresponding with those listed on the Application Dashboard.


Across the right-hand side of the navigation bar are additional menu links.  By hovering over the user name, the *My Profile* and *Sign Out* links become visible.  Refer to the **Feedback** and **My Profile** sections below, if applicable, for additional information.

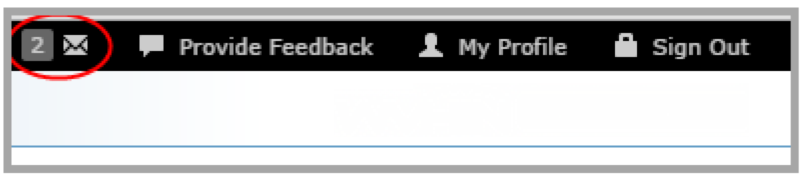



These links may also be configured to provide access to the My Profile and Sign Out buttons via individual buttons.


For users that have access to the Direct secure messaging application, a message notification may appear on the navigation bar.  This notification displays the number of unread messages in a user's Inbox.  When new messages are received, the indicator displays in red.

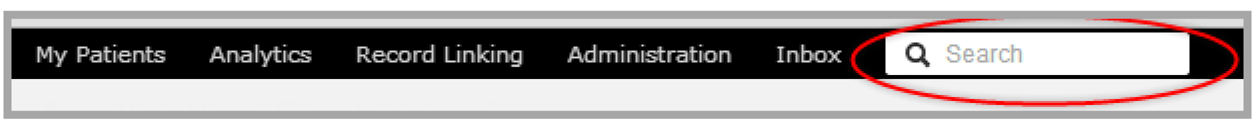



Clicking on the indicator will provide access to the Inbox screen.  After the user has visited the Inbox, the indicator display will change from red gray.



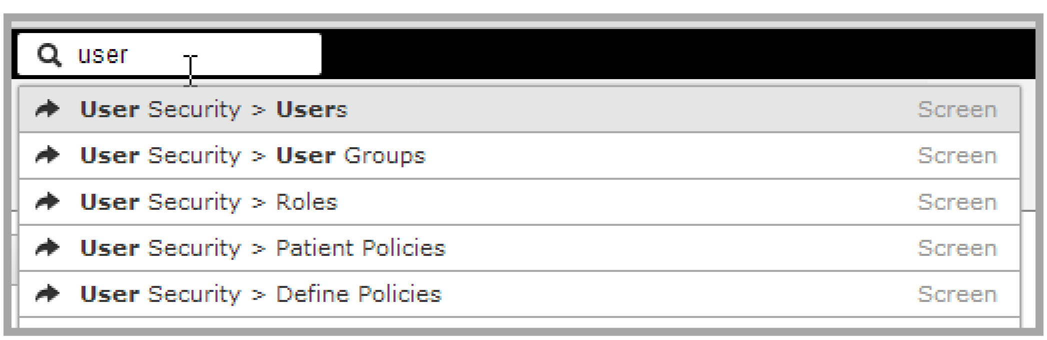

# Global Search Bar

The Global Search Bar is located at the end of the menu links on the left-hand side of the navigation bar. It is useful for searching and navigating directly to a user's record or to any application screen within the HIE platform.  The search terms are not case sensitive, and the search results will appear in a pop-up window directly below the search box.

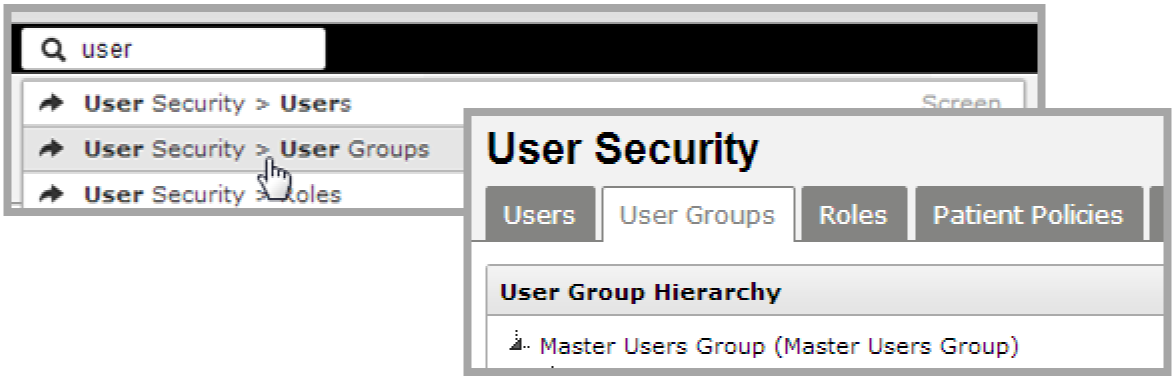



## Searching for Screens

The search results will include all screens for which the search term is included as all or part of either the application name (e.g., User Security) or the tab names (e.g., Users).

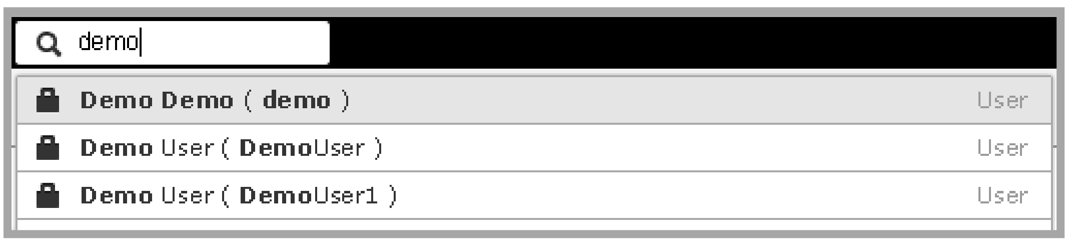



Clicking on a row from the list of results will provide access to that screen.




## Searching for Users

The search results include all users for which the search term is the user's first name, last name, or username. Search results do not include any user records that only partly match the search terms.

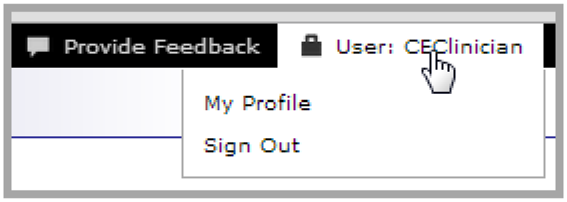



Clicking on a row from the list of results will provide access to the user's security record.


Because of this shortcut navigation feature, only users with the appropriate administrative permissions for accessing user security records will be able to use the global search bar to perform a search for users.

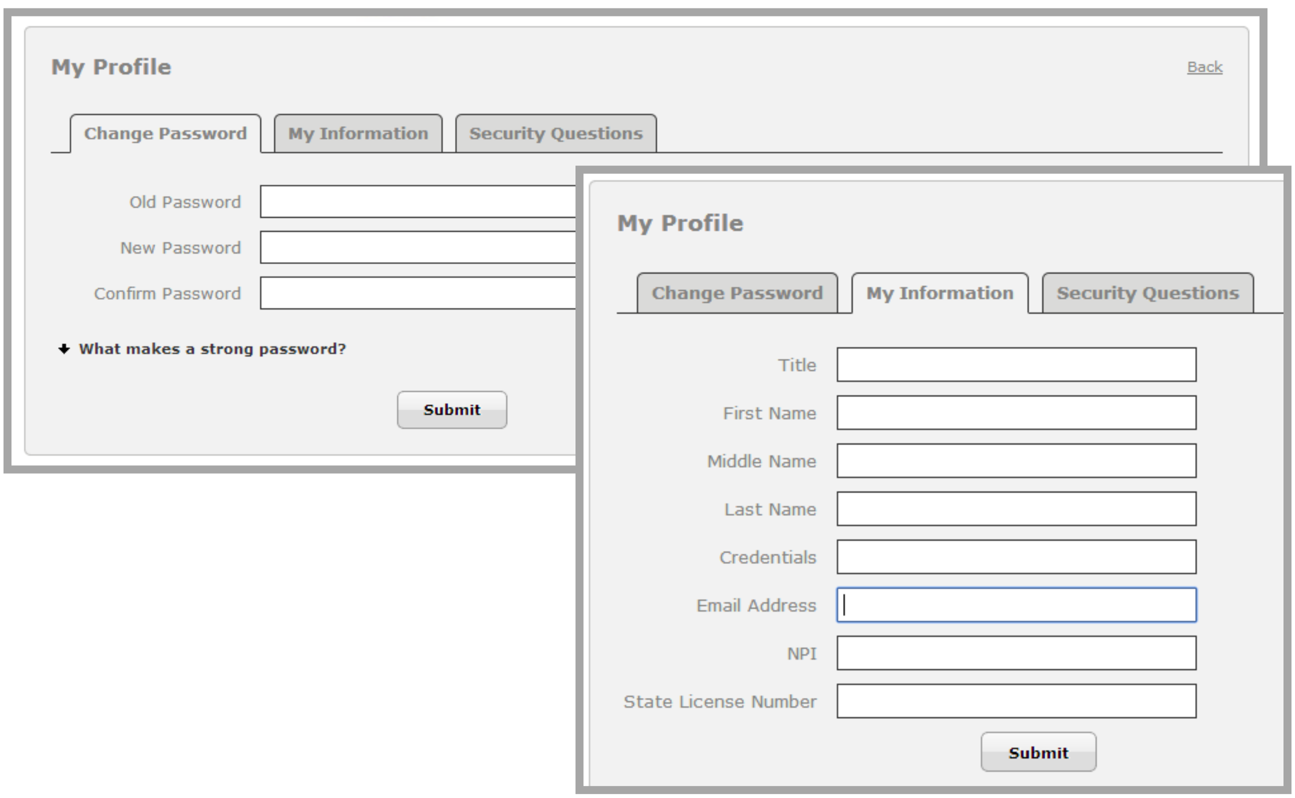
# MY PROFILE

To change your password and update your security questions and answers, access your profile by hovering over your user name in the upper right-hand corner of the screen and selecting the **My Profile** link.

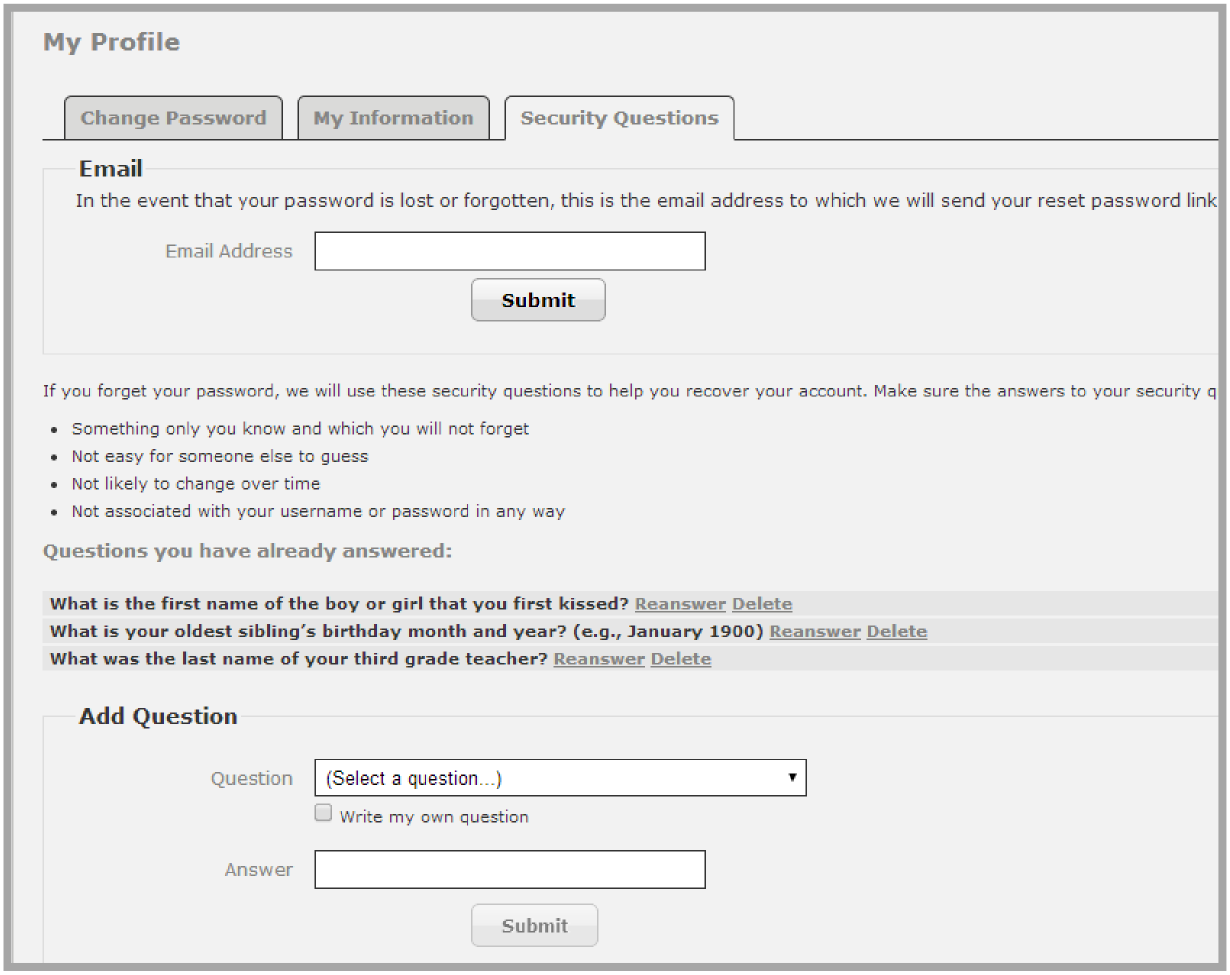



Note: The **My Profile** button may be available via a separate button on the navigation bar, instead of via a dropdown menu under the user name.


Here, you can update your password on the **Change Password** tab, view and update **My Information**, or update your **Security Questions**.



On the **Security Questions** tab, you can update the email address to which password reset links will be sent, and you can view and update your selected security questions.




Click the *Back* link on the right-hand side of the screen to return to the patient information tabs.

