DataMotion Direct
User Guide

TABLE OF CONTENTS

REVISION HISTORY

This section summarizes significant changes, corrections, and additions to the document. The history appears in chronological order with the most recent changes listed first.

Version 4

Documented the features for the DataMotion Direct 6.1 release which include performance improvements and UI updates to the Healthcare Provider Directory.

Chapter 4) Sending and Receiving DataMotion Direct Messages

Numerous improvements to the section have been made to better describe how to fully utilize all of the features of the *Address Book on page 37*.

Chapter 4) Sending and Receiving DataMotion Direct Messages

Added instructions on how to fully utilize the features of the *Direct Messaging Healthcare Provider Directory (HPD) on page 45*.

Version 3

Documented the new features for the DataMotion Direct 6.0 release, which include a new Healthcare Provider Directory (HPD) along with a Search feature, a new Group Mailboxes feature to allow delegates to manage inbox messages, the ability to view and print Consolidated-Clinical Document Architecture (C-CDA) attachments, and a greatly improved Address Book.

Chapter 2) Overview of the DataMotion Direct Messaging Portal

Added a section describing *Group Mailbox Configuration* on page 20.

Chapter 3) Navigating and Managing Your Messages

Added a section describing *Delegates: Managing Group Inbox Messages* on page 30

Chapter 4) Sending and Receiving DataMotion Direct Messages

Added a section describing the new *Address Book* on page 37.

In the section on *Viewing Attachments in Messages* on page 57, added a description of the new feature to view and print an attached XML or ZIP file containing a Consolidated-Clinical Document Architecture (C-CDA) document.

Version 2

Made major improvements to the DataMotion Direct content throughout the manual. Changes include adding more information specific to DataMotion Direct, adding new DataMotion

Direct screens, and using more specific terminology for DataMotion Direct. Consolidated information and removed some redundant content.

Version 1

Initial version of this document.

About This Publication

ABOUT DATAMOTION DIRECT

This publication describes how to use DataMotion Direct.

DataMotion is a Health Information Service Provider (HISP), and DataMotion Direct is the HISP message transport service that the company provides. DataMotion Direct enables secure message and data transfer for healthcare providers, patients, business associates and clinical systems. DataMotion Direct stores the information with AES-256 Bit Encryption.

It follows the national set of specifications and standards on Direct Exchange or Direct Messaging from the Direct Project (http://directproject.org/). The Direct Project specifies simple, secure, scalable, and standards-based methods for the exchange of authenticated and encrypted Protected Health Information (PHI) among trusted recipients over the Internet. This enables messages to be compliant with HIPAA and HITECH regulations, as well as conforming to Meaningful Use Stage 2 criteria issued by the Office of the National Coordinator for Health IT (ONC).

People who use DataMotion Direct include healthcare providers and care team members, patients, laboratories, hospitals, clinical systems, pharmacies, business associates, and health insurance providers. DataMotion Direct users can securely exchange a variety of sensitive data, including patient intake forms, electronic invoices, summary of care documents, large images, and other clinical healthcare data, as well as private or confidential messages and other communications. With integrated large file support, DataMotion Direct seamlessly delivers documents and images, eliminating a significant bottleneck in healthcare data exchange.

You can easily secure and transmit protected health information (PHI) in a manner that conforms to Meaningful Use guidelines and the Direct Project, improving quality of care. Meeting mandated data transfer requirements is fast and non-disruptive with DataMotion Direct. It's intuitive and easy to use, and it allows both in-network and out of-network communications. All types of sensitive data can be transmitted, and from the moment your data is sent until delivered, sensitive health information and images are fully protected. It's simple. It's fast. It's smart.

INTENDED AUDIENCE

The purpose of this information is to describe the DataMotion Direct Web Portal services included with your DataMotion Direct user account. This publication is primarily intended for end-users of DataMotion Direct. They are not expected to be security experts. It is helpful if the reader is familiar with navigating the Internet with a web browser such as Internet Explorer, Chrome, Firefox, Safari, and Opera.

Technical documentation for engineers, developers, programmers, system administrators, and system and application integrators is also available from DataMotion. See *DataMotion Documentation*.

The user interface has been designed for simplicity and ease so that end-users can accomplish the secure transport of messages and data in the quickest way possible.

PRODUCT TERMINOLOGY

Sometimes DataMotion Direct features and components have acquired synonyms or short-hand names in this documentation that are useful to know.

The following table provides synonyms that you may encounter. The synonyms may refer to a component or an identifiable part of a component.

Synonyms

Component	Sometimes Referred to as:
DataMotion Direct Messaging Portal	DataMotion Direct Web Portal DataMotion Direct Messaging Portal Web Portal Messaging Portal

HOW TO USE THIS PUBLICATION

The *DataMotion Direct User Guide* provides detailed instructions for using the product.

The chapters are written independently and can stand alone to minimize dependencies between them. The content is organized as follows:

About This Publication.
>   Provides an overview of the content of this publication and how to use the publication.

Chapter 1) Getting Started with DataMotion Direct
>   Describes how to establish your DataMotion Direct messaging account, how to log into the DataMotion Direct Web Portal, and how to reset your password if you should forget it.

Chapter 2) Overview of the DataMotion Direct Messaging Portal

Provides an overview of the DataMotion Direct Messaging Portal, including the Member Center, Menu Bar, and changing your user information and account preferences.

Chapter 3) Navigating and Managing Your Messages

Describes how to manage your messages and folders. Managing your messages includes finding, sorting, and navigating through your messages, and moving and deleting your messages. Managing your message folders includes creating, renaming, and deleting folders.

Chapter 4) Sending and Receiving DataMotion Direct Messages

Describes how to send, receive, track, retract, and manage your secure messages.

Chapter 5) DataMotion Direct for Tablets

Provides step-by-step instructions on how to set up and use DataMotion Direct for tablets (e.g., iPad device), including how to receive and send secure messages from within the native mail application.

Chapter 6) DataMotion Direct for Smartphones

Provides step-by-step instructions on how to set up and use DataMotion Direct for smartphones (iPhone, Android devices, etc.), including how to receive and send secure messages from within the native mail application.

Chapter 7) DataMotion Direct for Desktop Clients

Describes how to set up DataMotion Direct to use with desktop clients (for example, Microsoft Outlook).

RELATED INFORMATION

DATAMOTION DOCUMENTATION

- *DataMotion Direct Software Development Kit Technical Reference Manual* (part # 050001)
Documents the Application Programming Interfaces (APIs), and system development, maintenance, and administration tools for developers.

- *DataMotion Direct Administration Guide* (part # 050005)
Documents the system installation, maintenance, and administration tools for administrators and integrators.

Additional documentation is available on many other topics. Please contact DataMotion Customer Service for more information.

