



# Secure Messaging Training Guide

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v2.1

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## I. Overview

This guide provides a quick overview of the Secure Messaging application available through HEALTHeLINK.

## 2. Help/Support

### For HEALTHeLINK™ Support

**24/7 Help Desk Support**

**877.895.4724**

**Local Help Desk Support**

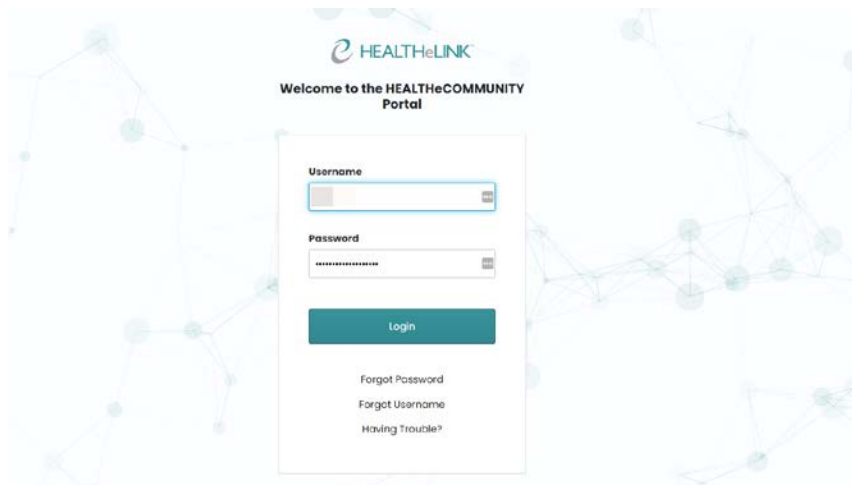
**716.842.6343**

Additional training materials are available at

[www.wnyhealthelink.com/PhysiciansandStaff/TrainingVideos](http://www.wnyhealthelink.com/PhysiciansandStaff/TrainingVideos)

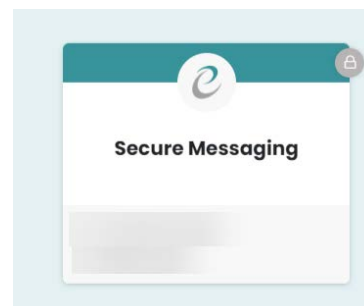
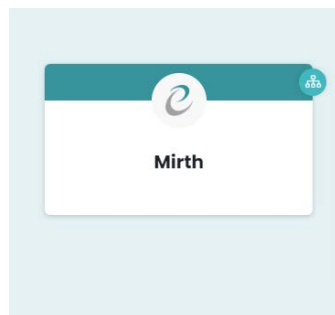
## 3. Logging into Secure Messaging

### I. Login to HEALTHeCOMMUNITY Portal with your credentials

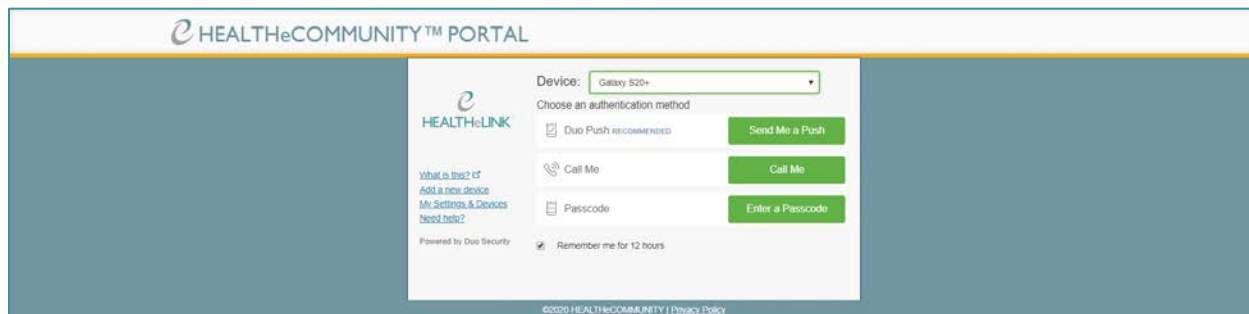


### 2. Select the “Mirth” Badge followed by the “Secure Messaging” Badge

- a. If you have Secure Messaging at multiple practices, select the practice for which you are expecting secure messages



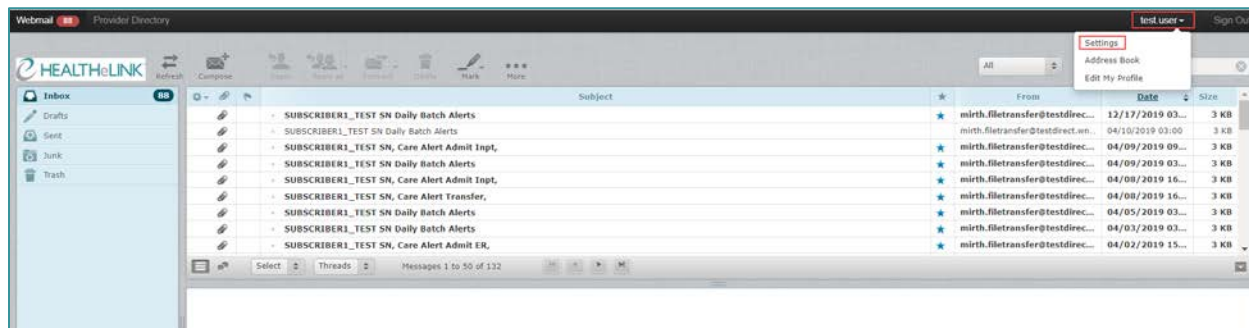
3. Go through two-factor authentication (TFA)
  - a. If you have already registered with Duo, simply authenticate using your pre-registered device
  - b. If you need to set up Duo TFA, please refer to the [Duo Security \(TFA\) Implementation Guide](#)



## 4. Managing Settings

To access Secure Messaging settings:

1. Click your username in top-right navigation



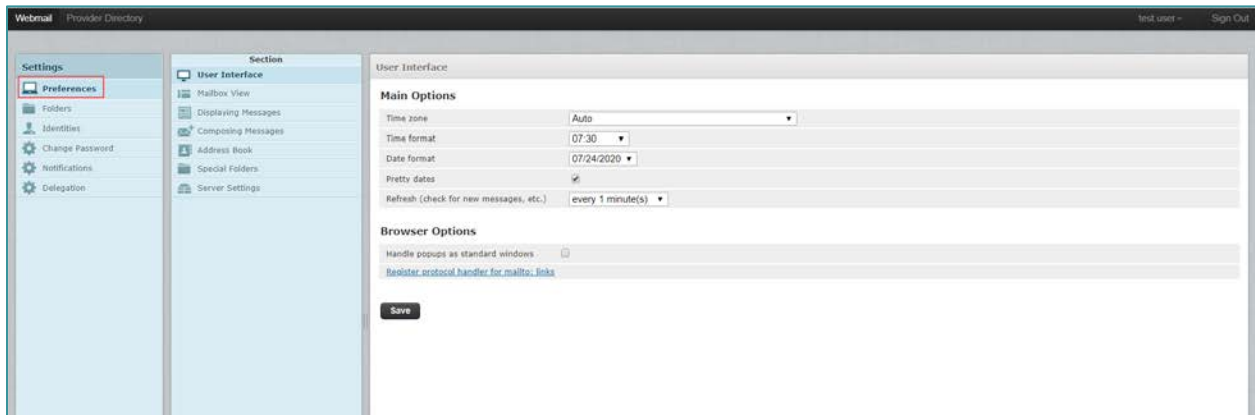
2. Select “Setting” option

### 4.1. Preferences

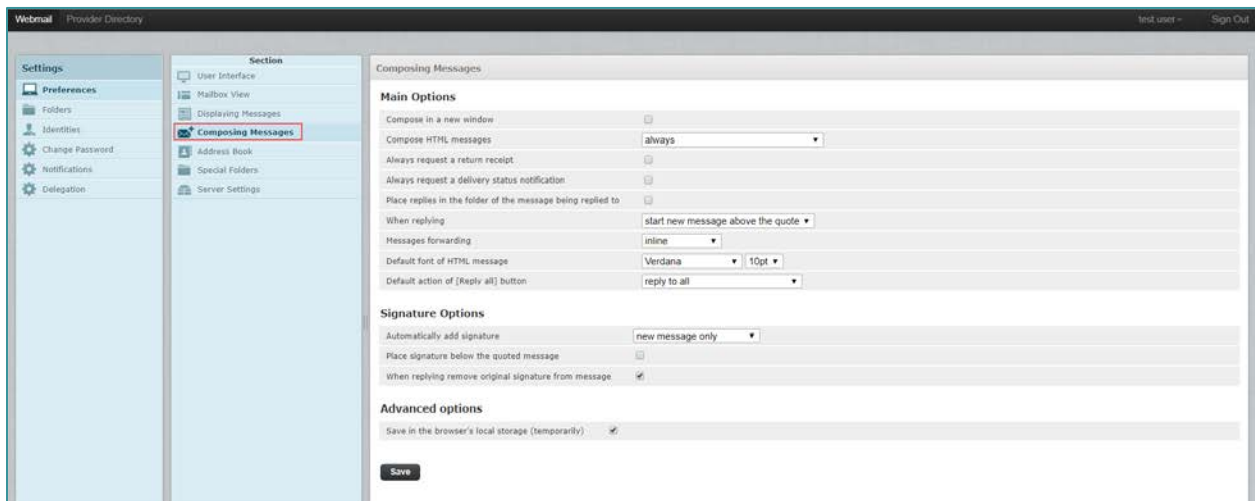
HEALTHeLINK recommends adjusting your preferences for the best experience in Secure Messaging.

To apply recommended settings:

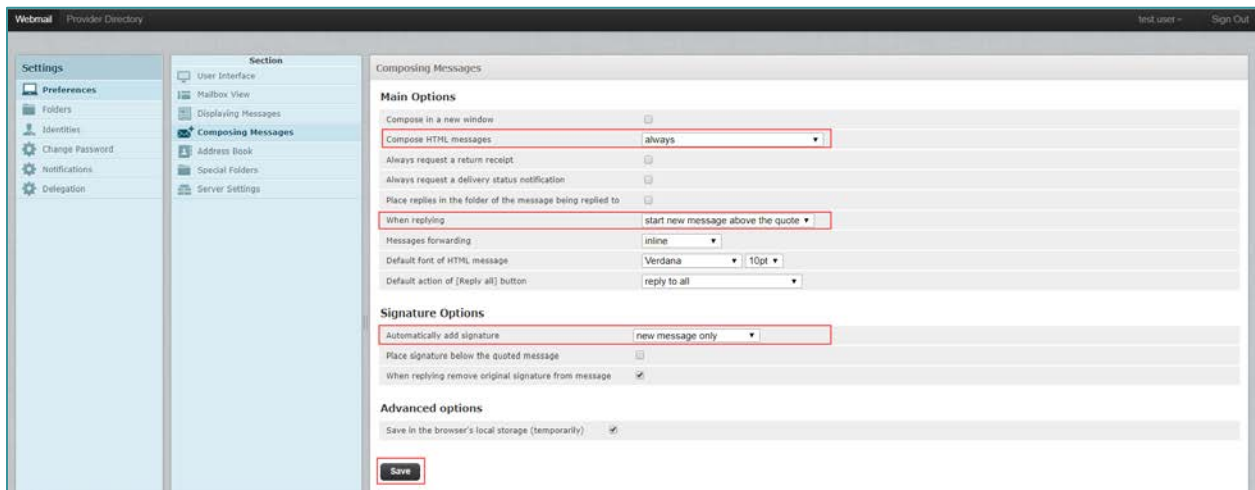
1. Navigate to Settings
2. Select “Preferences” in the left hand navigation



3. Click “Composing Messages”



4. Under the “Compose HTML messages” dropdown, select “always”
5. Under the “When replying” dropdown, select “start new message above the quote”
6. Under the “Automatically add signature” dropdown, select “new messages only”



7. Click [Save]

NOTE: Choosing to always compose HTML messages allows you to format your message using the features shown below.



## 4.2. Folders

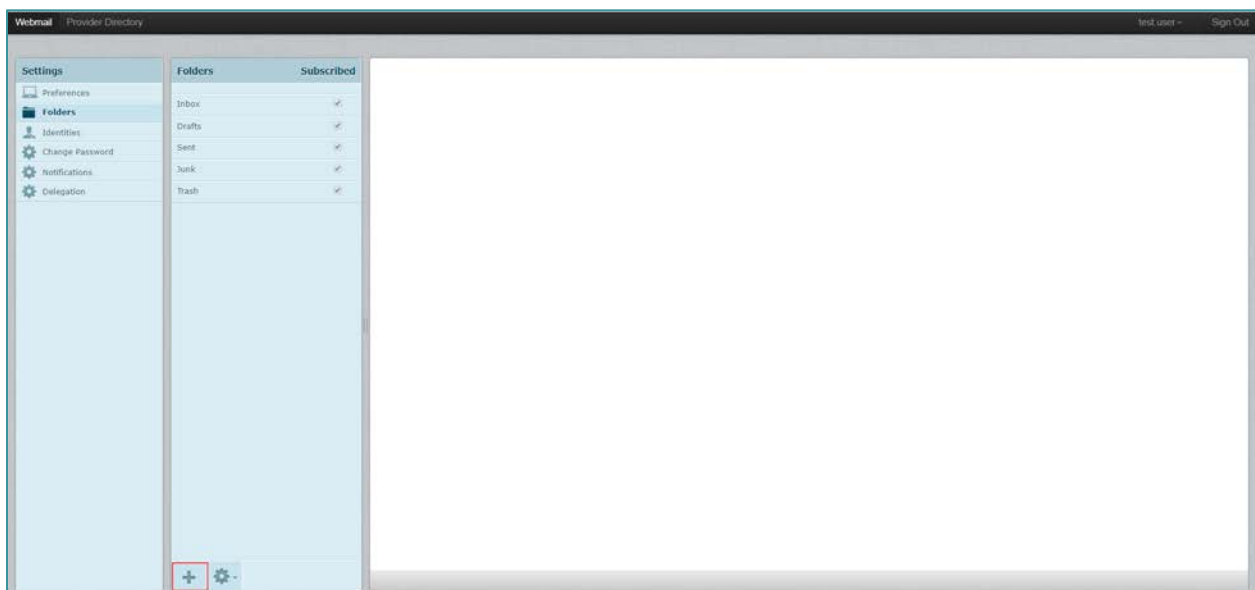
You can add and delete folders to better manage/organize your inbox.

To add a folder to your inbox:

1. Navigate to Settings
2. Select “Folders” in the left hand navigation

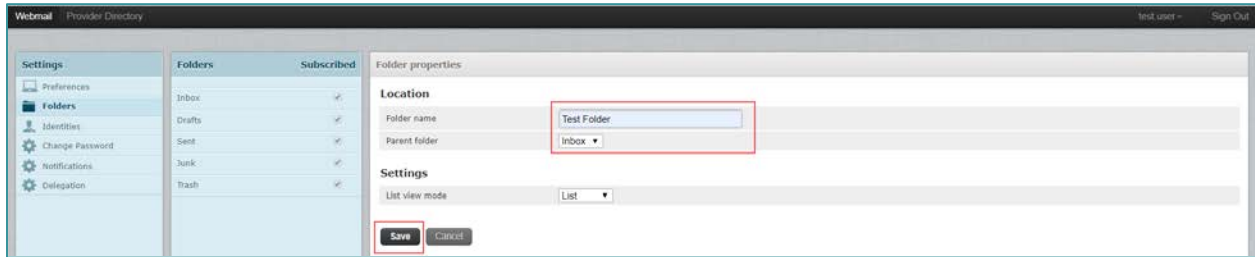


3. Click “+”



4. Enter the desired folder name

5. Select a parent folder, if desired.



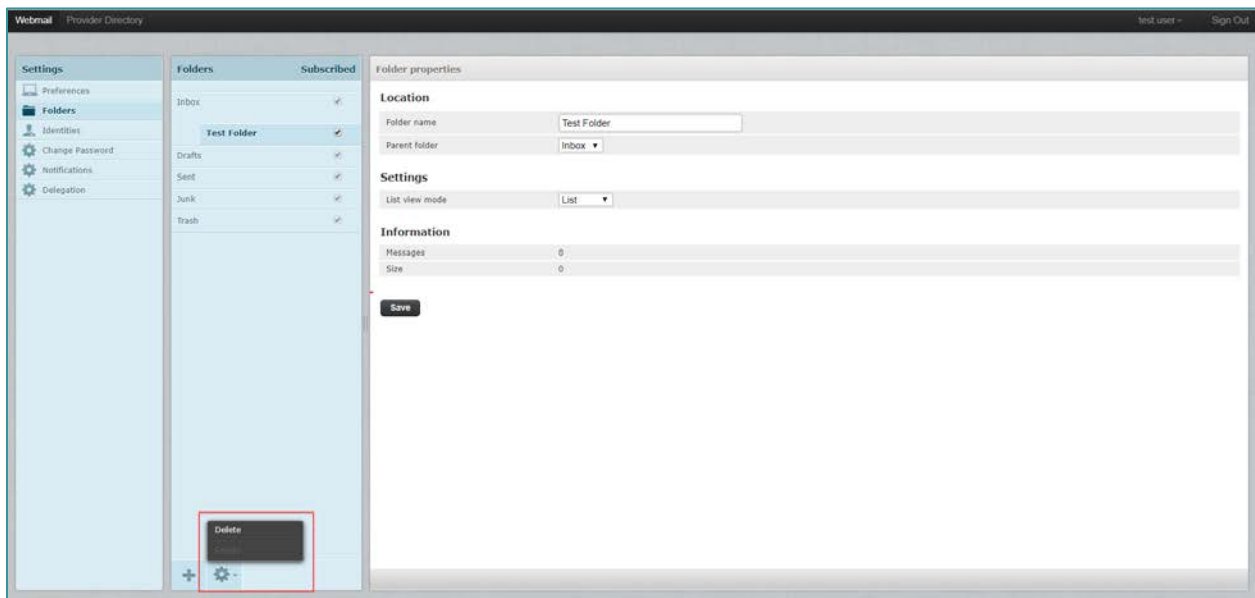
6. Click [Save]

To delete a folder from your inbox:

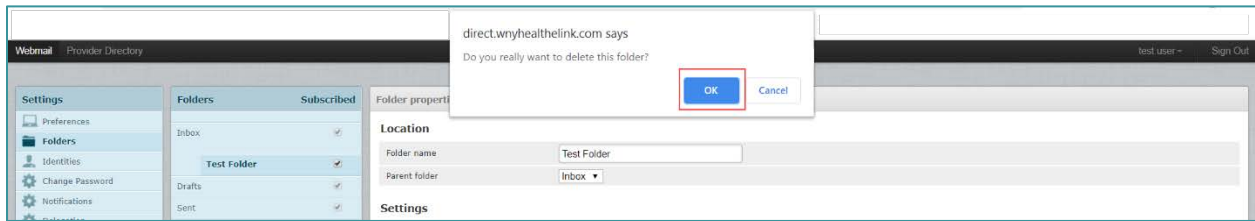
1. Navigate to Settings
2. Select “Folders” in the left hand navigation



3. Select the folder
4. Click the gear icon



5. Select “Delete”
6. Click [OK]



**When you delete a folder, all messages in the folder are deleted and unrecoverable. Please exercise caution when deleting folders.**

## 4.3. Identity

To add a signature to your messages:

1. Navigate to Settings
2. Select “Identity” in the left hand navigation

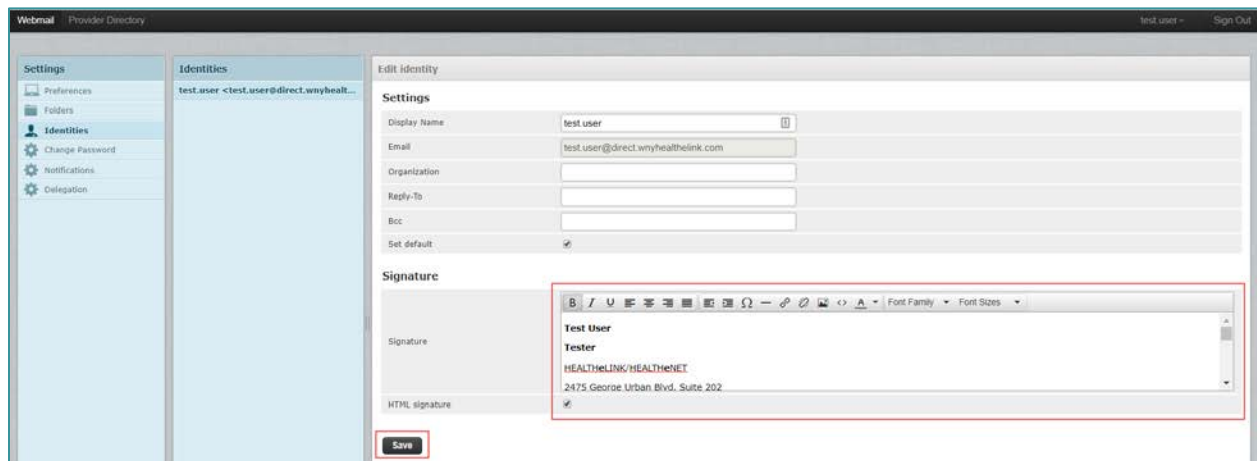


3. Select your email under Identities



4. Enter the desired signature in the “Signature” text box





5. Click [Save]

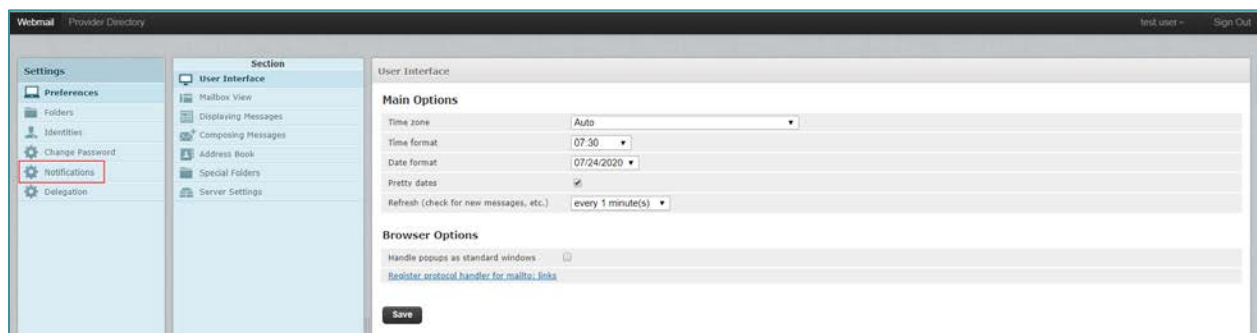
## 4.4. Notifications

Upon account set up, HEALTHeLINK configures your Secure Messaging account for you to receive an alert to your non-secure work email when you receive a secure message.

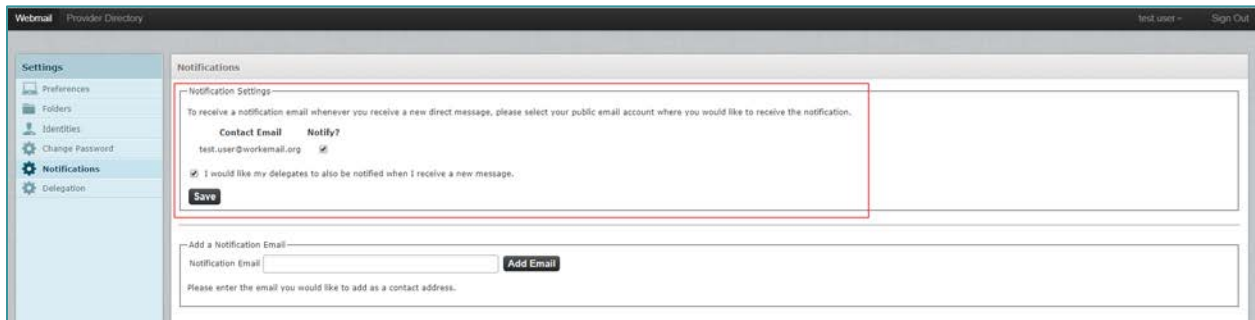
If you have a delegate, you should make sure they receive a notification in their regular email.

