

DIRECT TECHNOLOGY ADMINISTRATOR TRAINING



Tennessee eHealth Portal

Agenda

- ❖ Objectives of the training session
- ❖ DIRECT TECHNOLOGY– overview
 - ❖ Introductory movie - <http://www.youtube.com/watch?v=z3YzKajKZUo#t=39>
 - ❖ Glossary
 - ❖ Roles and Responsibilities
 - ❖ Assumptions
 - ❖ HIPAA considerations
 - ❖ Virus scanning
- ❖ The DIRECT Webmail Client
 - ❖ Invite Authorized Users to Register
 - ❖ Registration and DIRECT Mailbox Approval
 - ❖ Provider Directory (Add, Delete)
 - ❖ Sending, receiving and managing emails
 - ❖ Various ways of finding a DIRECT address
 - ❖ Shared mailboxes – requesting, approval and canceling
 - ❖ De-provisioning, suspending of Authorized User
 - ❖ Account Administrator Reports
- ❖ Questions

Objectives Of The Training

By the end of the training session you will:

- ❖ Have a conceptual understanding of DIRECT Technology
- ❖ Be able to send and receive DIRECT using AT&T Healthcare Community Online (HCO) to access the Tennessee eHealth Portal
- ❖ Be able to add Authorized Users to your contact list and search for Authorized Users in the Provider Directory.
- ❖ Be able to attach files to a DIRECT email.
- ❖ Be able to request for access to a shared mailbox, approve a request for access to a shared mailbox and discontinue access to a shared mailbox



DIRECT TECHNOLOGY OVERVIEW



Glossary

TERM	DEFINITION
CCA	Covisint Connection and Administration is an administrative tool designed to help DIRECT Account Administrators to manage Authorized Users access, change passwords and provide Service Packages.
DIRECT Email Address	Used to identify an endpoint (a Sender or Receiver) when patient data is exchanged. The DIRECT email address has two parts, an Authorized User name and a direct.tn.gov domain, for example, Jane.Doe@direct.tn.gov.
DIRECT Email	The content of the patient data being transferred from the Sender to the Receiver. The DIRECT email is similar to a package that is sent from one person to another via the postal service, such as the content within an envelope or a box.
Healthcare Community Online	(HCO) The AT&T website you will log into to access the Tennessee eHealth Portal. The Tennessee eHealth Portal allows you to send DIRECT email.
Private Key	(1) The key of a signature key pair used to create a digital signature. (2) The key of an encryption key pair that is used to decrypt confidential patient data. In both cases, this key must be kept secret.
Public Key	(1) The key of a signature key pair used to validate a digital signature. (2) The key of an encryption key pair that is used to encrypt confidential patient data. In both cases, this key is made publicly available normally in the form of a digital certificate.
S/MIME	Secure/Multipurpose Internet Mail Extensions, an Internet standard for securing MIME data. S/MIME provides privacy and data security through encryption; and authentication, integrity assurance, and non-repudiation of origin through signing.
SMTP	Simple Mail Transport Protocol, and industry standard for transporting email.

Job Roles & Responsibilities

❖ **Authorized Agency Representative**

- Has signing authority on behalf of the Participating State Agency
- Does not need access to the Tennessee eHealth Portal to fulfill this role

❖ **Approving Manager**

- Approves user to use DIRECT for sending and receiving Patient Data
- Does not need access to Tennessee eHealth Portal to fulfill this role

❖ **Security Manager**

- Verifies the identity of the Authorized User and the DIRECT Account Administrator
- Does not need access to Tennessee eHealth Portal to fulfill this role

❖ **DIRECT Account Administrator**

- Manages the DIRECT accounts for a State Agency, and provisions & de-provisions DIRECT accounts

❖ **Authorized User**

- Those persons who have been authorized by their Participating State Agency to access Patient Data through the Tennessee eHealth Portal. “Authorized Users” may include, but are not limited to, health care providers and employees, staff, contractors, or agents of the Participating State Agency



Assumptions for DIRECT

Certain basic assumptions drive use of DIRECT by end users, including:

- ❖ As required by law or policy, the Sender has obtained the patient's consent to send the patient data to the Receiver. Therefore, the Sender and Receiver know that the patient's privacy preferences are being honored.
- ❖ The Sender of a DIRECT email has determined that it is clinically and legally appropriate to send the patient data to the Receiver.
- ❖ The Sender has determined that the Receiver's address is correct.
- ❖ The Sender has communicated to the receiver, the purpose for exchanging the patient data.