1
Getting Started with DataMotion Direct

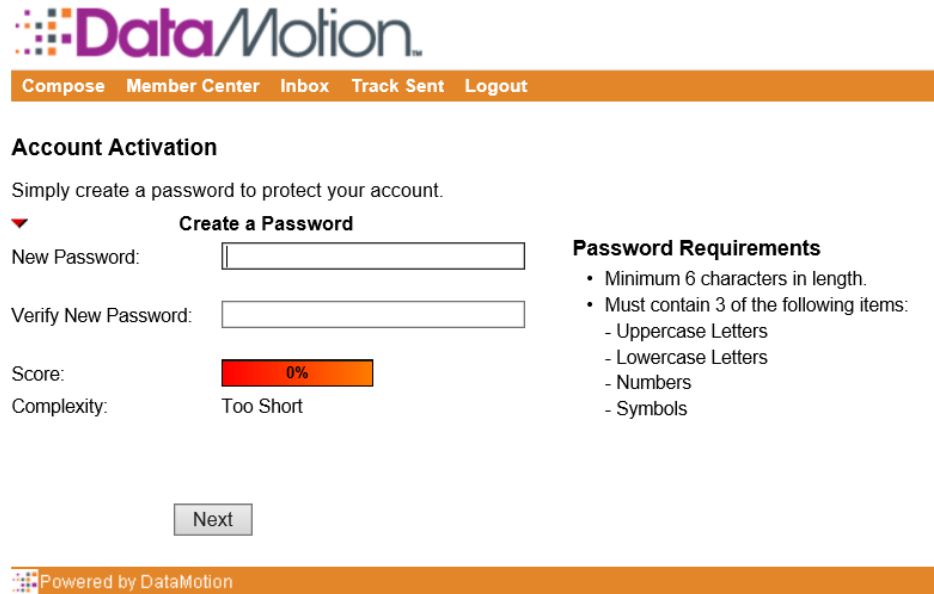## ESTABLISHING A DATAMOTION DIRECT ACCOUNT

The first step to using DataMotion Direct secure messaging is to establish your account and password. When your DataMotion Direct account is created through your company administrator, an email notification will be sent to the email address associated with your account. The email contains instructions describing how to access your DataMotion Direct account and create a secure password for it. When you click on the link in the email, it will take you to your account on the DataMotion Direct Web Portal so you can create your password and log in. This will complete the activation of your account and allow you to access and use DataMotion Direct.
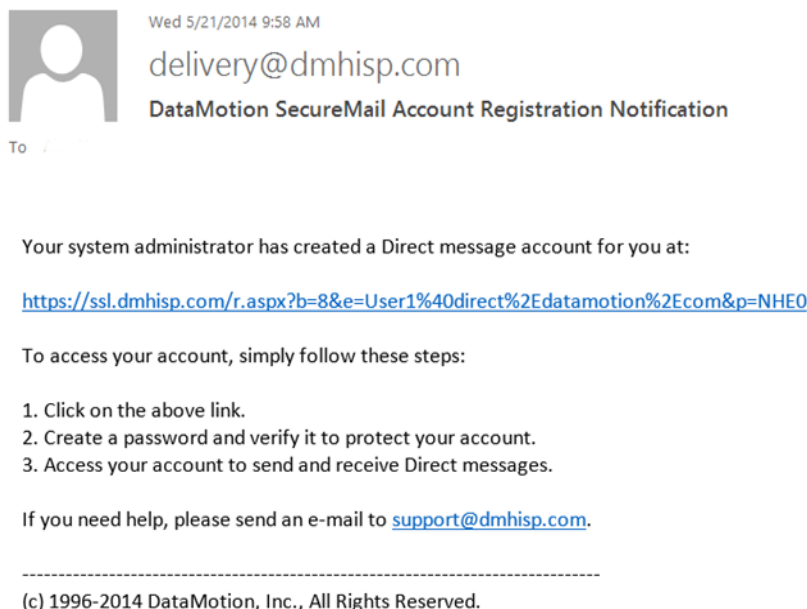
The URL shown in the message will take you to the DataMotion Direct Messaging Portal, where you will be prompted to enter a password for your account. See the following for details.

To activate your account:

1. Click the link in the email message. This will open your web browser to your DataMotion Direct account activation page.

2. In the **Create Password** fields enter the password you want to use to access your account and click *Next*. Memorize or make note of your password for future logins.

3. Click **Next**.

The activation is now complete and you are logged in.

USING THE DATAMOTION DIRECT MESSAGING PORTAL

LOGGING INTO YOUR DATAMOTION DIRECT MESSAGING ACCOUNT

The DataMotion Direct Messaging Portal is a website where you can send, receive, and track your secure messages. Access to this portal requires Internet access and a web browser. All major browsers are supported, including Internet Explorer, Firefox, Chrome, Safari and Opera.

To access your DataMotion Direct account through the Web Portal:

1. Use the web browser to navigate to the DataMotion Direct Messaging Portal site: https://ssl.dmhisp.com.

    NOTE: Your organization may provide a customized URL to use instead of this one.

2. Enter your DataMotion Direct messaging address and the password in the login window.

3. Click Enter to login.

For information about setting a UserID to be used for your login instead of your message address, see *Changing Your User Information* on page 19.

For your convenience, a link to the DataMotion Direct Messaging Portal is provided in all DataMotion Delivery Notification messages. You can click on this link and it will take you directly to the portal.

FORGOTTEN PASSWORD RESET

Below the login box is a link to reset your password. Click this link if you need to reset your password. You will receive an email message sent to the email address associated with your DataMotion Direct account. When you click the link in the email, it will take you to the portal and allow you to reset your password. See the following instructions for details.

To reset your password:

1. Click **HERE** in "Not sure what you password is? Click HERE to reset your password."

2. Enter your Direct Messaging address for this account.

    NOTE: If you enter your messaging address incorrectly, the system will not send a reset password email notification, nor will you receive an error notification.

3. You will see a confirmation that the process has started.

4. You will receive an email notification about the password reset.

Upon clicking the hyperlink included in the message, you will be presented with the Password Reset screen that instructs you to enter a new password. After following the instructions on the screen, you will be able to access your account.

2
Overview of the DataMotion Direct Messaging Portal

MEMBER CENTER

Once you have logged into your DataMotion Direct account, you will be shown the Member Center. The Member Center is the central location for your account. From here you can get to all the functionality of your account. By default the member center will not be visible for Direct Users. Contact your Administrator about enabling this feature.

NOTE: If you have new unread messages, you will be taken directly to your Inbox instead of the Member Center.

There are three sections that provide links to different aspects of your account, plus at the bottom of the screen, it shows a summary of some account details.

MESSAGES & FILES

This section provides access to message-related functionality. The options are:

Link	Description
Compose	Opens the Compose new message window so you can create and send a new secure message and/or file attachment.
Track Sent	Opens the Track Sent folder where you can see all the messages and files you have sent and review their tracking information.
Inbox	Opens the Inbox for secure messages you have received.
Group Inboxes	Opens the Group Inbox window where all messages shared between delegates of a Direct account are available.
Drafts	Opens the Drafts folder for messages you have started but did not yet send.
Folders	Opens the folder management window where you can create and manage subfolders which you can use to manage your messages.

