ICA THE INTEROPERABILITY EXPERTS™

# Kentucky Health Information Exchange

# Direct Portal Quick User Guide

April 2014

Help Desk: 1 (877) 222-3218
http://khie.ky.gov
http://khiedirect.org

# Change Control Sheet

| Release Date | Changes Made |
|---|---|
| January 2014 | • Original document released |
| April 2014 | • Upgraded for compatibility with CareAlign v3.2.7 |
| | |
| | |

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## What is CareAlign® Direct?

The CareAlign® Direct messaging solution is a HIPAA-compliant clinical communication tool that allows clients to securely send and receive patient information across the healthcare information exchange community. Direct enables user to attach patient information to a secure email and exchange that information across the continuum of care, no matter what electronic health record (EHR) technology is in place at a provider site.

Administered using ICA's CareAlign clinical portal, healthcare providers use Direct to communicate quickly and safely with other providers, which helps them more effectively manage patient referrals, transmit lab results and other time-sensitive information, lower preventable readmission rates, and provide more comprehensive patient care.

## About this User Guide

This is intended to be a quick reference guide for ICA's CareAlign® Direct messaging solution. You may read the guide sequentially for an overview of Direct and its capabilities or use the Table of Contents to find step-by-step instructions for completing specific tasks. Select features can only be accessed by designated administrators. If you have questions about your permissions, please contact your designated help desk.

Throughout the guide you will notice the following:

- Steps for completing specific tasks are presented in numerical order (1, 2, 3)
- Screenshots are labeled alphabetically (A, B, C, D, E)
- Notes are included throughout to provide helpful information about the application. Each note is introduced by a light bulb 💡.
- Hyperlinks appear in red text and allow you to read more about a topic by linking to additional information within the guide.

This documentation was developed to be wholly compatible with version 3.2.7 of the CareAlign portal. If you are running an alternate version of the software and have difficulty finding the answers to your questions, contact your designated help desk for assistance. You may also speak with your client representative about upgrading to the latest version of the CareAlign portal to take advantage of any new features and/or improvements that have been added since your last upgrade.

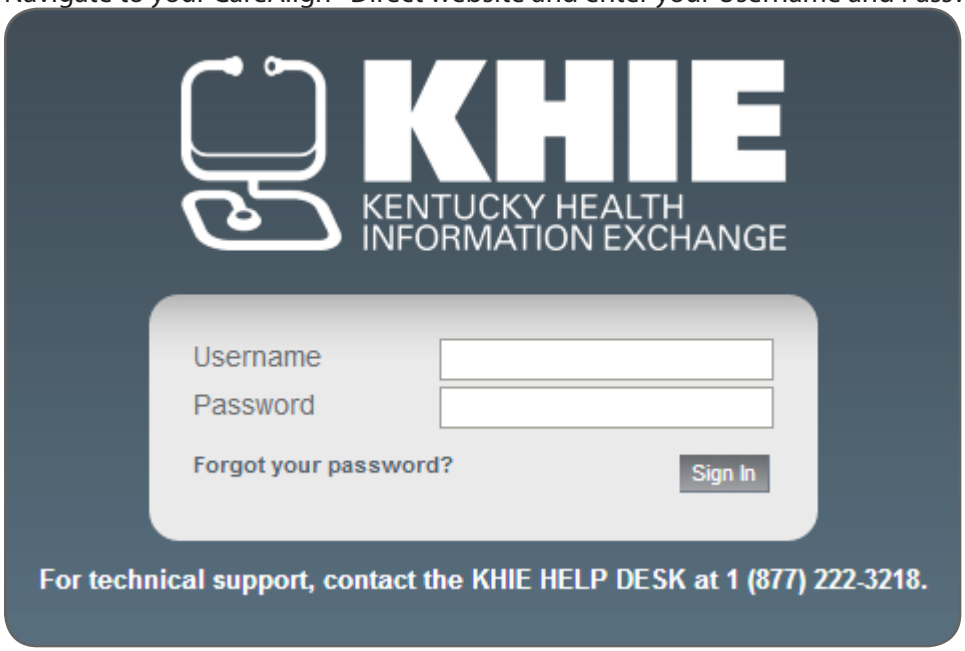
# Getting Started

In this chapter, you will learn to do the following:

- Log in to the system
- Create or change your password
- Set or change your security questions
- Recover a forgotten password
- Navigate Direct

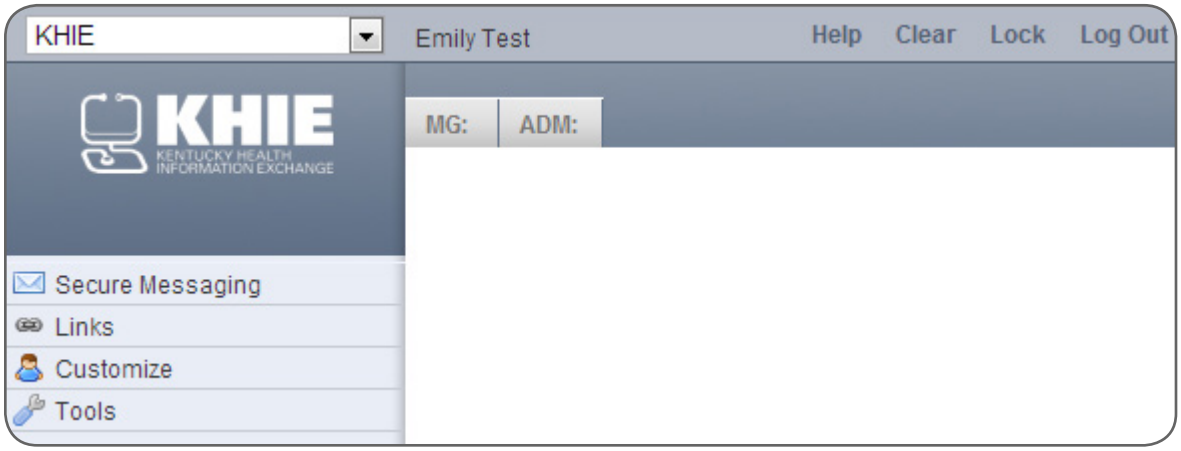
## Log in

1. Navigate to your CareAlign® Direct website and enter your Username and Password.




*Your sign-in interface may not look identical to the one above, but it will look and function in the same way.*

2. You will see the Direct home view.

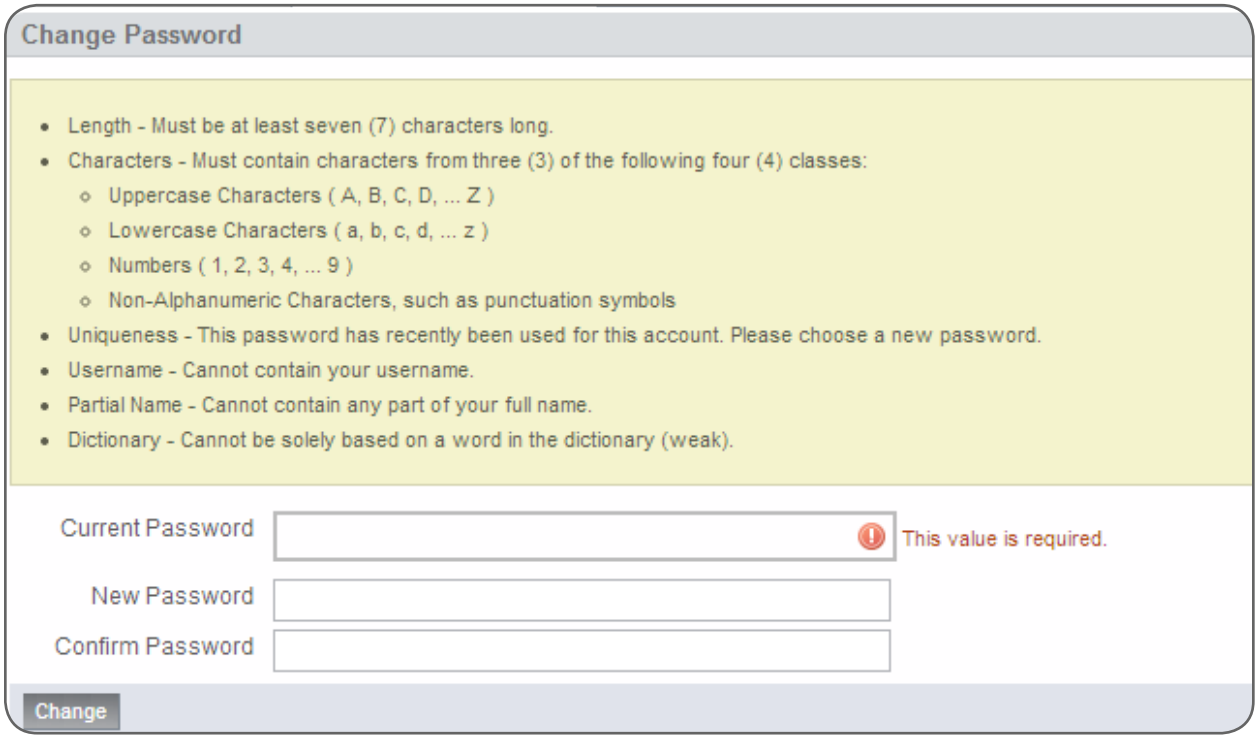


## Create or Change Your Password

There are three ways to arrive at the **Change Password** screen:

- The first time you log in to Direct , you will be prompted to change your password before you are sent to the home view.
- When your password expires, you will be directed to the screen automatically.
- To reset your password at any time, use the side navigation to go to **Tools** > **Change Password.**

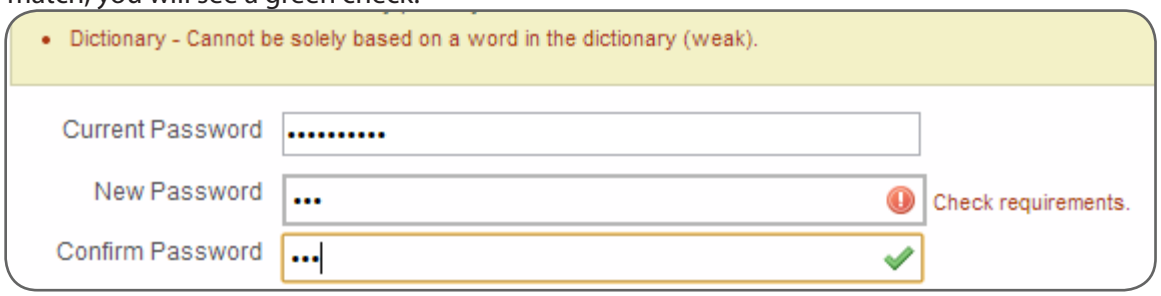
1. Once you arrive at the **Change Password** screen, enter your current password in the **Current Password** field. If this is your first time in Direct, enter the temporary password you were given. In the **New Password** and **Confirm Password** fields, enter the new password you want to use. The two fields must match.




2. Ensure that you meet the password requirements, shown above in yellow:
   - **Length:** Must be at least seven (7) characters long.
   - **Characters:** Must contain characters from three (3) of the following four (4) classes:
     - » Uppercase Characters: (A, B, C, D, ... Z)
     - » Lowercase Characters: (a, b, c, d, ... z)
     - » Numbers (1, 2, 3, 4, ... 9)
     - » Non-Alphanumeric Characters, such as punctuation symbols
   - **Uniqueness:** This password has recently been used for this account. Please choose a new password.
   - **Username:** Cannot contain your username.
   - **Partial Name:** Cannot contain any part of your full name.
   - **Dictionary:** Cannot be solely based on a word in the dictionary (weak).

