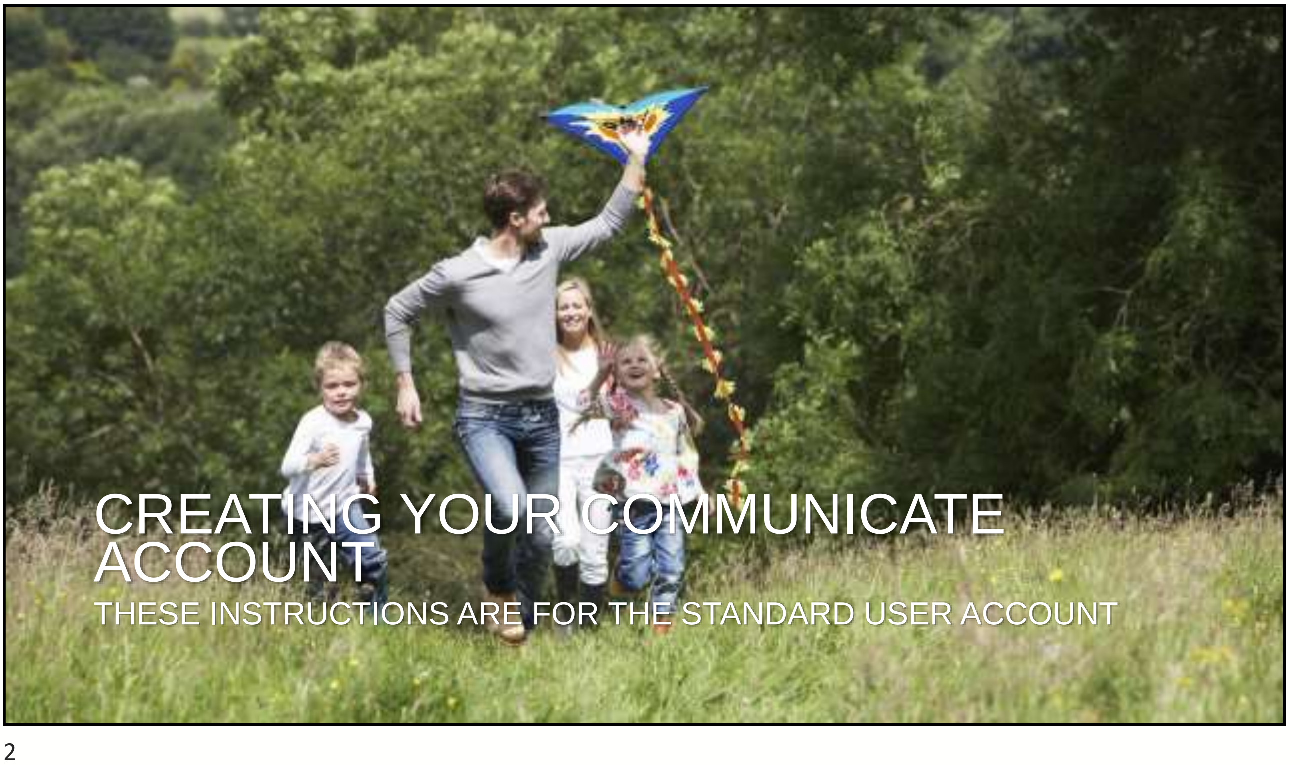

ORION HEALTH
SYNCRONYS
ORION HEALTH COMMUNICATE
SECURE COMMUNICATIONS ACROSS HEALTHCARE
TRAINING PRESENTATION

1


CREATING YOUR COMMUNICATE ACCOUNT
THESE INSTRUCTIONS ARE FOR THE STANDARD USER ACCOUNT

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REQUEST AN INDIVIDUAL ACCOUNT

Before you Begin:

- Ensure that your Healthcare Organization (HCO) has been set up with Communicate and that you know who the Administrator is in your Office.

Requesting an Account:

- On the Account Management Portal page, click on the **Self-Registration** link.

