HealtheConnections Secure Messaging User Guide

Important: Secure Messaging was formerly Direct Mail.

Authorized Users can securely communicate protected health information (PHI) with other healthcare providers using HealtheConnections' HIPAA-compliant Secure Messaging application. This feature empowers users to exchange information safely and efficiently, such as sending and receiving referrals, to support care coordination and help organizations meet quality metrics.

Our solution includes a Provider Directory, making it simple to find other authorized healthcare providers able to receive secure emails. A user can quickly address secure messages by selecting addresses and may include attachments in several formats. If a provider uses a different secure mail solution and it is linked to the HealtheConnections service, correspondence can also be sent by simply knowing the provider's secure email address.

The quick links below allow users to jump directly to the sections most relevant to their needs.

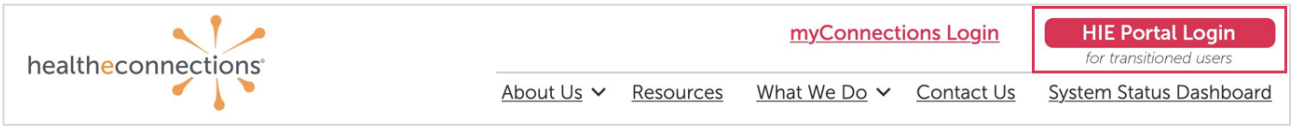
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HealtheConnections Health Information Exchange (HIE) Login

Secure Messaging and the Provider Directory is available within HealtheConnections HIE portal.

Access the HealtheConnections HIE portal at **https://www.healtheconnections.org/**, click the HIE Portal Login button in the top right corner.



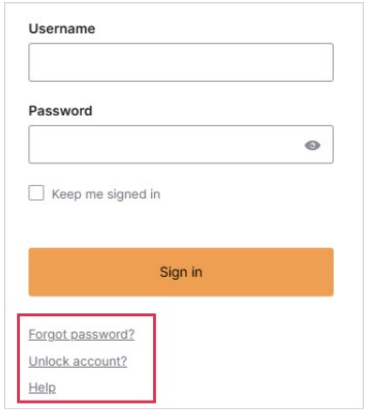
A new window will open to **https://portal.prod.healtheconnections.org**. At the HIE portal login screen, enter the assigned HealtheConnections Username and Password (the same credentials used to access myConnections). Click Sign In, then complete the standard Okta Multi-Factor Authentication (MFA) process.



Password Reset/Account Unlock

To reset a password or unlock an account, please contact the HealtheConnections Support team at **support@healtheconnections.org** or 315.671.2241 extension 5 for assistance.

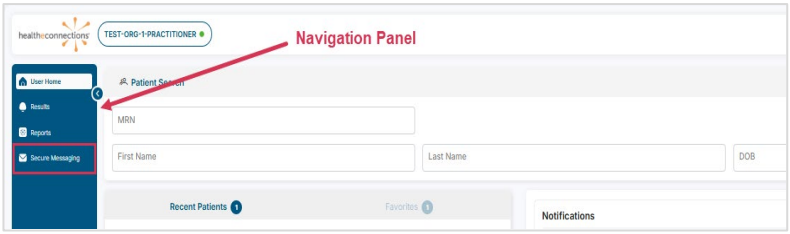
The Forgot password, Unlock account, and Help features are currently enabled but will change in the near future.



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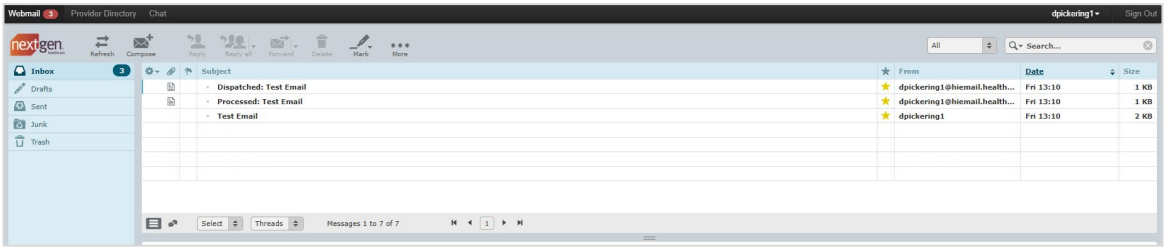
Secure Messaging Navigation

After logging into the Portal, an Authorized User is directed to the User Home page. To access Secure Messaging, select the Secure Messaging icon on the Navigation Panel.



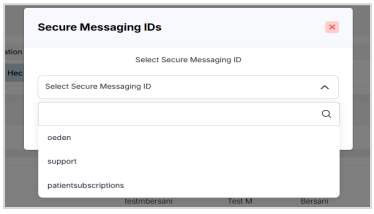
Secure Messaging Access

If an authorized user is configured for only one Secure Messaging account, once the icon is selected in the Navigation panel, a new tab will open directly into the Secure Messaging mailbox. View and send messages and search the Provider Directory here.