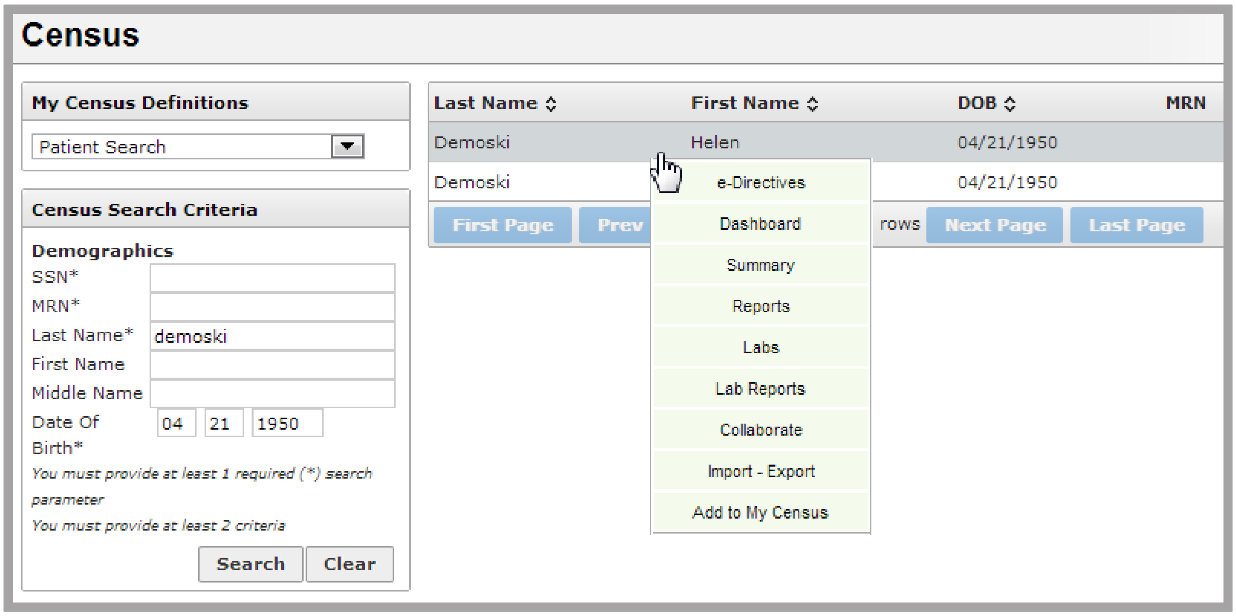
# MY PATIENT LISTS

Clicking on **My Patient Lists** from the Application Dashboard allows you to easily search for patients, access different parts of their medical records, and access tools for managing their care.

## Searching for Patients

Select **My Patient Lists** from the Application Dashboard to view patient records. From the *Census* screen, you can search for a patient using the listed criteria. Any required search terms will be marked with an asterisk.

Note: The options in the “Patient Search” dropdown menu may differ from the screenshot below, based on selections made by your HIE.




Patients matching the search criteria will appear in a list to the right of the search box. Results can be sorted by **Last Name**, **First Name**, or **DOB** (date of birth).

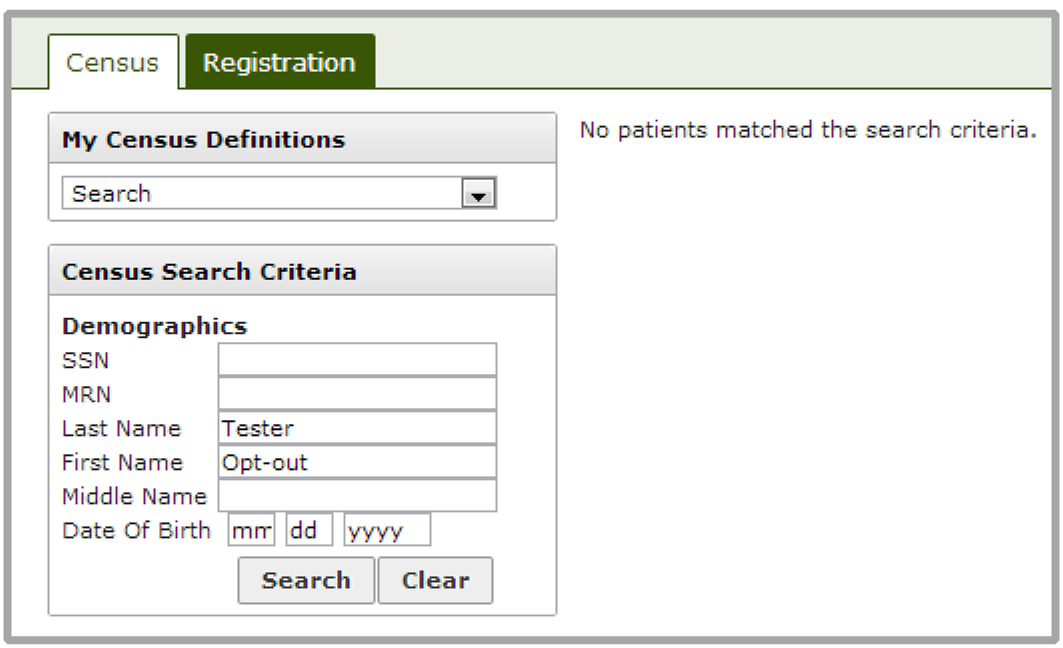
Click anywhere on the row with the patient’s name to access the Patient Summary, or right-click and choose from the menu. Clicking a tab option will take you directly to the tab for that patient.

Patients previously viewed and saved are accessible by selecting **My Census** from the *My Census Definitions* dropdown box. To add a patient to the **My Census** menu, right-click on them in the manual search results, and choose **Add to My Census**.


## Opted-Out Patients

By default, the HIE will be set up to follow an opt-out consent model:  all information not specially protected by federal or state laws is shareable under HIPAA TPO provisions and will be shared unless a patient explicitly elects to opt out of the system.

If a patient has elected to opt out, the clinical portal and query functions will follow a zero disclosure policy.  Therefore, a search for a patient who has opted out will return the message "*No patients matched the search criteria*", as shown below.



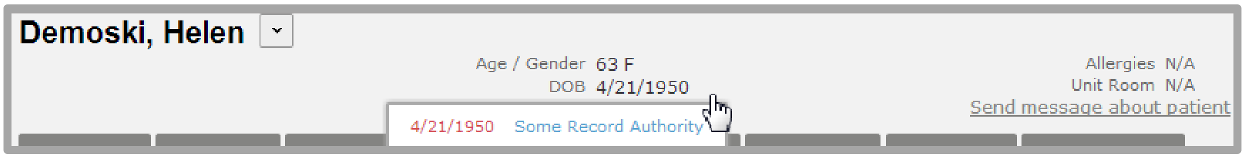

## Sensitive Health Information

Sensitive Health Information (SHI) may not be exchanged by the HIE among its connected providers or shown to users of the clinical portal unless the user meets the criteria for assignment of a role that has access to this information.  Examples of SHI include encounters from a state mental health institution, a substance abuse program, or psychotherapy session notes.  Therefore, all information for an encounter will be suppressed from data-based exchange, and will be suppressed from view in the clinical portal, unless the credentials of the user allow for access to SHI.

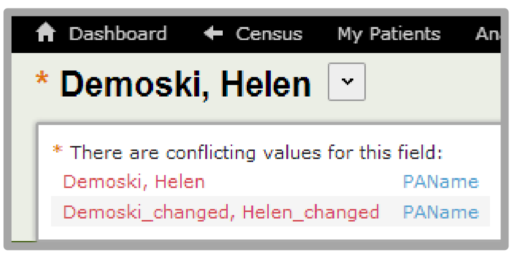
# Patient Banner

The Patient Banner contains basic patient information, summary views, and detailed administrative and clinical data. The patient's name, age/gender, DOB, MRN, and allergies (if available) are listed at the top of the page. Clicking the arrow beside the patient's name collapses/expands the header information.


Additional information (including the source, if available) can be displayed by hovering your cursor over any of the fields.



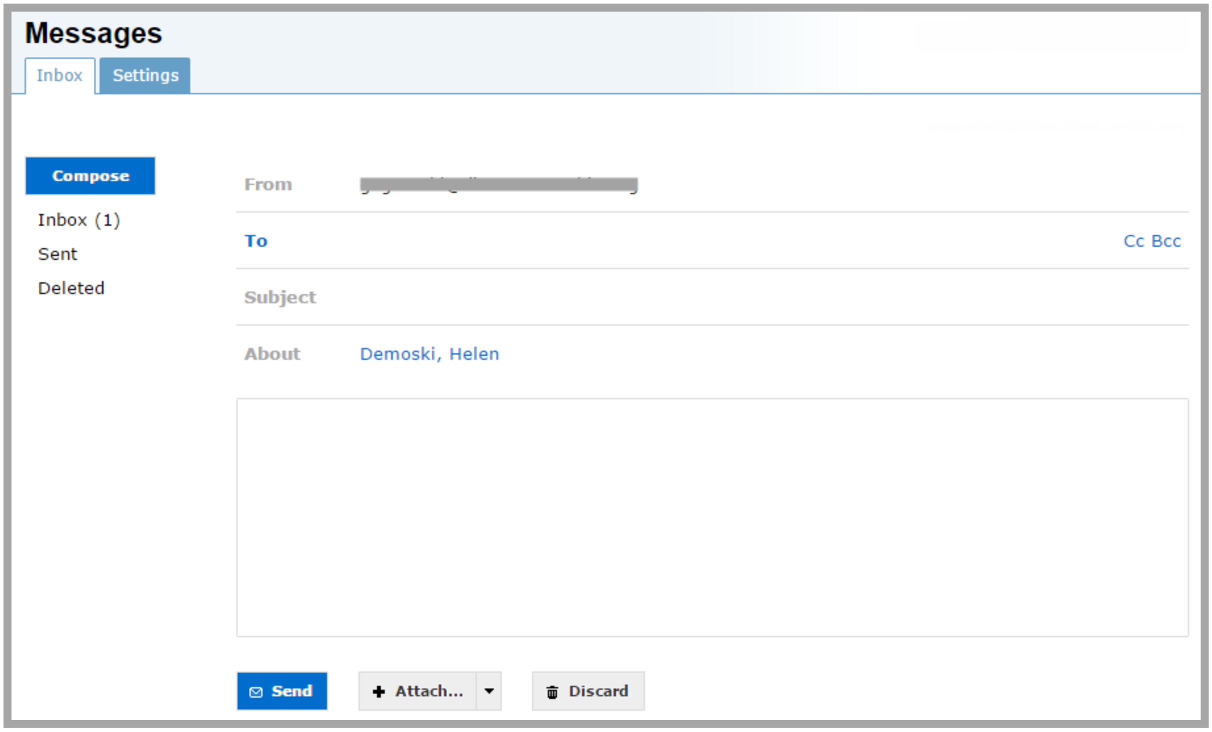

The Patient Banner can be configured to notify users of potential last name conflicts. If this option is enabled, a red asterisk may appear by the patient's name. This would indicate that one of the records linked together for this patient has a last name that differs from the others. For example, a patient's last name may change due to a change in marital status that is only reflected in one record.




Hovering the cursor over the patient's name will reveal a warning message that includes the conflicting information and the data sources for that information. Contact the HIE administrator to ensure that the patient's information is correctly updated.

## Sending Messages

Selecting **Send message about patient** allows a clinician to send a message within patient context to another provider. See the "Direct Messaging" section for more information about sending messages. Note: This link is not available if Direct Secure Messaging is not included in your solution.

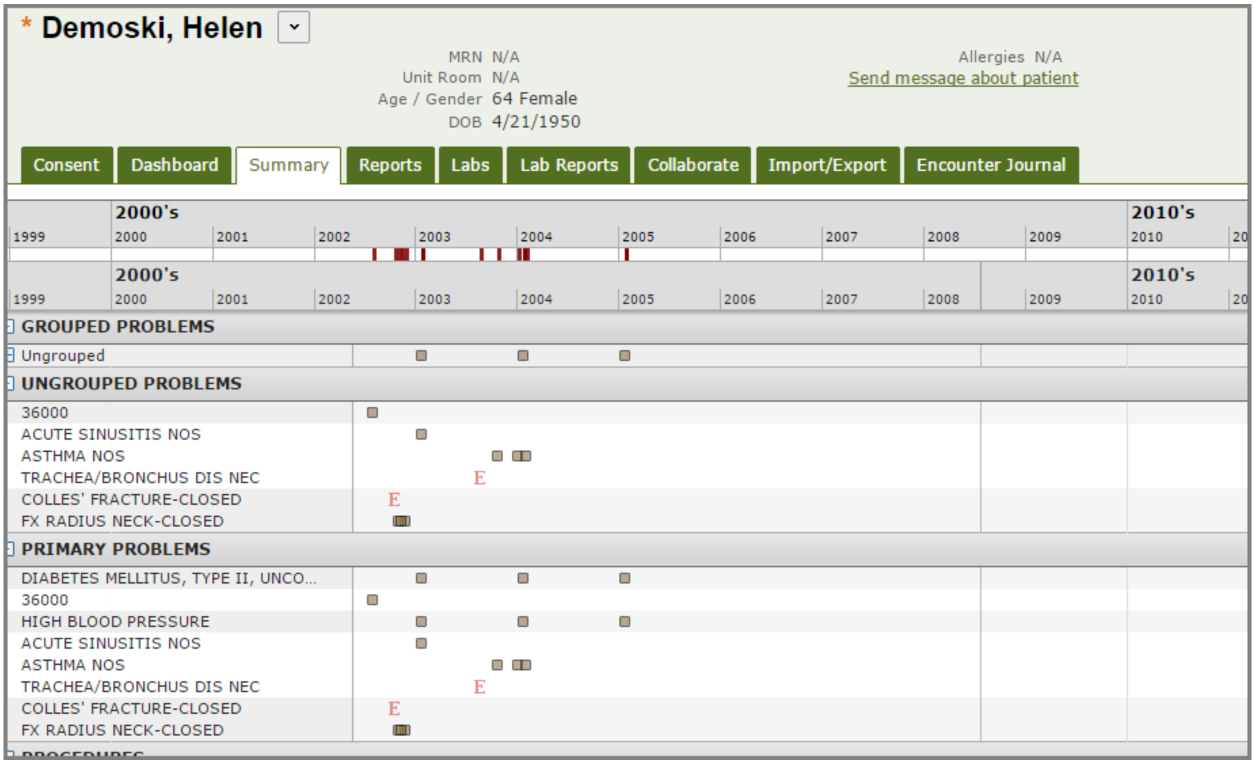



The message will include a link to the patient's record in the *About* field.  The screenshot below shows an example of a message that would be received by the recipient.  By clicking on the patient's name in the *About* field, the recipient will be directed to the Summary tab of the patient's record.