3. Click **Change.** If your password meets the requirements, you will see confirmation that it was changed successfully.

4. If your password does not meet the requirements, that requirement will turn red. Enter a new password into the **New Password** and **Confirm Password** fields and try again. If your passwords match, you will see a green check.



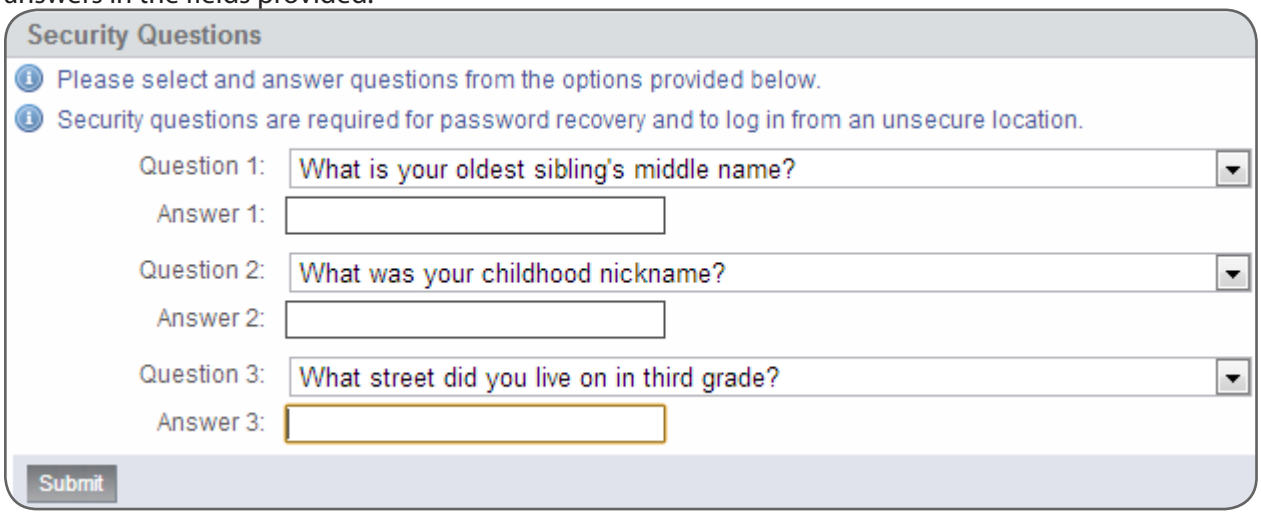

*Clients have the option to determine how often users must change their password.*

## Set or Change Your Security Questions

You will be prompted to set your security questions each time you log in until you do so. You are required to answer one security question to log in to Direct from an unsecured location (if you are using Trusted Networks) and you are required to answer all three questions in order to recover your password. There are two ways to set your security questions:

- The first time you log in, you will be prompted to select and provide answers to your security questions.
- To reset your security questions at any time, go to **Tools > Security Questions** in the side navigation.

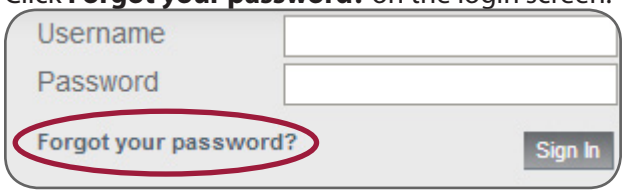
1. Follow the prompts to select three security questions using the drop-down menus and enter your answers in the fields provided.




2. Click **Submit**.

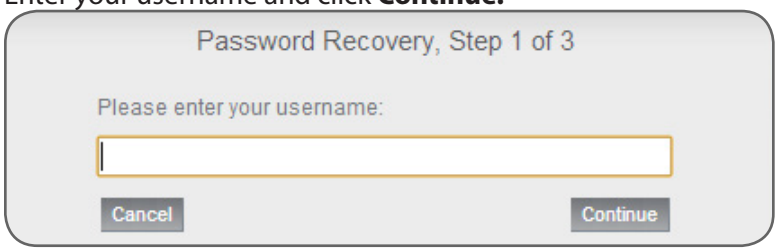
## Recover your Password

1. Click **Forgot your password?** on the login screen.

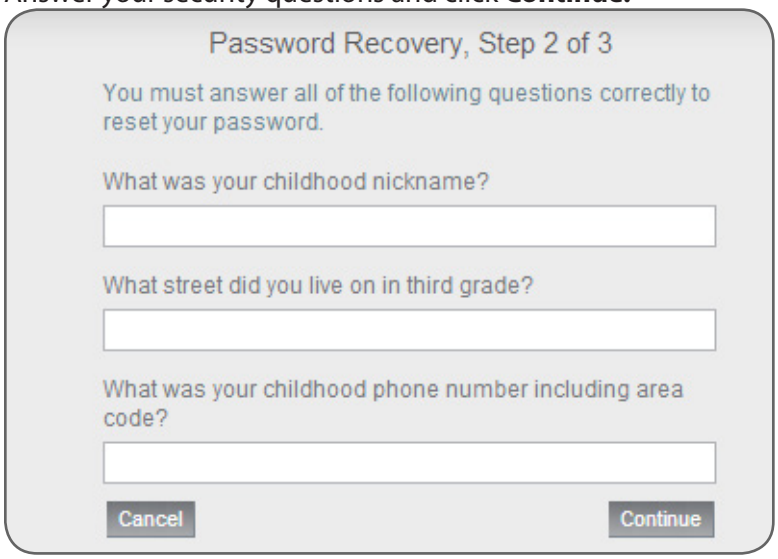


*Your account will be locked after five failed attempts to log in. You can recover your password at any time as long as your account has not been locked.*

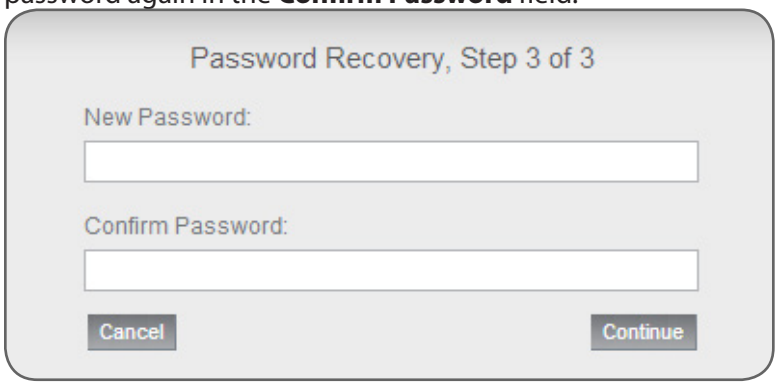
2. Enter your username and click **Continue.**




3. Answer your security questions and click **Continue.**



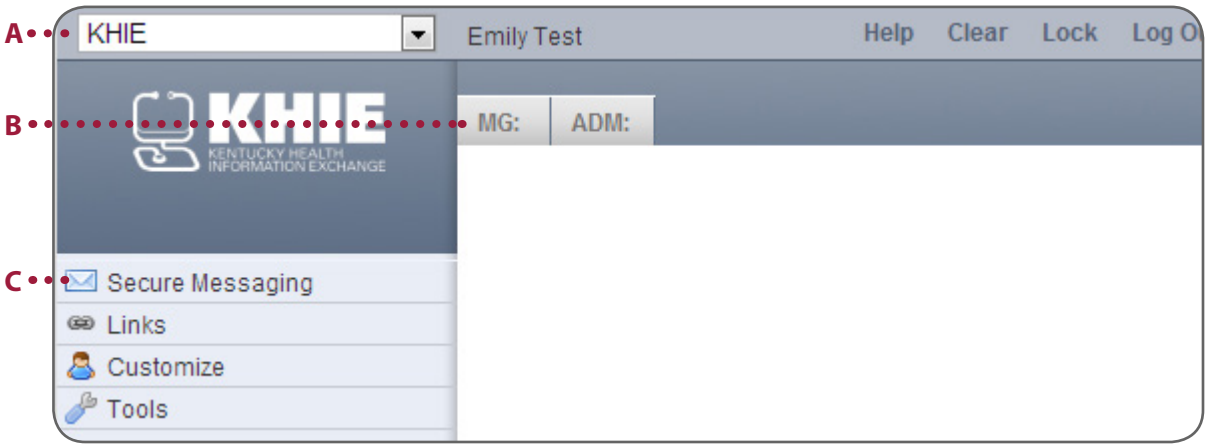

4. Enter your new password, being sure to meet the designated password requirements. Enter your new password again in the **Confirm Password** field.




5. Click **Continue** to confirm your new password and return to the login screen.

## Navigate Direct

When you log in to Direct you will see the home screen, which has persistent (A) top, (B) tab, and (C) side navigation.

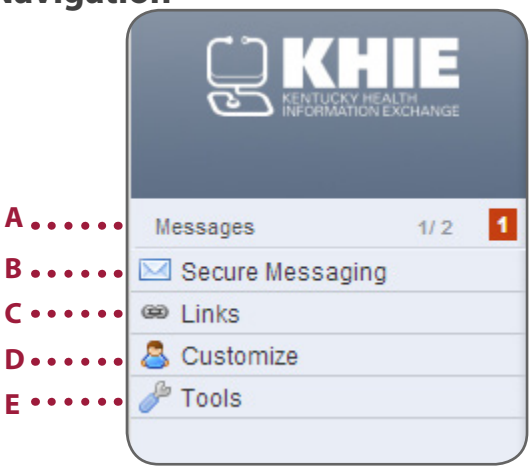



## Top Navigation

A. **Vault selection:** Choose your vault from a drop-down menu that lists all vaults you have permission to access.
B. **User information:** Identify the user currently logged in to the system.
C. **Help:** Access online help documentation (this guide).
D. **Clear:** Clear protected health information from the screen.
E. **Lock:** Lock your account and keep clinical information on the screen until you log back in.
F. **Log Out:** Log out and save.

*Each user must have access to at least one vault. If the user has access to multiple vaults, there must be one default vault. The user's secure messaging mailbox will be tied to the default vault, and the default vault will be automatically selected each time the user logs in to Direct.*

## Side Navigation




A. **Message notification bar:** View the number of new messages/total messages/urgent messages (in red) in your inbox.
B. **Secure Messaging**: Access and use your secure messaging mailbox when you are in your default vault.
C. **Links**: Add and view links to online resources that you use often.
D. **Customize:** Adjust settings to create a customized Direct experience.
E. **Tools***:* Use administrative and account access tools.

*Additional information for each tool in the side navigation is presented in following chapters.*

## Tabs

Tabs display information when you make a selection from the side navigation. For example, the MG, or Secure Messaging, tab will populate once you select **Secure Messaging**. Information remains in the tabs until you **Clear** or **Log Out** of your session.

A. **MG (Secure Messaging)**: Displays your secure messaging mailbox.
B. **ADM (Administration):** Displays administrative tools accessed by selecting **Tools**, **Links**, or **Customize** from the side navigation. The information you will be able to access within this tab will vary based on your administrative privileges.