MY ACCOUNT

This section provides access to account settings and an address book. The options are:

Link	Description
Address Book	Provides access to your address book where you can enter addresses for easy use in DataMotion Direct Messaging Portal.
User Information	Provides access to account and password settings.
Preferences	Provides access to settings related to how you send and receive secure messages.
Group Mailbox Configuration	Provides access to the configuration window for Group Mailboxes where you can designate delegate Direct addresses for your account.

ACCOUNT DETAILS

The Account Details area provides a snapshot of information about your account. You can see the number of messages sent and received, information about the amount of disk space available on your account and your login statistics.

MENU BAR

The menu bar provides quick access to common functions from all windows. The menu bar does not change as you move around the portal.

The following options are available on the menu bar:

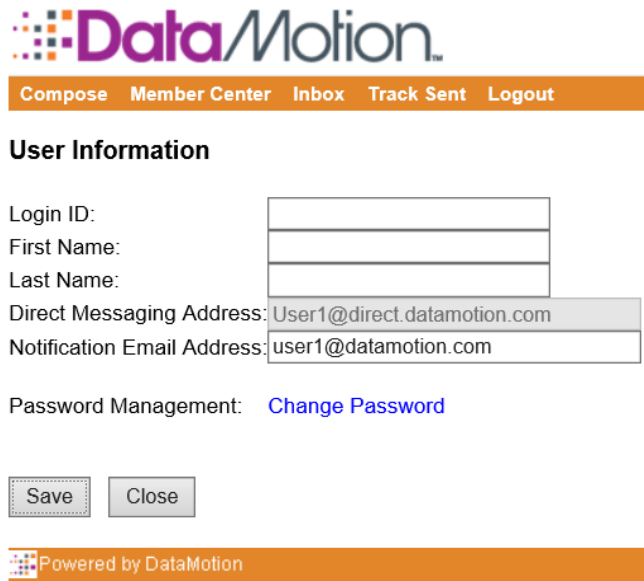| Menu	Description
Compose	Opens the Compose new message window so you can create and send a new secure message and/or file attachment.
Member Center	Takes you to the Member Center.
Inbox	Opens the Inbox for secure messages and files you have received.
Track Sent	Opens the Track Sent folder where you can see all the messages and files you have sent and review their tracking information.
Logout	Ends the current portal session. After you click this, you will need to login again to access the portal.

CHANGING YOUR USER INFORMATION

The following instructions describe how to edit your account information.

1. Go to the Member Center.

2. Under the **My Account** section, click **User Information**.

This opens the **User Information** page, similar to the following:

UNDERSTANDING YOUR USER INFORMATION OPTIONS

The following table explains the information which can be configured.

| Option	Description
Login ID (or UserID)	You can choose a Login ID (also called a User ID) to use when logging into the Web Portal. If you create a Login ID here, you can login with **either** your DataMotion Direct Secure Messaging Address or your Login/User ID. The User ID you select must be unique among all the other users on the system.
First & Last Name	You can enter your name. It will be used in notification messages sent to you.
Direct Messaging Address	Your Direct Messaging address. This field is view-only because of the restrictions of the Direct Messaging protocol.
Notification Email Address	Your email address that is associated with your account, which is used to send you message waiting notifications and other types of account notifications.
Password Management	If you click the **Change Password** link, it will display a page where you can change your password. You will need to enter your existing password first.

GROUP MAILBOX CONFIGURATION

Your DataMotion Direct group mailbox configuration provides the ability to delegate other Direct accounts (which must be within your company) to access and respond to messages on your behalf. This allows you to grant access to your inbox to trusted persons who can read, respond to, and download messages for you without the need for you to give them your account password. Delegates can also view and download attachments. They are not granted permission to access the contacts in your address book, delete your messages, or send entirely new messages on your behalf. Delegates must have a Direct messaging address within your company, and any messages they send on your behalf will be shown as being sent from their account. After you add delegates, the delegates can manage your inbox messages according to the instructions in *Delegates: Managing Group Inbox Messages*

To configure your Group Mailbox:

1. Go to the Member Center.

2. Under the *My Account* section, click **Group Mailbox Configuration**.
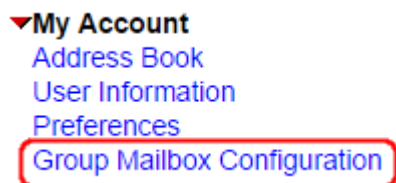
   This displays the configuration page where you can specify delegates who will be allowed to access messages in your inbox.

This window will display users who already have access to your messages and allows you to delegate more.

ADD DELEGATES

To add delegates, type the desired Direct User Address (from your company) into the Delegate Address field and click the **Add** button. If there were no problems with the given Direct Address, you will see the address listed below the entry field.

REMOVE DELEGATES

To remove delegates, find the desired Direct User Address you would like to remove and click the **Delete** button next to the address. If there were no problems with the deleting of desired Direct address, you will see the user removed on the resulting screen.
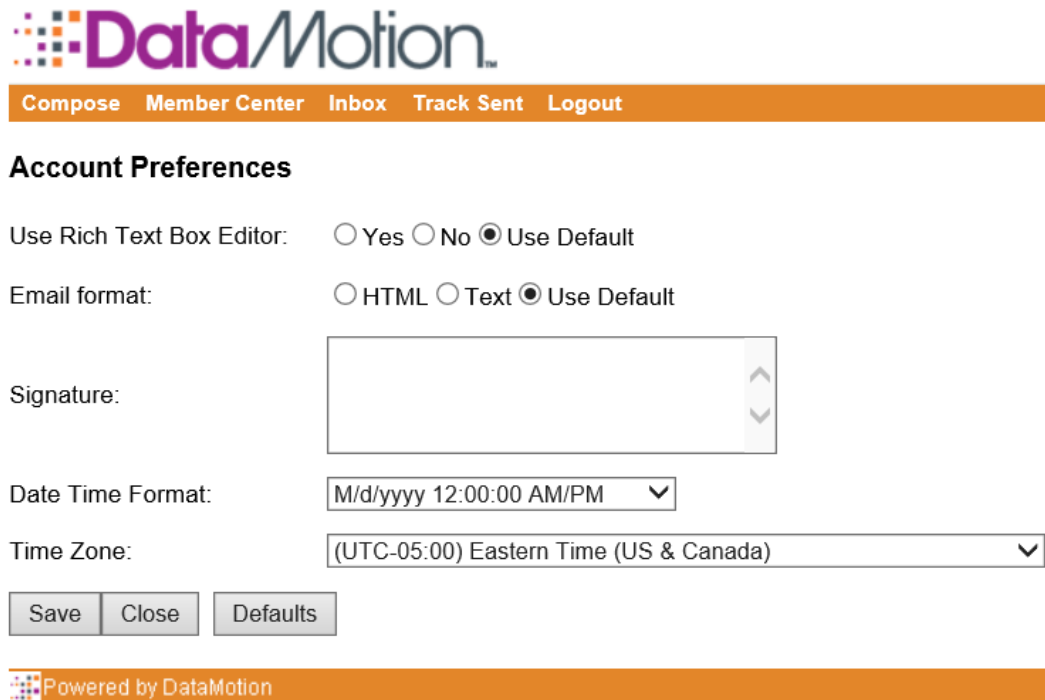