Authorized Users with Multiple Accounts

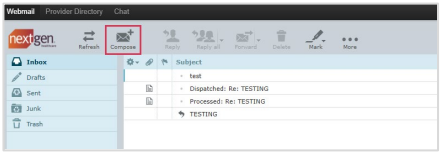
If an authorized user is configured with multiple accounts, once the icon is selected in the Navigation Panel, a selector screen appears. On this screen, the authorized user should select the appropriate account, then click continue.



A new tab will open into the selected Secure Messaging mailbox. View and send messages and search the Provider Directory here.

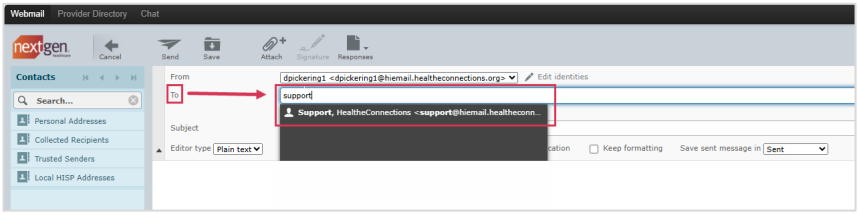
Composing a Secure Message

Click Compose on the top banner of the mailbox. It's important to note that a secure message **can only** be sent to individuals with a secure messaging email address. If a message is sent to an individual that does not have a secure messaging email address, it will not be delivered.



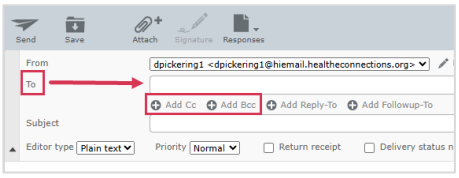
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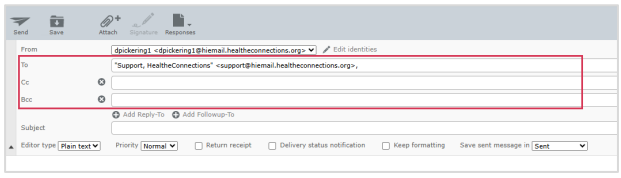
Enter the recipient's secure messaging email address in the To field. If the recipient's secure messaging email address is not known, and they are in the local provider directory, the To field will assist in finding the address. Begin typing the recipient's last name.



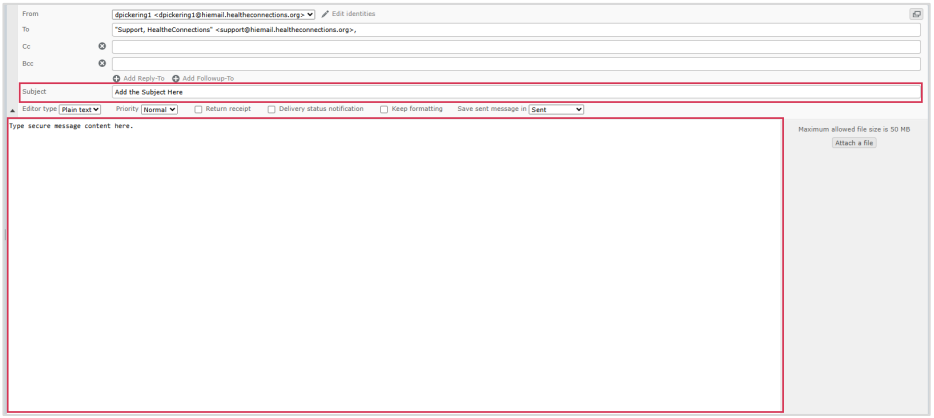
If the provider's secure messaging email address was located through either of the **Provider Directories search functions**, the recipient email will already be populated in the To field of the email that is being composed.

Add additional recipients in the To, Cc, or Bcc fields if needed. To access the Cc or Bcc fields, click on the + icon in front of either option. Remember to separate each recipient's secure messaging email address with a comma.



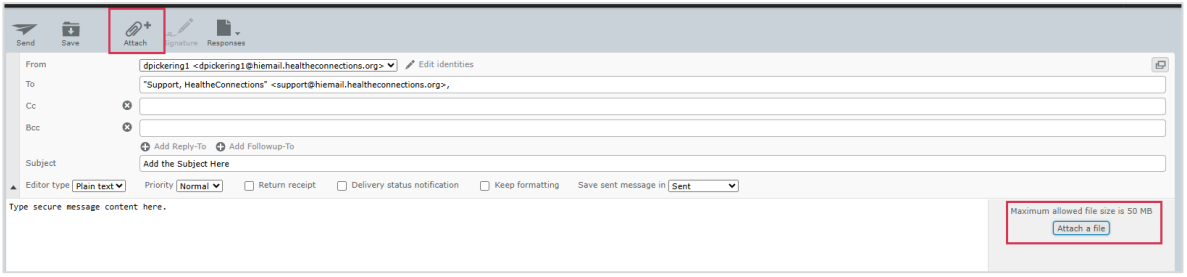


Type the subject and message, then click Send when ready.