# Using Secure Messaging

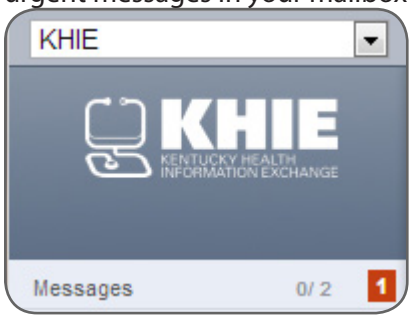
The Direct HIPAA-compliant secure messaging system allows you to securely send and receive patient information across the healthcare information exchange community. If you have access to **Secure Messaging** and have a mailbox, you are able to view, compose, send, and receive messages. In this chapter you will learn to do the following:

- View Messages
- Understand Message Indicators
- Manage and Reply to Messages
- Change your Mailbox Settings

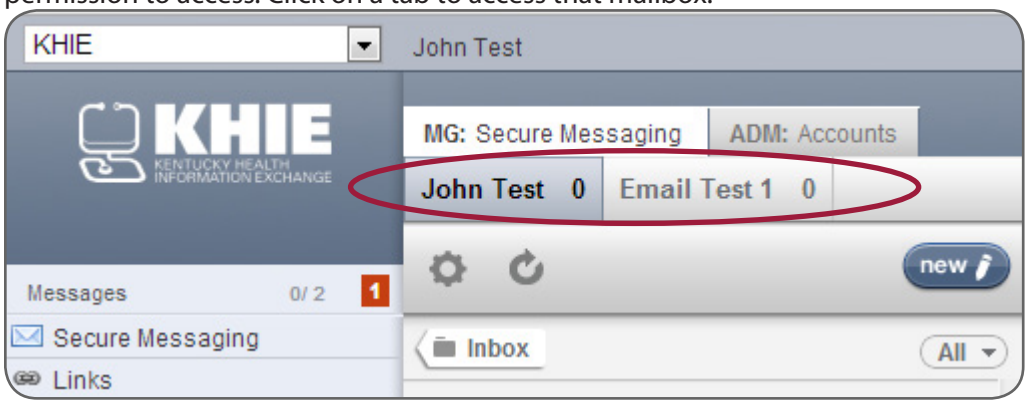
*Only System Administrators and Message Administrators can create secure messaging mailboxes for new and existing users.*

## View Messages

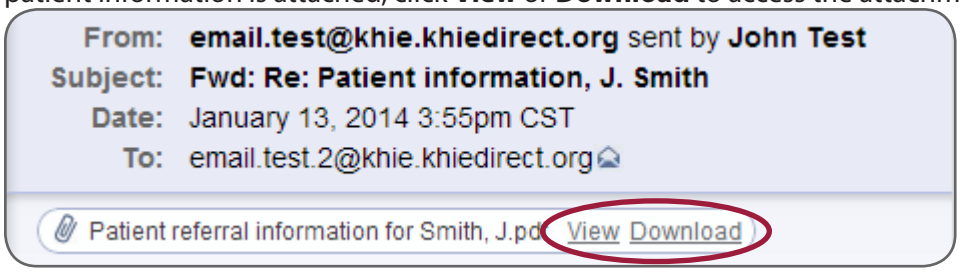
1. When you log in to Direct, you will see a message notification in the side navigation. The number of urgent messages in your mailbox is highlighted in red.



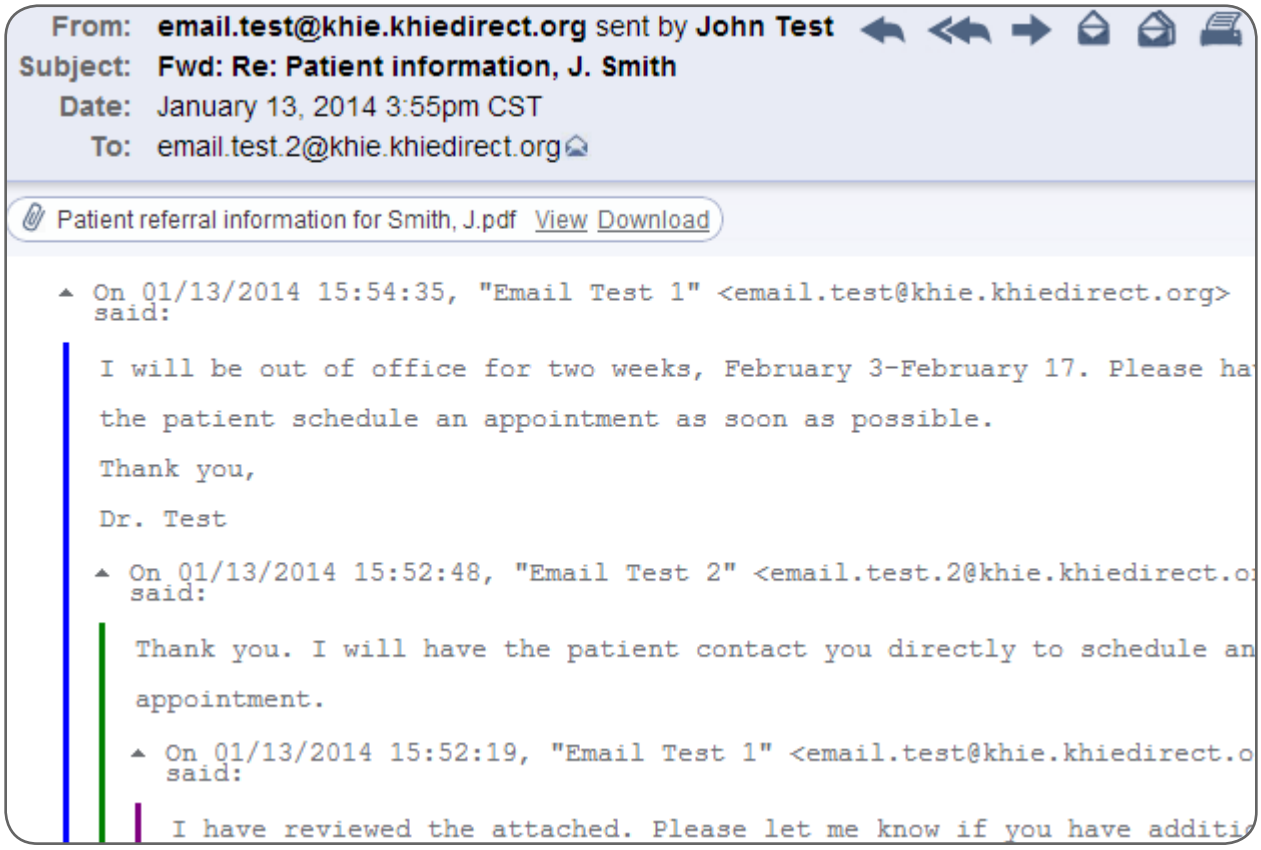

2. Select **Secure Messaging** in the side navigation. You will be taken directly to your default inbox in the MG tab, where you will see a list of your most recent emails and **tabs** for each mailbox you have permission to access. Click on a tab to access that mailbox.



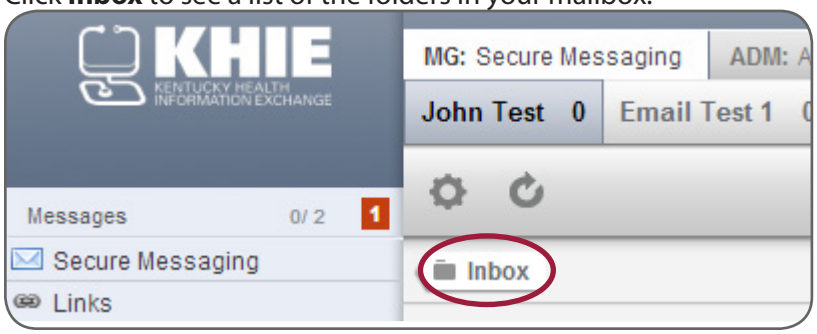
3. Click a message in the email list to display that email in the reading pane to the right of your inbox. If patient information is attached, click **View** or **Download** to access the attachment.



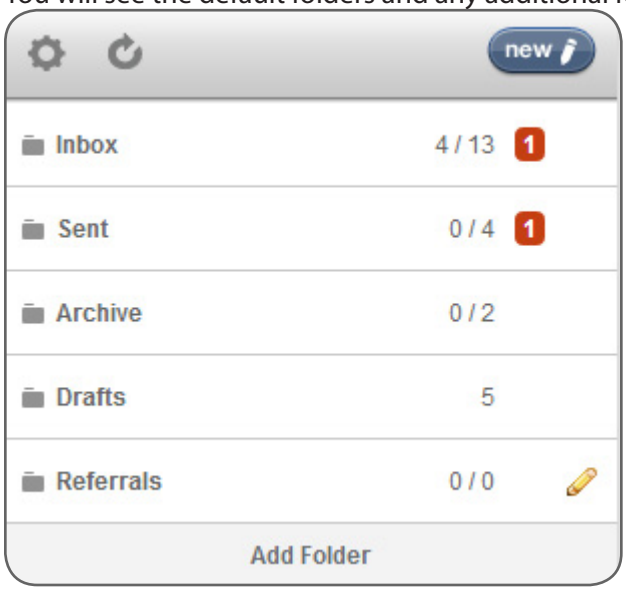

*Emails in Secure Messaging are stored as threads. A message thread includes replies and forwards so that you can easily view entire conversations with one click. Replies and forwards are hierarchically expanded in the message pane and identified by graduating, indented colored bars.*




4. Click **Inbox** to see a list of the folders in your mailbox.



5. You will see the default folders and any additional folders you have created.



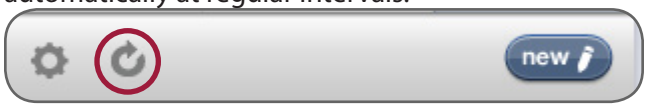

- **Inbox:** Holds all incoming message threads.
- **Sent**: Holds all outgoing messages that have been sent.
- **Archive**: When your inbox exceeds a defined number of messages (the default is 100), messages are automatically moved to your Archive folder. Any messages that have been saved to the patient chart are automatically added to the Archive folder.
- **Drafts**: Holds draft emails that you have saved in your inbox to complete and/or send in the future.
- **User-created folders**: Hold messages you move into a folder (e.g., Referrals). Click **Add Folder** to create a new folder.

*By default, messages are moved to the archive when you have more than 100 messages in your inbox and they are at least sixty (60) days old. Note that messages cannot be deleted. They can be moved to the Archive folder, but will still appear in threads in which they are referenced.*

6. Use the drop-down menu that appears in each folder to filter your messages. Choose All, External, Urgent, or Unread. Note that by default, messages in a folder are sorted by the date of the first message in a thread.

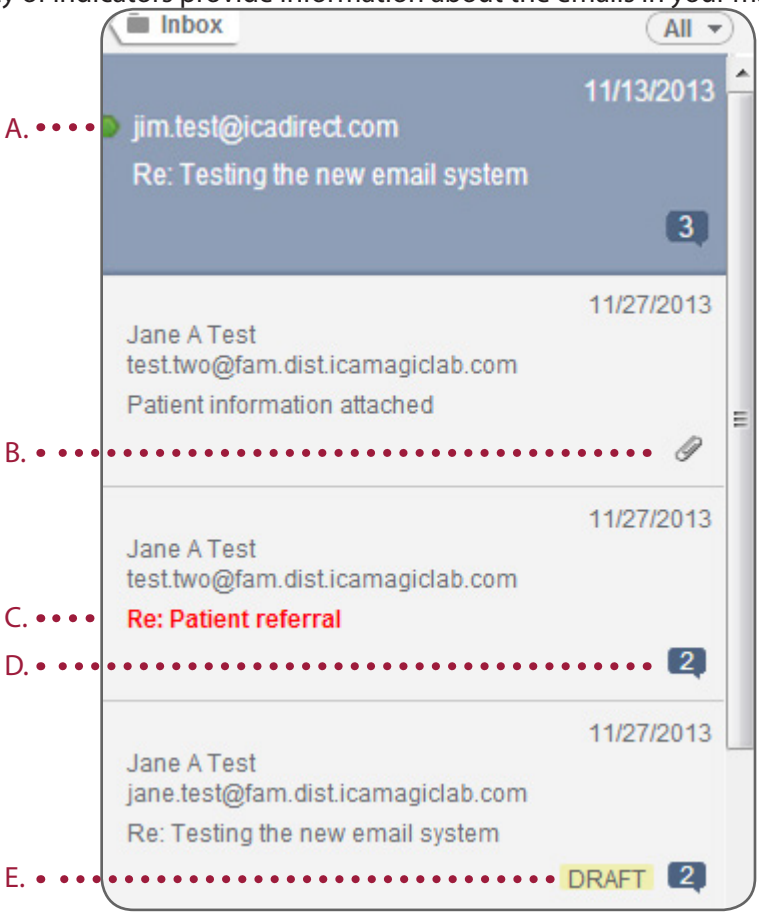
- **All** displays all message threads in the mailbox.
- **External** displays all messages sent from outside your vault.
- **Urgent** displays all message threads that were marked urgent by the sender.
- **Unread** displays all unread message threads.