CHANGING YOUR ACCOUNT PREFERENCES

Your DataMotion Direct account preferences provides you with the ability to select various formatting options for your secure messages. To configure your preferences:

1. Go to the Member Center.

2. Under the *My Account* section, click **Preferences**.
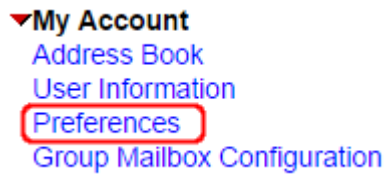
This displays the **Account Preferences** page.

UNDERSTANDING YOUR ACCOUNT PREFERENCE OPTIONS

In most instances, the default values do not need to be changed as they are the most common settings. The following table provides a description of the options.

Option	Description
Use Rich Text Box Editor	Turn on or off the ability to format new messages using rich text, including selecting fonts, font color, background color, and the ability to create lists. The default value is **Use Default**. When selected, it uses the default that is selected and controlled by your company settings (it is usually Rich Text).

Option	Description
Email format	Allows you to set the e-mail format between HTML or Text for messages that you receive. The default value is **Use Default**. When selected, it uses the default that is selected and controlled by your company settings (it is usually HTML).
Signature	Append a signature to the end of your messages. Simply enter your desired signature in the text entry box. The signature is added to every new message when you send the message.
Date Time Format	Configure your preferred date/time format (e.g., 24-hour time or am/pm time). You will see this date/time format in your message headers. The default value is **M/d/yyyy 12:00:00 AM/PM**.
Time Zone	Use the drop-down field to select the time zone for your account. The selected time zone is used anywhere the time is displayed, including when viewing Inbox or Track Sent messages and in Notification messages. The default value is **(GMT-5:00) Eastern Time (US & Canada)**.

After modifying your preferences, make sure to click **Save**.

3
Navigating and Managing Your Messages

GENERAL NAVIGATION

The messages in your message Inbox (which contains received messages), message Outbox (which contains copies of sent messages, also called Track Sent), and the messages in their subfolders are displayed and managed through a common user interface called the Message Folder window. The message folder window provides a set of navigation functions, including searching and sorting, as well as tools for organizing and managing messages.

CUSTOMIZING THE MESSAGE FOLDER WINDOW

The message folder window provides several ways to customize the display of messages.
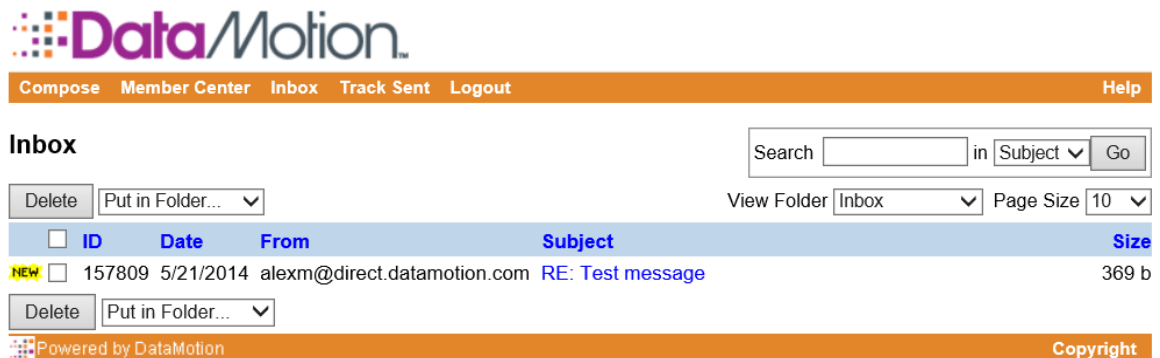
Sorting Your Messages

By default, messages are displayed sorted from the newest to the oldest. It is possible for messages to be sorted by any column shown (ID, Date, From, Subject or Size), in ascending or descending order. This can be done by clicking on the column header you want to sort on.

The first click will sort all the messages in ascending order based on the information in that column. A second click will sort in descending order for that column.

NOTE: The default sorting order is by Date in descending order. Whenever you navigate to a new message folder, such as when switching to the Member Center, or creating a new message, and then you return to the Inbox, the sorting order is initially set to use Date descending order.

Changing the Page Size

The Page Size control at the top right of the message folder window specifies how many messages may be displayed at one time. The default is to show 10 messages.
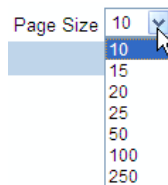
When there are more messages than can be displayed on a single page, a new page control will become available, showing the number of pages. By clicking on this drop-down menu, you can use it to select and quickly jump between pages of messages.

The Page Size setting is a persistent setting and will be remembered even between logins.

SEARCHING MESSAGES

The simple Search function at the top right of the message folder window searches only the current folder for the text pattern that you enter. It searches for this pattern within the **Subject**, **ID**, **From**, or **Date** field (column) that you select from the drop-down list.
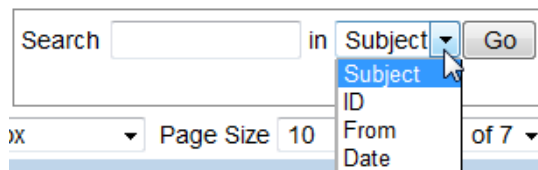
NOTE: The search looks only for exact matches within the selected column. If you enter a text string that matches only part of the field, it will not return any message results. However, you can use the % symbol as a wildcard to match zero or more characters. This allows you to find messages using a partial match followed by the wildcard. For example, to find all messages with a subject that starts with "new", enter new% as the search string.

To perform a simple search:

1. Enter a character string into the **Search** box.

2. Select the column/field in which to search for the string.

3. Click **Go**.

All messages with a match will be shown. To clear the search filter, you can either click the Back button on your browser or open the folder again.

CHANGING FOLDERS

There are several ways to navigate to a new folder. For example, links to the Inbox and Track Sent folders are available directly from the menu bar. They are also available on the Member Center page.

Another way to navigate to folders is by clicking on the **View Folder** list on the top right of the message folder window.
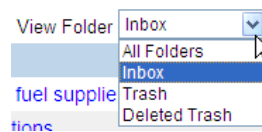
The folders listed will be related to the main folder you are navigating within. For example, if you are viewing the Inbox, you will see folders that are listed under the Inbox, while if you are viewing Track Sent, you will see folders listed under Track Sent (the outbox).

