

# HealtheConnections Direct Mail and Provider Directory

Authorized Users can communicate protected health information (PHI) with other healthcare providers using our HIPAA compliant application. Using this functionality can assist in meeting Quality Payment Program measures.

## HealtheConnections Direct Mail

HealtheConnections Direct Mail empowers users with HIPAA-compliant communication and collaborating options, such as sending and receiving referrals, for improved coordination of care.

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 addressees and may include attachments in several formats. If a provider uses a different Direct or 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.

### Logging In

You can access myConnections from our website https://www.healtheconnections.org



Or alternatively in your internet browser at https://hie.healtheconnections.org/login

## Logging-in to myConnections



usernames completen and treatn	nections is recorded and subject to audit. Unauthorized access is prohibited. Sharing of s and passwords is also prohibited. HealtheConnections is not responsible for the less or accuracy of information. Users are responsible for independent examination, diagnosis nent of a patient.
The inform informatio be viewing or patient Office for I the NYS M	nation accessed through HealtheConnections is confidential and may contain sensitive patient m. By logging in and accessing patient records in the health information exchange, you may patient records that contain HIV/AIDS protected under Article 27-F of NY Public Health Law records from facilities licensed or operated by the NYS Office of Mental Health for the NYS People With Developmental Disabilities which may not be re-disclosed except as permitted by lental Hygiene Law.
	Lisername
	Password
	Log In
	Log In Forgot password?
	Log in Forgot password? Please use your HIE Username and Password to log into myConnections.
you need	Log In Forgot password? Please use your HIE Username and Password to log into myConnections. I help or require a log in for this application, contact the HealtheConnections help de at (315) 671-2241 option 5 or email support@healtheconnections.org.

Type your HealtheConnections Username and Password into the appropriate fields and click Log In.



A green box indicates a valid entry and a red box indicates an invalid entry or nothing entered.

If you cannot recall your password, click the **Forgot Password** link to begin the password recovery process. After 3 unsuccessful attempts to log-in your account will be locked.



If you do not currently have a myConnections account or have been locked out, contact HealtheConnections support at <a href="mailto:support@healtheconnections.org">support@healtheconnections.org</a> or 315.671.2241 x 5 for your credentials.

Click the **Direct Mail** badge to open your mailbox.

DIRECT MAIL	×
DIRECT PROVIDER DIRECTORY	×

### **Searching for Providers**

There are two methods to search for a providers' direct email address (Global Provider Directory and Local Provider Directory).

Click on Provider Directory.



This will navigate you to the **Provider Directory**. If you wish to return to your Direct Mailbox at any time, select **Webmail**.



		My Account (esteed) Webmail
2929	Find Doctors & other healthcare providers	
Search Use the search options below to find Providers and Organizations Provider Directories to Search	Please perform a search Use the search options on the left to find providers and organizations.	
Direct Provider Directory × HealtheConnections_HPD ×		
Name (Last Name or Organization)		
(minimum 2 charactere) Specialty		
Location (City or Zip)		
Advanced Search Reset Search		

By default, the **Direct Provider Directory** and the **HealtheConnections\_HPD** directory are loaded.

## **Global Provider Directory**

The Global **Provider Directory** includes all available Regional Health Information Organizations (RHIOs).

	Web
2 9 2	Find Doctors & other healthcare providers
Search Use the search options below to find Providers and Organizations	Please perform a search Use the search options on the left to find providers and organizations.
Provider Directories to Search	
Direct Provider Directory ×	
HealtheConnections_HPD ×	Enter your cursor here. Click to type.
Name (Last Name or Organization)	
(minimum 2 characters)	
Specialty	
Choose a specialty	
Location (City or Zip)	
Advanced Search Reset Search	

The **Provider Directories to Search** function allows you to enter search criteria for other provider's **Secure Messaging (Direct)** email addresses. This section must contain at least one RHIO when performing your



search. To search additional RHIOs, put the cursor in the white box, and click. A drop-down box of additional RHIOs will appear. Click on the RHIO that you would like to search and it will appear in the list included in the **Provider Directories to Search** box.