HIPAA Considerations

- ❖ DIRECT is encrypted up to the point you see the data in your mail client, and in transit. This is the Health Information Technology for Economic and Clinical Health (HITECH) requirement
- ❖ DIRECT does not prevent you from violating the Health Insurance Portability and Accountability Act (HIPAA), for example by making copies of DIRECT emails and using them inappropriately
- ❖ Once you save any DIRECT email encrypted content to a local drive it is no longer encrypted
- ❖ The Tennessee eHealth Portal DIRECT client does not allow for BCC
- ❖ You cannot send DIRECT emails to a non-DIRECT email client, nor receive a DIRECT email from one
- ❖ You cannot send DIRECT emails to a system that has not been set up to receive DIRECT emails.
- ❖ S/MIME (the encryption behind DIRECT) does NOT encrypt the Subject Line



Virus Scanning

- ❖ The Tennessee eHealth Portal uses MacAfee to scan inbound and outbound DIRECT email for attachments with viruses.
- ❖ Inbound DIRECT email is scanned on arrival. If a DIRECT email is found to have an attachment with a virus, the attachment is removed but the DIRECT email is still sent to the mailbox indicating that the attachment was not delivered, the name of the attachment and why.
- ❖ A DIRECT email is sent back to the sender indicating that the DIRECT email had an attachment with a virus, and that the attachment was not delivered.
- ❖ If an Authorized User attaches a file with a virus and sends it to another Authorized User, the attachments are scanned at the time of being sent (not when being attached). The Authorized User will receive an email saying the DIRECT email was not sent and why. The DIRECT email will be in the Authorized User's sent email even though it was not sent.
- ❖ As with other email systems, attachments are scanned based on extension. The list of extensions is a combined list of those used by Gmail and Outlook.

THE DIRECT WEBMAIL CLIENT

Invite Authorized Users to Register

Use Case ID/Name	User Registration Invite to access the TN eHealth Portal
Use Case ID/Name	User Registration Invite
Description	This Use Case steps through how to create and send an invite to an Authorized User to register in the TN eHealth Portal
Priority	High
Frequency/Volumes	Often
Actors	DIRECT Account Administrator
Pre-conditions	<ul style="list-style-type: none"> • The DIRECT Account Administrator has signed a “DIRECT Account Administrator Acknowledgement Form” and the “Authorized User Identity Verification Form” also signed by the Security Manager. • Approving Manager in the Agency has approved the User to have a DIRECT email Account. • The DIRECT Account Administrator has a copy of the “Authorized User Acknowledgement Form” signed by the Authorized User. • The DIRECT Account Administrator has a copy of the “Authorized User Identity Verification Form” signed by the Authorized User and the Security Manager. • DIRECT Account Administrator has access to the TN eHealth Portal
Basic course of events	<p>1) Notify new Authorized User, via email, that he/she will receive an invitation from yourself on behalf of “Healthcare Community Online”. In this email, request the following mandatory information be returned to the DIRECT Account Administrator:</p> <ul style="list-style-type: none"> • Full Name • Provider Type

Invite Authorized Users to Register

Use Case ID/Name	User Registration Invite to access the TN eHealth Portal
Basic course of events	<ul style="list-style-type: none"> • Provider Specialty • Facility Name (example: Stewart County Department of Health) • Organization Name (example: Tennessee Department of Health) • Facility Street Address • Facility Mailing Address <ol style="list-style-type: none"> 2) DIRECT Account Administrator launches the TN eHealth Portal 3) Navigates to My Profile > Administration > Invite User 4) Parent Package Name: Select “TN eHealth Portal” 1) Subject: Pre-populated, however, feel free to revise if desired 2) Email Addresses: Enter Authorized User’s tn.gov email address in this field 3) Message Body: This field is pre-populated. DIRECT Account Administrator is allowed to make revisions, however, DO NOT REVISE, COPY, OR DISTURB THE LINK in the email. 4) Click “Next” 5) Verify Service Package Information is correct: TN eHealth Portal 6) Click “Send Invitation”
Alternative paths	None
Post-conditions	User invite successfully sent
Exceptions	None