Note:  The *About* field will only be visible to recipients with access to WVHIN patient records.

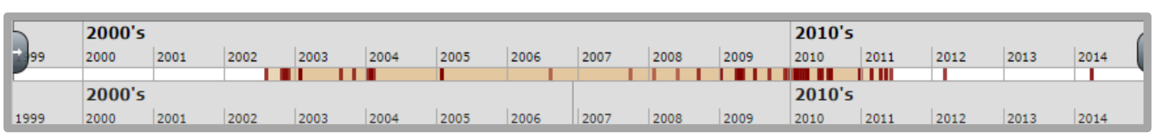
# Summary

After selecting a patient from the census, his or her data is opened in the **Summary** tab. Under the Summary page's main timeline, there are a number of panels which display a longitudinal view of a patient's problems, providers, procedures, and medications.




## Timeline

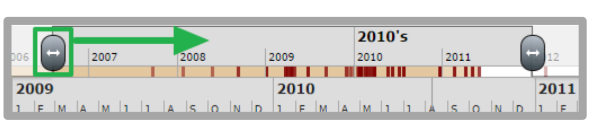
A timeline representing the time period in which the patient's data is available within the HIE is found at the top of the screen below the tabs.

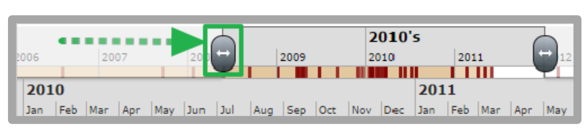



On the timeline, specific events are represented by red bands, and events that span multiple days are displayed as tan bands.

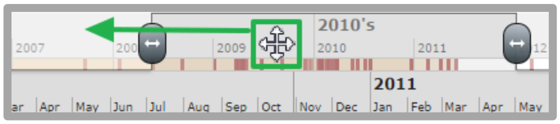
There are a number of ways to interact with the timeline to focus on a specific date range:

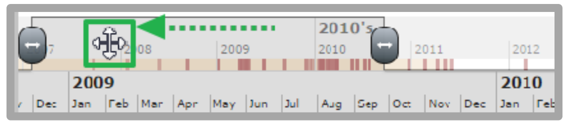
- The sliders at the ends of the timeline can be dragged left and right:



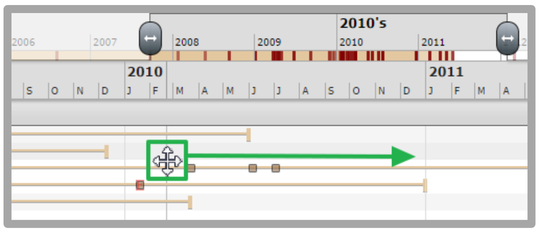



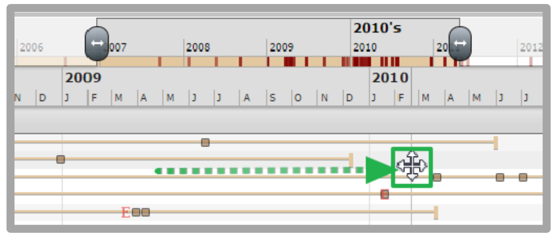

- By hovering the mouse over the area between the sliders (until the mouse cursor becomes a four-way arrow), the entire date range can be dragged left and right:





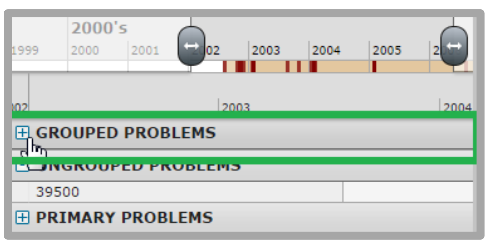
- The entire date range can also be moved by clicking and dragging left or right in an empty area in a results panel:

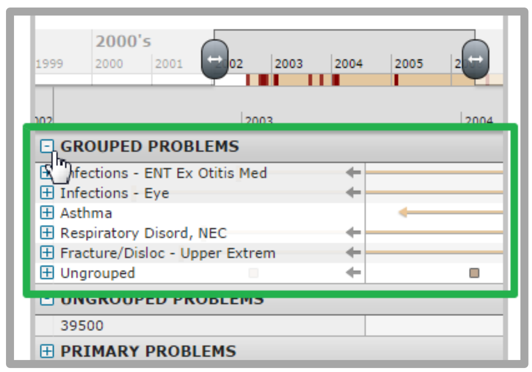




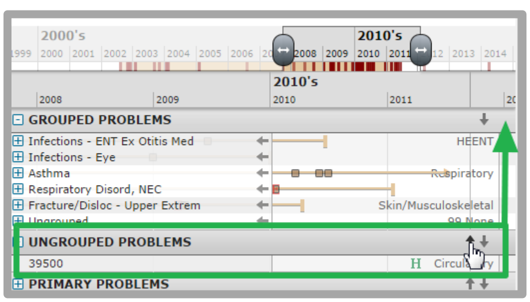
## Customizing the Summary

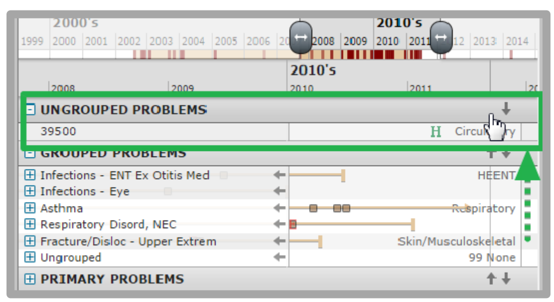
Each user may customize the order and content displayed on the **Summary** tab. Clicking on the plus and minus signs at the left of every panel row will expand or collapse that panel.



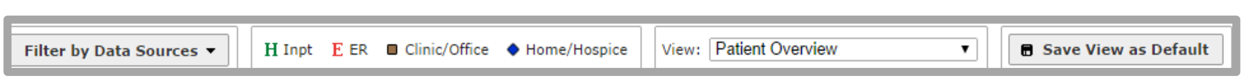

The order of the panels on the screen can be changed clicking on the up/down arrows at the right-hand side of every panel header.





## Summary Toolbar

The **Summary** tab toolbar appears at the bottom of the screen.

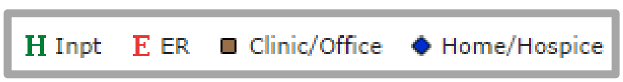



The summary toolbar shows functions and information applicable to the entire Summary screen:

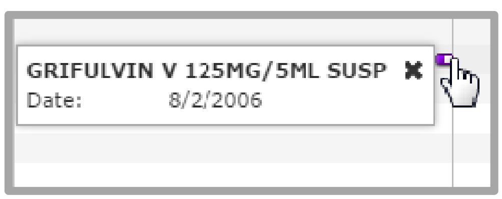
- **Filter by Data Sources:** Clicking this button will bring up a list of data sources in the HIE. Click on one of the data sources listed to restricted data displayed; a small check will appear next to that data source. Multiple data sources can be selected. To unselect a data source, click on it again, and the check mark will disappear.
- **Legend:** This legend lists all of the icons used to describe healthcare events shown on the Summary screen.
- **View:** The view of the Summary page can be set to one of four preset views:
    - **Patient Overview**—all panels are shown: Grouped Problems, Ungrouped Problems, Primary Problems, Medications, Procedures, Providers, and Immunizations.
    - **Patient Overview (Compressed)**—the panels shown in the Patient view all start collapsed.
    - **Reconciliation**—limits the panels to Problems, Medications, Procedures, Providers, and Immunizations.
    - **Reconciliation (Compressed)**—the panels shown in the Reconciliation view all start collapsed.
- **Save View as Default:** The current view can be preserved by clicking this button. Once saved, the button will disappear. To change to another view, use the **View** menu and click **Save View as Default** again.

## Detailed Information

Each data point within problems, providers, and procedures is represented on the longitudinal summary by one of the following icons (as displayed in the **Legend** on the toolbar) to indicate the type of encounter for each. Medications are represented by a capsule icon.

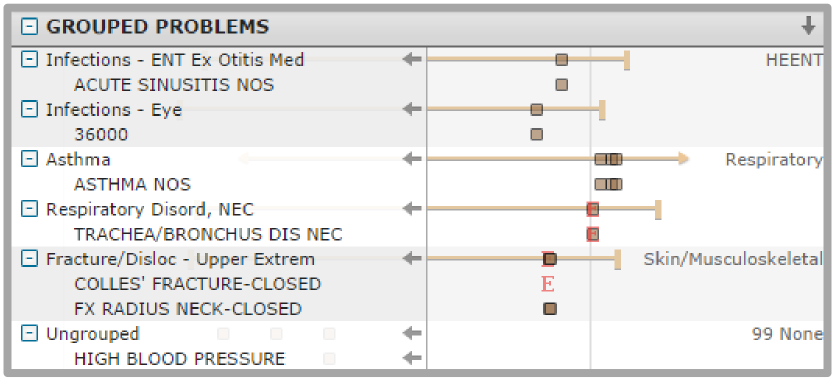



To get more detail about a specific encounter or medication, position the cursor over an icon until it becomes a hand and then click on the icon. A window will appear displaying more detailed information. Click on the **X** in the upper right of the window to close it.



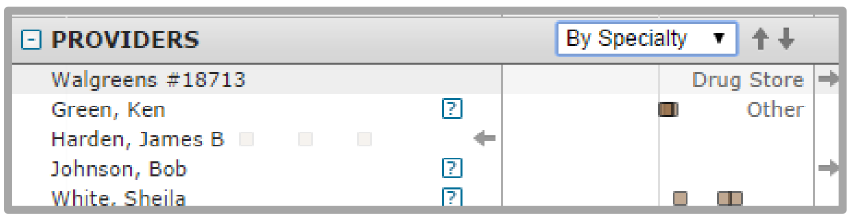

## Grouped Problems

In the **Grouped Problems** panel, problems are organized by system, with the problem label displayed to the right of the screen.

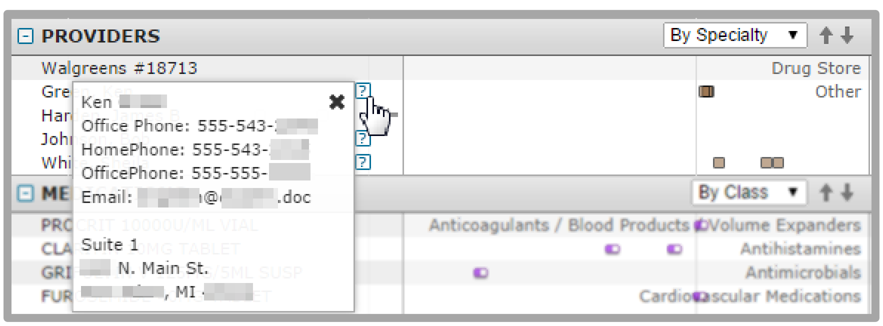



## Providers

Providers are organized alphabetically, and can also be listed by specialty class by clicking on the dropdown at the upper right of the panel.  Provider categories are listed at the right.

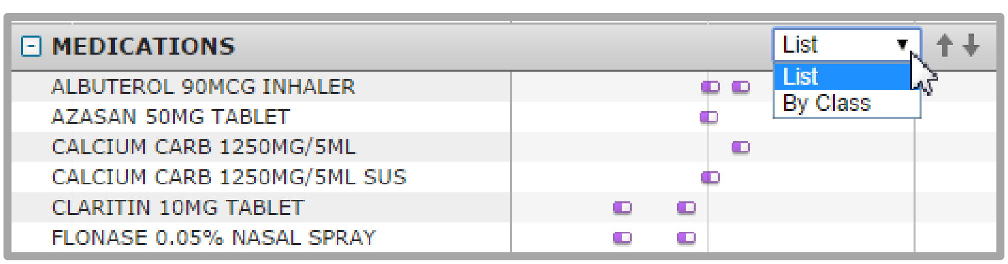



Additional information about the providers can be viewed by clicking the question mark icon next to the provider's name.

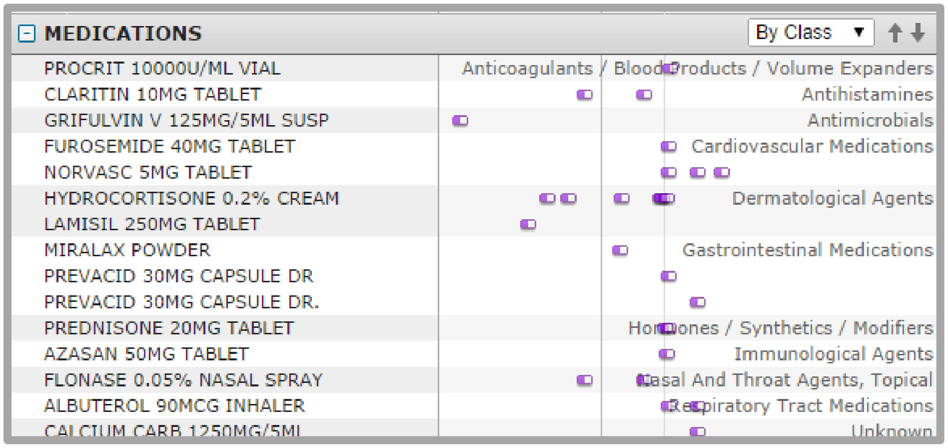



## Medications

Medications are organized alphabetically by default, but can also be listed by class by clicking on the dropdown at the upper right of the panel.  Both inpatient and outpatient medications are displayed.