REQUEST AN INDIVIDUAL ACCOUNT

Requesting an Account:

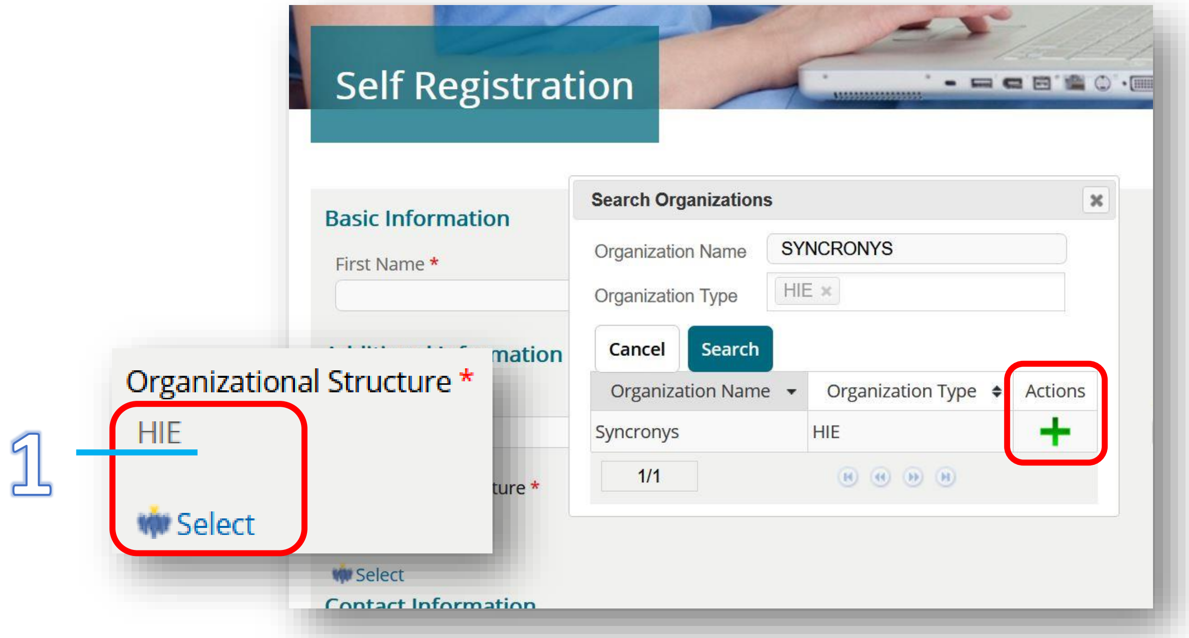
1. Complete the following fields. The asterisk (*) indicates a mandatory field.
2. When complete, click **Save**.
3. Contact your Organization Administrator to approve your account request.

Things to Note:

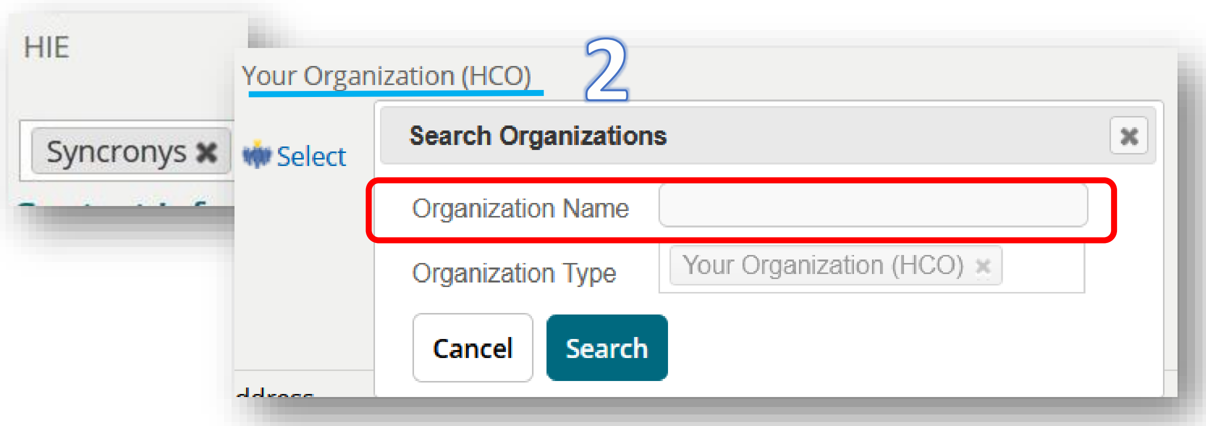
- Your first and last name cannot contain any **spaces**, or any of the following **special characters**. @ , ; # § ' [ ] ( ) _ .
- The NPI is required for Providers.
- Make sure you select the correct HIE and HCO, or else your account **will not be approved**.
  - HIE → The network your Organization belongs to, **SYNCRONYS**
  - HCO → The official name of your Organization

Requesting a Direct Secure Messaging mailbox on an existing domain

In the **Organizational Structure** required fields, search for SYNCRONYS first, clicking on the green plus sign to add it to your request.