The All Folders option will show messages that are in all the folders listed in the View Folder drop-down list; that is, it will list messages for all the folders related to the main folder type, either the Inbox or Track Sent folder.

Another convenient way to navigate to folders is using Manage Folders. When you select **Folders** on the Member Center page, it takes you to the **Manage Folders** page, where you can click on any folder to navigate to it.

MANAGING MESSAGES

Each message listed has a checkbox next to it. You can use this checkbox to select messages to delete or move to a new folder. Checking multiple messages will select them all for the action you specify.

Deleting Messages

To delete a message, check the box next to the message and click **Delete**.

When you delete, a message it will move the message to the *Trash* folder. The message remains in the Trash folder for a maximum of 14 days, unless otherwise deleted by you, after which it will be moved to the *Deleted Trash* folder. The message remains in the deleted trash folder for a maximum of 14 days, unless otherwise deleted by you, after which it will be permanently deleted.

To restore a message from the *Trash* or *Deleted Trash* folders, simply move it to another folder.

Moving Messages to Another Folder

To move a message to a new folder, check the box next to the message and select the appropriate folder from the "Put in Folder…" drop-down menu.
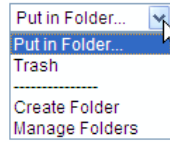
This will move the checked messages into the selected folder.

MANAGING FOLDERS

To further organize your messages, you can create (and delete) folders in much the same way you would in common desktop applications, such as Microsoft Outlook or Lotus Notes. The Manage Folders function can be accessed either from a message folder window or from the Member Center.

CREATING FOLDERS FROM THE MESSAGE WINDOWS

Do the following to create a new folder.

1. Open your Inbox or Track Sent folder.
2. Click the **Put in Folder…** drop-down arrow at the top left of the screen, and select **Create Folder** from the menu. (Note: This control is only shown if you have messages displayed in the folder.)

3. Enter the name for the new folder.

   NOTE: The Folder Located Under **field will default to the folder where you were located when you clicked the Create Folder item.**

4. Click **Add Folder**.

This new folder is now added to your existing list of folders and will appear in the drop-down list.

MANAGE FOLDERS WINDOW
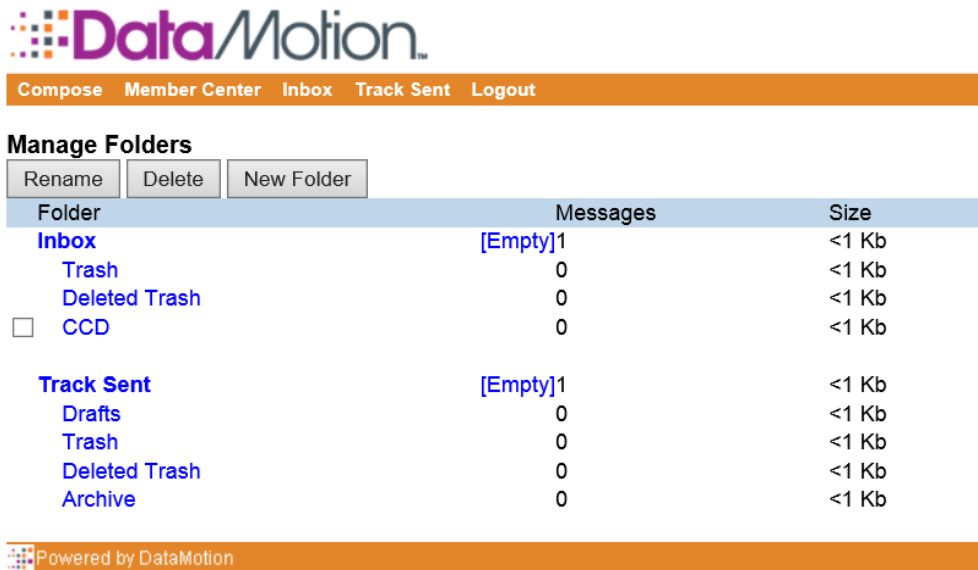
The Manage Folders window provides a full list of all folders in your account.

The **Manage Folders** window can be accessed either by clicking the **Folders** link in the Member Center or the **Manage Folders** item in the **Put in Folder…** drop-down menu.

> NOTE: DataMotion Direct contains built-in folders. The Inbox and Track Sent folders are the two main folder types. Each folder type has built-in folders under them including Trash and Deleted Trash. Built-in folders cannot be deleted or renamed. You cannot move messages from an Inbox folder type to a Track Sent folder type or the other way around.

All folders in your account are divided into two groups: Inbox folders and Track Sent (or outbox) folders. Messages that you have received are initially located in the Inbox and can only be moved to folders under the Inbox. Messages that you have sent are initially located in the Track Sent (or outbox) folder and can only be moved to folders under Track Sent. Draft messages are outbox messages and so are initially located in the Drafts folder under the Track Sent folder.

There are three actions available in the Manage Folders window: **Rename**, **Delete**, and **New Folder**. Rename and Delete do not apply to built-in folders and are only shown if you have already created at least one new folder.

Renaming a Folder

To rename a folder, you must first select a folder you have already created. Check the box next to the folder name and click the **Rename** button.

Enter a new name for the folder and click **Rename Folder**.

Deleting a Folder

To delete a folder, you must first select a folder you have already created. Check the box next to the folder name and click the **Delete** button.

Click **OK** to delete the folder.

NOTE: When you delete a folder, the messages in that folder are not deleted; they are moved back into the top level folder (Inbox or Track Sent).

Deleting the Contents of a Folder

To delete all of the contents within a folder, click the [Empty] link. After you confirm the action, the Direct Messages will be moved to the Trash folder. Selecting the [Empty] link on the Trash folder while it has messages inside it will send its contents

to the Deleted Trash folder. Clicking the [Empty] link on the Deleted Trash folder while it contains messages will permanently delete them.

Creating a New Folder

To create a new folder, click the **New Folder** button and follow the steps in *Creating Folders from the Message Windows* on page 27.

DELEGATES: MANAGING GROUP INBOX MESSAGES

A Group Mailbox is configured by the account owner, who has the power to assign delegates. (See *Group Mailbox Configuration* on page 20 for information on configuring the group mailbox delegates.) Delegates are granted account privileges to access the owner's Group Mailbox, where they can view and respond to the owner's messages.

A Group Mailbox Delegate can manage group messages as follows:

1. Navigate to the **Member Center**.

2. Under **Messages & Files** click **Group Inboxes.**

3. On the resulting window, you will see all group messages assigned to that delegate. You can distinguish between the delegate accounts using the "To" field, which you can sort by.

VIEWING MESSAGES

To view a message, click the subject of the message.