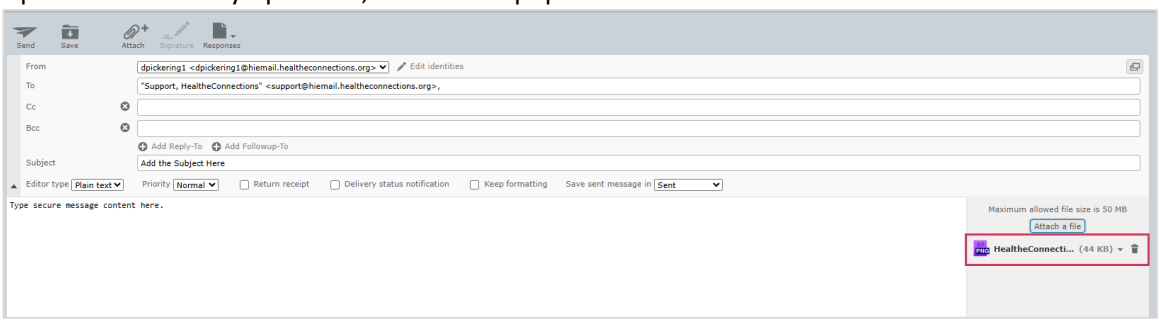
Attaching Files

To include an attachment in the message, click on Attach in the ribbon above the message or on the Attach a file within the message.

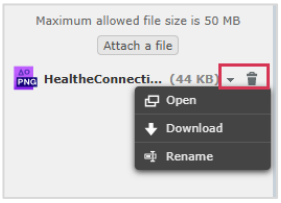


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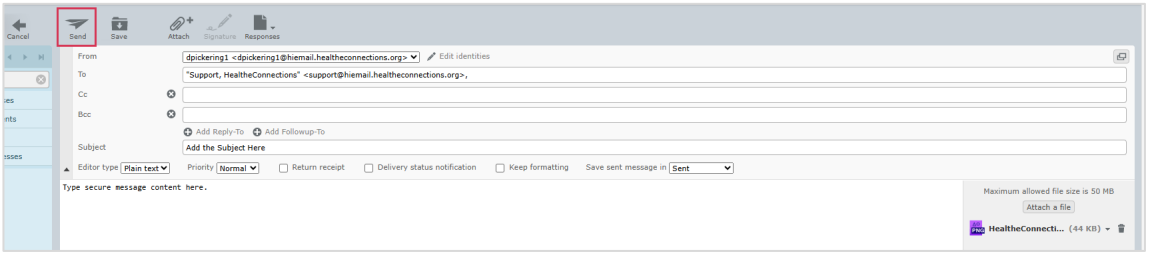
Once clicked, a dialogue box will appear. Locate the file that needs to be attached, select the file and click Open. If successfully uploaded, the file will populate with an indicator below the Attach a file button.



To remove the file, click on the Trash icon to the right of the attached file. Click the dropdown arrow, to open, download, or rename the file.

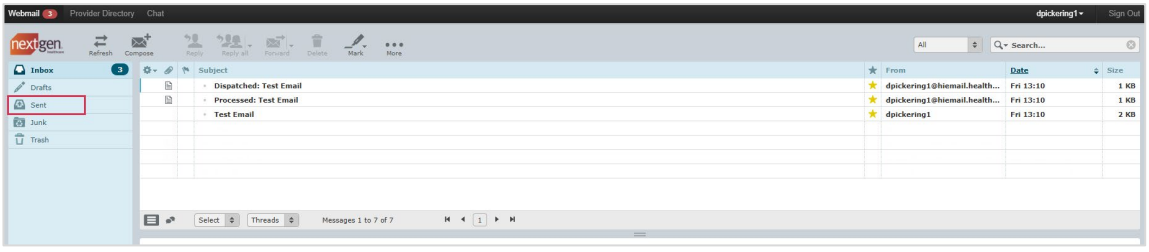


Once all files have been uploaded, the email is composed, select the Send icon to securely send the message.



Sent Messages

To view a list of sent messages, click on the Sent folder on the main navigation of the Secure Messaging account.



Receiving Messages

Email notifications will be sent to a regular email account, unless this **feature is turned off**. The notification will be sent from **noreply@hiemail.healtheconnections.org** with the subject: You have received a Direct Message.