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

Search criteria options are:

- Name
- Specialty
- Location

Did you know? HPD is short for Healthcare Provider Directory.

**Example**: A search was performed below (criteria shown in the yellow box). The search performed was for a provider in the HealtheConnections RHIO, Buffalo RHIO, and Rochester RHIO with the last name of Maxwell (only the first three letters are required). The results show information such as the Providers name, the directory they are in, regular email address and Direct (Secure Messaging) email address that is assigned to that particular provider.

- 1. Click on the email address you wish to use
- 2. Click compose to launch a message composition



A new window will appear (see below), with the Direct email address listed in the **'To'** field (orange highlight).

**Note:** After clicking Compose in the previous step, a new tab opens so that the Provider Directory remains available (yellow highlight).



myConnections	×   33	Healthcare Provider Directory	x 2% Secure Messaging (Direct) Webm x +
$\leftrightarrow$ $\rightarrow$ C $\square$ https:	://hiemail.health	econnections.org/mail/?_ta	ask=mail&_action=compose&_id=14223351695ca36adb27fe6
Webmail Provider Director	ry Chat		
		~ ~ ~	
Cancel Send	Sava A	Hach Signature Providers	
Contacts H	< > N	• From	esteed <esteed@hiemail.healtheconnections.org> 🔻 🖋 Edit identities</esteed@hiemail.healtheconnections.org>
Q	0	То	mikeb@hiemail.healtheconnections.org
Personal Addresses			O Add Co O Add Bee
Local HISP Addresses		Subject	

As an alternative search option, you can search directly from the **Direct Mail** Page.



Click on the magnifying glass icon that is labeled **Providers.** 



In the search box that appears, enter Last Name or Organization and choose either **All Directories** or a specific directory you wish to search.

Click the Search button.



Healthcare Provider Directory - Google Chrome		- 0	~
https://hiemail.healtheconnections.org/directory/searchPop	up.jsp		
Search ise the search options below to find providers and organization	IS		
ame (Last Name or Organization) Fax Number	Directory		
	All Directories 🔹		
dvanced Search Close	s and organizations.		

Results will appear below the search criteria section.

Hover your cursor over the white space area to the right of the email address. Three buttons will appear:

- To
- Cc
- Bcc

Select the appropriate button and a new screen will open where you may begin your message to that provider.

Name (Last Name or Organization)	Fax Number	Directory	
Healtheconnections		All Directories 🔹	
Advanced Search Search	Close		
Search Results 2 result(a) Name	Directory	Direct Address	
Search Results 2 result(s) Name HealtheConnections RHIO of CNY	Directory Direct Provider Directory	Direct Address healtheconnections@hiemail.healtheconnections.org	To Cc Ba

# **Local Provider Directory**

Upon logging in, click on the **Compose** button.





In the new screen, click Local HISP Addresses and a complete list will appear of all Providers in the HealtheConnections RHIO only. Type at least 3 letters of a Provider's name in the Search box to filter names. Double-click on the Provider's name to whom you with to send a message (highlighted yellow) and the Direct email address will appear in the 'To" field of the email.



### Sending a Secure Message

a message

Click on **Compose** if you have not already selected a provider through a directory search method.



Enter the recipient's direct email address in the **'To'** field. If you do not know the recipient's direct email address and they are in the local provider directory, the **'To'** field will assist you in finding the address if you begin typing the recipient's last name.

Ŧ	From	esteed <esteed@hiemail.healtheconnections.org> 🔻 🥒 Edit identities</esteed@hiemail.healtheconnections.org>	
	То	support	
		Mirth Support <mirthorg@hiemail.healtheconnections.org></mirthorg@hiemail.healtheconnections.org>	
	Subject	Support, HealtheConnections <support@hiemail.healtheconnections.org></support@hiemail.healtheconnections.org>	

If you have already located the provider's direct email address 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.

Direct Mail can NOT be sent to non-direct mail addresses.



You may add additional recipients in the **'To'** field or in the **'Cc'** or **'Bcc'** fields. To access the **'Cc'** or **'Bcc'** fields, click on the + in front of either option. Remember to separate each recipient's direct mail address with a comma.

