



Direct Messaging

Direct Administrator Guide – Managing Users + Organizations

Responsibilities + Actions

Direct Administrators are responsible for managing users for their organization. This includes adding users, assisting with training, removing access, etc.

There are two types of Direct Administrators. These types are distinguished via the “Trusted Agent” status. Those who have completed the GLHC Authorized Business Representative Identity Verification process are identified as a Trusted Agent.

User Type: Professional
 Domain: michiganhisp.midirect.net
 Status: Active
 Require ID Proofing: Yes
 Trusted Agent: Yes

Below is a list of actions for each type of Administrator, for general users, and for GLHC Support.

| Actions | Admin - Trusted Agent = Yes | Admin - Trusted Agent = No | General User | GLHC Support |
|--------------------------------|-----------------------------|----------------------------|--------------|--------------|
| Create Organizations | | | | X |
| Create Trusted Agents | | | | X |
| Delete Trusted Agents | X | X | | X |
| Create Admins | X | | | X |
| Delete Admins | X | X | | X |
| Create Users | X | | | |
| Manage Users | X | X | | |
| Lock Account | X | X | | |
| Unlock Account | X | X | | |
| Reset Password(s) | X | X | X | |
| Create User Direct Address | X | X | X | |
| Add Org Direct Address to User | X | X | | |
| Delete Accounts | X | X | | |
| Run Reports | X | X | | X |
| View Messages | X | X | X | |
| Send Messages | X | X | X | |

Create Organizations

To assure that Organizations meet Direct Trust standards, GLHC Support adds and manages organizations. To add or manage an organization, email GLHC Support at direct@gl-hc.org

Create Trusted Agents

Only GLHC Support can create a Trusted Agent. To become a Trusted Agent, complete the Authorized Business Representative Identity Verification (ABR) process.

Delete Trusted Agents

A Trusted Agent may be deleted by another Trusted Agent or Admin within an organization. Notify GLHC Support if a Trusted Agent is removed. Submit the notification to GLHC Support at direct@gl-hc.org.

Create Admins

An Admin may be created by a Trusted Agent within an organization. Notify GLHC Support if an Admin is created. Submit the notification to GLHC Support at direct@gl-hc.org.

Delete Admins

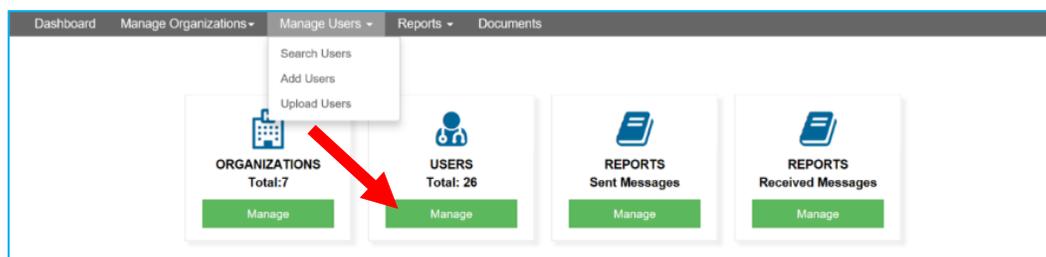
An Admin may be deleted by another Trusted Agent or Admin within an organization. Notify GLHC Support if an Admin is deleted. Submit the notification to GLHC Support at direct@gl-hc.org.

Create Users

Review the “Adding Users” user guide for information about how to create users. Find Direct user guides at www.gl-hc.org/resources/direct.

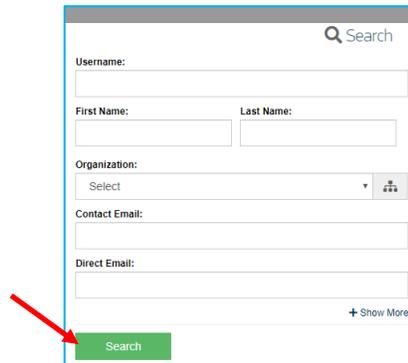
Managing Users

After logging in, click on the green button labeled **Manage** under Users in the Dashboard.



Search for Users

To search for a User, enter the details in the search fields and click the green **Search** Button. To get back to the search page, click the word **Search** in the upper right.



Search

Username:

First Name: Last Name:

Organization:  

Contact Email:

Direct Email:

[+ Show More](#)

General Information

To manage a particular User and see their details, click on their User Name.

Manage Users

Users for Sub Org 3

| Username | First Name | Last Name | Contact Email | Type |
|-------------------------------|------------|-----------|------------------------------|--------------|
| service2test2 | Service2 | Test2 | acookson@securesolutions.com | Professional |
| service2test | Service2 | Test | acookson@securesolutions.com | Professional |
| acooksonsub3 | andrew | acookson | acookson@securesolutions.com | Professional |

The details of the User will display on the right hand side of the screen.