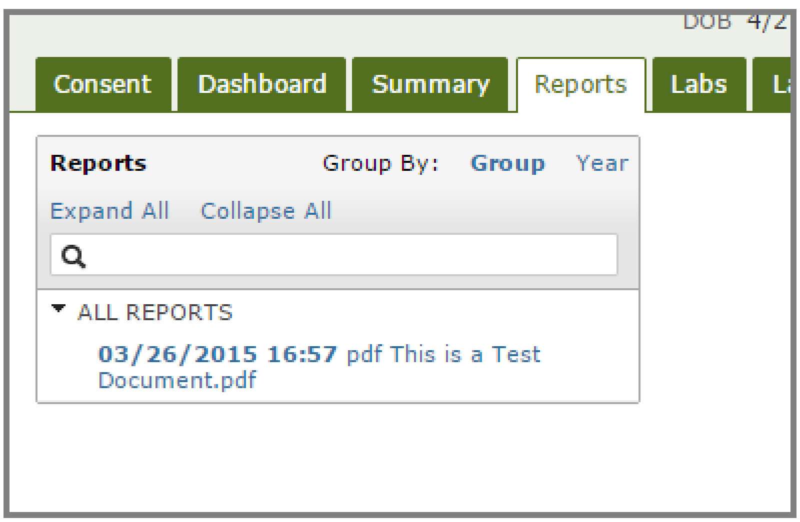



When organized by class, the drug class appears to the right of the medication names.



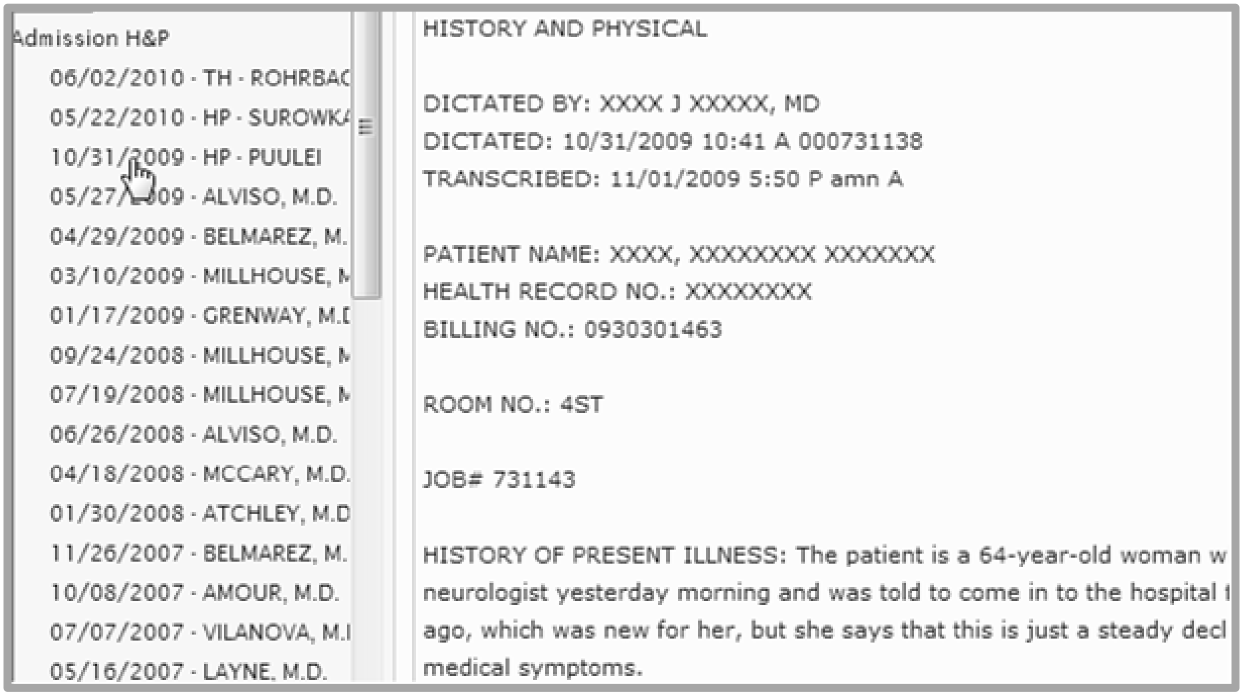

# Reports

The **Reports** tab includes all available text-based reports, such as: history & physicals, consults, ED notes, office visits, operative notes, radiology reports, imaging studies, and miscellaneous correspondence regarding the patient. The Reports also include any information contributed to the HIE as a Continuity of Care Document (CCD).

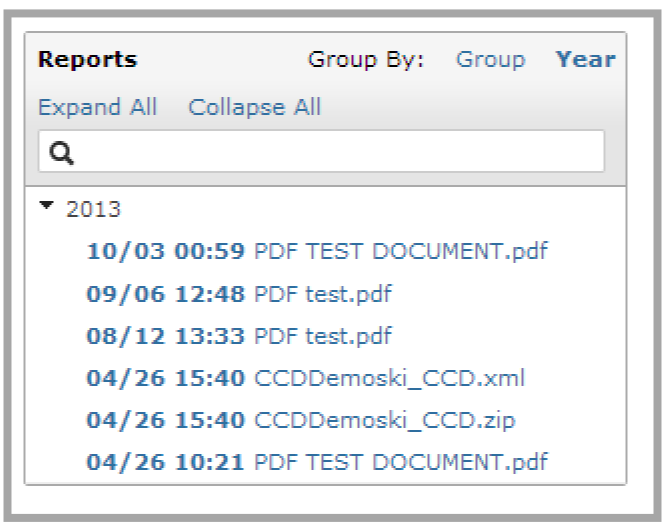



Reports are categorized by group. Each group can be expanded by clicking the arrow next to the group name. Within groups, reports are shown in order by date with the most recent report shown first. The **Expand All** button reveals all reports within all groups, and the **Collapse All** button hides all reports and shows the group names only.

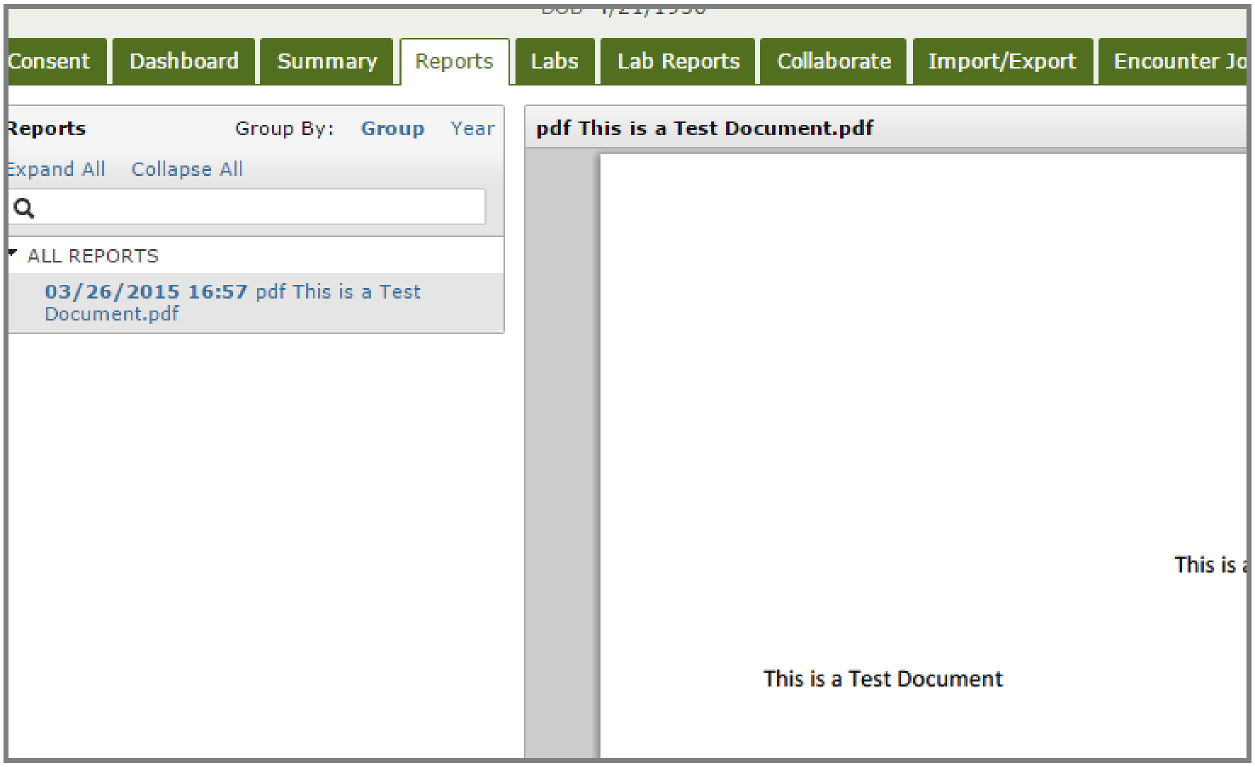
To display the content of the report, click the title. The contents will be displayed in the right-hand panel.



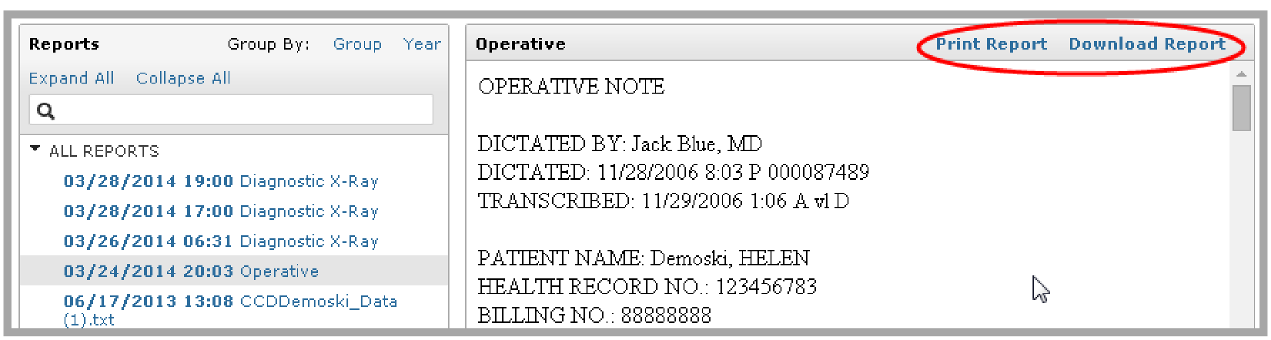

If you prefer to view reports in chronological order rather than by group, click **Year** above the list of reports on the left.




To search for a report, use the search bar located directly below the **Expand All** and **Collapse All** links. Search results will include any reports that have the search terms included in the report title.




Use the buttons located on the right side of the report title bar to print reports or download reports to your computer. Click the appropriate link (**Print Report** or **Download Report**) and follow the prompts to complete the desired task.

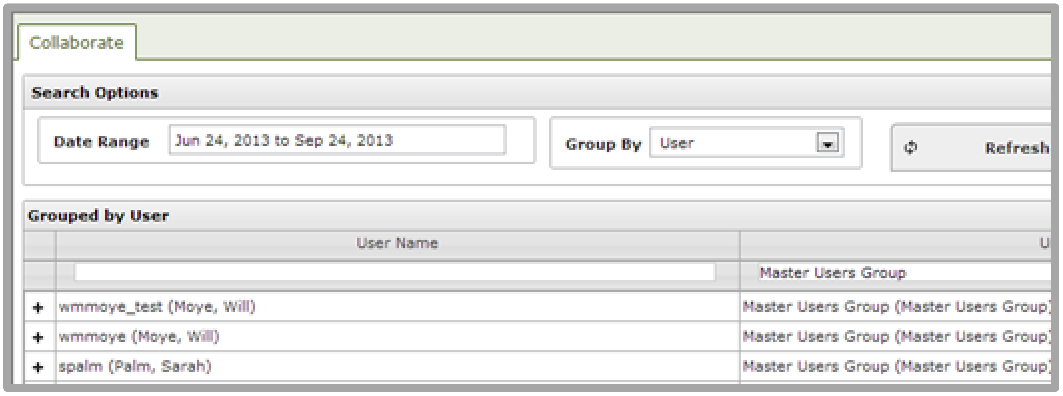



The **Print Report** link will not appear for documents that have been uploaded. To print these documents, use the built-in print mechanism as shown below.

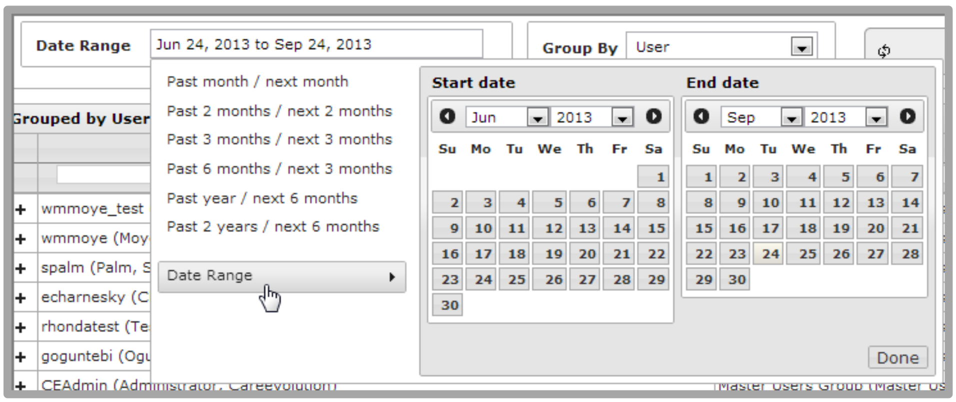
Note: Download and save reports only on computers and networks that are known and trusted.