7. Click the **refresh** icon to refresh your mailbox and load any new messages. Your inbox will also refresh automatically at regular intervals.




## Message Indicators

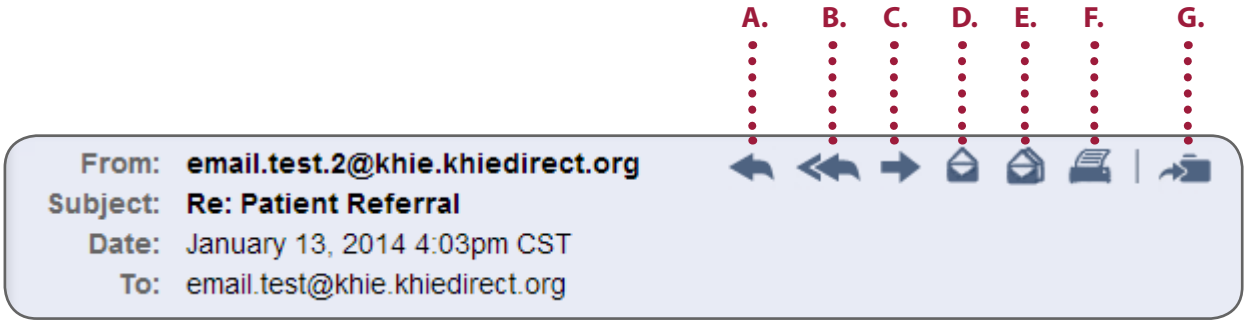
A variety of indicators provide information about the emails in your mailbox:




A. The **green** indicator conveys that the email is a Direct mail message that was sent across vaults.
B. A **paper clip** indicates that there is an upload from the Patient Chart attached to the message.
C. A **red** subject line indicates that an email was marked as Urgent by the sender.
D. A **blue** conversation bubble shows the number of emails contained in a message thread.
E. The word **DRAFT** indicates that a saved draft is attached to the thread (e.g., a reply that has not yet been sent).

## Manage and Reply to Messages

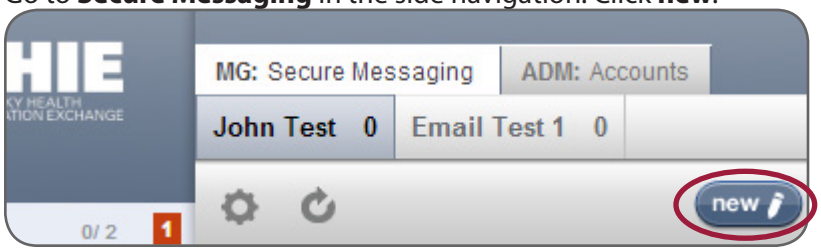
When viewing a message in the reading pane, use the icons at the top of the email to do the following:




- **A.** **Reply** to the sender
- **B.** **Reply to all**
- **C.** **Forward** the email to another recipient
- **D.** **Mark the message as unread**
- **E.** **Mark the thread as unread**
- **F.** **Print** the thread
- **G.** **Move** the message thread to another folder

## Compose and Send a Message

1. Go to **Secure Messaging** in the side navigation. Click **new**.




2. You will see the **New Message** pane.

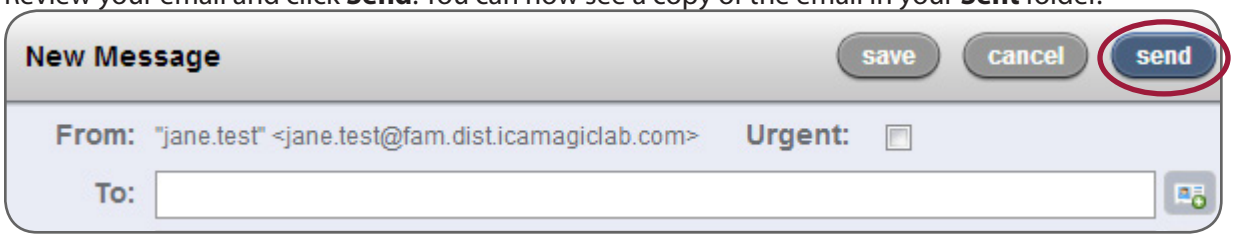
3. Click in the **To:** field to enter a recipient. If you have favorites in your **Address Book**, this field will automatically populate as you type.

*See Use the Address Book and Add Favorite Users for information on populating your address book.*

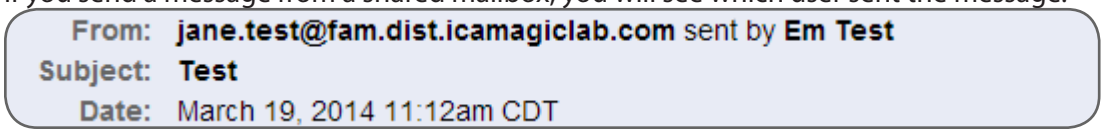
4. Enter the **Subject** and body text. Add any **Attachments**.

5. Check **Urgent** if your message is urgent.

6. Review your email and click **Send**. You can now see a copy of the email in your **Sent** folder.



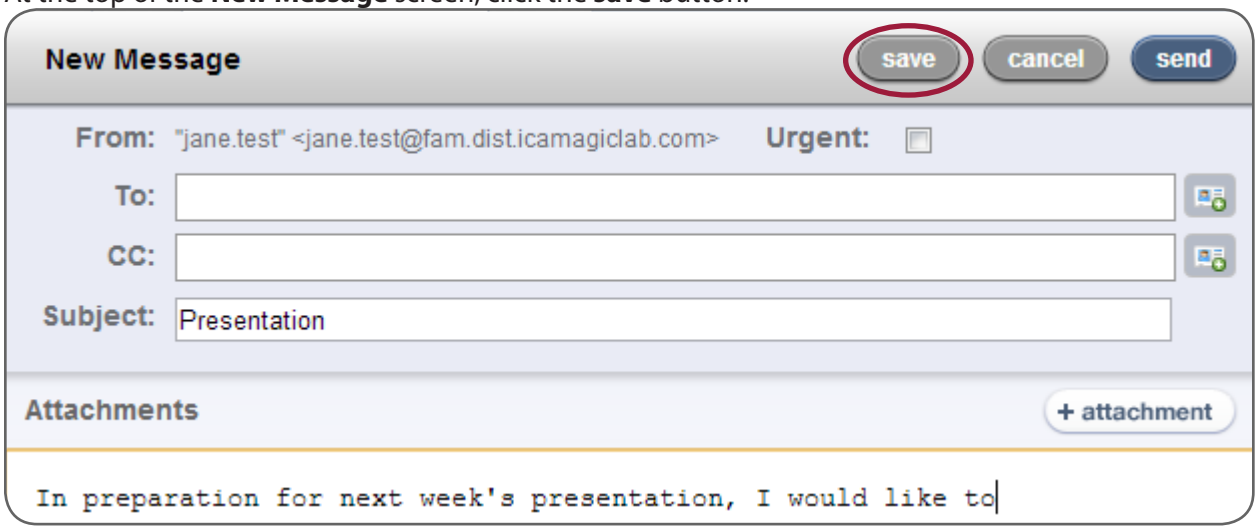

7. If you send a message from a shared mailbox, you will see which user sent the message.



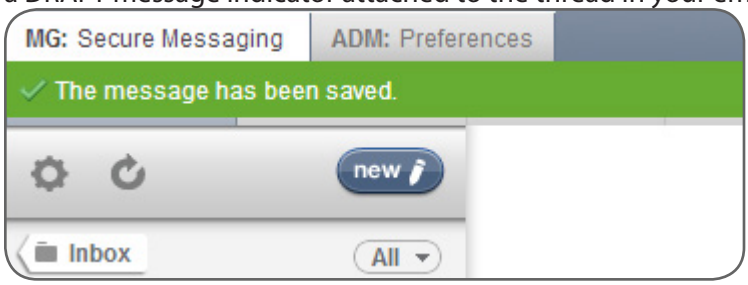

## Save Message as a Draft

If you are in the process of creating or responding to a secure message and want to save your progress, you can save the message as a draft.

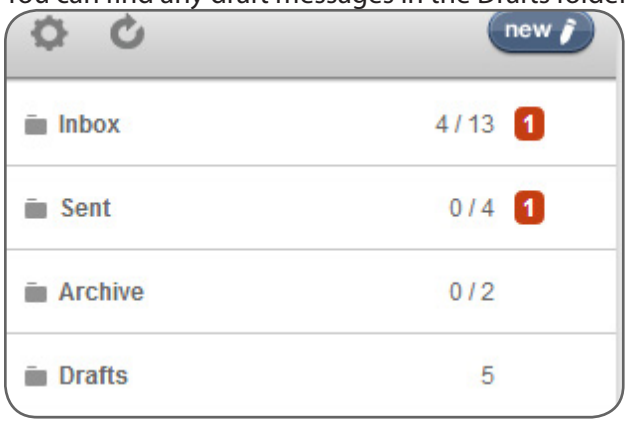
1. At the top of the **New Message** screen, click the **save** button.



2. You will see a notification in the message thread that "A saved reply has been started." You will also see a DRAFT message indicator attached to the thread in your email list.