NAME: Service2 Test2 

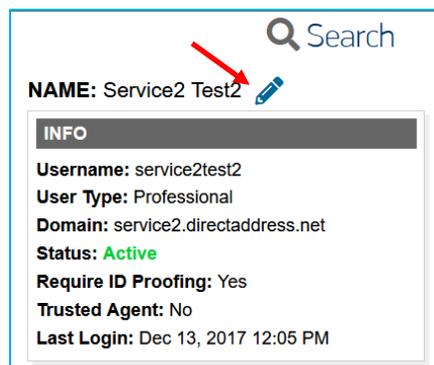
INFO

Username: service2test2
User Type: Professional
Domain: service2.directaddress.net
Status: Active
Require ID Proofing: Yes
Trusted Agent: No
Last Login: Dec 13, 2017 12:05 PM

PRIVILEGES:

Issue Invites: Off
 Create Users: Off

Edit the User demographics and email address by clicking the pencil icon next to their name.



Search

NAME: Service2 Test2 

INFO

Username: service2test2
User Type: Professional
Domain: service2.directaddress.net
Status: Active
Require ID Proofing: Yes
Trusted Agent: No
Last Login: Dec 13, 2017 12:05 PM

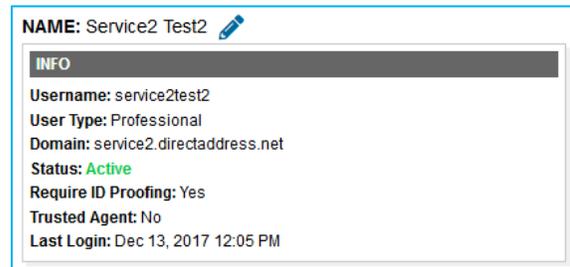
Detailed User information

The following will display for each user:

NAME - User first and last name

INFO

- **Username**
- **User Type:** Will always say "Professional"
- **Domain:** The domain where the user is registered
- **Status:** Active, Locked, or Pending - If the status is Pending, the user has not yet activated their account.
- **Require ID Proofing:** Will always say "Yes".
- **Trusted Agent (TA):** For most users it will say "no". Those with Trusted Agent (TA) privileges can create users without the user having to go through the identity verification process. Note: Any user who is created by an Administrator without TA privileges will be required to complete identity verification.
- **Last Login:** Displays the date and time the user last logged into Direct.



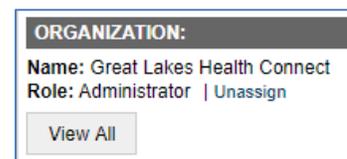
Privileges

- **Issue Invites:** "On" If the user/administrator can invite other users to self-register for a Direct account.
- **Create Users:** "On" If the Administrator is a Trusted Agent and has gone through the Identify Verification process.



Organization

- **Name:** The organization the user is registered in - A user may be part of multiple organizations if they are an admin in a Parent Organization
- **Role:** Privileges assigned to the user - Either "Admin" or "Member"



Contact Email

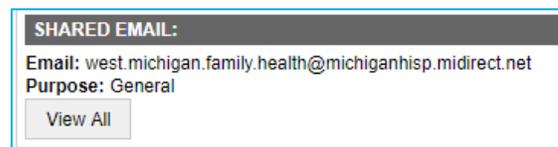
Displays the user's non-Direct email address (i.e. Outlook, gmail, yahoo, etc.) for the user to receive non-PHI email alerts for new Direct messages.

Direct Email(s)

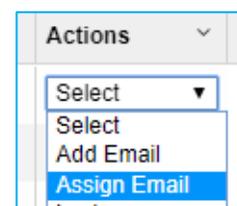
Will display a Direct email address if provisioned. **Note:** Only assign a Direct Mail if the user will be sending or receiving Direct messages. If the user will only view messages DO NOT assign a Direct email.

Shared Email(s)

Important: If you do not see an email listed in this section, the user will NOT be able to view any Organization/Shared Emails. "Shared Email" allow users to access a Shared Organization Direct Address. (See "Assign Email" on page 5 for further details).



If the organization's Direct address does not display, select "Assign Email" in the Actions dropdown menu. (See "Editing Actions for an Individual User" below for further details)



Specialty

Only used for providers. Specialty is broken down into three categories: Type, Classification, and Specialization. The Specialty comes from the current version of the National Uniform Claim Committee Health Care Provider Taxonomy Code Set. Review the Cost Set at www.nucc.org.