# Collaborate

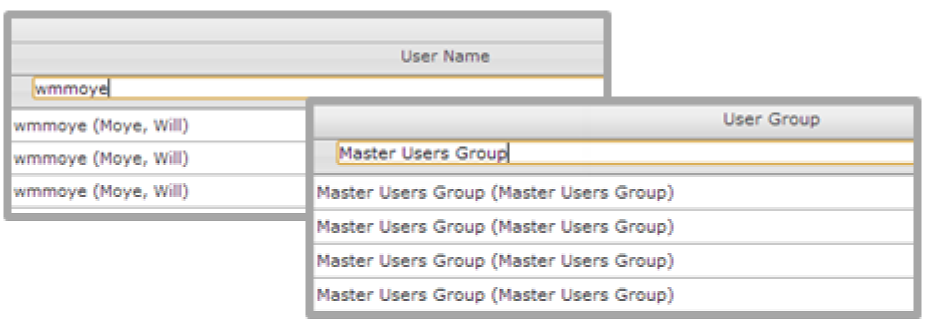
The **Collaborate** tab displays all users who have accessed a patient's information as well as the specific pages viewed. It provides a record of all user activity, including User Name, User Group, Address, and Phone Number when grouped by user; and Session Start Time, User Name, and User Group when grouped by session.



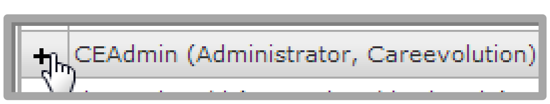

By default, the date range includes the previous 3 months, and the results are grouped by user. Clicking on the **Date Range** filter allows you to limit the results to any of the displayed ranges or to specify a start and end date.



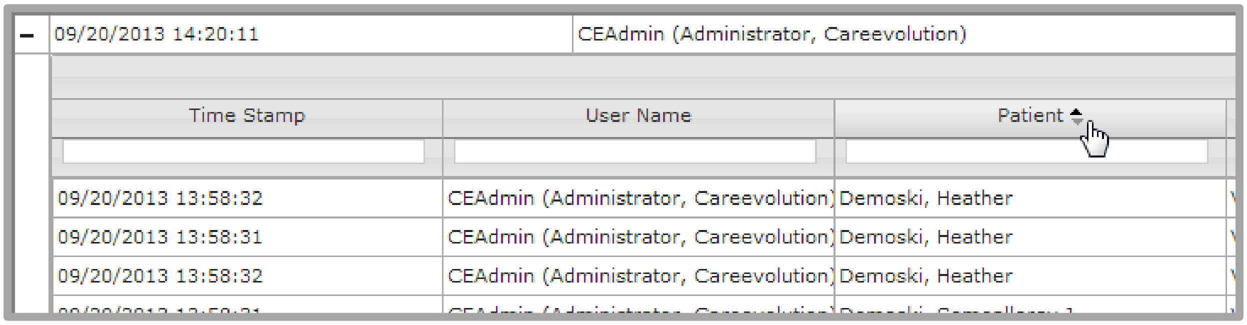

Search by user name or user group using the search boxes above the respective columns.




Click on the **+** sign beside the session to view a complete record of the user's access to the patient's record.



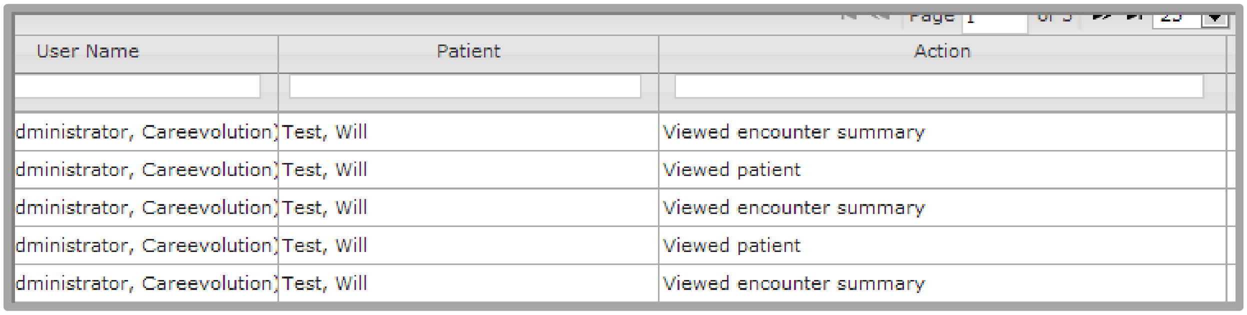

Click on any of the headers to sort by column.



| − | 09/20/2013 14:20:11 | CEAdmin (Administrator, Careevolution) |
|---|---|---|

| Time Stamp | User Name | Patient |
|---|---|---|
| 09/20/2013 13:58:32 | CEAdmin (Administrator, Careevolution) | Demoski, Heather |
| 09/20/2013 13:58:31 | CEAdmin (Administrator, Careevolution) | Demoski, Heather |
| 09/20/2013 13:58:32 | CEAdmin (Administrator, Careevolution) | Demoski, Heather |

Each log event includes time stamp, user name, patient viewed, actions performed by the user, details (including page duration), and applications viewed.



| User Name | Patient | Action |
|---|---|---|
| dministrator, Careevolution) | Test, Will | Viewed encounter summary |
| dministrator, Careevolution) | Test, Will | Viewed patient |
| dministrator, Careevolution) | Test, Will | Viewed encounter summary |
| dministrator, Careevolution) | Test, Will | Viewed patient |
| dministrator, Careevolution) | Test, Will | Viewed encounter summary |

# DIRECT MESSAGING

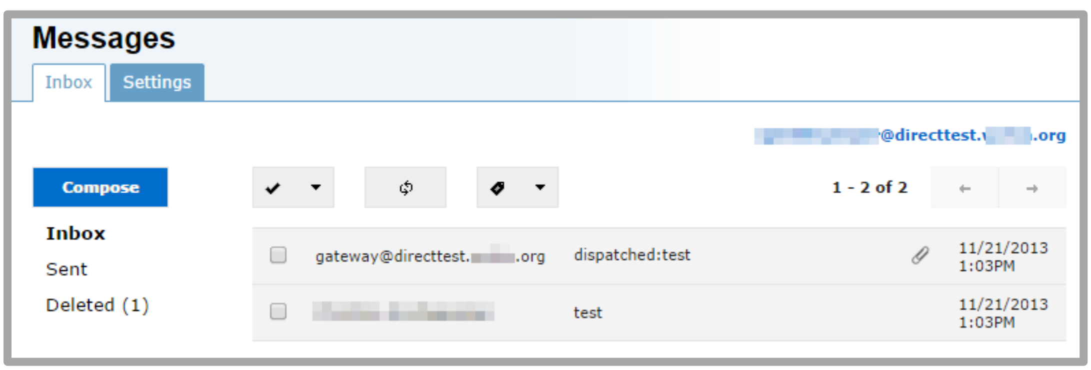
Direct Messaging is a method for secure transmission of PHI over the Internet.  Direct messaging:

- allows users to communicate with other users within their own HIE and other health information networks
- and offers the ability to delegate a mailbox to another Direct user to send/receive messages for a different account.

To begin using Direct Messaging, select **Inbox** from the Application Dashboard.


## Inbox

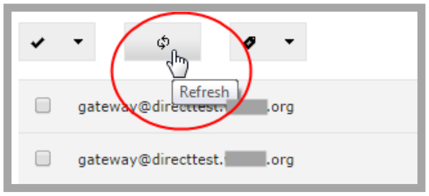
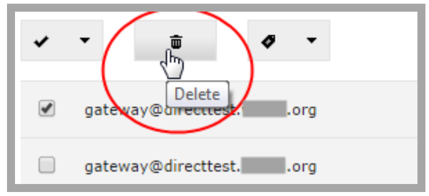
The **Inbox** works similarly to most email applications.  In the HIE, a user's Direct address is that user's HIE username followed by the system's Direct Messaging address.  For example, the Direct address for user "John_Smith" would be "John_Smith@[HIE Direct Domain Name].com".  The exact configuration of a Direct address depends on the system setup parameters.




The upper right of the **Inbox** screen shows the Direct address of the user whose mailbox is currently displayed.

There are three folders which store Direct messages:  **Inbox**, **Sent**, and **Deleted**.  Click on any of the folder names to access those folders.

Click the second button on the inbox toolbar, **Refresh**, to check for new messages.  To delete a message from a mailbox, select the checkbox beside the message and click the trashcan button.


Note:  The trashcan button appears in place of the **Refresh** button when at least one message has been selected.

## MDN Messages

MDNs (Message Disposition Notifications) are special messages that contain information about the receipt status of Direct messages.  MDNs are required by the Direct protocol and can help diagnose message delivery issues.

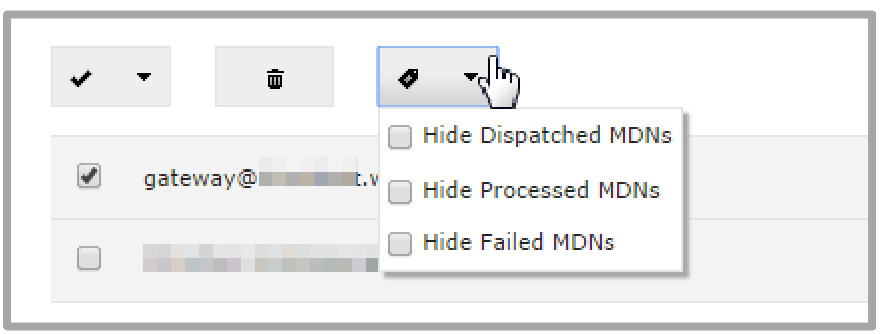
When a Direct message is sent from an inbox, the recipient's Direct server may respond with an MDN, indicating the message's receipt status.  These statuses are defined as follows:

- Processed MDN:  Indicates that a message has been received by the recipient's system.
- Dispatched MDN:  Indicates a message has been delivered to the recipient.
- Failed MDN:  Indicates that a message has not been delivered to the recipient.

Note:  Some Direct messaging systems do not send any MDN messages, so depending on the recipient of your message, you may not receive an MDN.

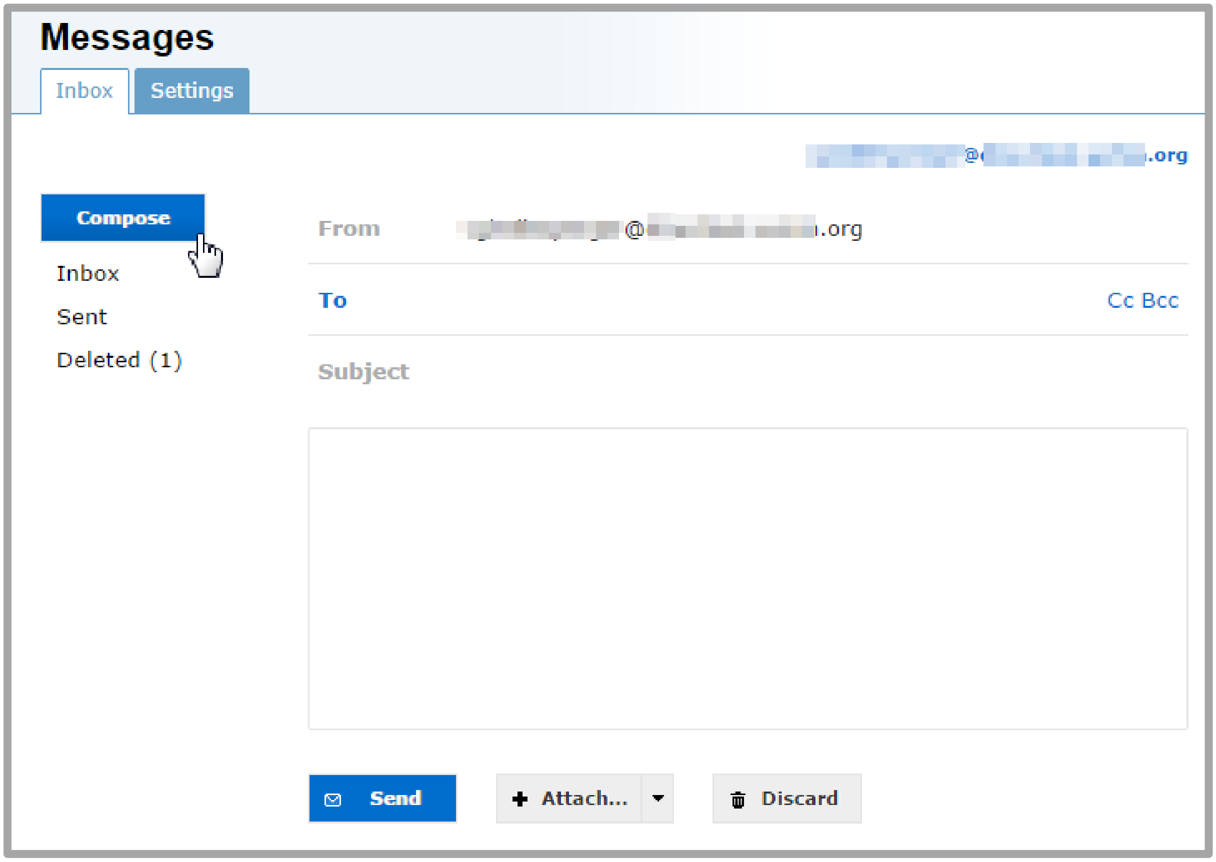
To hide MDN messages in your inbox, click on the tag button on the far right of the inbox toolbar and select an option from the dropdown menu.  Clicking on one of the check boxes will hide all messages of that MDN type.

To show MDN messages that have been previously hidden, uncheck the appropriate checkbox.




## Composing Direct Messages

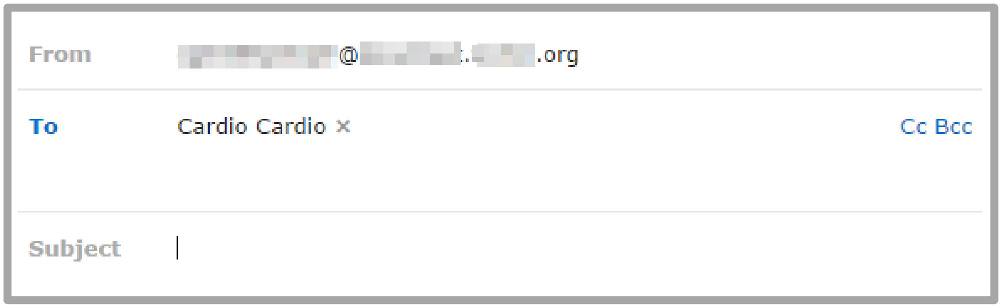
Click the **Compose** button to begin writing a new message.