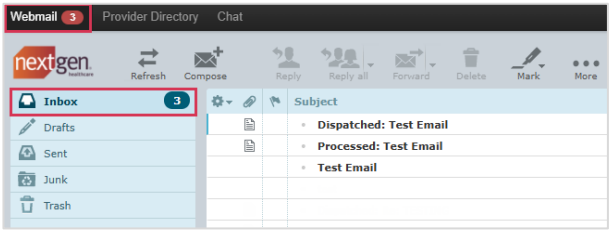
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The notifications will be similar to the following message:

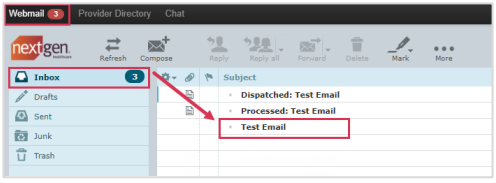
> ***Dear Your Name Here,***
>
> ***You have received a new DIRECT message. Please log in to view your message at URL will be provided here.***
>
> ***Once you have logged in, please click the Direct Mail button to view your Direct Messages.***
>
> ***If you have any questions about the Direct message that you've received or need assistance logging in, please contact HealtheConnections Support.***
>
> ***Thank you,***
> ***HealtheConnections Support***
> ***Email: support@healtheconnections.org***
> ***(P) 315-671-2241 x5***
> ***(F) 315-407-0053***

To view the message, click on the link in the notification email or by **logging into the HealtheConnections portal** to access Secure Messaging.

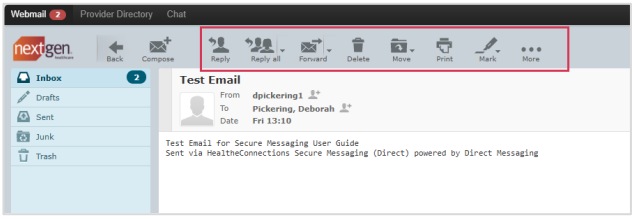
Once in Secure Messaging, an indicator will appear next to the Inbox and Webmail icons as to the number of new messages. Additionally, line items of a message are available here, including a Subject, Sender, Date, Size, and file, if attached.



To view the message, double-click the message in the Subject area. This will open the message.

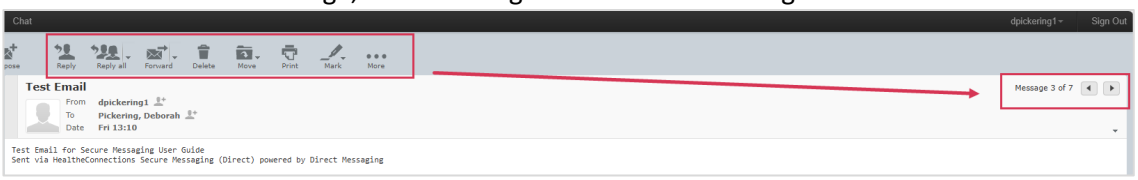


After reading the message, the following actions are available: Reply, Reply All, Forward, Delete, or Print the message. Select the appropriate icon and follow the prompts.

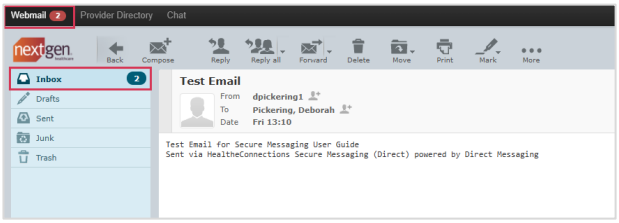


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To move to the next message, use the navigation arrows on the right side of the screen.

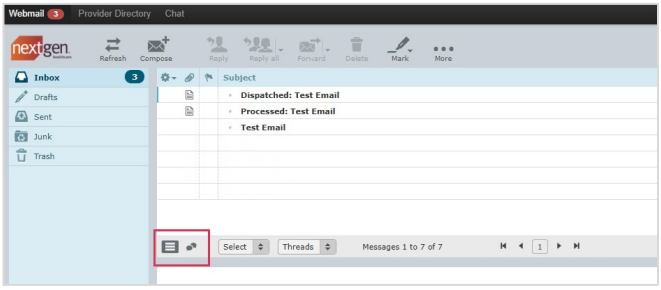


To close the message, click Webmail or on the Inbox folder to return to the main navigation screen.

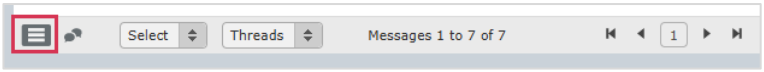


Viewing Messages

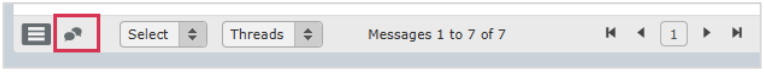
There are two options for a mailbox layout. To alternate between viewing options, select the appropriate icon in the lower left of the screen.