Contacts M < > M	▼ From	esteed <esteed@hiemail.healtheconnections.org> 🔻 🥒 Edit identities</esteed@hiemail.healtheconnections.org>
۹ 🚳	То	"Support, HealtheConnections" <support@hiemail.healtheconnections.org>,</support@hiemail.healtheconnections.org>
Personal Addresses		• Add Cc • Add Bcc
Local HISP Addresses	Subject	
	Subject	

Enter the subject of your email in the 'Subject' field and begin creating your email message.

When finished composing your message, click Send.

Cancel Send Save	Attach Signature Providers	
Contacts 🔺 🛛 🔺 א	• From	esteed <esteed@hiemail.healtheconnections.org> 🔻 🧪 Edit identities</esteed@hiemail.healtheconnections.org>
۹. 📀	То	"Support, HealtheConnections" <support@hiemail.healtheconnections.org>,</support@hiemail.healtheconnections.org>
Personal Addresses		• Add Cc • Add Bcc
When you are	Subject	
finished, click Send	Type your secure email r	Enter Subject here

## **Attaching Files**

You may attach files with your direct email message by clicking on the **Attach** button OR on the **Attach** icon.

ltheconnections			
Carcel Send Save	Attach	e Providera esteed ≪esteed@hiemail.healtheconnections.org> ▼	
Q. (8)	То	"Support, HealtheConnections" <support@hiemail.healtheconnections.org>,</support@hiemail.healtheconnections.org>	
Personal Addresses		O Add Cc O Add Bcc	
Local HISP Addresses	Subject		
	Type your sec	ure empil message here.	Attach a file

When you click on either option, two dialogue boxes will appear: **The Attach a file** dialogue box and a **File Explorer** box. If the **File Explorer** from your computer does not open automatically or closes, you can relaunch it by clicking on the **Choose Files** button.

Locate the file that you would like to attach, click on the file and click **Open**.

	Choose Files No file chosen Maximum allowed file size is 50	МВ	)		
	Upload Cancel				
	HIE_User_Account_request_Coroner_02_J	1/2/2018 9:31 AM	Adobe Acrobat D	499 KB	
letwork	HIE_User_Account_Request_Disaster_Ma	1/2/2018 8:54 AM	Adobe Acrobat D	577 KB	
	HIE_User_Account_Request_OPU_02_Jan	4/20/2017 2:27 PM	Adobe Acrobat D	295 KB	
1.0	Colort the file			2. Click Op	en
1. 3	Select the me			<u> </u>	

The file name will now show next to the **Choose Files** button. Click **Upload**. This will attach the file to your email message.

Choose Files	HIE User Acpt 2016.pdf	
lavimum all	owed file size is 50 MB	



You will see that a file has been successfully attached to a message with an indicator below the **Attach a file** button. If you wish to remove the file before you send the message, click on the **Trash** icon to the right of the attached file.

	Attach a file
POF HIE_U	ser_Account_Reques 👕

When you are finished composing your email message, including any attachments, select the **Send** icon and your message will be securely sent to the addressee.



To view a list of sent email, click on the **Sent** folder on the main navigation of your webmail account.



## A s

Health Connections	Compose		Hard Hard - The Area		Al 🔶	۹	
Ca Linbox	0-0	10	Subject ÷	*	from	Date	Size
Processed			<ul> <li>Re: Patient Summary</li> </ul>		tamiek	Today 12:51	1009
/ Drafts			<ul> <li>Re: test</li> </ul>		tamiek	11/19/2013 15:55	931
🕢 Sent	8		• testing		tamiek	11/14/2013 11:11	68 K
and the second s	6		<ul> <li>testing</li> </ul>		tamiek	11/14/2013 11:14	68 )
Call York			<ul> <li>Re: testing</li> </ul>		tamiek	11/14/2013 13:45	1 4
Trash			Re: Testing		tamiek.	11/15/2013 10:28	958
			Re: Testing processed notification		tamiek	11/19/2013 15:57	943
	11		Re: Testing with an attachment		tamiek	Thu 14:32	993
		•	Select + Threads + Messages 1 to 8 of 8				ī

### **Receiving Messages**

You will receive email notification (similar to below message) in your regular email account unless you turn this feature off (see "turning off notifications").