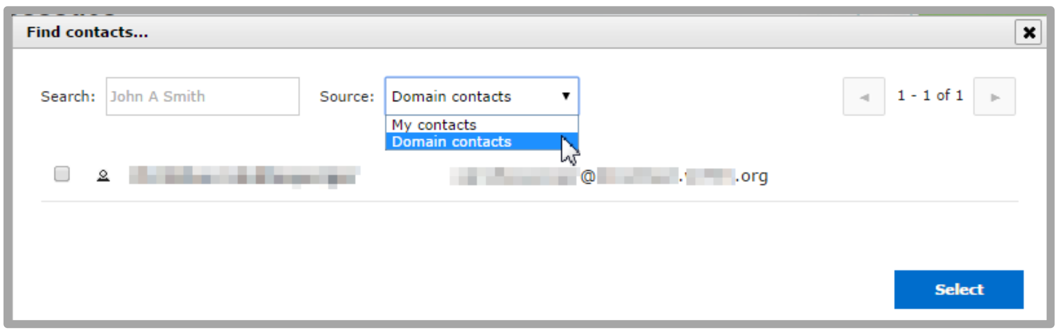

To add a recipient's Direct address to the message, begin typing the first or last name of the recipient. As you begin typing, the autocomplete feature will suggest matching Direct users within your HIE directory. Click on the correct name and address to add it to the list of recipients.

If you are sending the message to an external Direct user, type in the Direct email address and press the enter key to add it to the list of recipients.


The selected address will be displayed in the *To* field. You may add additional recipients in the *To* field, or add recipients to the *Cc* or *Bcc* fields by clicking on the appropriate links on the right-hand side of the screen. Click the **X** to remove an address in any of these fields.




Recipient addresses can also be added by clicking on the **To** link. This will bring up the **Find contacts…** popup screen, which is used to search for addresses. Recipients can be found by typing in the *Search:* textbox.




The scope of the address search can be changed by selecting an address book source from the *Source:* dropdown menu. Select from a list of personal contacts by clicking **My contacts**, or search all of the Direct addresses in the current Direct domain by choosing **Domain contacts**.

When the search is complete, click on the checkbox next to any Direct recipients to add, and click the **Select** button in the lower right.

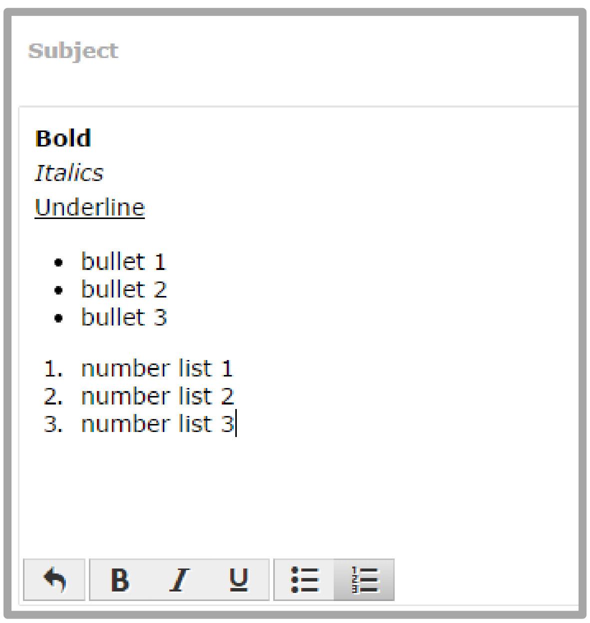
Once the system has validated the recipient's Direct address, a green underline will appear. Hovering over the address will reveal the following status message: "This is a trusted Direct address."


If the system cannot verify a recipient's Direct address, or if the address does not have a valid trust certificate registered with the system, it will appear underlined with red. Hovering over the address will reveal more information about the status of the address. The specific message that appears may vary; the screenshot below shows just one example of a status for Direct addresses that cannot be verified by the system.


Note: Direct messages may still be sent to addresses that have not been verified or that are not trusted; however, be aware that any information sent to these addresses may not be secure. If you encounter one such address, contact your administrator for assistance.

To begin composing a Direct message, enter a subject heading in the *Subject* field, and then type the message in the box below.

The toolbar located at the bottom of the message text box contains tools for formatting message text. A tooltip will appear when hovering the cursor over a toolbar icon that will describe its function.



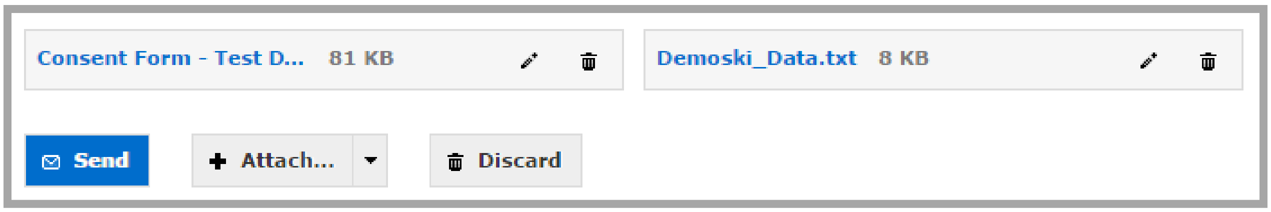

If you have created a signature (using the **Settings** tab), it will automatically appear in the body of the message.

For information on including attachments in a Direct message, refer to the **Direct Message Attachments** section below.

To delete the message without sending, click the **Discard** button. To send the message, click the **Send** button.

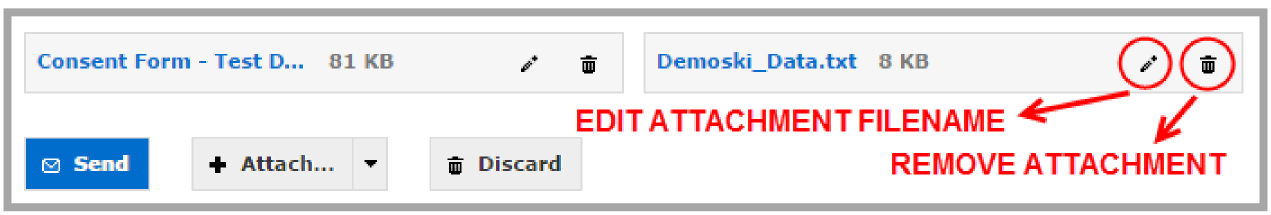

## Direct Message Attachments

To add an attachment to a Direct message, click on the **Attach…** button located below the message box and select any number of local files to attach. Any file(s) that have been attached will appear above the **Send**, **Attach…**, and **Discard** buttons.



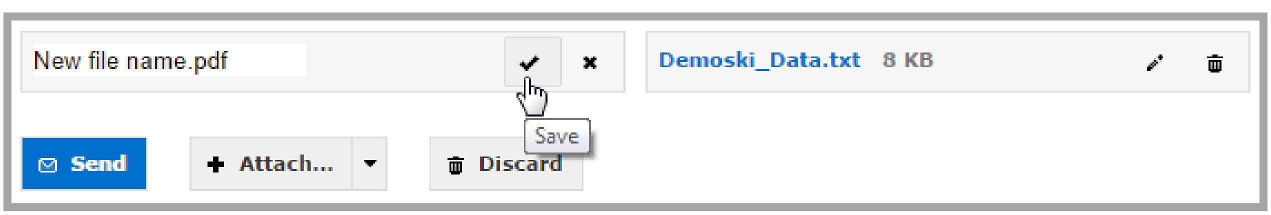

Note: The combined size of all attachments to a Direct message must be 10 MB or less (the maximum size of the entire Direct message, including attachments, is 16 MB).

Attachments can be deleted from a message by clicking the trashcan icon to the right of the appropriate file.

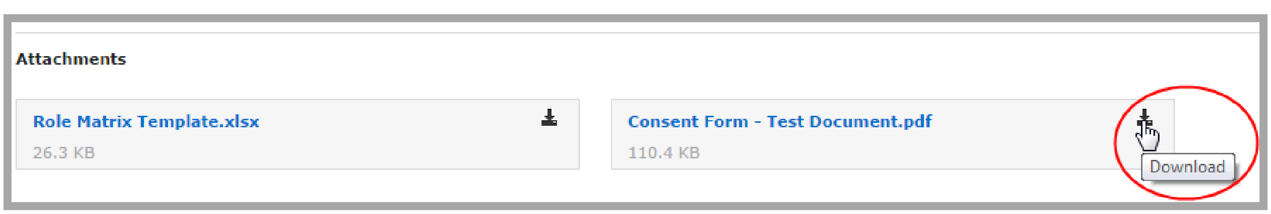



The file name for any attachment can be changed by clicking on the pencil icon to the right of each attachment and typing in a new file name in the text box. The original file extension (e.g., .PDF, .DOC, etc.) must be added to the new file name; otherwise, the recipient will be unable to open the file.

Click the checkmark to save the new file name, or click the X to cancel the file name change and revert to the original file name.

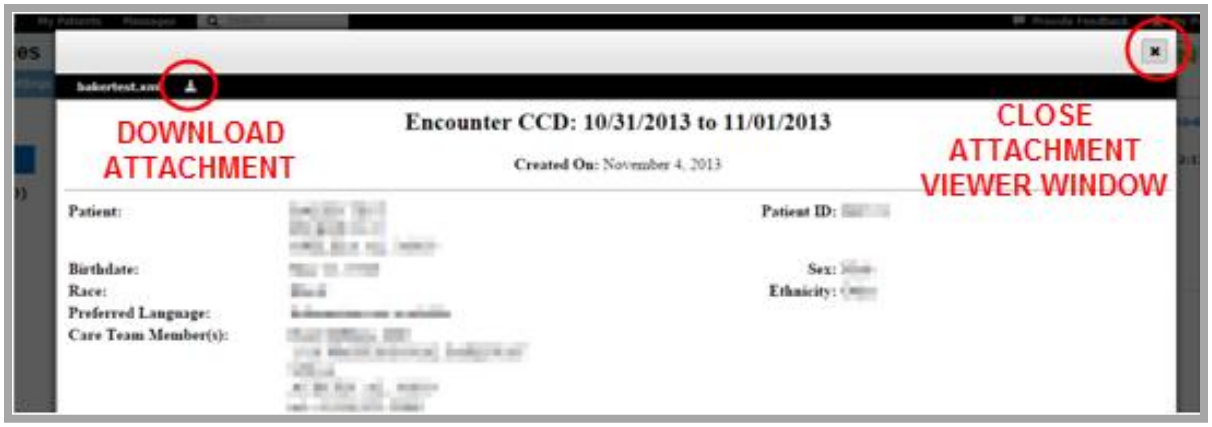



When a Direct message with an attachment has been received, the attachment can be downloaded by clicking the download icon.

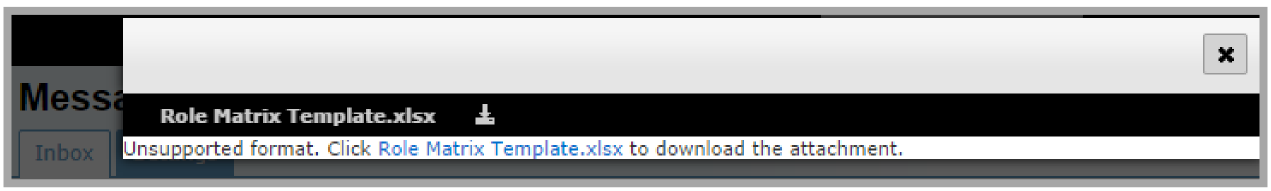


Certain supported document formats can be viewed in an attachment viewer window while on the Inbox screen.  Supported files currently include PDF, CDA, XDM.ZIP, JPG, PNG, BMP, HTML, and TXT.

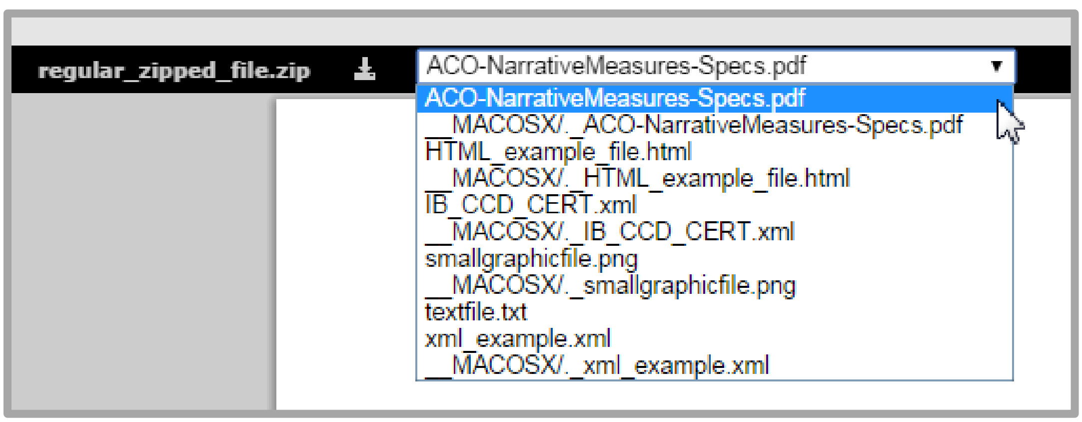
Click on the attachment file name (in blue) to open the attachment viewer window..  The file being viewed can be downloaded by clicking the download icon in the upper left corner, next to the file name.  To return to the Inbox, click the X in the upper right corner of the attachment viewer window.




Note:  If the file is not in a format that is supported by the viewer, the following message will appear, with instructions on how to download the file instead.