To navigate to these settings:

1. Navigate to Settings
2. Select “Notifications” in left hand navigation



3. Adjust settings as needed



Below are examples of notification emails that you and your delegate will receive to your non-secure work email account when a secure message is received.

<p><b>You have received a new DIRECT message!</b> MirthMail &lt;noreply@mirthmail.com&gt; Sent: Mon 11/18/2013 4:07 PM To: Christopher Mayer</p> <hr/> <p>Dear Chris Mayer,</p> <p>You have received a new DIRECT message.</p>	<p><b>You have received a new DIRECT message!</b> MirthMail &lt;noreply@mirthmail.com&gt; Sent: Mon 11/18/2013 4:11 PM To: Christopher Mayer</p> <hr/> <p>Dear Chris Mayer,</p> <p>You have received a new DIRECT message.</p> <p>We have also notified the following delegates: * Julie Mayer (julie.mayer)</p>	<p><b>You have received a new DIRECT message!</b> MirthMail &lt;noreply@mirthmail.com&gt; Sent: Mon 11/18/2013 4:11 PM To: Julie Mayer</p> <hr/> <p>Dear Julie Mayer,</p> <p>Your delegator, Chris Mayer, has received a new DIRECT message.</p>
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## 5. Delegation

You have the ability to make someone a delegate for your account. A delegate can send and receive messages on your behalf. Typical uses may be a delegate monitoring a physician's account or a delegate monitoring the account of someone who is on vacation.

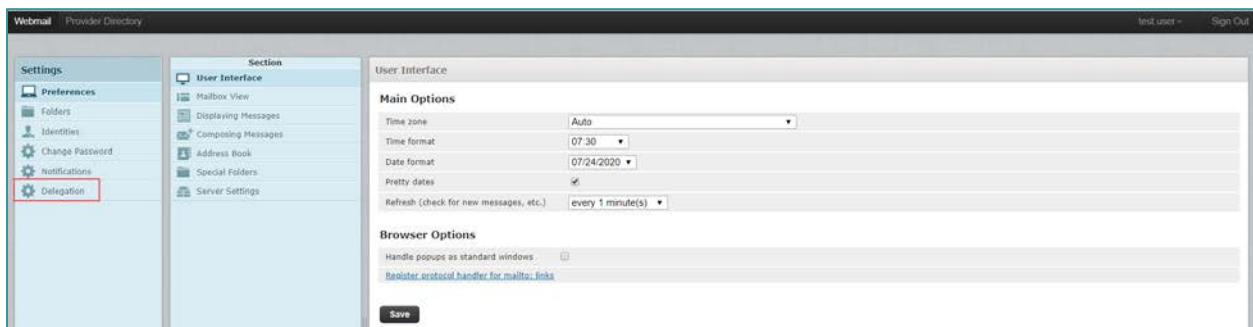
### Important things to know before adding a delegate:

- **Please be aware that this is a LIVE mirrored account. This means that if a delegate deletes a message, it will delete the message for all users across all platforms.**
- **In order to add a delegate, that user must first be setup with a "Secure Messaging" account. If the user does not already have that permission, the Authorized Contact for your practice will need to submit a user request via the AC Portal, and request that the "Secure Messaging" permission be added to the user's portal account.**

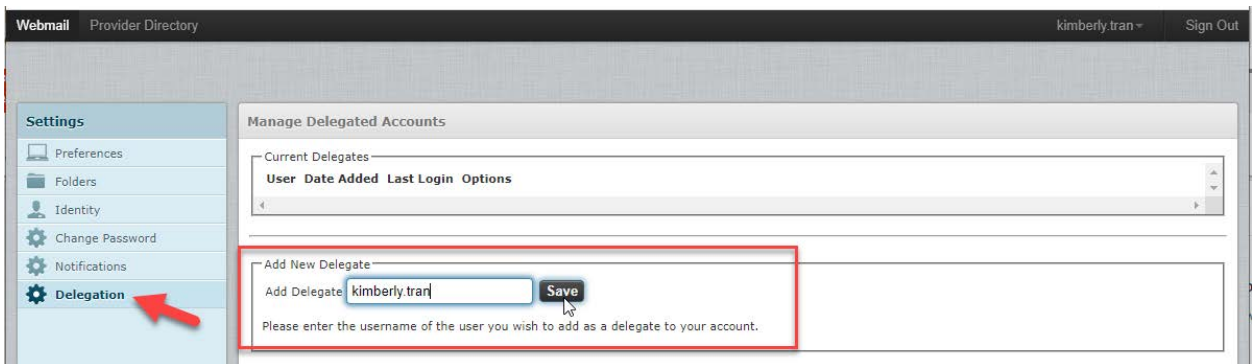
## 5.1. Adding a Delegate



1. Click on your name that is displayed in the top right corner. From the drop down displayed, choose the correct mailbox for the alert subscription (the inbox where your alerts are received). Example below shows the default “Personal” account as “kimberly.tran” and the *SHARED* account as “account.managers”.
2. Once you have selected the mailbox that you are wishing to add a delegate to, click on “Settings”
3. Click on “Delegation” and the “Add New Delegate” field will appear.

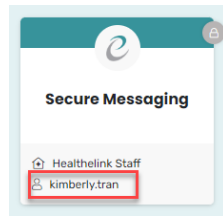


4. Enter your delegate’s Secure Messaging username
  - a. The delegate must be another user of Secure Messaging



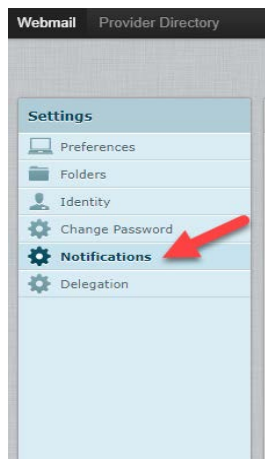
1. In the box next to “Add Delegate” enter firstname.lastname (must be all lowercase, also include any numbers that may follow the last name for this user – Ex. joan.smith2) of the user you would like to add.

You can confirm the username by having the user log into their HEALTHeCOMMUNITY™ portal, and look at their secure messaging badge. The name listed on the secure messaging badge is what you will enter in the “Add Delegate” field.



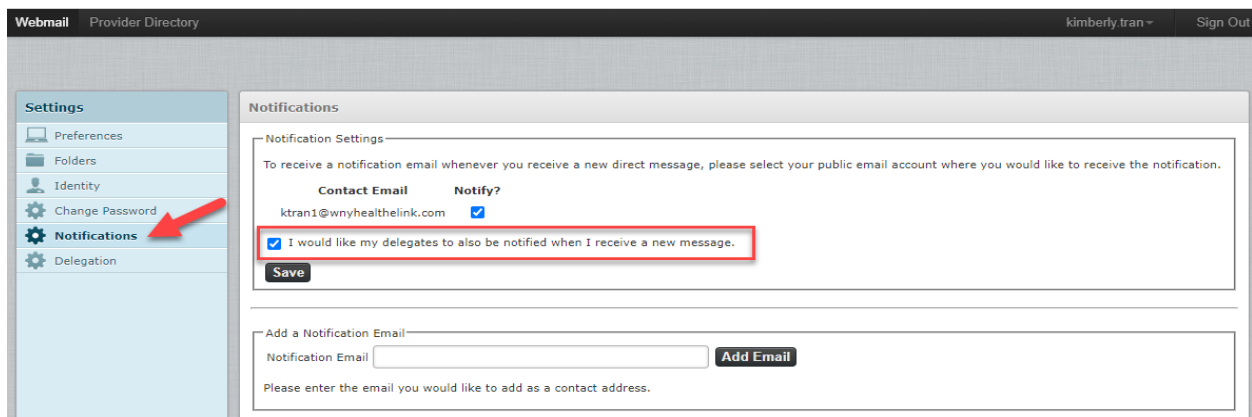
2. Once you add the user and click “Save”, the user’s name will automatically be displayed under “Current Delegates”.