When viewing a message, you can Forward, Reply To Sender, Reply To All, Download Message and view attachments. For more information about these functions see, *General Navigation*.

4
Sending and Receiving DataMotion Direct Messages

NOTE: Additional features are provided to DataMotion Direct subscribers when sending messages to recipients who also are members of DataMotion Direct.

For example, DataMotion provides the Retract message feature for <u>local HISP messages</u> (sent to subscribers of the DataMotion Direct HISP), but not when sending messages to subscribers of <u>foreign HISPs</u>. Certain aspects of other features may differ depending upon whether the recipient belongs to the local or a foreign HISP.

SENDING AND TRACKING MESSAGES

DataMotion Direct enables you to easily send highly secure messages and attachments. It also provides a range of additional security options that traditional messaging applications do not offer. These additional security options include:

- Confirming that a message has been received
- Learning when a message has been opened

SENDING DATAMOTION DIRECT MESSAGES

You can send messages via the simple and intuitive DataMotion Web Portal.

To send a secure message from the Web Portal:

1. Open your web browser to the DataMotion Direct Web Portal.

2. From the DataMotion Member Center, click **Compose** (on the top menu bar, or under Messages & Files).

This displays the **Compose** new message window.

3. Enter the message address for the recipient(s) and a Subject.

   » You can also enter a user nickname tied to an e-mail address in your address book or a group name from your address book. For more information, see *Address Book* on page 37.

   » For multiple recipients, separate them with a comma and space ", ".

   » If desired, you can search the Healthcare Provider Directory (HPD) for a provider's Direct address by clicking **Address Book** and then the **Access HPD…** button. For more information, see *Direct Messaging Healthcare Provider Directory (HPD)* on page 45. .

   » Click the **Show CC** link to display the **Cc:** line for entering Copy To addresses.

   » Click the **Show BCC** link to display the **Bcc:** line for entering Blind Copy To addresses. (The **Show BCC link** is only available if you already clicked **Show CC**.)

4. The **Attachments** area allows you to add attachments to your message.

   » The **Browse** button allows you to search for files to attach from your local computer.

   » The **Add** button adds a new line for attaching additional files. (Only one file can be attached per line.)

   » The **Remove** button removes a file that was attached to the message (it will not delete the file from the local system; only from the message).

5. Create your message in the **Message** window.

   NOTE: The Message window provides a rich-text editor only in supported browsers (e.g., Internet Explorer, Chrome, Firefox, Safari, and Opera). Unsupported browsers will use a plain-text editor.

6. Click **Send Secure** to send the message.

For information about receiving DataMotion Direct messages, see *Receiving Messages* on page 55.

SECURITY AND PRIVACY CONSIDERATIONS FOR ENCRYPTED MESSAGES

With DataMotion Direct, the security, privacy, and confidentiality of the message contents (that is, the message body and all attachments) are protected by encryption that allows only the sender and recipients to access the contents.

DataMotion messages adhere to the standard Internet protocol for secure messaging, called S/MIME or Secure MIME. With this standard, the secure content in the message consists of the message body and attachments, which are encrypted. The message body is the message text that you enter and send to recipients, and the attachments are any files that you include to send with the message.

The optional Subject line of the message is part of the message header information and is not protected by encryption. If you include sensitive, confidential, or private information in the Subject line of messages, it is like placing it on the outside of an envelope sent through

traditional mail, which can be viewed by anyone who sees the envelope. The header information is not encrypted because it is used to control the message and its transmission. Besides the optional Subject line, the header information contains the sender and recipient addresses and other metadata, such as routing/tracking information.

Organizations should train their users to understand and follow practices that protect private or sensitive information when using secure encrypted messages. Users should learn how to protect information by using the message body and attachments and by not including anything sensitive in the Subject line. All users should be aware that when they include a Subject line with the message, it is like writing a note on the outside of an envelope so that anyone could see it. To prevent the exposure of sensitive or private information in the Subject line, the recommendation is to have a blank or non-descriptive subject.
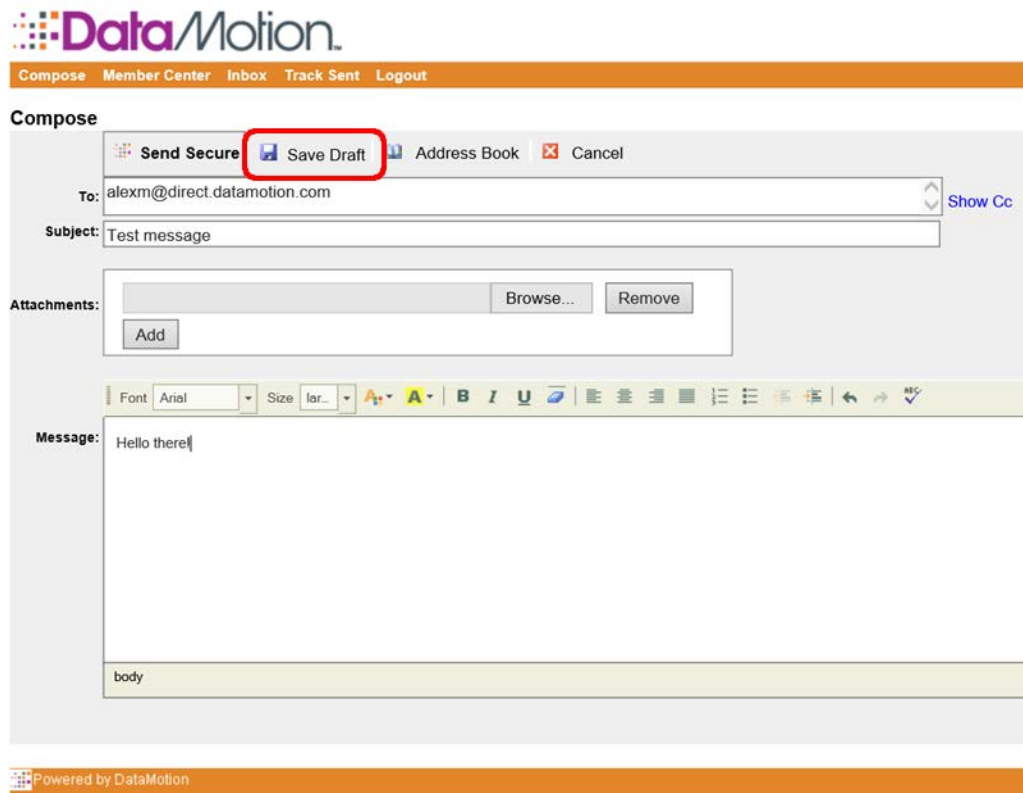
Users should also be aware of other privacy and security considerations. For example, in some cases, private information may be conveyed by the fact that the sender is engaging in a conversation with the recipient, such as when a medical specialist is sending a message to a patient. Also, senders must accurately enter correct addresses for their recipients to ensure the content is sent to the correct destinations.