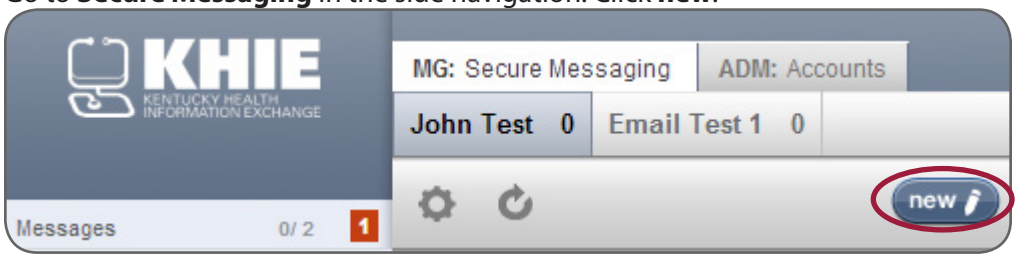



3. You can find any draft messages in the Drafts folder in your mailbox.

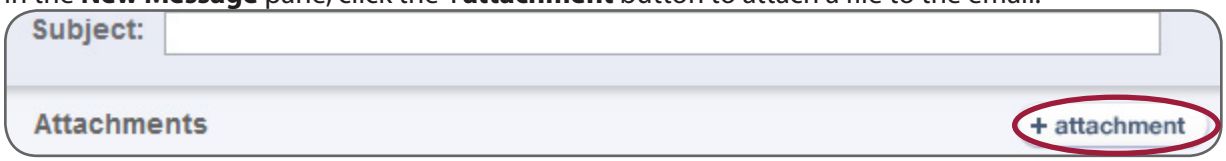



## Add an Attachment

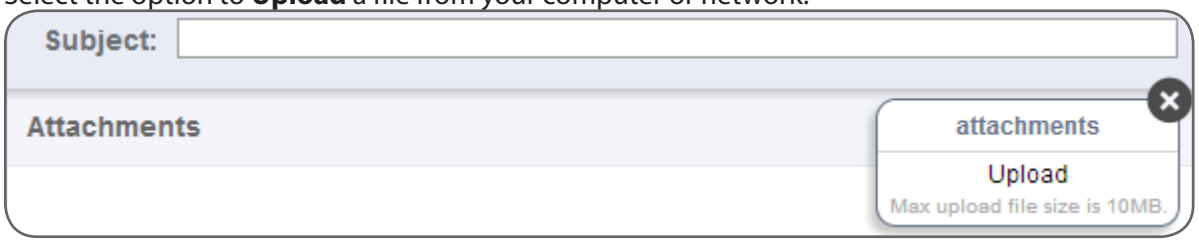
1. Go to **Secure Messaging** in the side navigation. Click **new**.




2. In the **New Message** pane, click the **+attachment** button to attach a file to the email.




3. Select the option to **Upload** a file from your computer or network.



4. Click **Choose File** and select a document that resides on your computer or network. This button may also say **Browse,** depending on your environment. Click **+attachment** > **Upload** again to attach additional files.

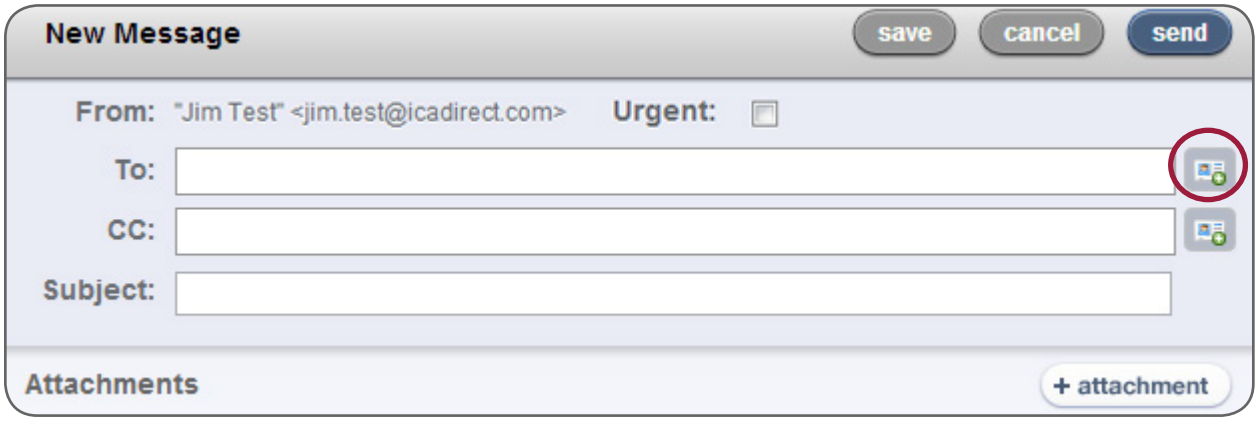
## Use the Address Book and Add Favorite Users

The Address Book helps you manage and easily access your favorite email addresses and allows you to search for users when you need to find an email address. In this section, you will learn to do the following:

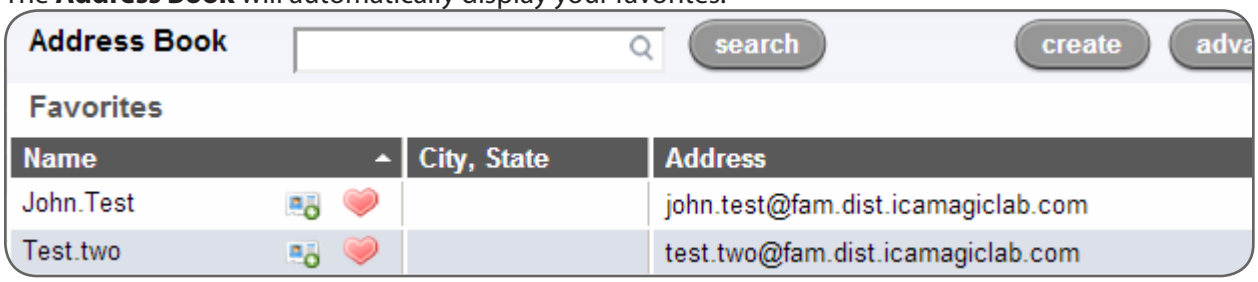
- Send a message to a favorite
- Search for a user using Basic Search and Advanced Search
- Add or Remove a favorite
- Create a favorite

### Send a New Message to a Favorite

1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.




2. The **Address Book** will automatically display your favorites.



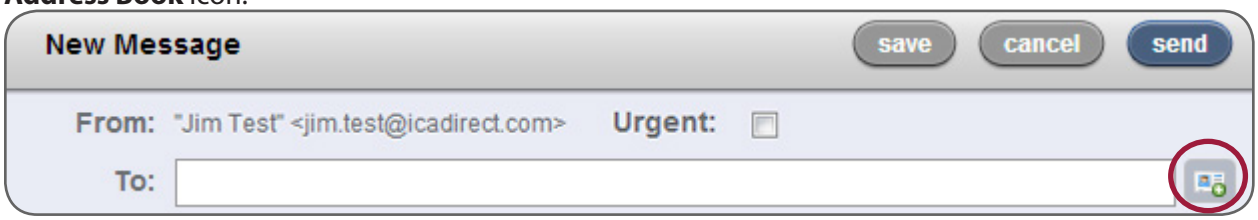
3. Click the contact icon to enter that email address in the **To:** field of your email.

## Search for a User

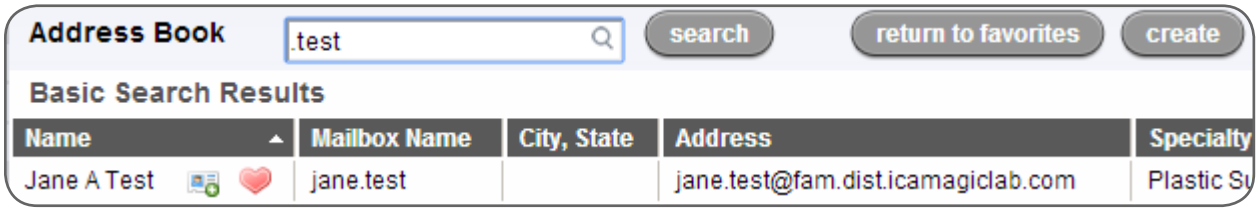
### Basic Search

Basic Search allows you to search for a user's name, address, city, state, or specialty.

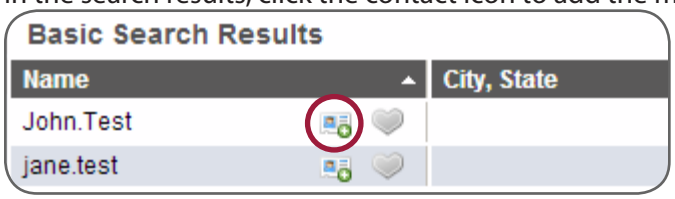
1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.




2. Enter the piece of information you would like to search by (e.g., first and last names, address, city) in the search box next to **Address Book**.



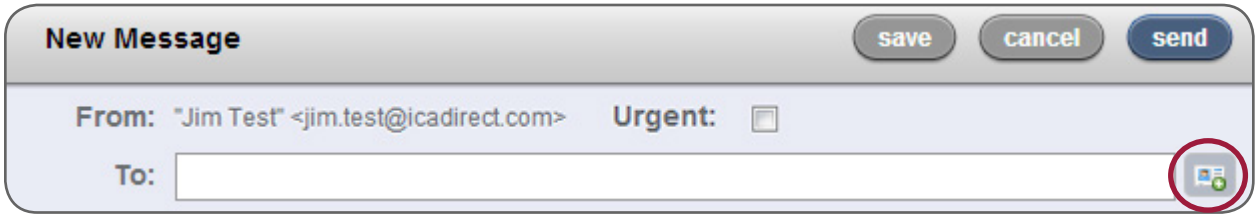

3. In the search results, click the contact icon to add the mailbox to the **To:** field of your email.



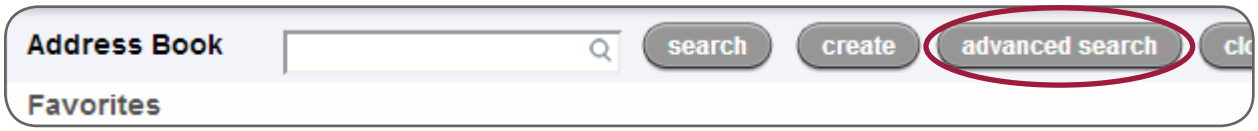
## Advanced Search

Advanced Search allows you to search multiple fields at once to find the email address you are searching for. You can search by first name, last name, address, city, state, and/or specialty.

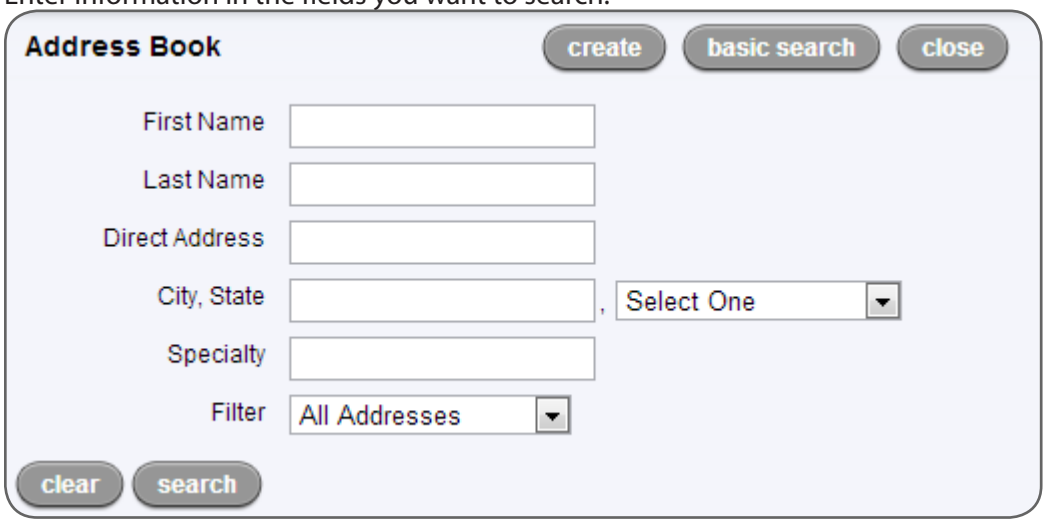
1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.