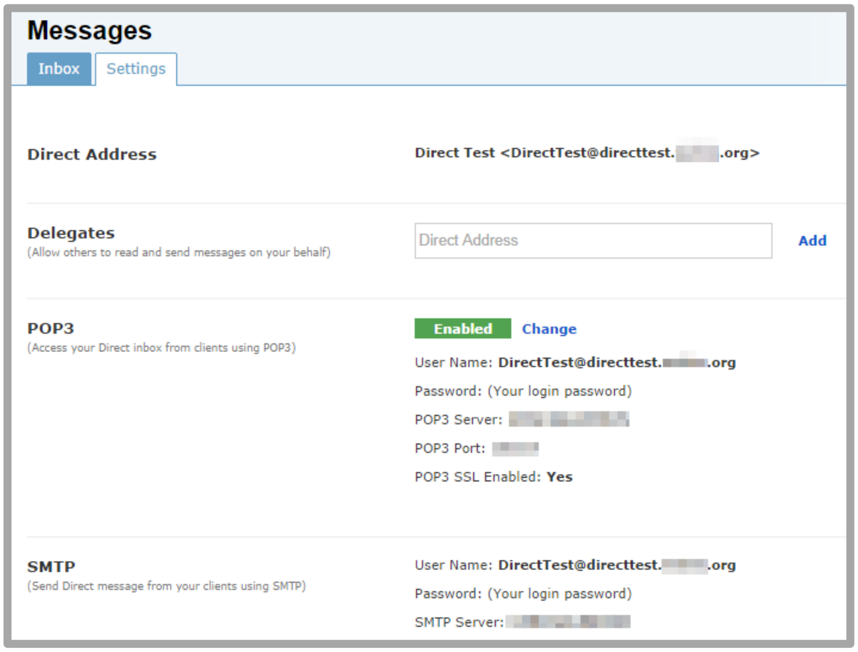



If a file opened in the attachment viewer contains a number of other files (as in a zip file), a dropdown menu will allow the selection of specific files stored within the main file.  Select the file to be viewed from the dropdown list, and it will appear in the attachment viewer window.



# Settings

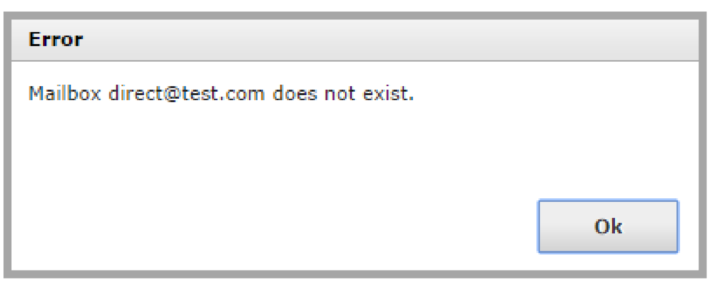
The **Settings** tab of the *Messages* screen provides information needed to configure a standard email client (such as Microsoft Outlook) to send and receive Direct messages. It also provides setup options for assigning delegates, enabling email notifications, and including a Direct message signature.




## Delegates

To grant another HIE user the ability to read and write Direct messages on your behalf, enter the Direct address of that user in the **Direct Address** field of the *Delegates* section.

If the delegate user's address is part of the current user's Direct domain, it will automatically be added to the list of delegates. If the address is not part of the current user's Direct domain, click the **Add** link. If the address can be verified, it will be added; otherwise, an error message will appear.



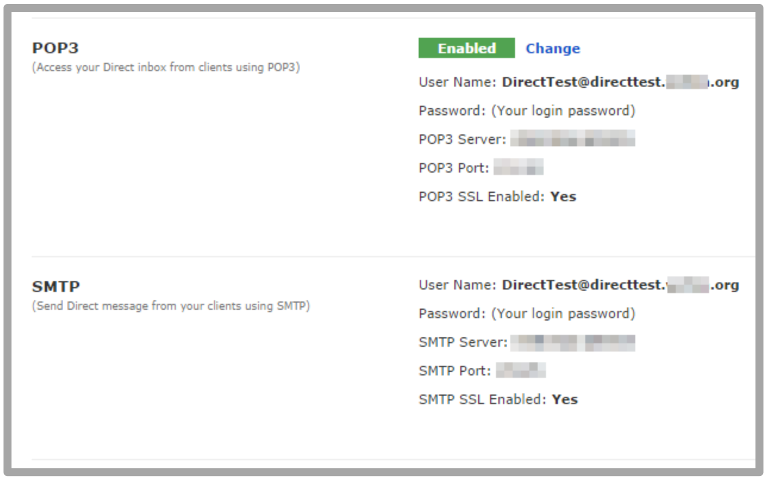

Multiple users can be added as delegates. To remove any previously added Direct addresses, click the red **X** at the end of the delegate's row.

For more info on using delegates, see the **Delegates** section below.

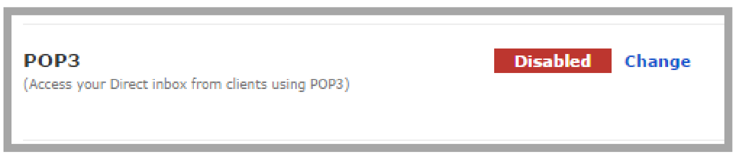
## Configuring Outlook and Other Email Clients

Information needed to set up a connection to another mail client (including your Direct address, POP3 settings, and STMP settings) is available on the **Settings** screen.

To enable transactions through a POP3 server, make sure that the green *Enabled* notification is visible.



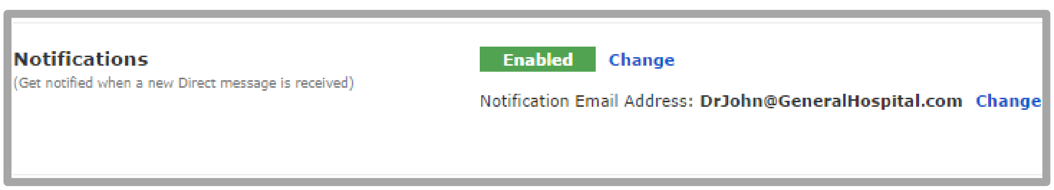

To disable POP3 transactions, click on the **Change** link in the *POP3* section. The green *Enabled* notification will change to a red *Disabled* notification.




Note: Remember to use your HIE user name and password when configuring access through the outside client.

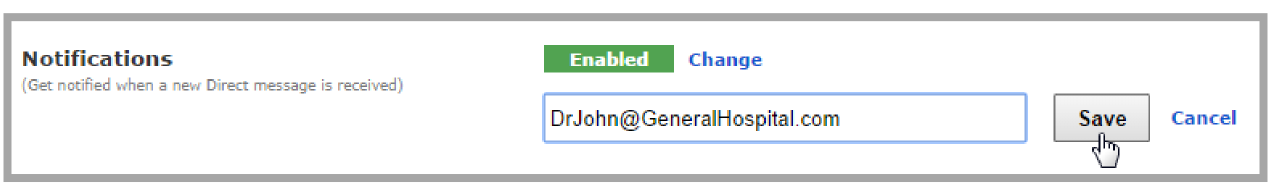
## Notifications

The Direct messaging system can be set to send notification emails to an external address when a Direct message is sent to you in the HIE system.

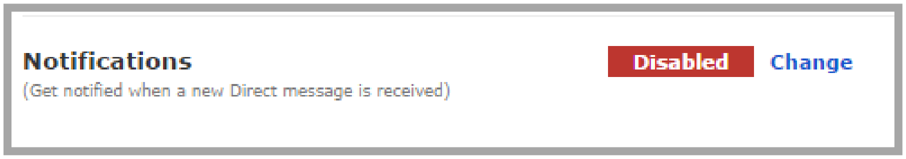



Note: Until the *Notifications* section is completed, notifications are not active and will not be sent.

To enable notifications, make sure that the green *Enabled* notification is visible. Then click on the **Change** link next to the *Notification Email Address:* header. Enter a valid email address in the text box which appears and click the **Save** button.




To disable notifications, click on the **Change** link. The green *Enabled* notification will change to a red *Disabled* notification.




## Creating a Signature

If desired, you may automatically append a signature to your Direct messages.  For example, a signature might include information such as your name, your contact information, and a statement about information disclosure policy.

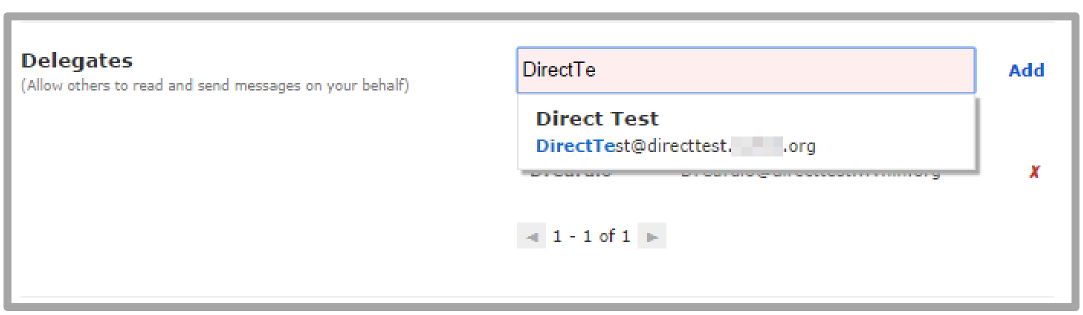

Enter your desired text in the *Signature* window.  Basic text formatting options are available in the toolbar located at the bottom of the window.  Once done, click the **Save** button.  Any text included will appear automatically at the end of each Direct message you compose.

# Delegates

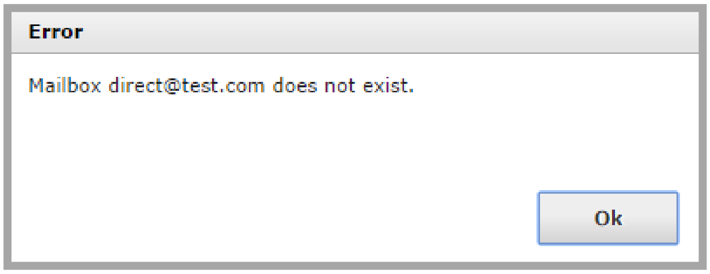
Delegates are users who have been granted permissions to manage another user's Direct inbox, including reading messages, replying/forwarding, and composing new messages.  Each user is able to add and remove delegates at any time using the **Settings** tab on the *Messages* screen.

## Adding Delegates

To grant an HIE user the ability to read and write Direct messages on your behalf, enter the Direct address of that user in the **Direct Address** field of the *Delegates* section.



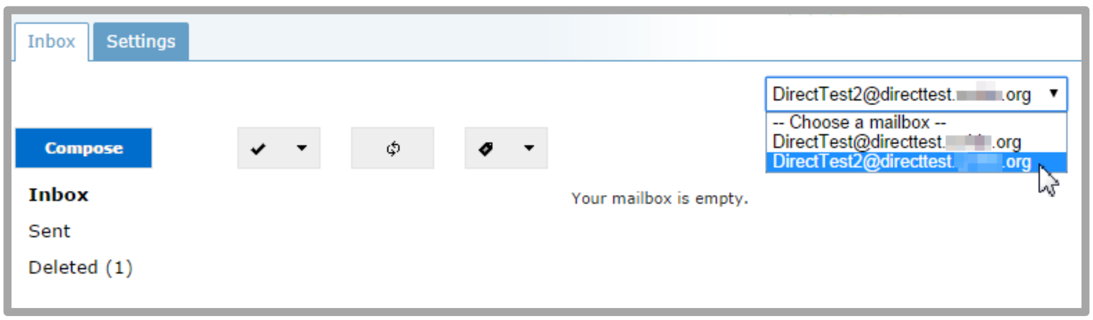
If the delegate user's address is part of the current user's Direct domain, it will automatically be added to the list of delegates. If the address is not part of the current user's Direct domain, click the **Add** link. If the address can be verified, it will be added; otherwise, an error message will appear.




Multiple users can be added as delegates. To remove any previously added Direct addresses, click the red **X** at the end of the delegate's row.

## Acting as a Delegate

If another user has added you as a delegate, you can access his or her Direct account by clicking on the Direct address in the upper right of the **Inbox** screen.

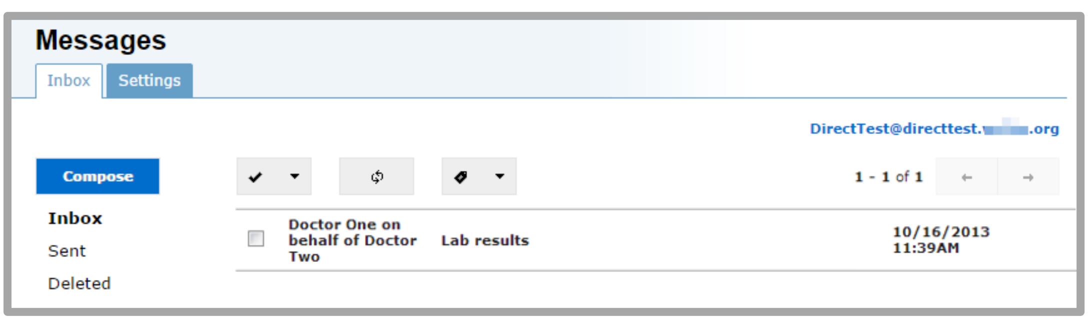



Select a Direct user address from the *Choose a Mailbox* dropdown menu to switch to that user's Direct inbox.

As a delegate, you will be able to read, write, reply to, and forward Direct messages within the delegated inbox. Users should keep in mind their organization's privacy and security policies before setting up any delegates.

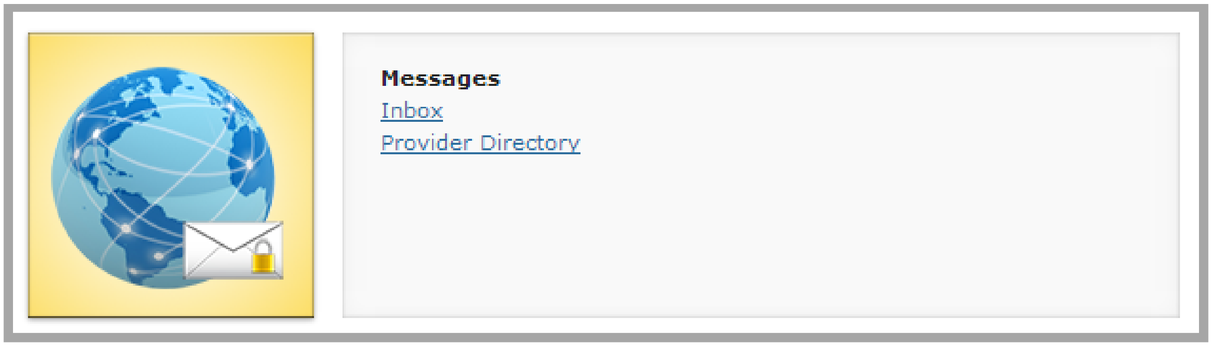
Note: Only the original inbox owner can assign and delete delegates to his or her inbox.