ID(s)

Only used for providers. Identification for the user such as State Medical License and NPI.

Lock Account

The account will lock if a user is not verified or attempts an incorrect username and password combination five (5) times. If an account is locked, it will say "Locked" in the **Status** section of the User Details.

Administrators can choose to lock an account for various reasons by selecting the **Lock** action for the user.

Unlock Account

To unlock a user, select the **Unlock** action for the user. Unlock a user before resetting their password.

Reset Password

If a user has forgotten their password and is unable to use the self-service reset function, select the user and click **Reset Password** from the user actions. A temporary password will be sent to the contact email address associated with the users account. For security purposes, no other identifying information will be included in the email. If the user never activated their account and is unable to locate their initial temporary password, the Administrator can reset their password under the Actions dropdown list. If the user has an issue with their account the Direct Administrator may contact GLHC Support for assistance.

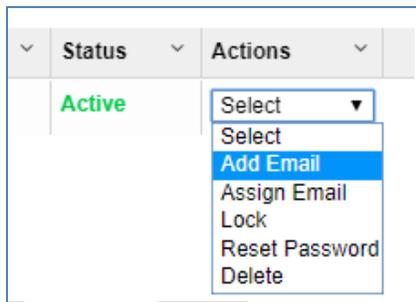
Creating a User Direct Address

User these instructions to add a Direct Address to a user. These instructions are not for adding the user's personal email address to their account.

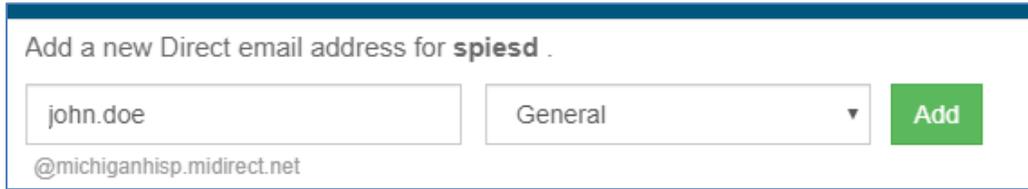
Only assign a Direct Address if the user will be sending Direct messages under their own name and NOT on behalf of the organization/office. DO NOT assign a Direct Address if the user is only viewing messages or will be using the organization's Direct address to send messages.

To create a User's Direct Address:

1. Select **Add Email** under Actions

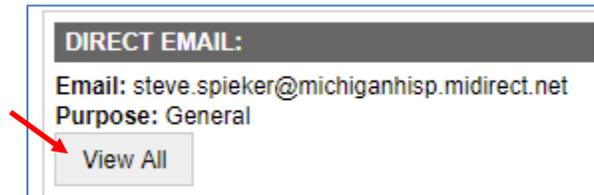


2. Enter the User's first name (period) then last name and select **General** under "Select Purpose". Then click **Add**.



Deleting a User Direct Address

1. To delete a Direct Address, click **View All** under **DIRECT EMAIL:** on the right hand side of the Manage User screen.



2. Then, click **Delete** to the right of the desired Direct Address.

| Direct Address | Purpose | Keep MDN | Actions |
|------------------------------------|---------|----------|------------------------|
| john.doe@michiganhisp.midirect.net | General | No | Delete |

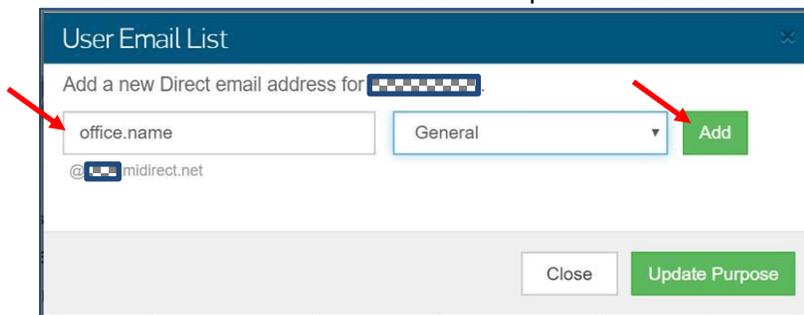
Changing a User Direct Address

The only way to change a user's Direct Address is to delete the existing address and then create a new user Direct Address.

Add Org Direct Address to User

A user can only view Organization Direct messages when the Organization's Direct Address has been added to their user account.

1. Locate the "**Shared Email:**" section in the user's account and then click **Add**.
2. Enter the Direct Address in the text box. Only enter the part that is located BEFORE the @ symbol. The domain is written in the text box below.
3. Select "General" from the dropdown and then click "Add".