Authorized User Provisioning - Registration

Use Case ID/Name	User Management
Description	This Use Case reviews how an Authorized User registers in the TN eHealth Portal
Priority	High
Frequency/Volumes	Often
Actors	Authorized User
Pre-conditions	<ul style="list-style-type: none"> DIRECT Account Administrator has access to CCA
Basic course of events	<ol style="list-style-type: none"> Authorized User receives an email invite from Healthcare Community Online to register. Authorized User clicks on hyper link in the invite to begin registration process Enter information as prompted on the screen. Mandatory fields are indicated by red bars next to the field. (Note that the address field is pre-populated, however, please update with your State Agency's street address). Once entry is completed, click "Continue Registration". Enter Authorized User sign in information <ul style="list-style-type: none"> User ID: Enter your State Network ID (RACF#) Password: Please note special requirements shown in the pop up box when entering your password. Challenge Question: You will need to enter a challenge question in case you forget your password. Challenge Answer: You must present this answer EXACTLY and you input in order to retrieve a new password. <p>Once you have completed the Authorized User Login Information, click "Continue Registration".</p> Please read the Covisint Portal Service Agreement and then click "Accept the Terms" to continue.
Alternative paths	None
Post-conditions	Authorized User is registered in the CCA
Exceptions	None



Requesting a DIRECT Mailbox

Use Case ID/Name	User Management
Description	Authorized User requesting a mailbox
Priority	High
Frequency/Volumes	Often
Actors	Authorized User
Pre-conditions	<ul style="list-style-type: none"> DIRECT Authorized User registered and created in CCA
Basic course of events	<ol style="list-style-type: none"> Authorized User receives an email from "Healthcare Community Online" stating they have been approved and registered. Authorized User clicks on the link in the email Link launches TN eHealth Portal Enter information as prompted by the screen <ul style="list-style-type: none"> Mailbox Name: Enter your First and Last name DIRECT Address: Enter your FirstName.LastName Domain: Choose direct.tn.gov from the drop down menu Organization: Select your State Agency from the drop down menu NPI: Enter your NPI, if applicable Confirm NPI, if applicable Click "Submit"
Alternative paths	None
Post-conditions	DIRECT Address request is sent to DIRECT Account Administrator
Exceptions	None



DIRECT Mailbox Address Approval

Use Case ID/Name	User Management
Description	Approve DIRECT Mailbox request
Priority	High
Frequency/Volumes	Often
Actors	DIRECT Account Administrator
Pre-conditions	<ul style="list-style-type: none">• DIRECT Authorized User has requested a DIRECT Address
Basic course of events	<ol style="list-style-type: none">1) DIRECT Account Administrator launches the TN eHealth Portal2) Select the "Mailbox User Management Tab"3) Under DIRECT Address Approval, select the Authorized User you wish to approve4) Verify the address format is FirstName.LastName5) Click "Approve" or "Reject"
Alternative paths	None
Post-conditions	Next time Authorized User logs into the TN eHealth Portal, the DIRECT Inbox will now be visible
Exceptions	None

Adding Authorized User to Provider Directory

Use Case	User Management
Description	Adding New Authorized User to the Provider Directory
Priority	High
Frequency/Volumes	Often
Actors	DIRECT Account Administrator
Pre-conditions	<ul style="list-style-type: none"> • DIRECT Authorized User is registered and received a DIRECT email address
Basic course of events	<ol style="list-style-type: none"> 1) DIRECT Account Administrator launches the TN eHealth Portal 2) Select the “Provider Directory Tab” 3) Select “Provider” Tab 4) Click “Add New Provider” button. <ul style="list-style-type: none"> • Demographics: Enter Authorized User’s First Name, Last Name, Known Name (First Name and Last Name or nick name if desired) • Identifiers: Click the “Add” button • Identifier: Enter Authorized User State Network ID • Identifier Type: Select “Other” from the drop down menu • Provider Type: Select type(s) from the scroll down menu and hit the “>>” button to move type over to the field on the right • Provider Specialty: This field is not marked as mandatory, however, it is very important to select your Provider Specialty(s) to enable that field to be used as a search criteria. Select your specialty(s) from the scroll down menu and hit the “>>” to move it to the field to the right.