SAVING AND RESUMING DRAFT MESSAGES
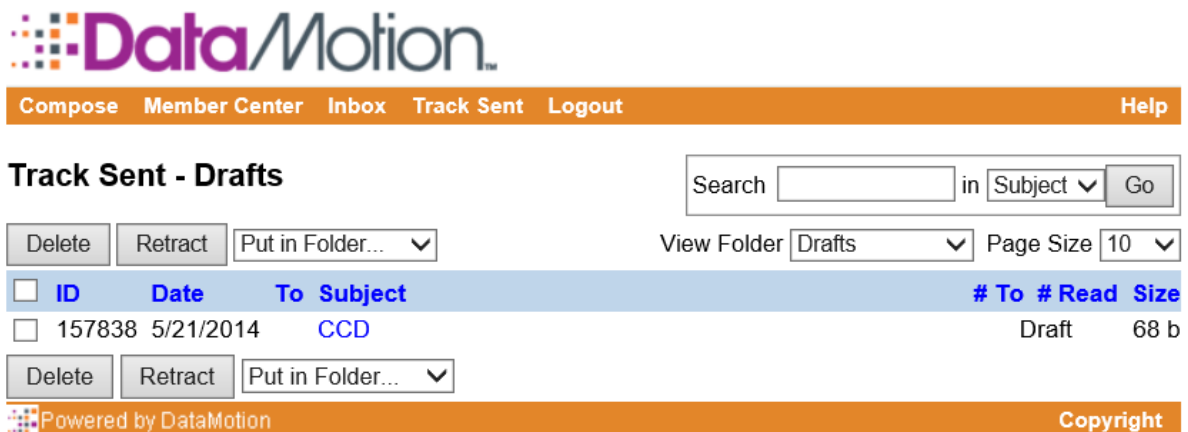
DataMotion Direct enables you to securely save drafts of messages, so that you can recall and complete them at a later time.

1. To save a draft copy of your message, click the **Save Draft** button at any point while composing your message. This places a copy in the Track Sent Drafts folder.

   NOTE: The system will automatically save a draft of your message periodically while you are still composing the message if the Compose window has been left open for 5 minutes or more.

2. To resume editing a message draft, navigate to the Track Sent **Drafts** folder. You can then select the draft message you want to open by clicking the Subject link of the message.

When you send the message, the draft copy will be automatically deleted. (If multiple drafts were saved, only the currently open draft will be deleted when you send the message.)

ADDRESS BOOK

The address book gives you the capabilities to effectively manage Direct messaging addresses for your recipients. Recipient addresses can be maintained as individual address book entries ("contacts"), or you can create address book groups containing many addresses. Group names can be added to your recipient list when you compose a message. Nicknames can also be used in the recipient list in place of the address.

Click the **Address Book** button in the Compose new message window (or the **Address Book** link in the Member Center) to display a web form where you can select addresses from your address book, add new addresses to your address book, and search the Healthcare Provider Directory (HPD) for new addresses to add to your address book and your message.

> NOTE: Green dots identify unsaved additions, and red dots identify unsaved deletions. To discard your unsaved changes to the address book (contacts and groups), click the Reset button. To save changes, click the Save button.

COMMON ADDRESS BOOK TASKS

The first time you access the Address Book, it will be empty, with no contacts or groups. To take full advantage of the address book's capabilities, you must add contacts and groups by performing the following tasks.

1. *Adding a Contact*: The first task is to add a contact. This allows you to add the contact to the To, Cc, and Bcc recipient lists, or to use the contact Nickname instead. You can also add contacts to Groups.

2. Adding Groups: The next task is to make a group. Although groups are not required, they allow you to create a distribution list so that you can quickly and easily send to multiple recipients. This is especially useful when you send to a group of recipients on a regular basis.

3. Moving Contacts into Groups: The third task is to move contacts into any groups if desired. (By default, contacts are not assigned to any group and are classified as "Unfiled.")

The following sections provide step-by-step instructions for these tasks.

Adding a Contact

1. In the **Direct Address** text entry field, enter a valid Direct messaging address (required).

2. In the optional **Nickname** and **Name** fields, you may also enter a nickname and full name if desired. If you enter a nickname here, it provides you with an easy way to send to this contact, because when you compose a message, you can type the short nickname in the recipient list instead of the full address.

3. After entering the appropriate information, click the green plus sign (+) at the end of the row on the right ("Add Contact to Address Book" will appear if you hover your mouse over the plus sign).

4. You can add more contacts if desired, and when you are done, click the **Save** button to save your changes to the address book.

Adding Providers from the Healthcare Provider Directory (HPD)

If you are a healthcare professional who uses DataMotion Direct, you can also add contacts to your address book from the Healthcare Provider Directory (HPD). This is useful if you don't know the provider's Direct address or exact name. To find providers, click the **Access HPD…** button to bring up the HPD Search Window. After you import providers from the HPD to your address book, you must click the **Save** button if you wish to save them to your address book. For more information, see *Direct Messaging Healthcare Provider Directory (HPD)* on page 45.
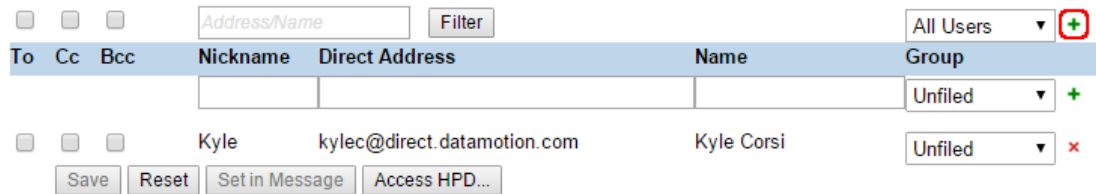
Adding Groups
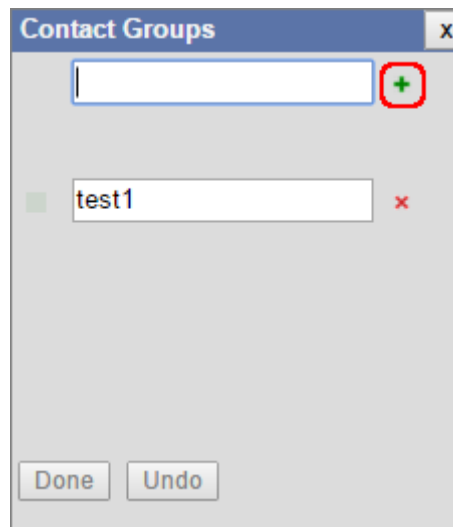
Although groups are not required, they allow you to create a distribution list so that you can quickly and easily send to multiple recipients. This is especially useful when you send to a group of recipients on a regular basis.

1. Click the green plus sign at the top right, next to the Group column ("Edit Groups" will appear if you hover your mouse over the sign).