Next, search for the name of your **Health Care Organization (HCO)** and add it.



Continue with the **Contact Information** fields, adding **Email, Address, and Phone number**. This information flows into the directory, so it is important not to skip these fields.

When the form is complete, review the information and click Save.

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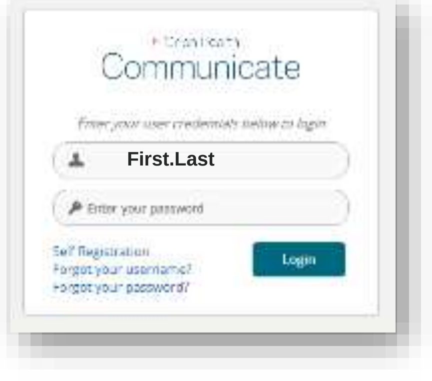
WHICH URL?

https://dsm.<u>management</u>.orionhealthcloud.com



First time login. Requesting new accounts. Account management. Password resets. Challenge question set up, *prior to mailbox use*.

https://<u>dsm</u>.orionhealthcloud.com

Routine mailbox use. Setting up a "Shared" mailbox. User preferences.

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LOGGING IN FOR THE FIRST TIME

Before you Begin:

You will receive an email informing you that your request for a user account has been approved. The email will include your username and initial password.

First time logging in:

- On the Account Management Portal Login page, enter your username and initial password.
- You will then be asked to change your password. As you meet the password requirements, the boxes will turn green.

Password Requirements:

- expires every 90 days.
- must be between 8 and 12 characters long.
- must contain at least one and a maximum of 3 numeric characters.
- cannot contain the characters **< > " ' ( )**
- cannot contain your username.
- cannot contain your first or last name.

ACCOUNT MAINTENANCE | MODIFY YOUR USER PROFILE

Modify Your Information:

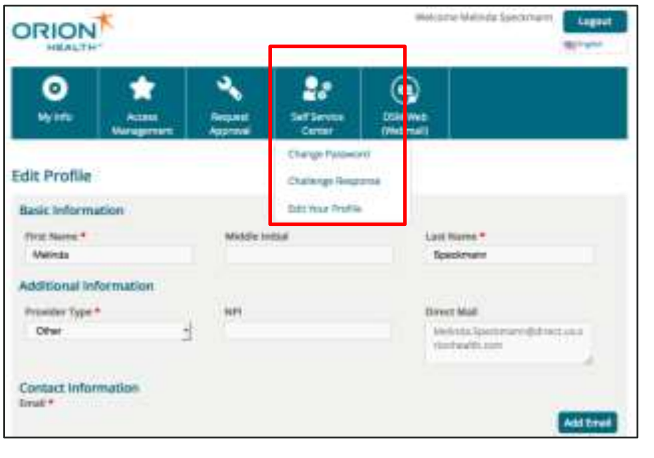
- From the Account Management Portal menu, select **Self Service Center > Edit Your Profile**.

Change Your Password:

- From the Account Management Portal menu, select **Self Service Center > Change Password**.