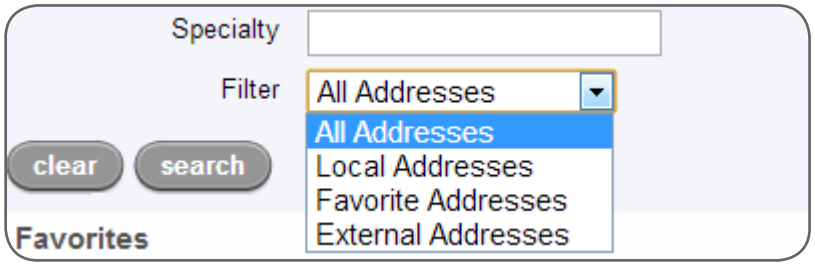

2. Click **advanced search.**



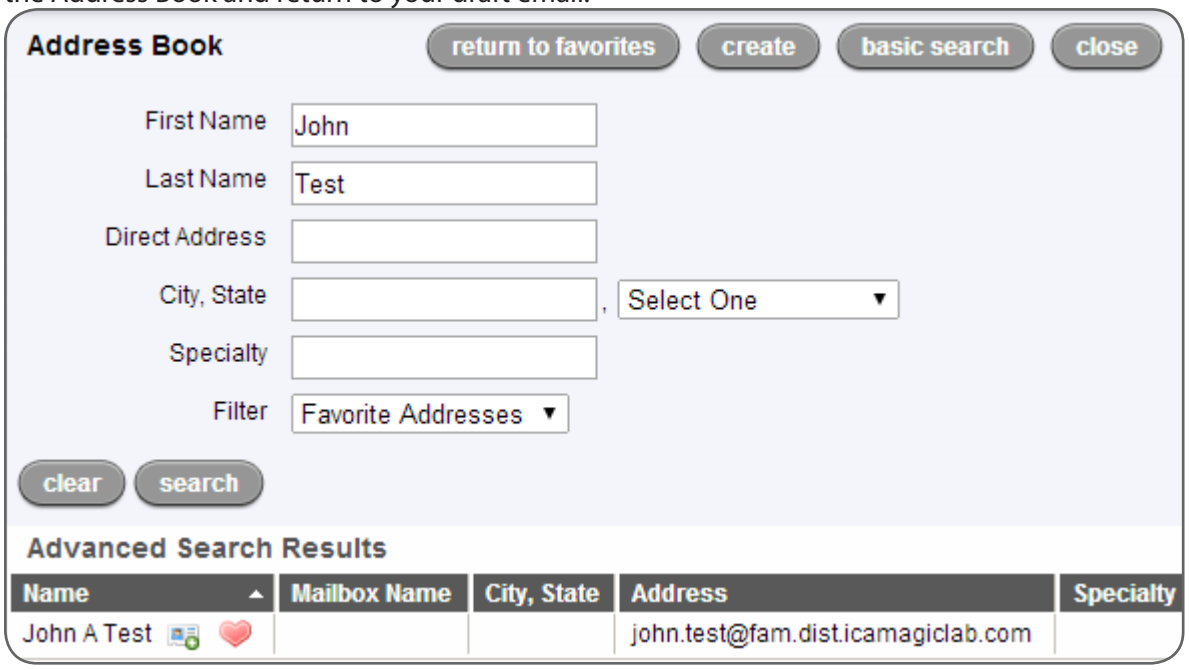

3. Enter information in the fields you want to search.




4. Use the drop-down menu to filter your advanced search results, and click **search**.
   - ***Local Addresses*** are those in your current vault.
   - ***External Addresses*** are CareAlign addresses published outside of your current vault.
   - ***Favorite Addresses*** will search only your favorites.
   - **All Addresses** will combine Local, Favorite, and External Address searches into one search. This is how the Basic Search works.



5. Click **create** to create a new favorite, **basic search** to switch to a basic search screen, or **close** to close the Address Book and return to your draft email.

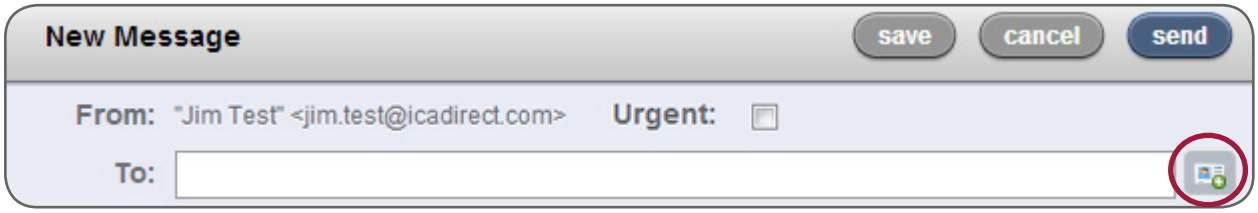



*See Add a Favorite for more information on adding and creating favorites.*

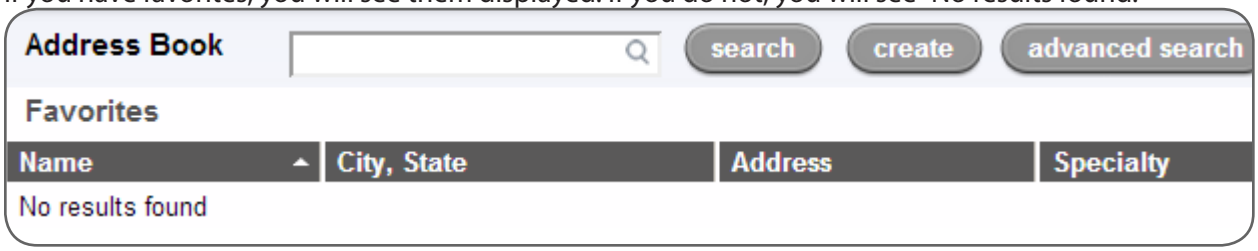
## Manage Favorites

### Add a Favorite

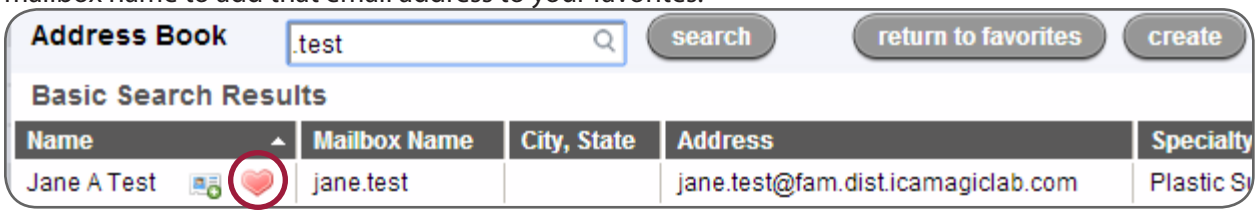
1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.




2. If you have favorites, you will see them displayed. If you do not, you will see "No results found."



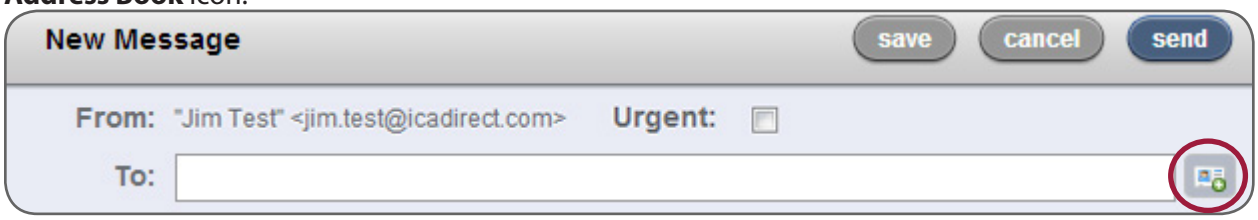
3. Conduct a Basic Search or Advanced Search. In the search results, click the heart icon next to the mailbox name to add that email address to your favorites.



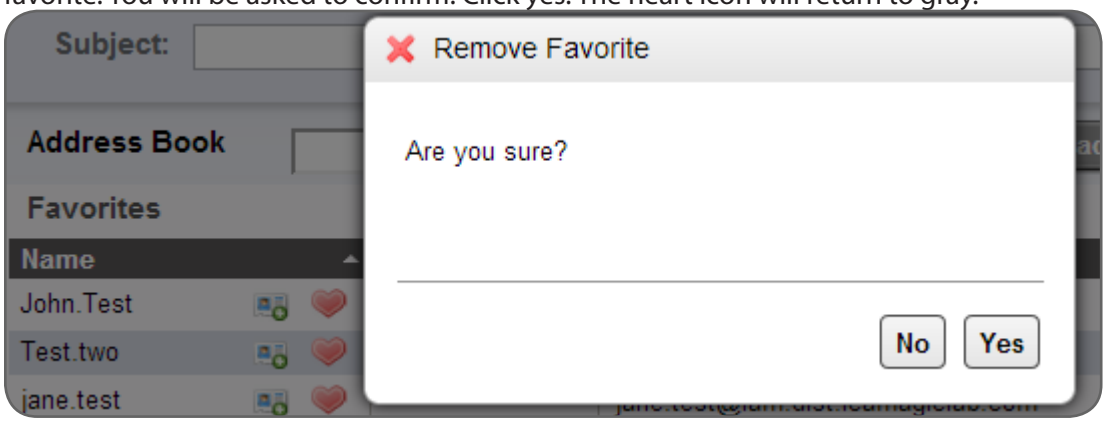

4. You will see the heart icon turn red.

Remove a Favorite

1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.



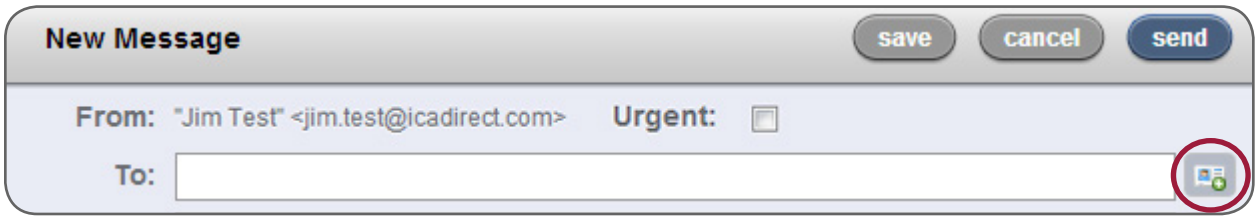

2. You will see a list of your favorites. Click the red heart icon next to the mailbox name to remove a favorite. You will be asked to confirm. Click yes. The heart icon will return to gray.




*Note that if a mailbox is archived and deactivated, it will automatically be removed from the address book but not from your favorites. You must manually edit your favorites.*

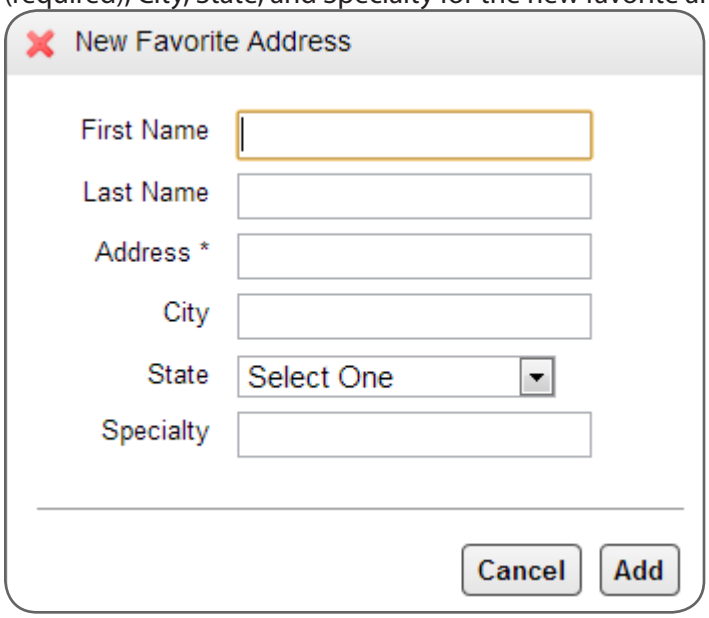
Create a Favorite

1. Go to **Secure Messaging** in the side navigation and click **new**. In the **New Message** pane, click the **Address Book** icon.