- List View allows the user to see messages as an individual line item

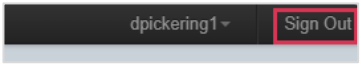


- Thread View allows the user to follow a conversation of messages by grouping them together.



Logging Out

For security purposes, always sign out of Secure Messaging rather than simply closing the application. Click on Sign Out and then close the application.



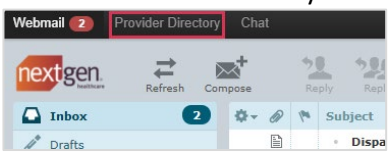
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Provider Directory

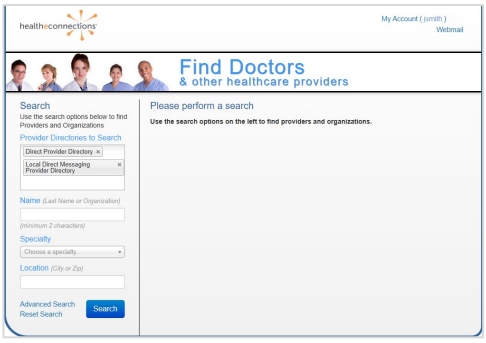
There are two methods to search for a providers' secure messaging email address:

- Global Provider Directory
- Local Provider Directory

Click on Provider Directory.



This will navigate to the Provider Directory. By default, the Direct Provider Directory and the Local Direct Messaging Provider Directory are loaded.



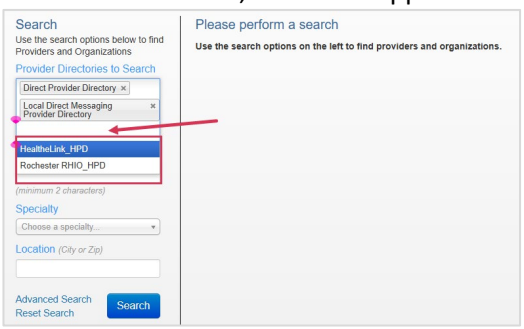
To return to Secure Messaging at any time, select Webmail in the top right of the screen.



Global Provider Directory: Searching

The Global Provider Directory includes all available New York State Qualified Entities (QEs). The Provider Directories to Search function allows the user to enter search criteria for other provider's secure messaging email addresses. This section must contain at least one QE when performing the search.

To search additional QEs, put the cursor in the white box, and click. A drop-down box of additional QEs will appear. Following the QE name HPD is listed for Healthcare Provider Directory. Click on the QEs that you would like to search, and it will appear in the list included in the Provider Directories to Search box.

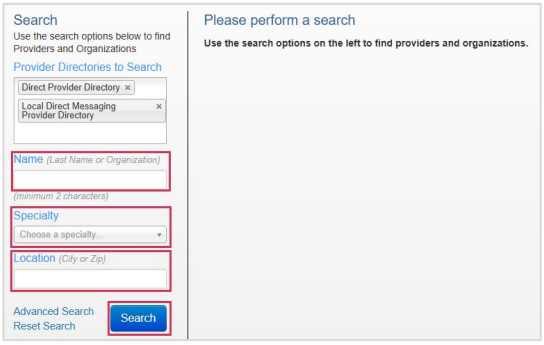


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The remaining search criteria options are available to narrow the search. **At least one of the search criteria options must be used in conjunction with a QE for a search to be executed.**

Search criteria options are:

- Name (Last Name or Organization, minimum 2 characters)
- Specialty (Select from menu)
- Location (City or Zip)



Global Provider Directory: Composing a Message

Here is an example of how to use the search feature to compose a message.

A search was performed below using the following search criteria:

- Provider Directories to Search: Direct Provider Directory, Local Direct Messaging Provider Directory, HealtheLink_HPD, Rochester RHIO_HPD
- Name: Blank
- Specialty: Blank
- Location: Syracuse

The number of matching providers or healthcare organizations will show at the top and bottom of the page. Use the buttons to move through the pages.

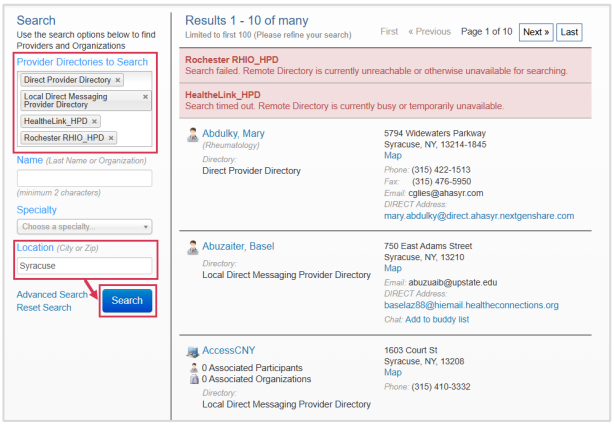


The search results display provider or healthcare organization details, including:

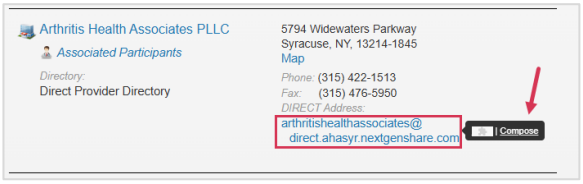
- Provider's name
- Affiliated participants and organizations
- Associated directories
- Physical address
- Phone
- Fax numbers
- Regular email address
- Secure messaging email address

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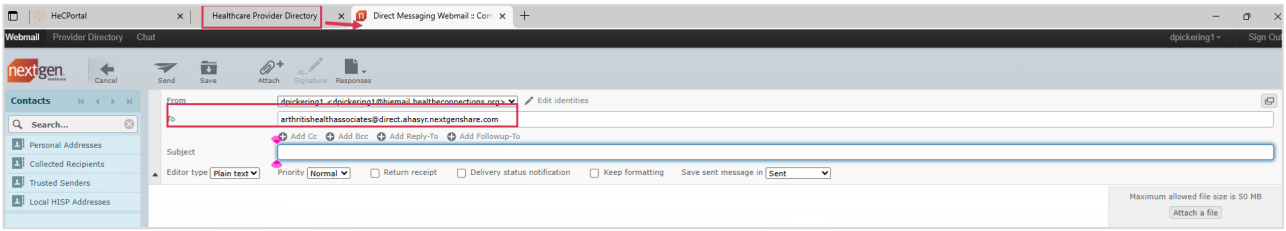
- Search results from other QEs: Rochester RHIO_HPD, HealtheLink_HPD



Once the correct provider is located, select the provider's email. A screen will populate, next to the window. Click compose to launch a message composition.

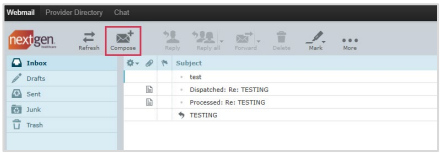


A new window will appear, with the secure messaging email address listed in the To field.

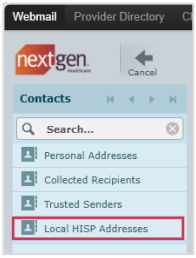


Local Provider Directory: Searching and Composing a Message

Click on the **Compose** button.

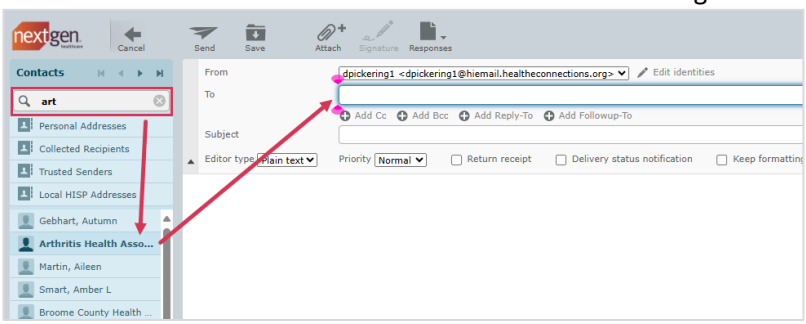


In the new screen, click Local HISP Addresses and a complete list will appear of all HealtheConnections Providers only.



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Type at least three (3) letters of a Provider's name in the Search box to filter names. To send a message, double-click on the Provider's name and the secure message email address will appear in the To field.



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Additional Features

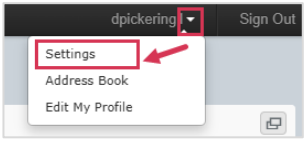
While all features and configuration settings are not made available in this guide, we have provided the more commonly used or requested features to support Secure Messaging users.

Assigning a Delegate

Within Secure Messaging, a delegate is an individual with a valid provider or staff account who is granted access to another account, which can be for a provider or organization. The delegate uses their own credentials to log in and then has the means to switch over to the delegator's account.

Delegate relationships are strictly defined and do not cascade. For example, if a provider A has delegated his account to Provider B, and Provider B has delegated his account to Provider C, those delegates may only access their own accounts and the delegator's account. This means that Provider C has no access to Provider A's account. Similarly, if a provider has delegated his account to four delegates, those delegates may only access their own account and the provider's account – they have no access to the other delegate accounts associated with that provider.

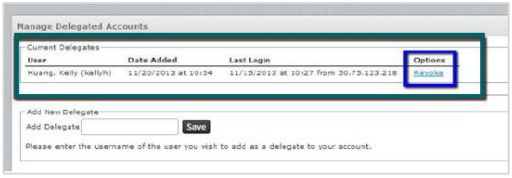
Once logged in, click the down arrow next to the users Secure Messaging username, which is located at the top, right corner of the screen. Click on Settings**.**



Select Settings menu. Click on Delegation. Enter the Secure Messaging Username in the Add New Delegate box and click Save. **Important**: Enter the USERNAME and NOT the direct email address.