Change Your Challenge Responses:

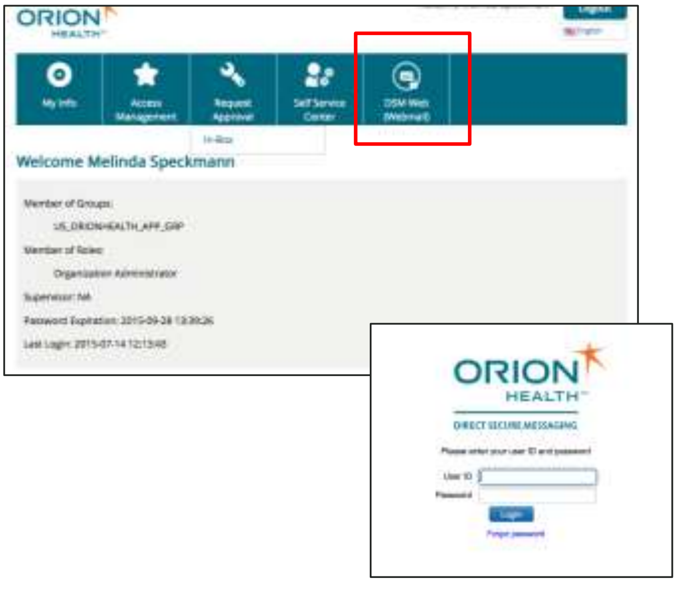
- From the Account Management Portal menu, select **Self Service Center > Challenge Response**.



LOGGING IN FOR THE FIRST TIME

First time logging in:

1. After changing your initial password, you can now login to your Management Portal account.
   – This is to manage your profile and other users' accounts if you are an Administrator.
2. Click **DSM Web (Webmail)** to redirect to the login page for the Communicate Web Client.
   – Communicate Web is the email platform where you will send/receive your secure messages.
   – The login information is the same as the **updated information** from your Management Portal account.
   – https://dsm.orionhealthcloud.com/concerto/Login.htm



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ACCOUNT MAINTENANCE | RESPONSES

Purpose:

This will allow the **User** to reset their Password without help from an **Account Administrator**.

Set Up:

1. From the Account Management Portal menu, select **Self Service Center > Challenge Response**.
2. Select three questions and enter an answer for each question.
3. Click the **Save** button. The following message is displayed: *Responses Successfully Saved*

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ACCOUNT MAINTENANCE | YOUR USER ACCOUNT

How to Reset your Password IF you created Challenge Responses:

1. On the Account Management Portal Login page, select **Forgot your password?**
2. Enter your username, then click the **Unlock Account** button. Communicate will send you an email with instructions.
3. Click the link in the email to answer your Challenge Response questions. Note that this link is only valid for **5 days**.
4. Click the **Submit** button. If you answered **at least two** out of the three questions correctly, you are requested to set a new password.

How to Reset your Password IF you did not create Challenge Responses:

- Ask your Administrator to reset your Password.

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COMMUNICATE FEATURES | WITH MESSAGES

Receiving Messages:

- When you first log in to Communicate, the **Inbox** is shown by default. To view messages in other folders, select the wanted folder.
- Select the message in the list to view the message contents on the screen.

Sent Messages:

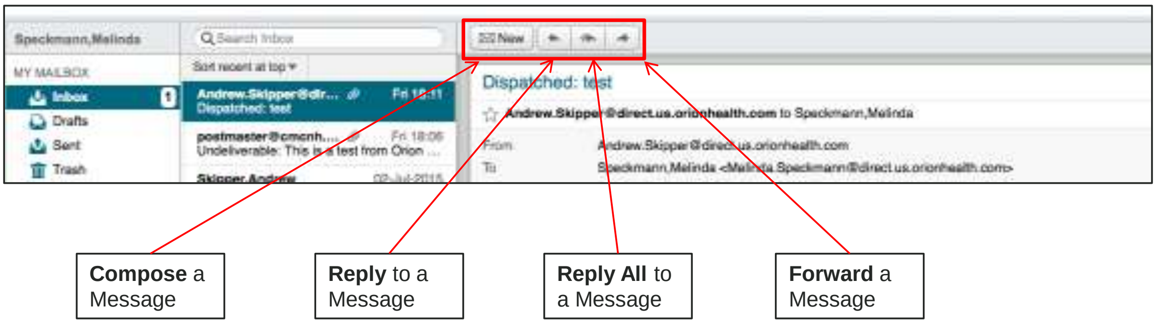
- Sent Messages can be viewed by clicking **Sent** in the left hand directory under **MY MAILBOX**.