2. Click **create**.

3. A **New Favorite Address** window will pop up. Enter the First Name, Last Name, Email Address (required), City, State, and Specialty for the new favorite and click **Add**.

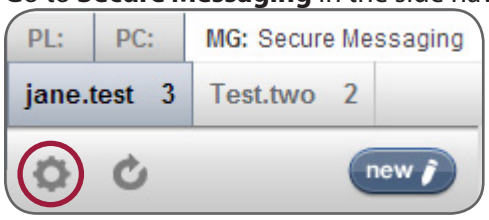



*When you create a favorite address, that address will automatically appear in your Address Book favorites. The favorite addresses you create will only be visible to you.*

## Change your Mailbox Settings

These settings are mailbox specific. You can make selections for each mailbox you have access to.

1. Go to **Secure Messaging** in the side navigation. Select the correct mailbox and click the gear icon.



2. You will see your mailbox settings. Click **Save** at the bottom of the screen to save any changes.

Return to Mailbox

## General

Receive Message Notifications? ☑ Your email address is jane.test@fam.dist.icamagiclab.com.

Shared Users: John A Test (john.test) ×

## User Settings

Default Mailbox ☑

Message Signature

Include Message Signature ☐

## Provider Directory

Publish? ☑

City & State

Specialties: Plastic Surgeon ×

## Auto Forwarding

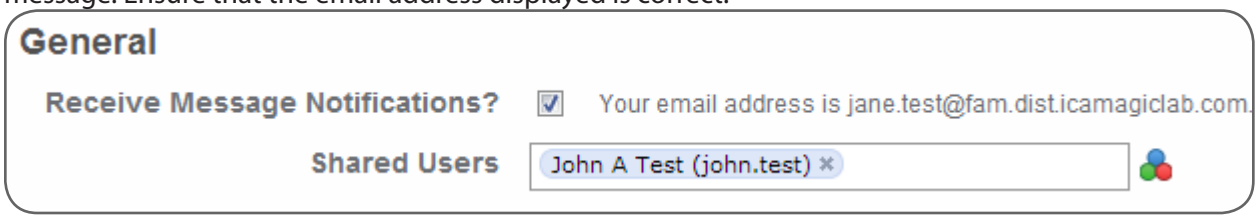
Keep a copy? ☑

Recipients:
"Jane A Test" <test.two@fam.dist.icamagiclab.com> ×
"John A Test" <john.test@fam.dist.icamagiclab.com> ×

Cancel Save

## General Settings

1. Check **Receive Message Notifications?** If you would like to be notified when you have a secure message. Ensure that the email address displayed is correct.



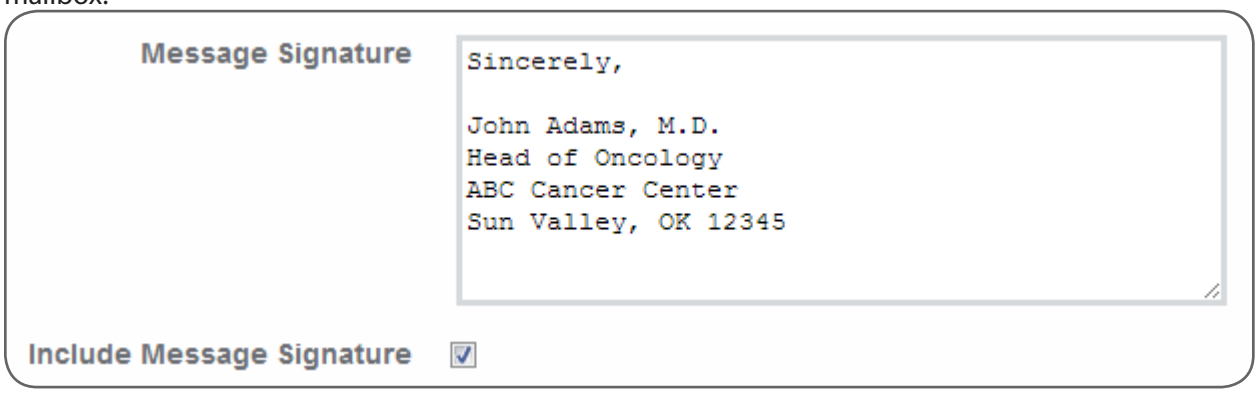

2. Confirm that the **Shared Users** field lists the other users who should have access to this mailbox. Add or remove users as necessary.

*If you are a mailbox user, and not the mailbox owner, your settings will only allow you to change your Message Notification, Signature, and Auto Forwarding settings.*

## User Settings

1. Check the box next to **Default Mailbox** to set that mailbox as your default. If you are currently in your default mailbox, this box will already be checked.

2. To add a signature at the end of your outgoing messages, enter your signature in the box provided. Check **Include Message Signature** to add your signature to every message you send from this mailbox.




*Users can manage their own signature for each mailbox they have access to. For example, if there are two users of the same mailbox, both users can have different signatures for that mailbox. In addition, if one user has access to two mailboxes, that user can have a separate signature for each mailbox.*

## Provider Directory

1. Check **Publish?** to publish your email address to the Provider Directory, which will make it visible to all users. If you choose not to publish your email address, it will only be seen by users in the default vault in which your mailbox is established.

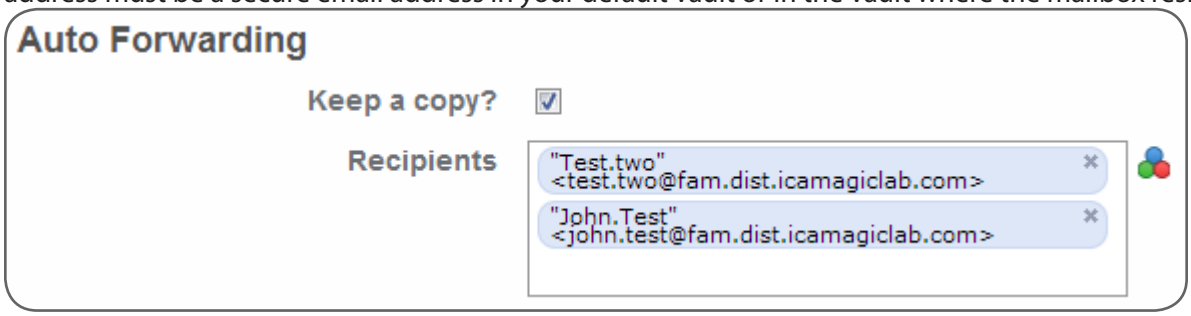
2. Enter your **City & State** and **Specialties** (optional). This allows users to search for your email address using these terms in Advanced Search.

## Auto Forwarding

Auto Forwarding allows you to automatically forward your secure messages to another secure email address.

1. Check **Keep a copy?** if you would like to receive a copy of your emails in both mailboxes.

2. Enter the secure email address or addresses to which you would like to forward your emails. The address must be a secure email address in your default vault or in the vault where the mailbox resides.



# Viewing and Managing Links

Links allow you to create and access a list of hyperlinks from within the application so that you can quickly navigate to sites you visit often. Resources are added by System Administrators, and are visible to all users across vaults. In this chapter you will learn to do the following:

- View Your Links
- Manage Your Links
- View Resources

## View Your Links

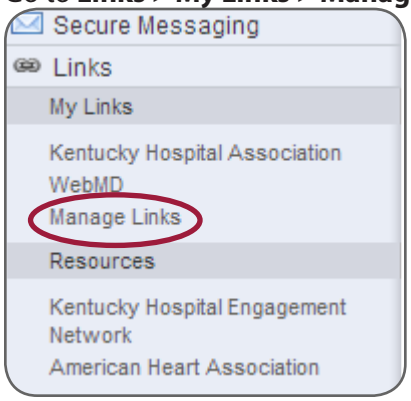
1. Go to **Links** > **My Links** in the side navigation.

2. You will see your links in the drop-down menu. Click any link to open the website in a new tab.

## Manage Your Links

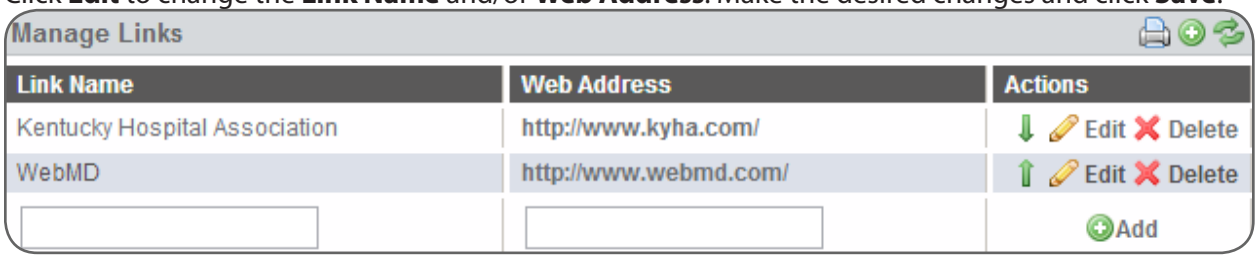
**Manage Links** allows you to move, edit, delete, and add links.

1. Go to **Links** > **My Links** > **Manage Links** in the side navigation.

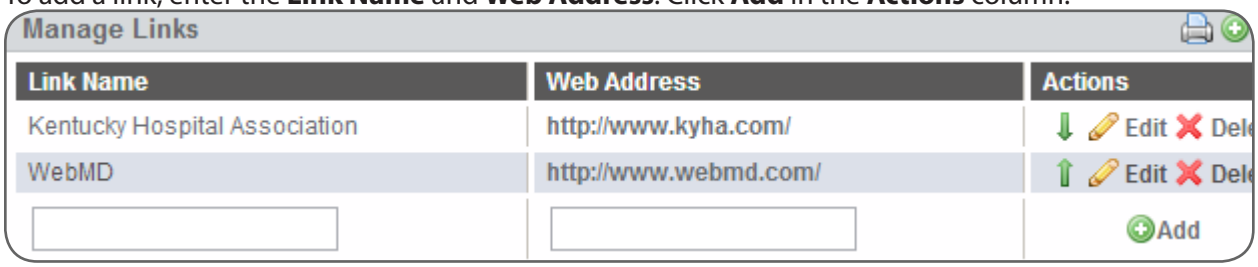



2. In the **Actions** column, use the green arrows to edit the position of your links (i.e., the order in which they will appear in the side navigation).

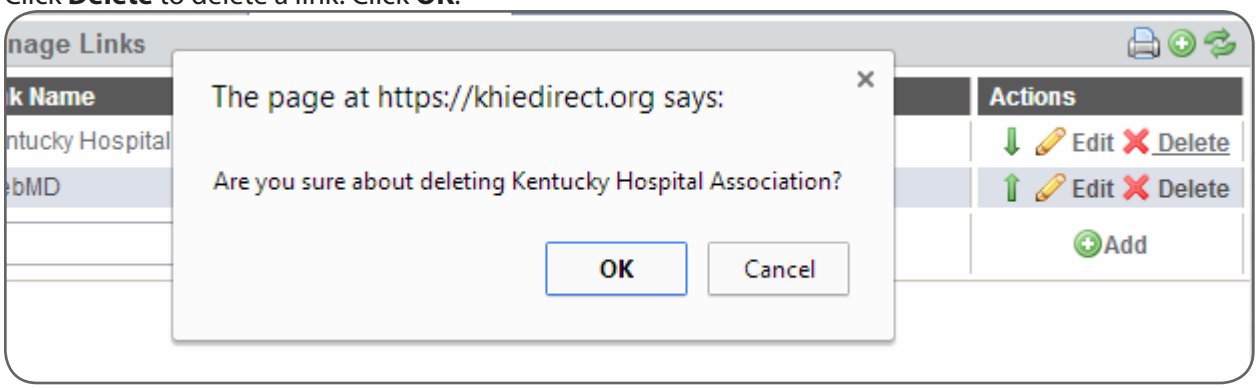
3. Click **Edit** to change the **Link Name** and/or **Web Address**. Make the desired changes and click **Save**.