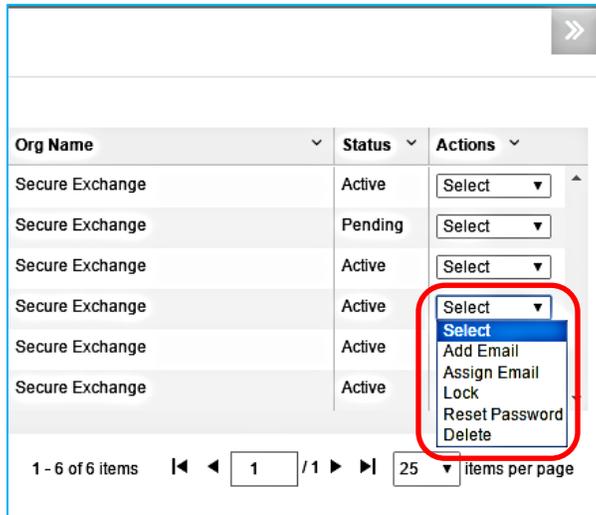


The user may need to refresh the webpage or log out and then log back in to view Organization messages.

This allows users to have their own Direct Address, as well as access a Shared Organization Direct Address.

Editing Actions for an Individual User

An Administrator can make specific changes to a User's account by selecting the "Actions" dropdown to the right of the row for a selected User. The available actions are Add Email, Assign Email, Lock Reset Password, and Delete.

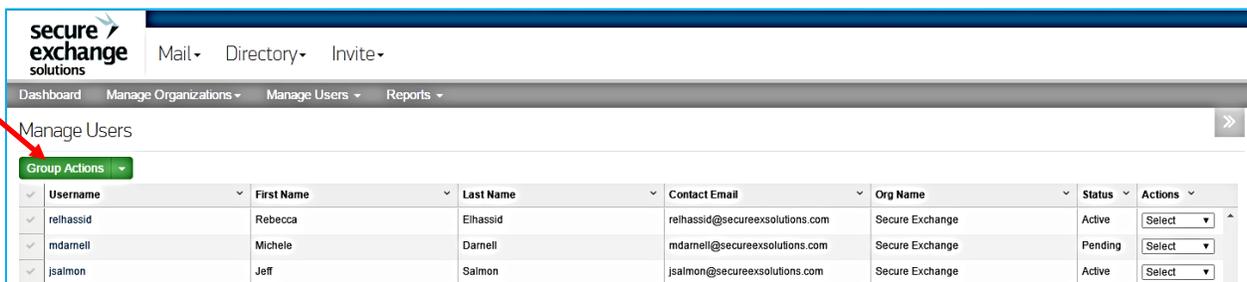


| Org Name | Status | Actions |
|-----------------|---------|---------|
| Secure Exchange | Active | Select |
| Secure Exchange | Pending | Select |
| Secure Exchange | Active | Select |

1 - 6 of 6 items 1 / 1 25 items per page

Editing Actions for an Multiple Users

Admins may take action on subgroups of users from the same organization by selection "Group Actions". The available actions are: Assign Emails, Reset Password, and Delete.



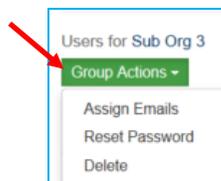
secure exchange solutions Mail Directory Invite

Dashboard Manage Organizations Manage Users Reports

Manage Users

Group Actions

| Username | First Name | Last Name | Contact Email | Org Name | Status | Actions |
|-----------|------------|-----------|--------------------------------|-----------------|---------|---------|
| reihassid | Rebecca | Elhassid | reihassid@securexsolutions.com | Secure Exchange | Active | Select |
| mdarnell | Michele | Darnell | mdarnell@securexsolutions.com | Secure Exchange | Pending | Select |
| jsalmon | Jeff | Salmon | jsalmon@securexsolutions.com | Secure Exchange | Active | Select |



Users for Sub Org 3

Group Actions

- Assign Emails
- Reset Password
- Delete

Delete Accounts

Delete a user as soon as they are no longer part of your organization. If you delete a User, all information and messages related to the User will be deleted. Inform GLHC if you delete a Trusted Agent or Admin.

Run Reports

Review the “Reports” user guide for more detailed information on how to run reports. Find Direct user guides at www.gl-hc.org/resources/direct.

View Messages

Review the “Using GLHC Direct Messaging” user guide for more detailed information about viewing messages. Find Direct user guides at www.gl-hc.org/resources/direct.

Send Messages

Review the “Using GLHC Direct Messaging” use guide for more detailed information about how to send messages. Find Direct user guides at www.gl-hc.org/resources/direct.