COMMUNICATE FEATURES | WORKING WITH MESSAGES

- To expand the message details panel, select the **Message Details** icon.
- The following table displays the name of each field on the message details panel, along with an explanation of each field:

Field	Description
Original Sender	The original sender's name and email address from whom a forwarded message was received.
Forwarded by	The intermediary sender's name and email address from whom a forwarded message was received.
From	The sender's name and email address.
Sent By	The sender's name and email address. (When messages are being sent by a proxy or shared mailbox user)
On-Behalf of	Mailbox owner on whose behalf the messages are being sent. (When messages are being sent by a proxy or shared mailbox user)
To	The recipient's name and email address.
CC	The recipient's name and email address to whom a "carbon copy" of the message was sent.
Date Received	The date and time when the message was received by the recipient.
Subject	The text displayed for the message in the recipient's inbox.
View Mode	Indicates whether the displayed message content is HTML, or Plain Text.
	If the message contains both HTML and Plain Text, the message content is shown in HTML by default. A link is displayed which enables you to switch the message content between HTML and Plain Text.

COMMUNICATE FEATURES | WITH MESSAGES



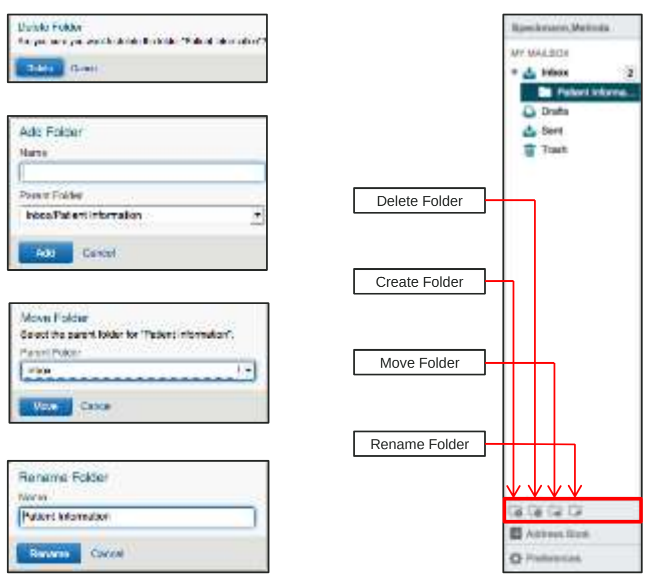
COMMUNICATE FEATURES | MANAGING FOLDERS

Types of Folders:

- System Folders - Inbox, Drafts, Sent, and Trash. System folders cannot be moved, renamed, or deleted.
- User-defined Folders - Folders you have created to organize your mail.

Process:

1. Click on the Folder Icon of interest.
   a. If you want to delete a folder, be sure you have the correct one selected.
   b. If you are adding a folder, add the name and select the Parent Folder.
   c. If you want to move a folder, select the folder you want to move to.
   d. If you want to rename your folder, enter in the new name.
2. Click the blue button to make your changes permanent.



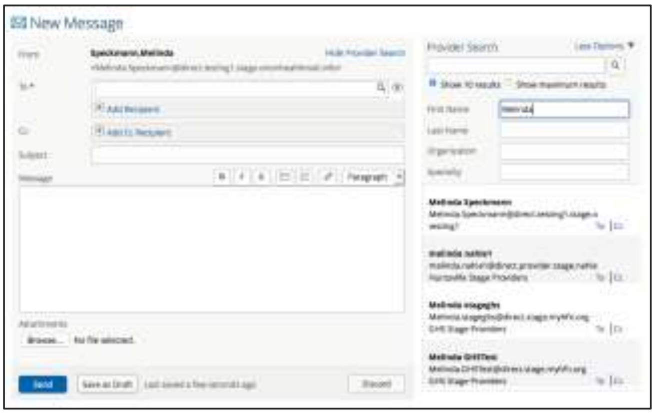
COMMUNICATE FEATURES | GLOBAL ADDRESS BOOK

What:

- Ability to search all Communicate users within their HIE Network.
- The Global Address Book is also referred to as the “Health Provider Directory” (HPD).
- The HPD is maintained by the HIE Admins.

Features:

- **To/CC** search field is set up to auto-complete the search from the HPD when looking for the direct address or Provider Name.
- The **Provider Search** can search by First Name, Last Name, Organization and Specialty.