4. To add a link, enter the **Link Name** and **Web Address**. Click **Add** in the **Actions** column.



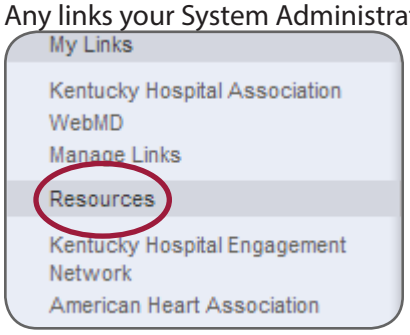

5. Click **Delete** to delete a link. Click **OK**.




## View Resources

1. Go to **Links** > **Resources** in the side navigation.

2. Any links your System Administrator has shared will display in the side navigation.




3. Click on any link to open that webpage in a new tab.

*Only System Administrators can add and edit **Resources.***

# Customizing Your Direct Experience

Customize allows you to choose how patient information displays on the screen. You can update your preferences and, if you have System Administrator privileges, update the preferences of other users.

## Update Your Preferences

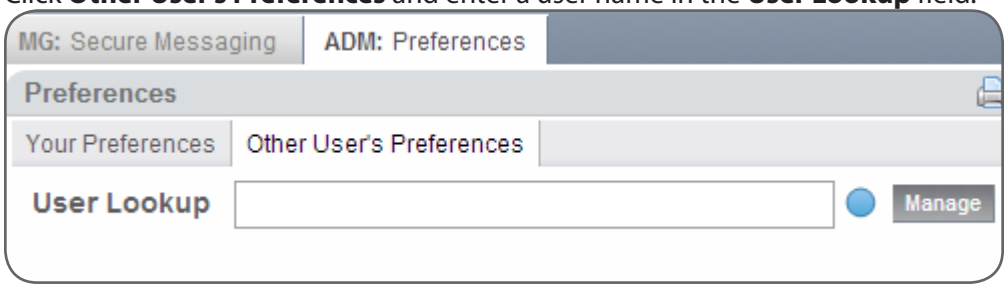
1. Go to **Customize** > **Preferences** in the side navigation. To update the email address where you would like to receive notifications when you have a new secure message, enter the new address and click **Update**.

2. Your preferences will automatically update. You will see a notification that your changes have been saved.

### Update Other User's Preferences

If you are a System Administrator, you have the ability to update another user's preferences.

1. Click **Other User's Preferences** and enter a user name in the **User Lookup** field.




2. You can then update that user's email address. Enter the new address and click **Update**.

# Managing Your Account: Tools

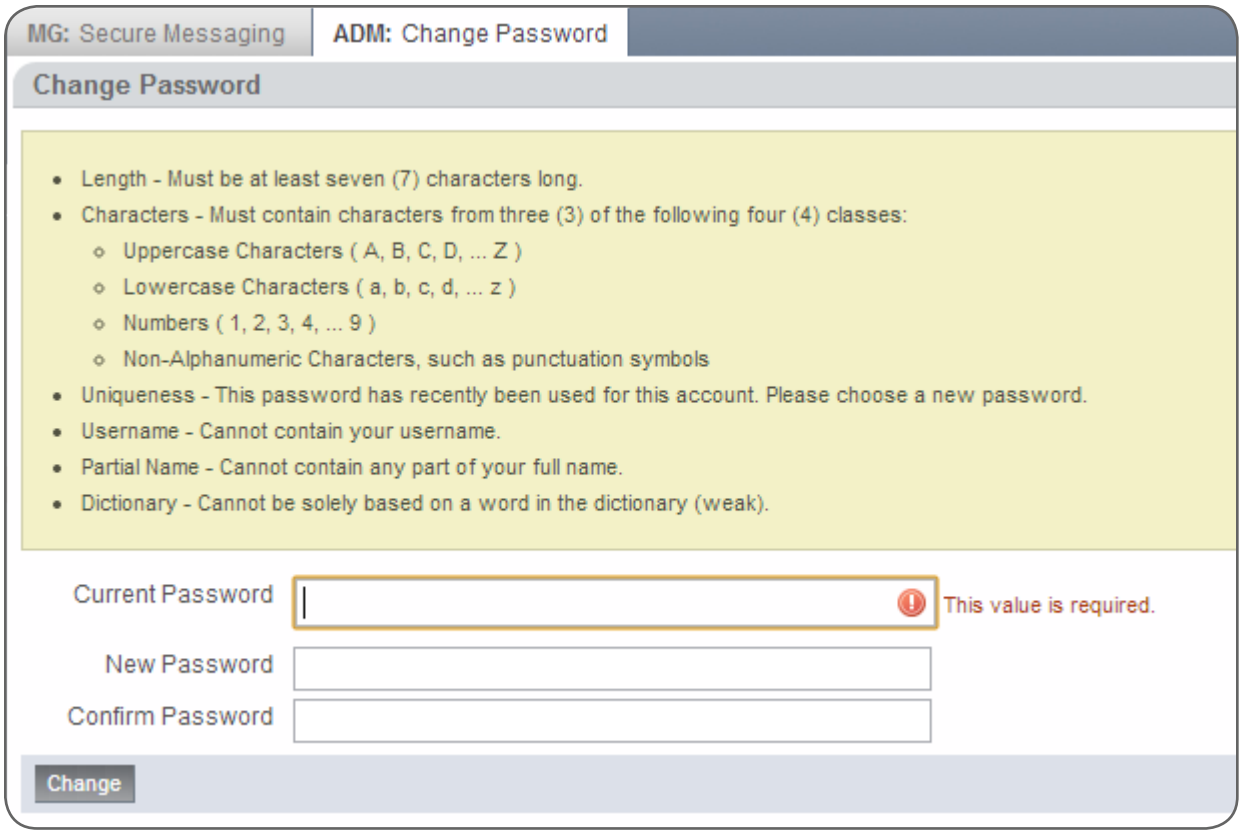
Tools allow you to manage your account and, if you are an administrator, to manage other user accounts and application settings. In this chapter, you will learn to do the following:

- Change Your Password
- Set or Update Your Security Questions

## Change Password

1. To reset your password at any time, go to **Tools** > **Change Password** in the side navigation**.**

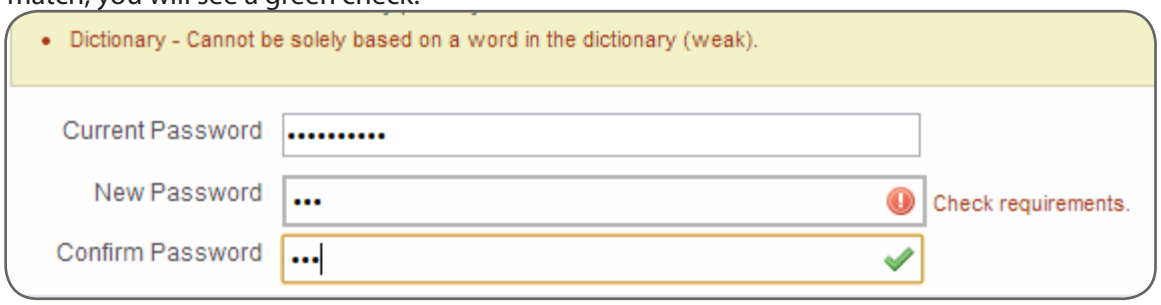
2. In the **Current Password** field, enter your current password. In the **New Password** and **Confirm Password** fields, enter the new password you would like to use. These two fields must match.




3. Ensure that you meet the password requirements, shown above in yellow:
   - Length: Must be at least seven (7) characters long.
   - Characters: Must contain characters from three (3) of the following four (4) classes:
     - » Uppercase Characters: (A, B, C, D, ... Z)
     - » Lowercase Characters: (a, b, c, d, ... z)
     - » Numbers (1, 2, 3, 4, ... 9)
     - » Non-Alphanumeric Characters, such as punctuation symbols
   - Uniqueness: This password has recently been used for this account. Please choose a new password.
   - Username: Cannot contain your username.
   - Partial Name: Cannot contain any part of your full name.
   - Dictionary: Cannot be solely based on a word in the dictionary (weak).

4. Click **Change.** If your password meets the above requirements, you will see confirmation that your password was changed successfully.

5. If your password does not meet one of the above requirements, that requirement will turn red. Enter a new password into the **New Password** and **Confirm Password** fields and try again. If your passwords match, you will see a green check.

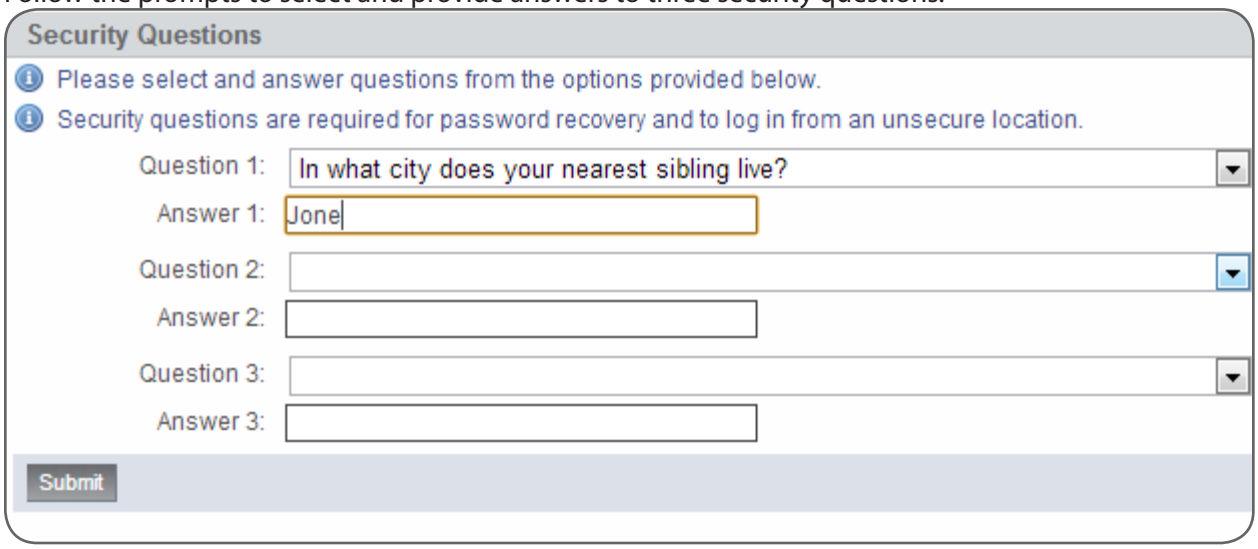



## Security Questions

You are required to answer one of your three security questions when you log in from an unsecured location (if you are using Trusted Networks) and you are required to answer all three security questions in order to recover your password. You will be prompted to set your security questions each time you log in until you do so.

1. To reset your security questions at any time, go to **Tools** > **Security Questions** in the side navigation.

2. Follow the prompts to select and provide answers to three security questions.




3. Click **Submit**.