Adding Authorized User to Provider Directory

Use Case	User Management
Basic course of events	5) Hit the “Save” button 6) Click on the “Contact Info” Tab <ul style="list-style-type: none"> • Facility Name: Click the “Add” button. Enter Facility Name, such as “Stewart County Health Department” • Organization Name: Click the “Add” button. Enter State Agency Name, such as Department of Health”. • Address: Both “Practice Address” and “Mailing Address” are mandatory. <ul style="list-style-type: none"> ❖ Practice Address: Enter the physical address of your organization’s location ❖ Mailing Address: Click on the “Mailing Address” Tab and enter organization’s mailing address • Email: <i>Email Address</i> - Click the “Add” button. Enter the Authorized User’s tn.gov email address. <i>DIRECT Address</i> - Click the “Add button and enter the Authorized User direct.tn.gov email address.
Alternative paths	None
Post-conditions	New Authorized User has been added to the Provider Directory
Exceptions	None

Finding a DIRECT Address in the Provider Directory

Use Case	User Management
Description	Searching for an Authorized User in the Provider Directory
Priority	High
Frequency/Volumes	Often
Actors	Authorized Users
Pre-conditions	<ul style="list-style-type: none">• DIRECT Authorized User is registered and received a DIRECT email address• DIRECT Authorized User has been added to the Provider Directory
Basic course of events	<ol style="list-style-type: none">1) Authorized User launches the Tennessee eHealth Portal2) Click "Provider Directory" tab3) Click "Provider" tab4) Search by name: Enter the Authorized User's Las Name and enter the State of Tennessee. Click "Search"
Alternative paths	None
Post-conditions	Successful search for Authorized User in the Provider Directory
Exceptions	None

Deleting Authorized User from Provider Directory

Use Case	User Management
Description	Deleting Authorized User from the Provider Directory
Priority	High
Frequency/Volumes	Often
Actors	DIRECT Account Administrator
Pre-conditions	<ul style="list-style-type: none">Authorized User has been added to the Provider Directory
Basic course of events	<ol style="list-style-type: none">1) DIRECT Account Administrator launches the TN eHealth Portal2) Select the "Provider Directory Tab"3) Select "Provider" Tab4) Enter a search for the Authorized User using the last name and state.5) Choose from the search results the Authorized User to be deleted and hit the "Delete Provider" button.
Alternative paths	None

Sending a DIRECT Email

Use Case	User Management
Description	Sending a DIRECT email
Priority	High
Often	Often
Actors	Authorized User
Pre-conditions	<ul style="list-style-type: none">Authorized User has a DIRECT Inbox Address
Basic course of events	<ol style="list-style-type: none">1) User launches TN eHealth Portal2) DIRECT Inbox > New3) In the "To..." box enter the Authorized User's email address you would like to send the message to.<ul style="list-style-type: none">• To Search for Authorized User in your "Contact List" or "Provider Directory" click on "To..."• Click the tab you want to search from then enter search criteria4) Compose message, click "Send"
Alternative paths	None
Post-conditions	Authorized User has successfully sent a DIRECT email

Managing the DIRECT Inbox

Use Case	User Management
Description	Managing the DIRECT Inbox
Priority	High
Often	Often
Actors	Authorized User
Pre-conditions	<ul style="list-style-type: none"> Authorized User has a DIRECT Inbox Address
Basic course of events	<ol style="list-style-type: none"> User launches TN eHealth Portal Authorized user can receive DIRECT emails The mailbox operates much like an Outlook Mailbox System Add new contacts by clicking the "Contact List" button Click "Add New Contact" <ul style="list-style-type: none"> Enter Authorized User's full name Enter Authorized User's DIRECT email address (DIRECT email addresses for Authorized Users can be found in the Provider Directory; make a note of the user's DIRECT email address to type into New Contacts.
Alternative paths	None
Post-conditions	Authorized User successfully manages the DIRECT email inbox