### 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: <u>support@healtheconnections.org</u> (P) 315-671-2241 x5 (F) 315-407-0053

To view the message, click on the link in the notification email OR log directly into myConnections and click on the **Direct Mail** badge.

**Note:** The notification email that is sent that says, "You have received a Direct Message" is sent from **support@healtheconnections.org.** If you do not receive your notifications, please contact us so that we can check your configuration settings.

An indicator will appear next to the **Inbox** and **Webmail** icons as to the number of new messages. You will also see a line item of a message, including a Subject, Sender, Date, and Size. You may also see if there is a file attached.





To view the message, double-click the message in the **Subject** area. This will open the message. After reading the message, you may Reply, Reply All, Forward, Delete, or Print the message. Select the appropriate icon and follow the prompts. Click **Webmail** or on your **Inbox** folder to return to your inbox.



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



## **Viewing Messages**

There are 2 options for layout for your mailbox:

- 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.

To alternate between viewing options, select the appropriate icon in the lower left of your screen. The setting becomes effective as soon as it is selected.





### **Additional Features**

While all features and configuration settings are not made available in this guide, we have provided the more commonly used and / or requested features for your information.

### Assigning a Delegate

Within **Direct Mail**, 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 his or her 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 your Direct Mail username, which is located at the top, right corner of the screen. Click on **Settings.** 

	kgonyea -	Sign Out
	Settings Address Book	
All	\$ Edit My Profile	٢



Select Settings menu. Click on Delegation.

Settings	Section	User Interface				
Dreferences	User Interface					
Freierences	Mailbox View	Main Options				
Folders	Displaying Messages	Time zone	Auto	•		
Identities	Composing Messages	Time format	07:30			
Notifications	Address Book	Public format	07/04/2010 -			
Delegation	Special Folders	Date format	07/24/2019			
	Server Settings	Pretty dates	<u>«</u>			
	ana correctorige	Refresh (check for new messages, etc.) every 1 minute(s)				
		Browser Options				
Th	read	Handle popups as standard windows				
	read	Register protocol handler for mailto: links				

Enter the Direct Mail **Username** in the **Add New Delegate** box and click **Save**. Please note that you should enter the **USERNAME** and NOT the direct email address.

Webmail Provider Directo	ory Chat
Settings	Manage Delegated Accounts
Preferences	Current Delegates-
Folders	User Date Added Last Login Options
L Identities	4
Notifications	
Delegation	Add New Delegate Add Delegate johnsmith Save Please enter the username of the user you wish to add as a delegate to your account.

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



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Vebmail Provider Direct	ory Chat			cmax@hlemail.ho	altheconnections.org =	Sign Out
Settings	Manage Delegated Ac	counts				
Preferences	Current Delegates			-		
Folders	User	Date Added	Last Login	Options		
L Identity	Huang, Kelly (kellyh)	11/20/2013 at 10:34	11/15/2013 at 10:27 from 50.75.123.218	Revoke		
A Change Passund						
Ma change carations	and the second second second second					
Notifications	Add New Delegate					

#### **Removing a Delegate**

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

#### Notifications

Notifications in Direct Mail are emails that are sent to an email account outside of the Direct Mail application notifying the User that a **Secure Message** has been received. The default notification setting is turned on during initial configuration, meaning that you will receive notifications (similar to the email below) unless you de-activate this feature.

#### 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 : <u>support@healtheconnections.org</u> (P) 315-671-2241 x5 (F) 315-407-0053

#### **Removing Notifications**

Once logged in, click the **down arrow** next to your Direct Mail **username**, which is located at the top, right corner of the screen. Click on **Settings**. In the Settings Menu, click on **Notifications**.



				kgonyea -	Sign Out	
				Settings		
		All	*	Address Book Edit My Profile	0	
lebmail Provider Director	y Chat	and				
Settings	Section	n	User 1	nterface		
Preferences	See Interrace		Main	Ontions		
Folders	Displaying Messager		Mail	options		
L Identities	Composing Message		Time	zone	Auto	•
🔆 Notifications 🔻	Address Book		Time	format	07:30	
Delegation	Special Folders		Date	format	07/24/2019 •	
	Server Settings		Pretty	/ dates	8	
	Server decongs		Refre	sh (check for new messages, etc.)	every 1 minute(s) 🔹	
	Notifications		Brow	ser Options		
			Hand	le popups as standard windows	0	
			Regis	ter protocol handler for mailto: links		
			Save	2		

There will be a Contact Email reflecting your non-direct public email address. Uncheck the **Notify?** box to disable notifications. The box should be blank if notifications are disabled.