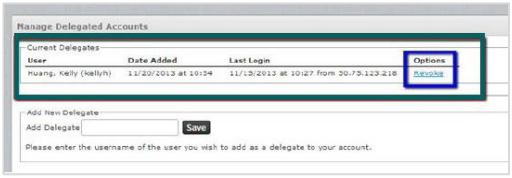


Upon clicking Save, the screen will refresh and the Username information entered will appear under Current Delegates.



Removing a Delegate

To remove a delegate, click Revoke next to the user's information and the delegation relationship will end.



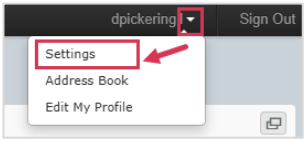
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Notifications Settings

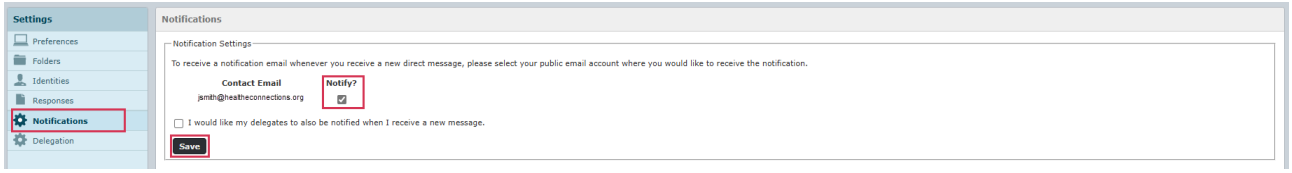
Notifications in Secure Messaging are emails that are sent to an email account outside of the Secure Messaging application notifying the User that a Secure Message has been received. The default notification setting is turned on during initial configuration and users will receive notifications, similar to the email below, unless the feature is turned off.

> **Dear Your Name Here,**
>
> **You have received a new DIRECT message. Please log in to view your message at URL will be provided here.**
>
> **Once you have logged in, please click the Direct Mail button to view your Direct Messages.**
>
> **If you have any questions about the Direct message that you've received or need assistance logging in, please contact HealtheConnections Support.**
>
> **Thank you,**
>
> **HealtheConnections Support**
> **Email: support@healtheconnections.org**
> **(P) 315-671-2241 x5**
> **(F) 315-407-0053**

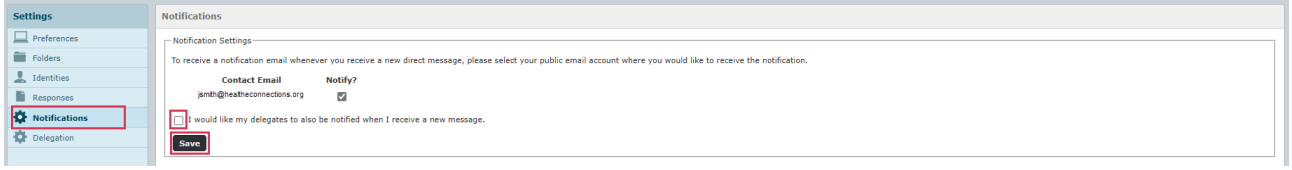
Once logged in, click the down arrow next to the Secure Messaging username, which is located at the top, right corner of the screen, then click on Settings.



In the Settings Menu, click Notifications. There will be a Contact Email reflecting the non-direct public email address. Uncheck the Notify? box to disable notifications. The box should be blank if notifications are disabled. Click Save.

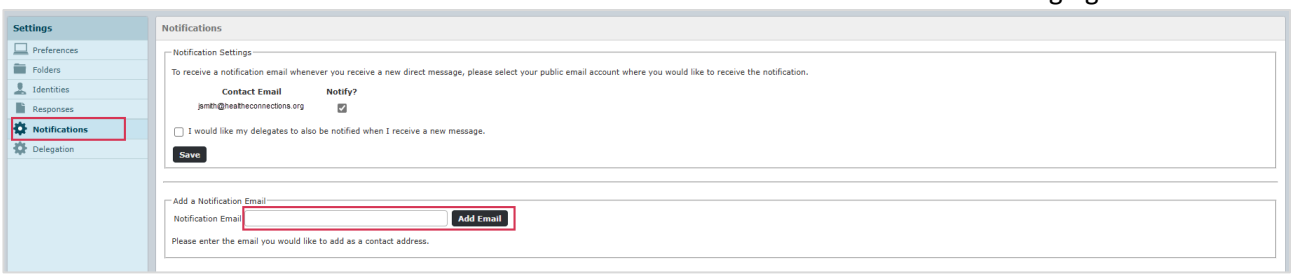


Uncheck the Delegate Notification checkbox (making the box blank) to turn off notifications being sent to delegates. Click Save.