Request Access to Shared Mailbox

Use Case	User Management
Description	Request Access to Share an Authorized User's Mailbox
Priority	High
Frequency/Volumes	Often
Actors	Authorized User
Pre-conditions	<ul style="list-style-type: none"> DIRECT Authorized User has a DIRECT Inbox Address
Basic course of events	<ol style="list-style-type: none"> Authorized User launches the TN eHealth Portal On the Menu bar, hover over the tab labeled "Mailbox User Management" Select "Shared Address Request" Search for an existing address by using the search request feature in the "Request DIRECT Shared Mailbox" (located at the very bottom of the page). Enter all or part of the DIRECT address or name of the Authorized User in the "Search Request" field. Click "Go" When the search results display, select the address for which access you are requesting. Click "Submit" An email of notification from nhindirect@covisint.com of this request is sent to the Authorized User email that was set up in their profile during registration. Authorized User must log in to approve or reject your request.
Alternative paths	None
Post-conditions	Shared DIRECT Address request is sent to user address provided during registration.



Shared Address Approval/Rejection

Use Case	User Management
Description	Shared Address Approval/Rejection
Priority	High
Frequency/Volumes	Often
Actors	Authorized User
Pre-conditions	<ul style="list-style-type: none"> Authorized User is created in CCA admin and is registered Authorized User has a DIRECT Inbox Address
Basic course of events	<ol style="list-style-type: none"> 1) User launches TN eHealth Portal 2) On the Menu Bar, hover over "Mailbox User Management" 3) Select "Shared Address Approval" 4) Enter part or all of the DIRECT address or name of user in Search Request(s) field. Click "Go". You can also find the request by scrolling to find the pending request. 5) When the search results display, select the address for approval. 6) Click "Approve", "Reject" or "Reset" to take you back to the original list of requests.
Alternative paths	None
Post-conditions	User can now see shared mailbox when clicking on the down arrow next to the Mail Tab or by clicking "New" when writing a new email.

De-provision Authorized User

Use Case	De-provisioning an Authorized User
Description	De-Provisioning Authorized User
Priority	High
Frequency/Volumes	Occasionally
Actors	DIRECT Account Administrator
Pre-conditions	<ul style="list-style-type: none"> • DIRECT Account Administrator has rights to CCA
Basic course of events	<ol style="list-style-type: none"> 1) DIRECT Account Administrator launches the TN eHealth Portal 2) Navigate to My Profile > Search > Users in my Organization > Basic Search for User 3) Search for Authorized Users is based on their user profile information. Enter Criteria for Last Name, First Name search; check any filter options to refine your search and click "Search". 4) Authorized Users will show in "Search Results", click on the Authorized User to be de-provision. 5) Under the "View Profile" tab, click on "Edit User Profile" 6) Change email address to that of the Authorized User who will be monitoring the DIRECT mailbox of the de-provisioned User. (The Authorized User and the DIRECT Account Administrator will receive an email from "Healthcare Community Online" notifying the User that changes has been made to the Authorized User's Profile. 7) Click "Save Changes"; then click "OK". 8) Under the "View Profile" tab, click on "Reset User Password"



De-Provisioning Authorized User

Use Case	De-provisioning an Authorized User
Basic course of events	<ol style="list-style-type: none"> 9) Follow Steps 1-3 on the screen, then click “Reset Password”. 10) Give the Authorized User monitoring the DIRECT mailbox the 1st half of the password show on the screen by verbally by telephone and inform the Authorized User that the 2nd half of the password will arrive in an email from “Healthcare Community Online” and will verify the password has been changed . 11) Instruct the Authorized User that once the 2nd half of the password is received, they will need to login as that de-provisioned Authorized User and it will prompt them to change the password. 12) The Authorized User that is responsible for monitoring this DIRECT Mailbox will need to request a shared mailbox with the Authorized User who is being de-provisioned. (An email of notification from nhindirect@covisint.com of this request is sent to the Authorized User email that was set up in their profile during registration.) 13) Once this is completed, the DIRECT Account Administrator will need to log in as the de-provisioned user and approve the shared address request. 14) Upon completion of these steps, the DIRECT Account administrator must suspend the de-provisioned Authorized User. (See next slide)
Alternative paths	None
Post-conditions	De-Provisioned Authorized User mailbox is now monitored by designated Authorized User.
Exceptions	None