## 5.2. Notifications for Delegate



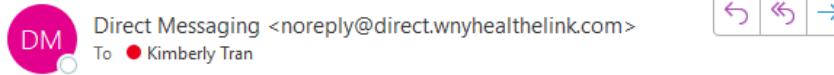
By setting up notifications for your delegates, every time that a message comes into the main Mirth Mail (Secure Messaging) account, the delegate would receive a notification to their work email account alerting them that they have a new message waiting for them in the Mirth Mail (Secure Messaging) account. To turn on notifications for a delegate, please follow the directions below:

1. Click on “Notifications”
2. Checkmark the box next to “I would like my delegates to also be notified when I receive a new message”.



3. Click “Save”
4. Now, when a new message comes in, the delegate would receive an email like the one below:

You have received a new DIRECT message!

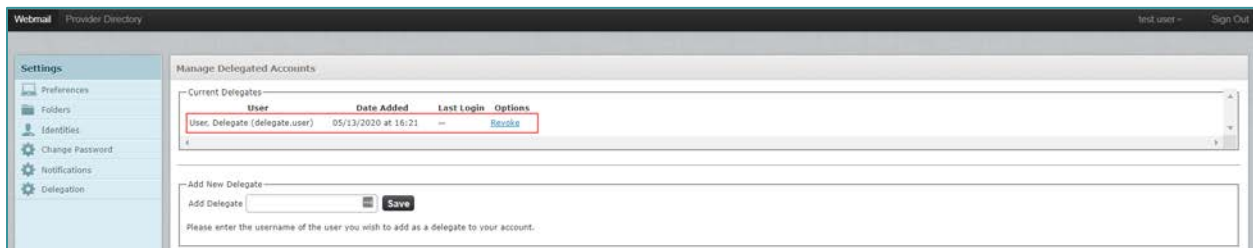


HeL Notice: Trusted Sender

“Notifications” for your delegates are required to be turned ON in order for the delegate to receive these emails

Dear Kimberly Tran,

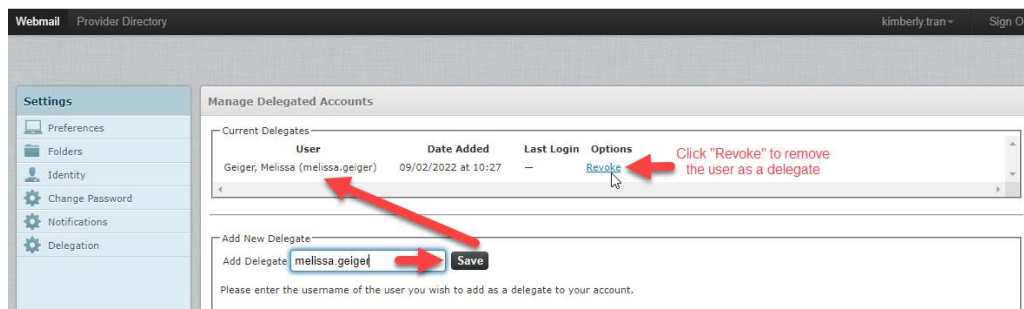
Your delegator, Account Managers, has received a new DIRECT message.



### 5.3. Deleting a Delegate

As the Mirth Mail (Secure Messaging) Owner, you have the ability to add and/or delete delegates at any time necessary. To delete a user from the group, please follow the instructions below.

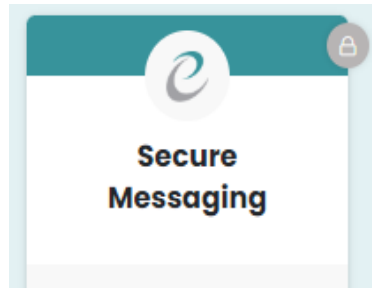
1. Log into your Mirth Mail (Secure Messaging) Account and click on your name in the top right corner to select “Settings”
2. Click on “Delegation” in the left hand column
3. Under “Current Delegates” in the top window, locate the delegate that you would like to remove access from and click on the “Revoke” button next to their name.



### 5.4. Accessing a Shared Account

Once a user has been added as a delegate to a shared Mirth Mail (Secure Messaging) account, they will be able to toggle between their own account (default) as well as the shared account.

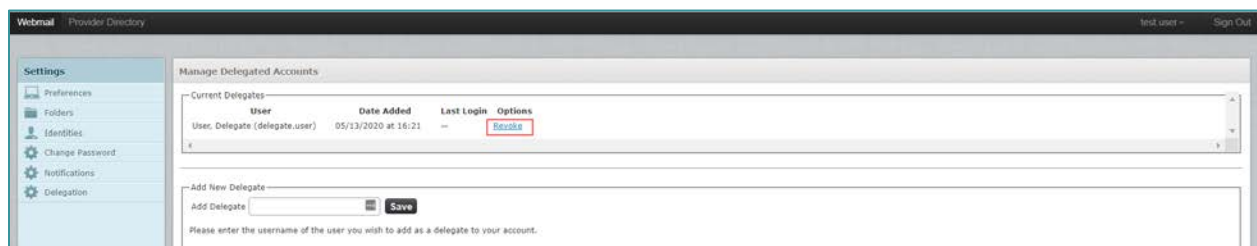
1. Click on your “Mirth” Badge and then select the “Secure Messaging” Badge



2. This will bring you to your main (personal) Mirth Mail (Secure Messaging) inbox as the default.
3. To access a *SHARED* account that you are listed as a Delegate on, you will need to click on your name that is displayed in the top right corner.
4. Under “Delegations” you will see a list of other secure messaging accounts that you have access to. Click on the account that you would like to access, and the inbox will automatically be displayed.



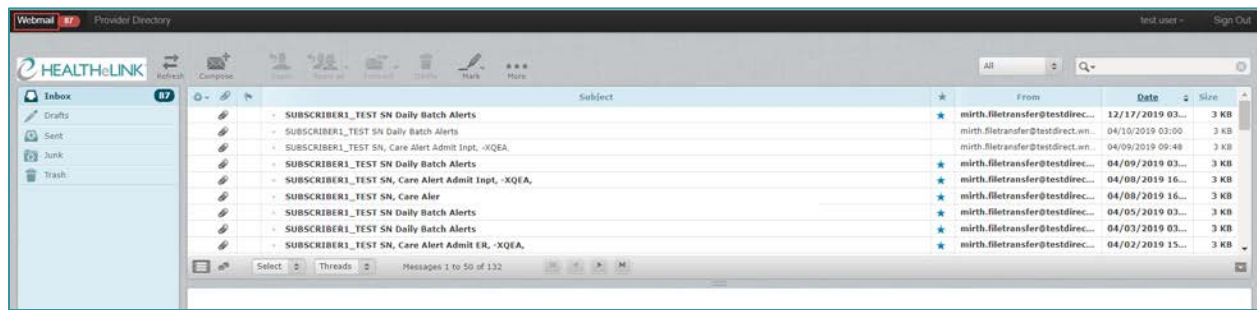
5. **REMEMBER** – This shared inbox is a LIVE mirrored account. This means that if a delegate deletes a message, it will delete the message for all users across all platforms.



## 6. Inbox

The landing page when logging into Secure Messaging is the inbox. This is where you can view and compose messages.

You can return to the inbox at anytime by clicking “Webmail” link in the top right navigation.