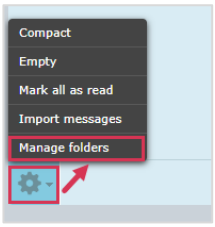
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To add a different or additional email account for notifications, enter a public email address under Add a Notification email box and click Add Email to save. This should NOT be the secure messaging email address.

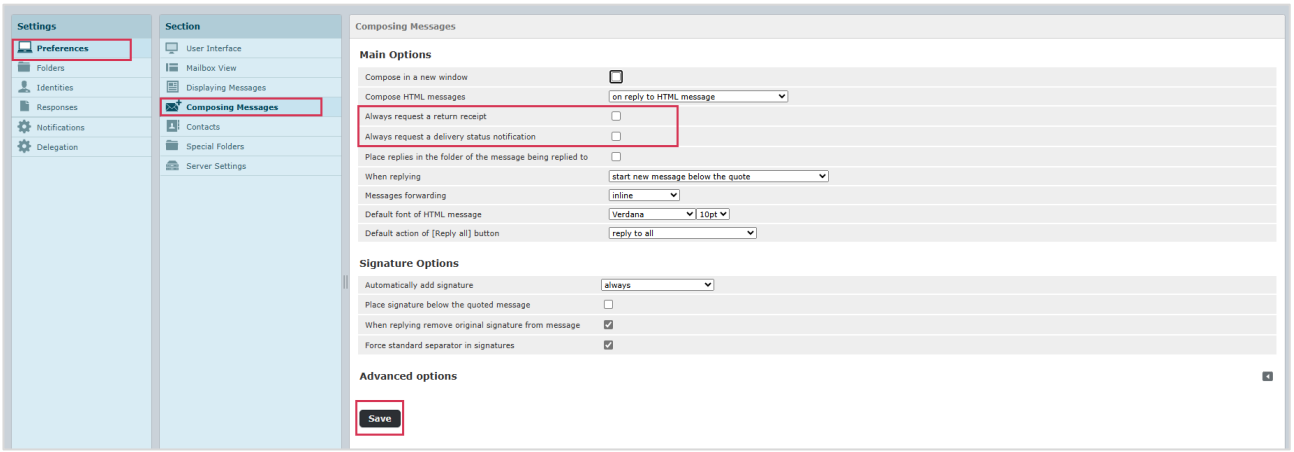


Return Receipt and Delivery Status Notifications

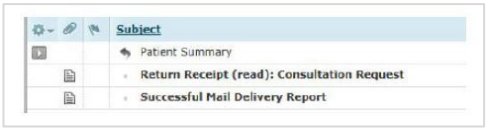
To request a return receipt and/or request a delivery status notification, click on the gear widget at the bottom left hand corner. Then select Manage Folders.



Select Preferences in the Settings Menu, then Composing Messages in the Section Menu. Select the appropriate box for the feature to enable, then click Save.



If the Return Receipt is checked, when a message has been opened by the recipient, the sender will receive a message indicating the status of the message that was sent.



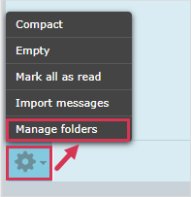
If the Delivery Status notification option is checked, the sender will receive a message indicating either Successful or Unsuccessful Mail Delivery. If an Unsuccessful Mail Delivery notification is received, the message has not been processed or sent. Examples:

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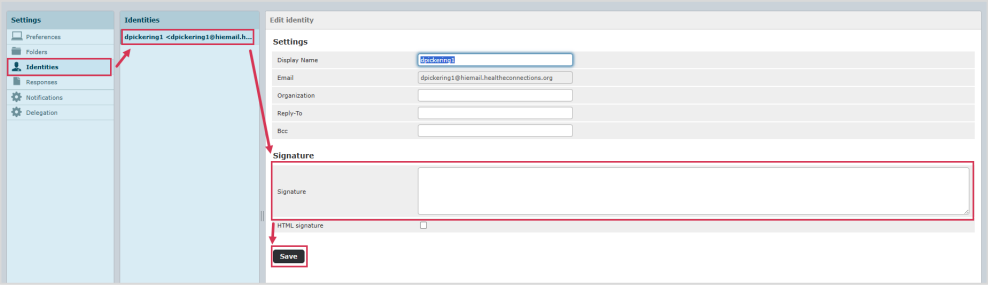
Personalized Signature

To insert an electronic signature automatically in each message, click on the gear widget at the bottom, left hand corner and then select Manage Folders.



In the Settings Menu select Identities. Choose the identity to associate.

Click Identities, click the email to associate, add the signature to the signature field, and click save.



Each time a new message is composed, the signature will be automatically added to the message.

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