Suspend Authorized User

Use Case	Suspend Authorized User in CCA/TN eHealth Portal
Description	Suspend Authorized User
Priority	High
Frequency/Volumes	Occasionally
Actors	DIRECT Account Administrator
Pre-conditions	DIRECT Account Administrator has access to CCA
Basic course of events	<ol style="list-style-type: none"> 1) User launches the TN eHealth Portal 2) Navigate to My Profile > Search > Search Users in My Organization > Basic Search for User 3) Enter “Last Name” or “Last Name, First Name” of Authorized User 4) Authorized User will show in search results, click on Authorized User’s Name 5) In the “User Status” Portlet, “Status Options” click “Suspend User” 6) Suspension Reason: Enter a suspension reason in the box. 7) Click “Yes, Suspend User” if applies
Alternative paths	None
Post-conditions	Suspended User from access to the TN eHealth Portal
Exceptions	None

Delete Authorized User

Use Case	Delete Authorized User in CCA/TN eHealth Portal
Description	Delete Authorized User
Priority	High
Frequency/Volumes	Occasionally
Actors	DIRECT Account Administrator
Pre-conditions	<ul style="list-style-type: none"> • DIRECT Account Administrator has access to CCA • Authorized User has been Suspended
Basic course of events	<ol style="list-style-type: none"> 1) User launches the TN eHealth Portal 2) Navigate to My Profile > Search > Search Users in My Organization > Basic Search for User 3) Enter “Last Name” or “Last Name, First Name” of Authorized User 4) Authorized User will show in search results, click on Authorized User’s Name 5) In the “User Status” Portlet, “Status Options” click “Delete User” 6) Permanent Removal Reason: Enter a permanent removal reason in the box. 7) Click “Yes, Permanently Remove User” if applies 8) Once an Authorized User’s ID has been deleted, it can never be used again
Alternative paths	None
Post-conditions	Deleted Authorized User’s access to the TN eHealth Portal
Exceptions	None

Managing “My Profile”

Use Case	Managing Authorized User’s Profile
Description	Functionality of all phases of My Profile
Priority	High
Frequency/Volumnes	Often
Actors	<ul style="list-style-type: none"> • DIRECT Authorized Users
Pre-conditions	Direct Authorized User has access to CCA
Basic course of events	<p>Home: Quick access to the most common administrative tasks in CCA</p> <ul style="list-style-type: none"> • Organization’s Information • Reports • Audits • Pending Requests • Locked Accounts • Frequently Asked Questions <p>My Profile:</p> <ul style="list-style-type: none"> • View my Profile • View My Service Packages • Edit My Profile • Change My Password • Request a Service Package

Managing “My Profile”

Use Case	Managing Authorized User's Profile
Basic course of events	<p>My Organization:</p> <ul style="list-style-type: none">• View My Organization Profile• View My Organization Service Packages• View My Organization Hierarchy• View My Organization Users• Request a Service Package for My Organization• View My Organization Administrators• View My Organization Options <p>Search:</p> <ul style="list-style-type: none">• Search for Users In My Organization• Search For Divisions In My Organization's Hierarchy <p>Administration:</p> <ul style="list-style-type: none">• Check for Pending Requests• Invite Authorized Users to Register• Manage Roles and Services

Managing “My Profile”

Use Case	Managing Authorized User’s Profile
Basic course of events	<ul style="list-style-type: none">• Run Audits Reports: <ul style="list-style-type: none">• User Summary• User Service Package Summary• Service Summary• Security Administrator Reports
Alternative paths	None
Post-conditions	Successfully manage My Profile
Exceptions	None