COMMUNICATE FEATURES | PERSONAL ADDRESS BOOKS

	GLOBAL	PERSONAL
Maintained by:	HIE Administrators	You
Includes:	All Communicate Web Addresses in your HIE Network	Addresses of your choice
Visibility:	All Communicate Web Users in your HIE Network	Only You
Distribution Groups:	Must be done by the Organization or HIE Administrators	Ability to create your own custom distribution group to send to

COMMUNICATE FEATURES | PERSONAL ADDRESS BOOK

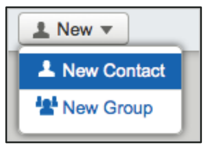
Viewing a Contact:

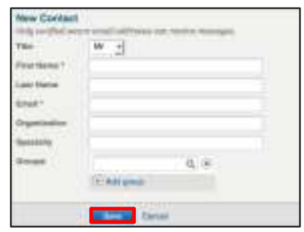
1. Select the **Address Book** link at the bottom of the left pane. The **Address Book** screen is displayed.
2. Select the contact. The contact details are displayed in the right pane.

Adding a Contact:

1. Select on the **New** drop-down button and select the **New Contact** option.
2. The **New Contact** screen is displayed. The mandatory fields are marked with an asterisk (*).
3. Add the contact details.
4. Select the **Save** button.

NOTE: The **Add Group** link is to add a contact to a group that you can create. *See next slide.*





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COMMUNICATE FEATURES | PERSONAL ADDRESS BOOK

Deleting a Contact:

1. Select the **Address Book** link at the bottom of the left pane. The **Address Book** screen is displayed.
2. Select the contact from the **Address Book**.
3. Select the **Delete** button located at the top right corner. A warning message is displayed.
   - Select **Confirm** to delete the contact. The contact is also deleted from its group.
   - Select **Cancel** to cancel deletion.

Updating a Contact:

1. Select the **Address Book** link at the bottom of the left pane. The **Address Book** screen is displayed.
2. Select the contact from the **Address Book**.
3. Select the **Edit** button. The **Edit Contact** screen is displayed. The mandatory fields are marked with an asterisk (*).
4. Update contact details and select the **Save** button.

NOTE: The name of the contact will populate in the To/CC field of a new message.

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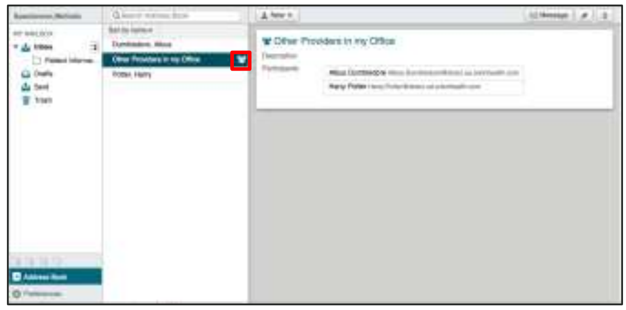
COMMUNICATE FEATURES | PERSONAL ADDRESS BOOK

Purpose:

- A contact group enables you to maintain a list of email addresses and provides an easy way to send an email message to everyone in the group at once by addressing the email to the contact group.

Viewing a Group:

1. Select the **Address Book** link at the bottom of the left pane. The **Address Book** screen is displayed.
2. Select the contact group. The contact group details will be displayed in the right pane.



Adding a Group:

1. Select on the **New** drop-down button and select the **New Group** option. The **New Group** screen is displayed. The mandatory fields are marked with an asterisk (*).
2. Add the contact group details.
   - The contacts must be entries in your Personal Address Book in order to add them to a group.
   - Click the + to add more than one contact.
   - You can also click on the delete icon to remove a contact.
   - NOTE: When adding/editing a contact, you can assign a contact a group in the profile if the group exists.
3. Select the **Save** button.