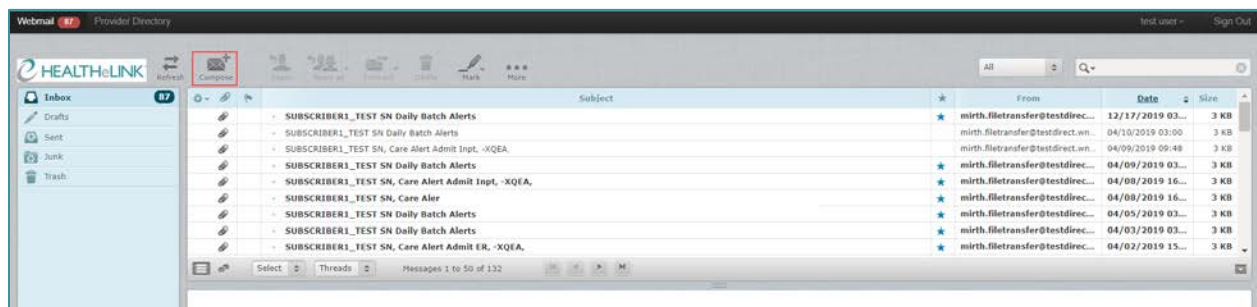


The number next to the “Webmail” link is the number of unread messages in your inbox.

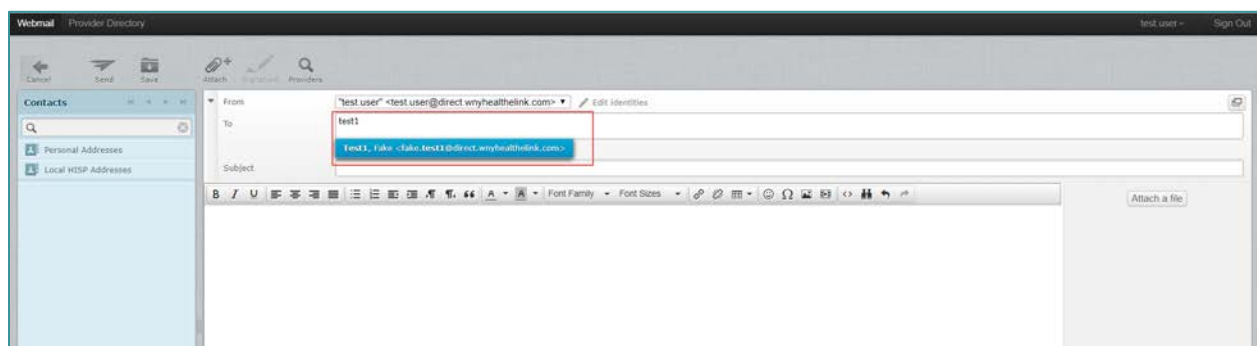
## 6.1. Composing and Sending a New Message

To compose a new message:

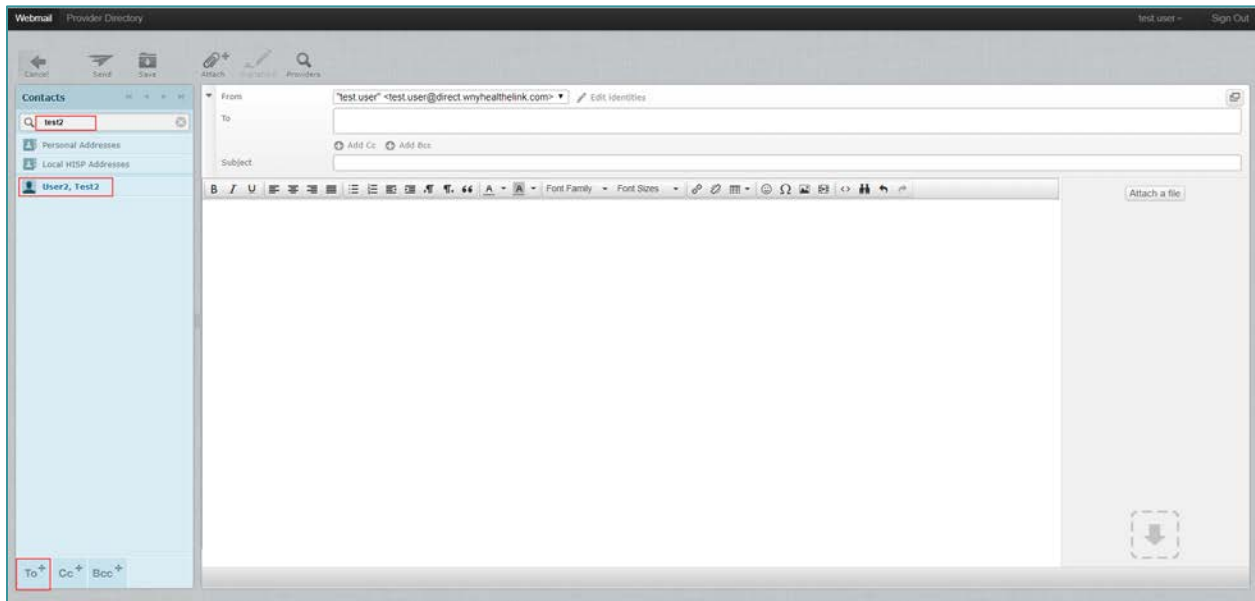
1. Navigate to the inbox
2. Click “Compose”



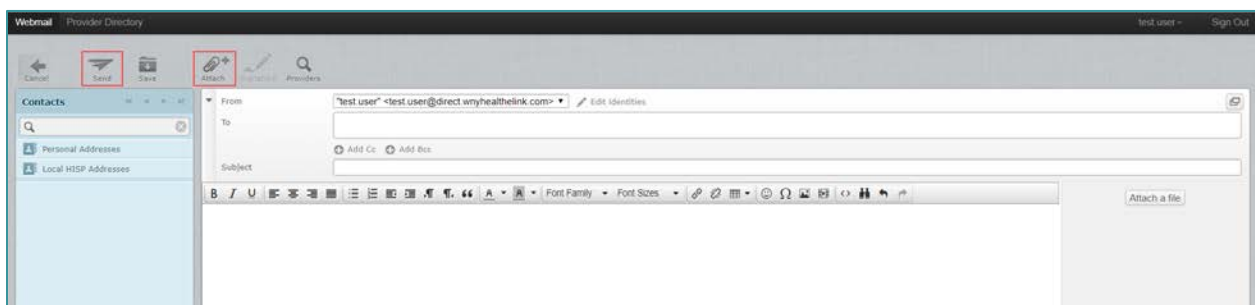
3. Compose the email as you would with any other email service
  - a. There are two ways to add a recipient:
    - i. Begin typing the name of the recipient in the “To” field and select it once it shows up in the dropdown box



- ii. Search for the recipient’s name using the contact list on the left panel. Once you locate the recipient, select the entry and click “To+”



4. Click “Attach” to attach files, if necessary



5. Click “Send”

## 6.2. Using the Provider Directory

You can also search organizations and providers within or outside of the HEALTHeLINK secure messaging directory through the Provider Directory.

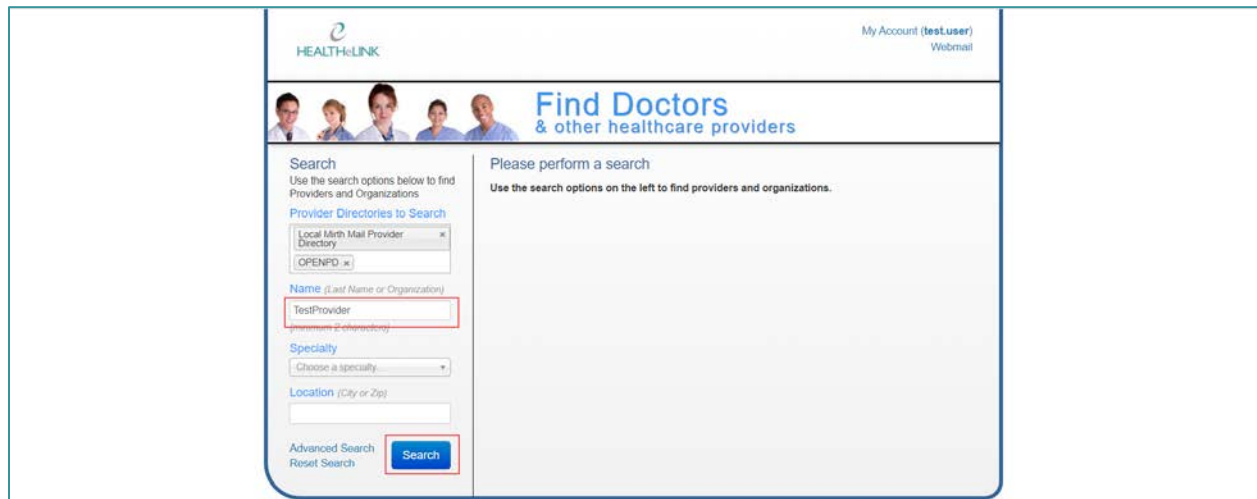
To access and search the Provider Directory:

I. Click “Provider Directory” in top left navigation menu





## 2. Enter your search criteria



HEALTHeLINK My Account (testuser) Webmail

### Find Doctors & other healthcare providers

**Search**  
Use the search options below to find Providers and Organizations

**Provider Directories to Search**

Local Mirth Mail Provider Directory  
OPENPD

**Name** (Last Name or Organization)  
TestProvider

**Specialty**  
Choose a specialty

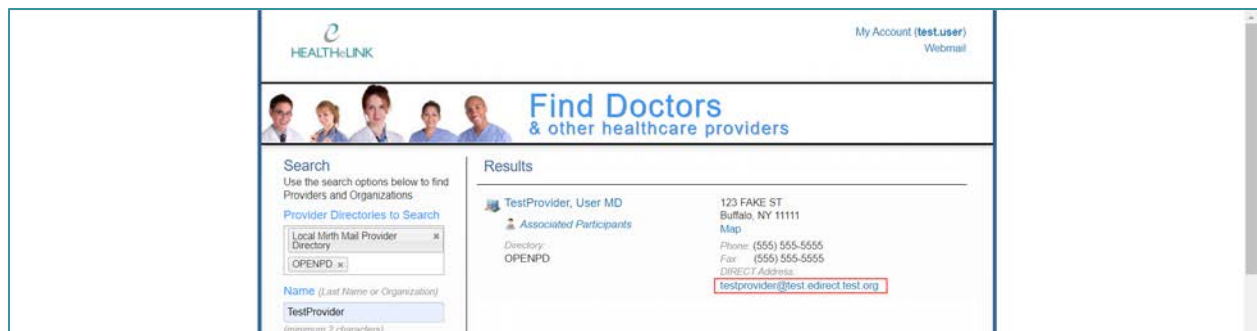
**Location** (City or Zip)

Advanced Search  
Reset Search **Search**

**Please perform a search**  
Use the search options on the left to find providers and organizations.

## 3. Click [Search]

- If the organization or provider you would like to message is listed in the results, click on the direct email address to compose your message



HEALTHeLINK My Account (testuser) Webmail

### Find Doctors & other healthcare providers

**Search**  
Use the search options below to find Providers and Organizations

**Provider Directories to Search**

Local Mirth Mail Provider Directory  
OPENPD

**Name** (Last Name or Organization)  
TestProvider  
(minimum 2 characters)

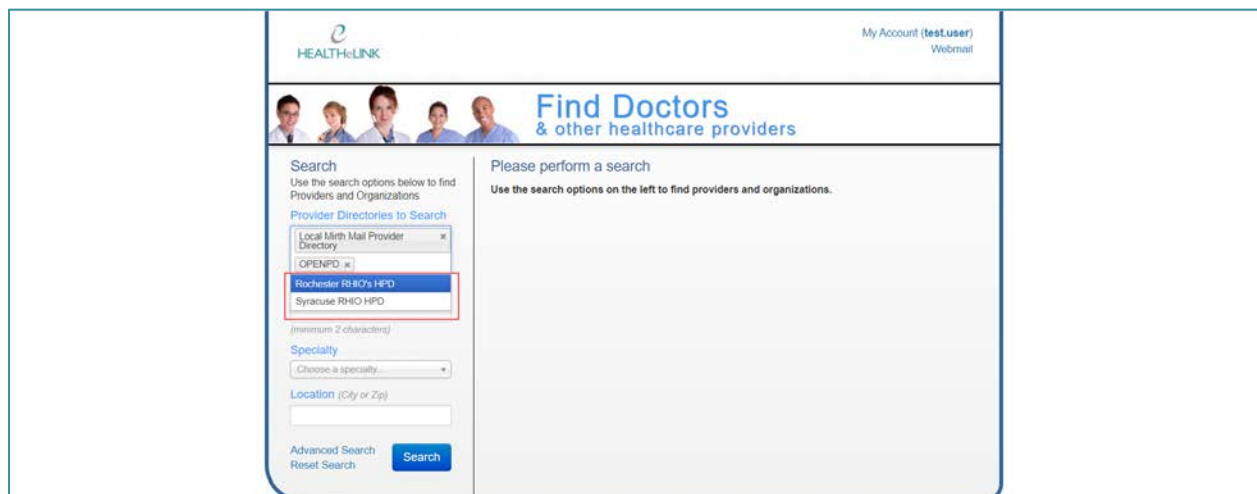
**Results**

TestProvider, User MD  
Associated Participants

Directory: OPENPD

123 FAKE ST  
Buffalo, NY 11111  
Map  
Phone: (555) 555-5555  
Fax: (555) 555-5555  
DIRECT Address: [testprovider@test.edirect.test.org](mailto:testprovider@test.edirect.test.org)

- If you wish to search outside the HEALTHeLINK directory, click the white space under “Provider Directories to Search” and select the directory



HEALTHeLINK My Account (testuser) Webmail

### Find Doctors & other healthcare providers

**Search**  
Use the search options below to find Providers and Organizations

**Provider Directories to Search**

Local Mirth Mail Provider Directory  
OPENPD  
Rochester RHIO's HPD  
Syracuse RHIO HPD  
(minimum 2 characters)

**Specialty**  
Choose a specialty

**Location** (City or Zip)

Advanced Search  
Reset Search **Search**

**Please perform a search**  
Use the search options on the left to find providers and organizations.

## 7. Adding to Address Book

You can add contacts from outside organizations to your address book.

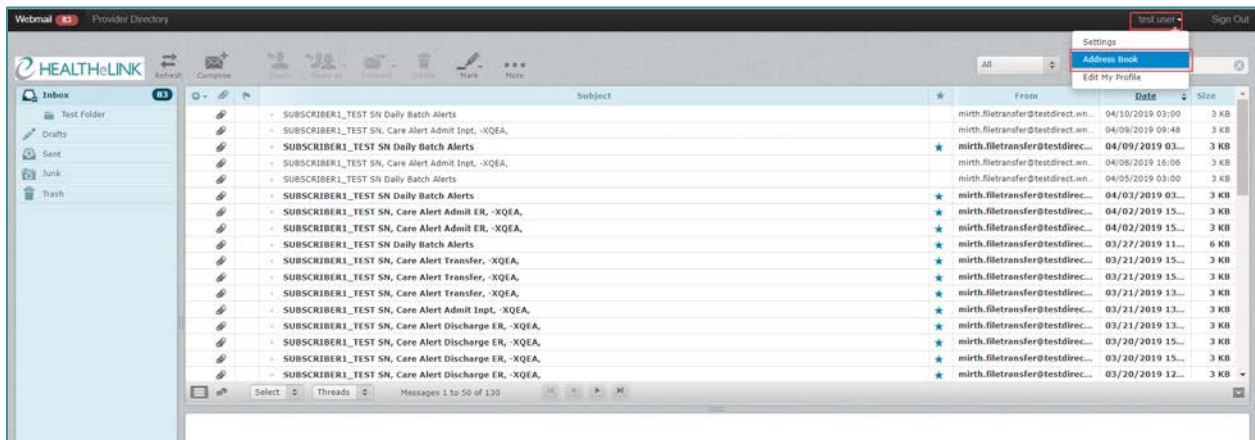
To add contacts to your address book from an existing email:

1. Locate and open the email with desired contact
2. Click add icon next to sender's email address

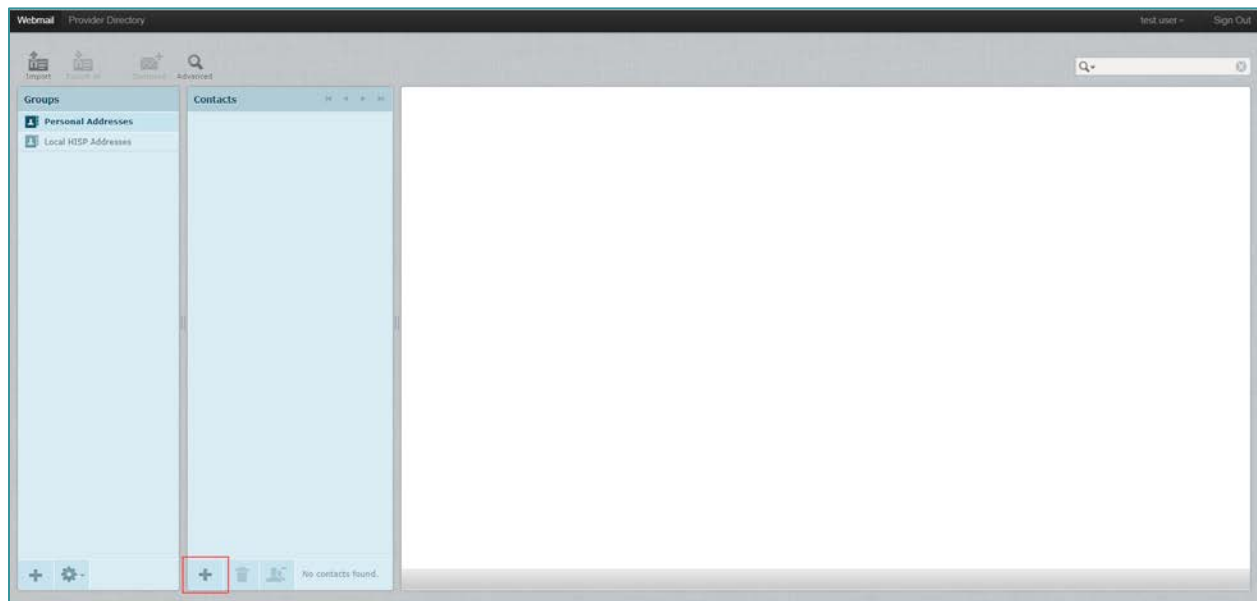


To add contacts to your address book manually:

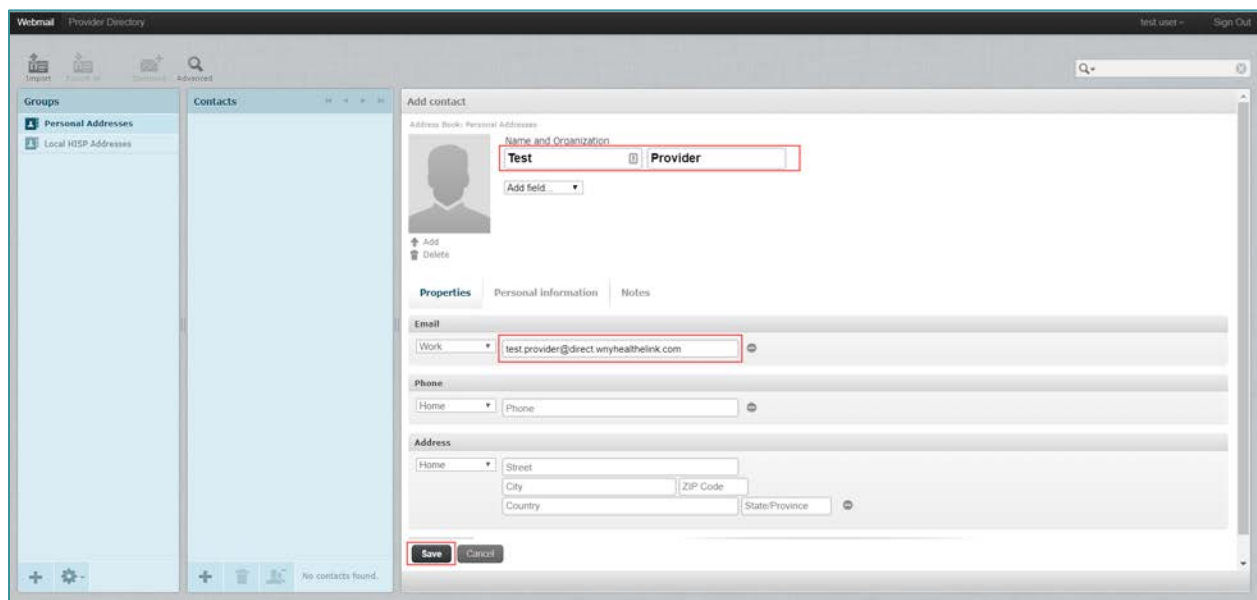
1. Click your username in top-right navigation



2. Select "Address Book" option
3. Click "+"



4. Enter contact information (first name, last name, and email)



5. Click [Save]

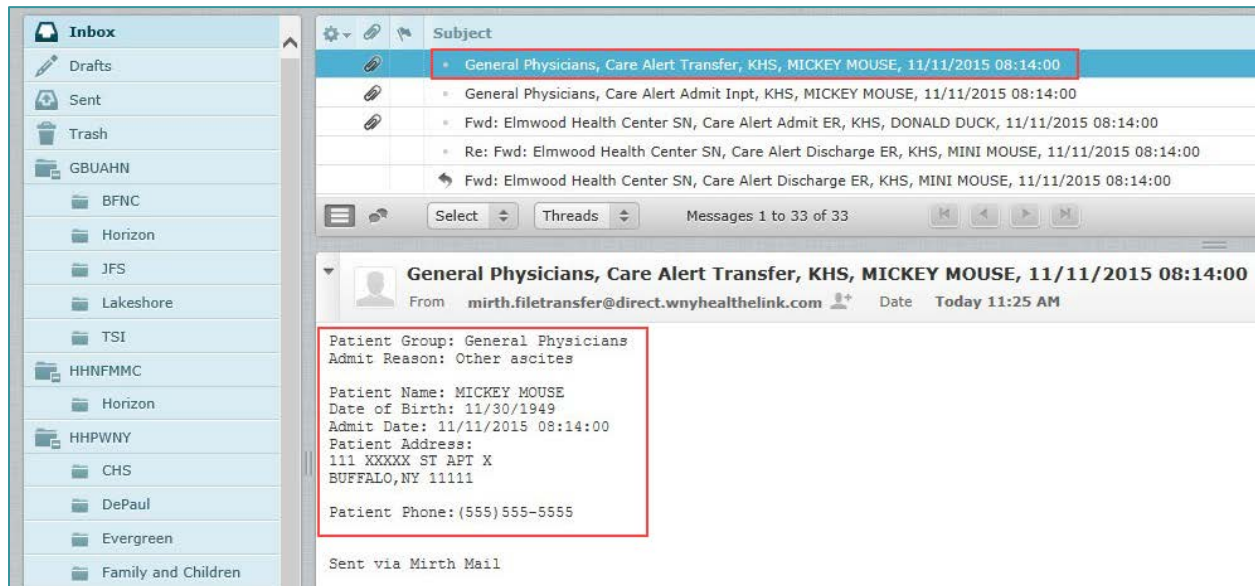
## 8. Receiving Alerts via Secure Messaging

This section provides useful information on alerts received through Subscribe and Notify services.

The subject line of the notification provides the following information:

- Subscribing Facility or Organization
- Admit, Discharge, or Transfer
- Inpatient or ER or OP
- Hospital

- Patient First Name
- Patient Last Name
- Date/Time



The message provides demographic and clinical information about the patient. Use this information to conduct a patient search in HEALTHeLINK for any necessary follow-up.

Specific alerts groups can be located by entering criteria in the search window of the inbox. Examples that may be useful are searches by:

- ADT
- Event type
- Hospital
- Patient name