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

Click **Save** to save your settings.

Settings	Notifications
Preferences	- Notification Settings-
Folders	To receive a notification email whenever you receive a new direct message, please select your public email account where you would like to receive the notification.
1 Identities	Contact Email Notify?
Notifications	kgonyes@healtheconnections.org 🕑
Delegation	I yould like my delegates to also be notified when I receive a new message.
	Add a Notification Email

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 your Direct Mail address.



Settings	Notifications
Preferences	- Notification Settings-
Folders	To receive a notification email whenever you receive a new direct message, please select your public email account where you would like to receive the notification.
🤱 Identities	Contact Email Notify?
Notifications	kgonyea ghealtheconnections.org 🕑
Delegation	I would like my delegates to also be notified when I receive a new message.  Save  Add a Notification Email  Notification Email  Please enter the email you would like to add as a contact address.

## **Return Receipt and Delivery Status Notifications**

You can configure your Direct Mail to request a return receipt and / or request a delivery status notification.

Click on the gear widget at the bottom left hand corner and then select Manage Folders.



Select Preferences in the Settings Menu and Composing Messages in the Section Menu.



Settings	Section	Composing Messages	
Preferences	Mailbox View	Main Options	
💼 Folders 🔺	Displaying Messages	Compose in a new window	0
L Identities	Composing Messages	Compose HTML messages	on reply to HTML message
Notifications	Address Book	Always request a return receipt	
Delegation	Special Folders	Always request a delivery status notification	0
	Server Settings	Place replies in the folder of the message being replied to	
	21: 1	When replying	start new message below the quote 🔻
1. (	Click	Messages forwarding	Inline
Prefere	eferences	Default font of HTML message	Verdana 🔹 10pt 🔻
		Default action of [Reply all] button	reply to all
	2. Click	Signature Options	
	Composing	Automatically add signature	always 🔻
	Messages	Place signature below the quoted message	
	Messages	When replying remove original signature from message	×
		Advanced options	
		Save in the browser's local storage (temporarily)	
		Save	

Select the appropriate box for the feature you wish to enable and then click **Save.** 

If the **Return Receipt** is checked, when a message has been opened by the recipient you will receive a message in your inbox indicating the status of the message that was sent. If the **Delivery Status notification** option is checked, you will receive a message in your inbox indicating either Successful or Unsuccessful Mail Delivery. If you receive an Unsuccessful Mail Delivery notification, your message has not been processed or sent. Examples:

Q-0	197	Subject
		Patient Summary
		Return Receipt (read): Consultation Request
		Successful Mail Delivery Report

## **Your Signature**

If you choose, you may configure your Direct Mail to insert your 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 you wish to associate.

- 1. Click Identities
- 2. Click the email you wish to associate
- 3. Add your signature
- 4. When you are done click save



Add your signature to the signature field and click save.

Each time you compose a new message, your signature will be automatically added to the message.

## Logging Out

For security purposes, you should always sign out of your **Direct Mail** account rather than simply closing the application. Click on **Sign Out** and then close the application.



# References



The below are utilized in the configuration of Direct Mail accounts or are vital in the process.

### Authorized User Certification and Application

The Authorized User Certification and Application web form is utilized for new users and Direct Mail can be requested as a component of a new user configuration, if the organization is eligible for Direct Mail (see A-8 – Form – DigiCert Declaration of Identity information).

#### **Direct Mail User Form**

If an individual or individuals already have HealtheConnections user accounts and decide at a later date to implement Direct Mail, the abbreviated Direct Mail User form can be used.