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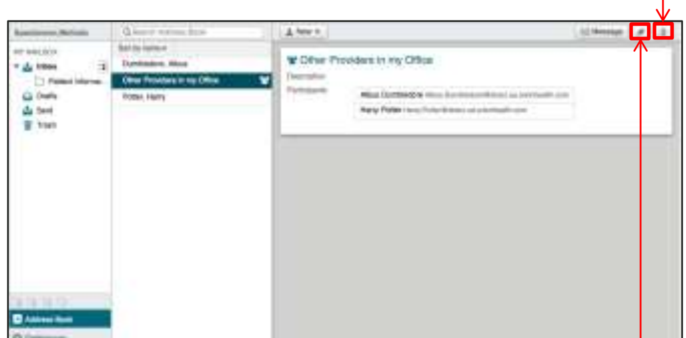
COMMUNICATE FEATURES | ADDRESS BOOK

Deleting a Group:

1. Select the **Address Book** link at the bottom of the left pane. The **Address Book** screen is displayed.
2. Select the Group from the **Address Book**.
3. Select the **Delete** button located at the top right corner. A warning message is displayed.
   - Select **Confirm** to delete the contact. The contact is also deleted from its group.
   - Select **Cancel** to cancel deletion.



Updating a Group:

1. Select the **Address Book** link at the bottom of the left pane. The **Address Book** screen is displayed.
2. Select the Group from the **Address Book**.
3. Select the **Edit** button . The **Edit Group** screen is displayed. The mandatory fields are marked with an asterisk (*).
4. Update the contact group details.
5. Select the **Save** button.

NOTE: The name of the group will populate in the To/CC field of a new message.

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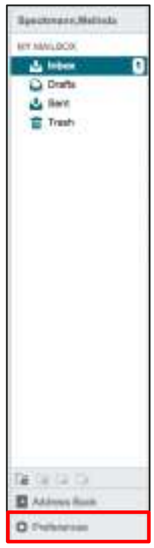
COMMUNICATE FEATURES | AUTHORIZING ANOTHER PERSON TO MANAGE YOUR MAILBOX

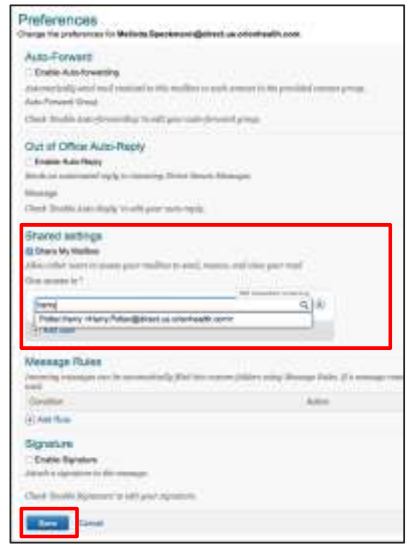
Purpose:

- You can authorize another person to manage your mailbox on your behalf. This includes visibility to all of your messages as well as the ability to send and manage messages on your behalf.

Process:

1. On the left pane in Communicate Web, select **Preferences**.
2. On the **Preferences** screen, under **Shared settings**, select the **Share My Mailbox** checkbox to enable sharing.
3. In the **Give Access To** field, start typing the name of the user you want to share your mailbox with. Possible matches are displayed as you type.
4. Select a user from the list.
5. If you want to share your mailbox with additional users, click the **Add user** link.
6. Click the **Save** button. Note that your shared settings will not take effect until you save.
7. Verify with the User that you authorized if they can see your mailbox in their account.





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COMMUNICATE FEATURES | A SIGNATURE

Purpose:

- Communicate Web enables users to automatically add a custom signature to all new, reply, and forwarded messages. This helps to identify the sender of the message. Message signatures can include details such as credentials and contact information.

Process:

1. Select the **Preferences** tab at the bottom of the list of folders.
2. Select the **Enable Signature** checkbox to enable the message signature.
3. Enter the message signature to be added automatically when you send a message. You can customize the font style and insert links using the rich-text formatting buttons. Refer to Rich-text Formatting for details.
4. Select the **Save** button.

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COMMUNICATE FEATURES | ADDING A SIGNATURE

Please Note:

- Please don't copy and paste content from external sources into the signature editor. This includes text and images.
- When composing a message from your individual mailbox and you have enabled signature in the preference screen, the signature will be inserted in the message automatically. However, if you are composing a message from a mailbox you were authorized to manage, you will have to add your signature manually or select the signature button from the rich-text editor toolbar.