Messages sent by a delegate will include a notification that they were sent on behalf of another user.



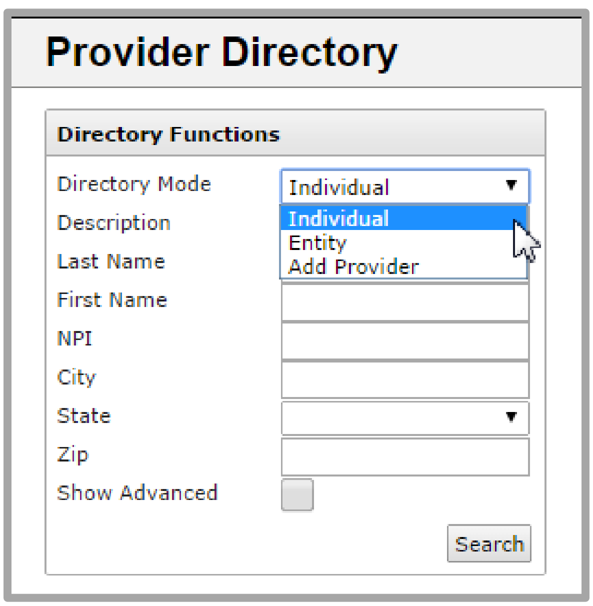
# Provider Directory

The Provider Directory allows you to search for providers within your own HIE and, in some cases, other exchanges.

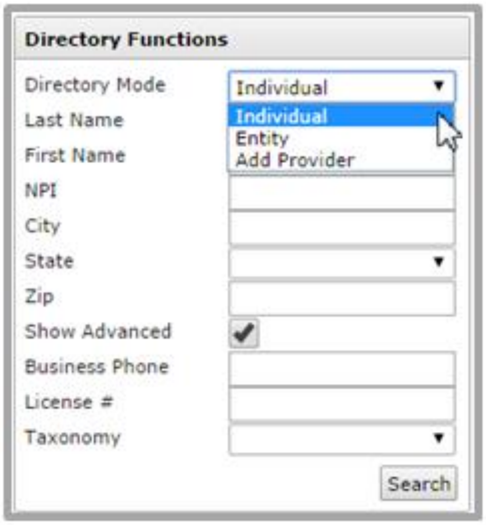


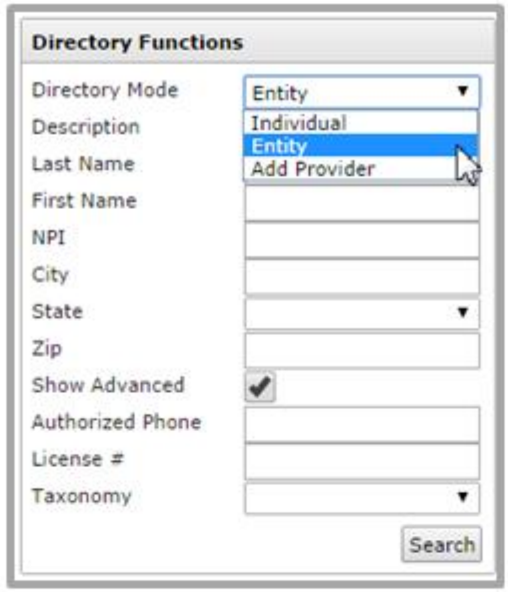

## Searching the Provider Directory

Multiple options exist for searching the Provider Directory, including searching for both individuals and entities.  To begin, select one of these options, either **Individual** or **Entity**, from the *Directory Mode* dropdown menu.




Enter information about the provider being searched for in the appropriate text boxes.  Clicking on the *Show Advanced* check box will reveal additional search options.




In addition to standard demographic information, searches can be conducted using:

- **Description –** entity search only; search for an entity's name (e.g., Main Street Clinic) in the HIE database or in any linked databases
  Note: The results will include entities for which the name entered as the entity's description is an exact match to the search terms.
- **NPI –** National Provider Identifier; search using the individual or entity's 10-digit number from the NPI Registry, available from CMS
- **License #** – search for an individual or entity's professional license number
- **Taxonomy** – search for an individual or entity's practice category or specialty from options in the dropdown menu

Once the search information has been entered, click the **Search** button. Results will appear to the right of the search box. Select the desired individual provider or entity from the list of results by clicking on its result row.


## Viewing and Editing Provider Information

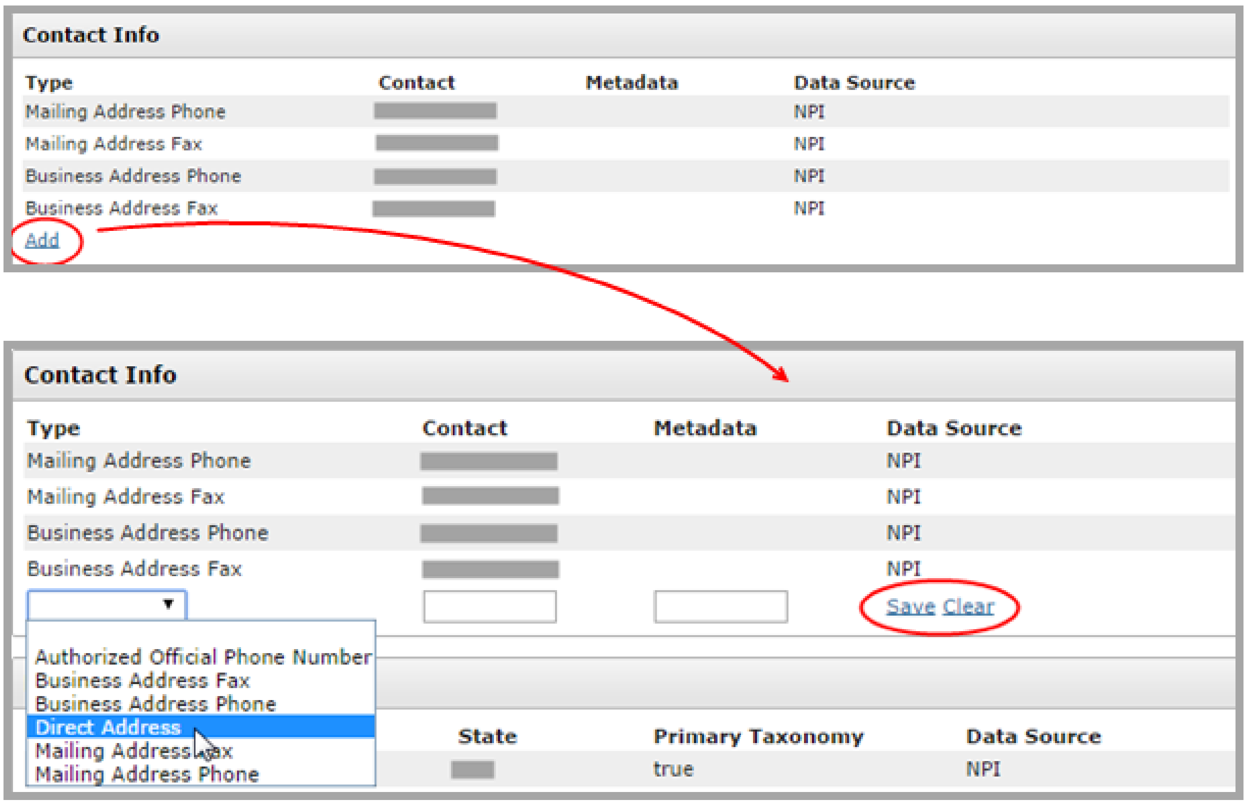
Once a provider is selected, the *Provider Detail* screen appears, showing the **View Individual Provider** tab (or for entities, the **View Entity Provider** tab).

On this screen, information about the provider is divided into a number of panels:

- **Names/Officials:** lists demographic info about a provider or each of an entity's officials
- **Identifiers:** lists ID numbers issued by NPI, Medicare, Medicaid, etc., and their effective dates
- **Addresses:** lists mailing addresses

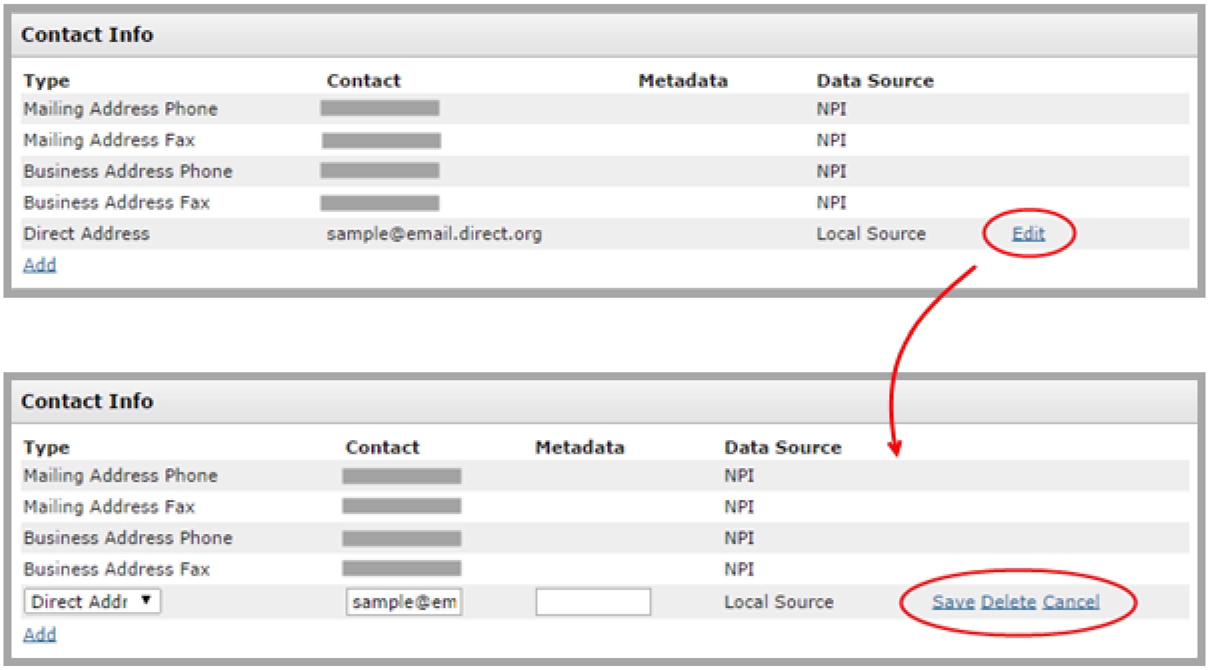
- **Contact Info:** lists phone numbers, fax numbers, and Direct message addresses
- **Licenses:** lists the numbers of any licenses held, the associated taxonomy classification, and their state of issuance
- **Descriptions (Entities only):** lists any specific identifying information about the entity

Additional information can be added to any of the above panels modified by clicking the **Add** link at the lower left of the appropriate panel. Fill in any boxes and make selections from dropdowns as appropriate.




When finished, click on the **Save** link to the far right of the row to save the changes, or click **Clear** to cancel the changes.

Any added information can be changed again by clicking on the **Edit** link that will appear next to user-added rows. Changes can be saved or cancelled, or the row can be removed completely by clicking the **Delete** link.


**Contact Info**

| Type | Contact | Metadata | Data Source | |
|---|---|---|---|---|
| Mailing Address Phone | | | NPI | |
| Mailing Address Fax | | | NPI | |
| Business Address Phone | | | NPI | |
| Business Address Fax | | | NPI | |
| Direct Address | sample@email.direct.org | | Local Source | Edit |
| Add | | | | |

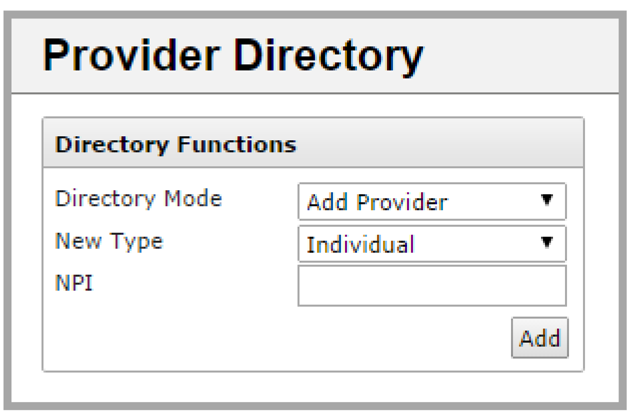
**Contact Info**

| Type | Contact | Metadata | Data Source | |
|---|---|---|---|---|
| Mailing Address Phone | | | NPI | |
| Mailing Address Fax | | | NPI | |
| Business Address Phone | | | NPI | |
| Business Address Fax | | | NPI | |
| Direct Addr | sample@em | | Local Source | Save Delete Cancel |
| Add | | | | |

Note: Any manual additions made to provider information will appear with a data source of "Local Source", and will be visible to any user that has access to the Provider Directory.

## Adding a New Provider

To add a new provider to the local Provider Directory, select the **Add Provider** option from the *Directory Mode* dropdown menu on the *Provider Directory* search page. Choose the appropriate provider type (Individual or Entity), and enter a valid 10-digit NPI number in the appropriate box.




Click the **Add** button and you will be directed to the **View Individual Provider** (or **View Entity Provider**) screen, where other information can be added.

# PROVIDE FEEDBACK

The **Provide Feedback** link in the upper right-hand corner of every screen is used to submit questions, suggestions, or problems. A support team regularly reviews all feedback and responds appropriately.


Each message will automatically include information about the page and patient currently being viewed. Therefore, the user should not include patient demographics or other identifying information.