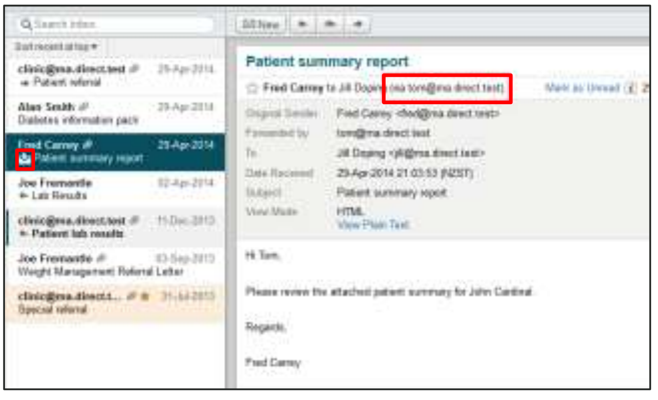
COMMUNICATE FEATURES | AUTO-FORWARDING MESSAGES YOU RECEIVE

Purpose:

- Communicate enables users to have all of their messages automatically forwarded to other email addresses. This ensures that messages can be dealt with in a timely manner.

Function:

- When a message is auto-forwarded, a copy of the message is left in the original recipient's **Inbox**. The forwarded message will display the **Auto-Forward Received** icon in the final recipient's Inbox folder. The forwarded message will also display the **Auto-Forward Sent** icon in the intermediary's Inbox folder.
- Auto-forwarded messages in the final recipient's mailbox include a via label in the header of the open message, specifying who last forwarded the message.



COMMUNICATE FEATURES | MESSAGES YOU RECEIVE

Before you Begin:

- Ensure that you have created a contact group in your **Personal Address Book**.

Process to Enable:

1. Select the **Preferences** tab at the bottom of the list of folders.
2. Select the **Enable Auto-forwarding** checkbox to enable auto-forwarding.
3. Select the contact group.
4. Select the **Save** button.

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COMMUNICATE FEATURES | OUT OF OFFICE AUTO-REPLY

Purpose:

- Communicate enables you to configure an **out of office** or **automatic reply** to respond to people who send you an email message. This helps inform people that you are not in the office or that your response might be delayed. Automatic Replies can include details, such as alternate contact information.

Process to Enable:

1. Select the **Preferences** tab at the bottom of the list of folders.
2. Select the **Enable Auto-Reply** checkbox to enable the out of office auto-reply.
3. Enter the message to be sent when you receive a message.
4. Select the **Save** button.

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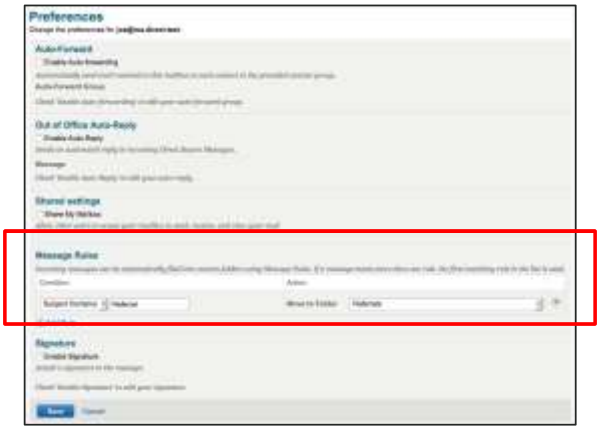
COMMUNICATE FEATURES | MESSAGE RULES

Purpose:

- Allows you to create rules to automatically filter incoming messages by content or address into a custom folder.

Process to Enable:

1. Select the **Preferences** tab at the bottom of the list of folders.
2. Define the Condition (See Chart)
3. Define the action to take when a message meets a condition. For example, in the **Move to Folder** field, select the folder to file the message into when the condition matches. (Example: The picture to the right shows that any messages with the subject *Referral*, should be move to the *Referrals Folder*.)
4. Select the **Save** button to save your changes.
5. To add additional rules in the **Message Rules** panel, select the **Add Rule** link.



Condition	Description
Subject Contains	Enter the subject to filter on. For example, filter messages that have the word Referral in the subject. Test will return Test and Tests.
From	Enter the email address of the sender. For example, filter messages from admin@<emailaddress>.com