2. In the Contact Groups dialog box that opens, type in a name for the group and click the green plus sign (+). The name is added to the groups list in the dialog box.

3. You can add more groups if desired. You can also modify any groups you have added. To change the name of a group, click on the group name in the list and make the changes. To delete a group, click on the red "X" next to the group name. A red circle will appear next to the text field, indicating the group will be deleted.
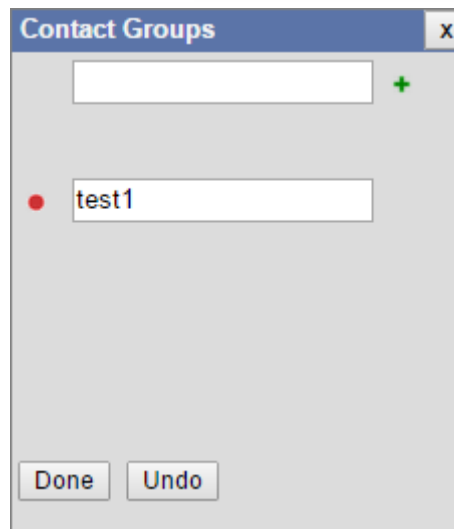
NOTE: You can click the Undo **button at any point during this process to reverse the group changes you have made. The Undo button will only work when you have made active changes to the groups, and it will become grayed out when there are no active changes. When you are asked to confirm the Undo ("Save group changes before leaving?" will appear as a popup), click Cancel to discard the changes.**

4. Click the **Done** button when you have completed adding or changing your groups. This closes the Groups dialog box and returns to the address book.

5. Click the **Save** button to save your (groups) changes to the address book.

Moving Contacts into Groups

By default, contacts are not assigned to any group and are classified as "Unfiled." Do the following to move contacts into any groups if desired.

1. Find an existing contact's information in the address book.

2. Click the Group drop-down menu to the right of the contact's information, and select the desired group from the list.
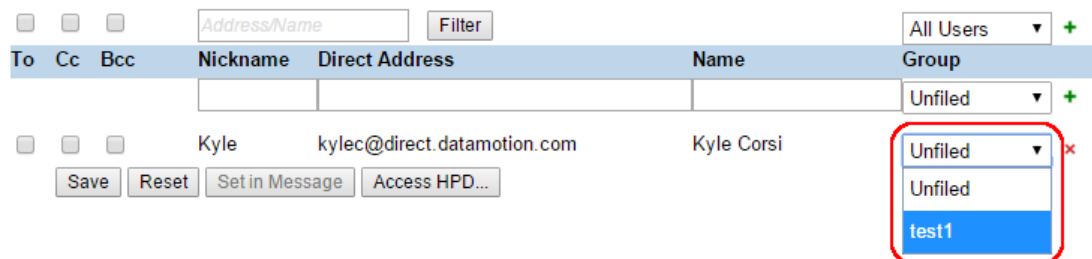
3. Click the **Save** button to save your changes to the address book.

4. To confirm that the contact was added to the group, you can select the group name in the group filter drop-down menu on the top right. This displays the contacts assigned only to that group. To cancel the group filter, select All Users in the group filter drop-down menu.

EDITING OR DELETING CONTACTS

If you want to delete a contact from the address book or change a contact's information, you can do so easily.

1. Find an existing contact's information in the address book.

    Click directly on the information you want to add, modify, or delete. For example, click in the space for **Nickname** to add a nickname. You can then add, delete, or modify text in the field.

2. Click directly on the information you want to add, modify, or delete. For example, click in the space for **Nickname** to add a nickname. You can then add, delete or modify text in the field.

    NOTE: Fields that you have changed will become highlighted when you leave the field.

3. To delete a contact, click on the red "X" to the right of the contact's information.

To	Cc	Bcc	Nickname	Direct Address	Name	Group	
						Unfiled	+
☐	☐	☐	● Kevin	kevinm@direct.datamotion.com	Kevin M	Unfiled	☒

Compose   Member Center   Inbox   Track Sent   Logout   Help

Address/Name   [Filter]   All Users ▼ +

[Save] [Reset] [Set in Message] [Access HPD...]

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4. Click the **Save** button to save your changes to the address book.

FILTER (OR FIND) CONTACTS

The Filter feature is located at the top of the address book. It allows you to find address book entries easily. This is especially helpful when your address book contains many entries. You can use a **text filter** or a **group filter** or both. The text filter helps you find contacts by Name, Nickname, and Address. The group filter displays only the members of a selected group. When the filters are combined, they help you find contacts within a group.

Text Filter

1. In the text box next to the Filter button, enter a name, nickname, or address, or part of one of these, and click the **Filter** button. Only those entries containing matching text will be displayed in the list. The text matching is case-sensitive.

2. To **cancel** a text filter, clear the field by deleting all text in it, and click the **Filter** button again.

Group Filter

1. Click on the Group drop-down menu to the right of the Filter button, and select the group from the list. You can select All Users, a specific group you have created, or Unfiled, which shows all contacts not assigned to a group.

2. To **cancel** a group filter, select **All Users** in the group drop-down menu.
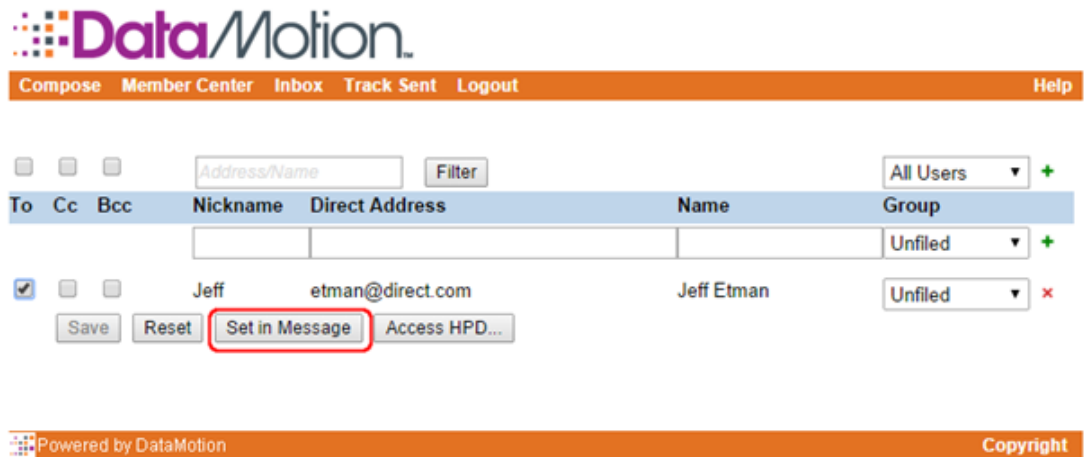
HOW TO USE CONTACTS IN YOUR MESSAGE RECIPIENT LISTS

There are several ways that you can use contacts in your message recipient lists (To, Cc, Bcc):
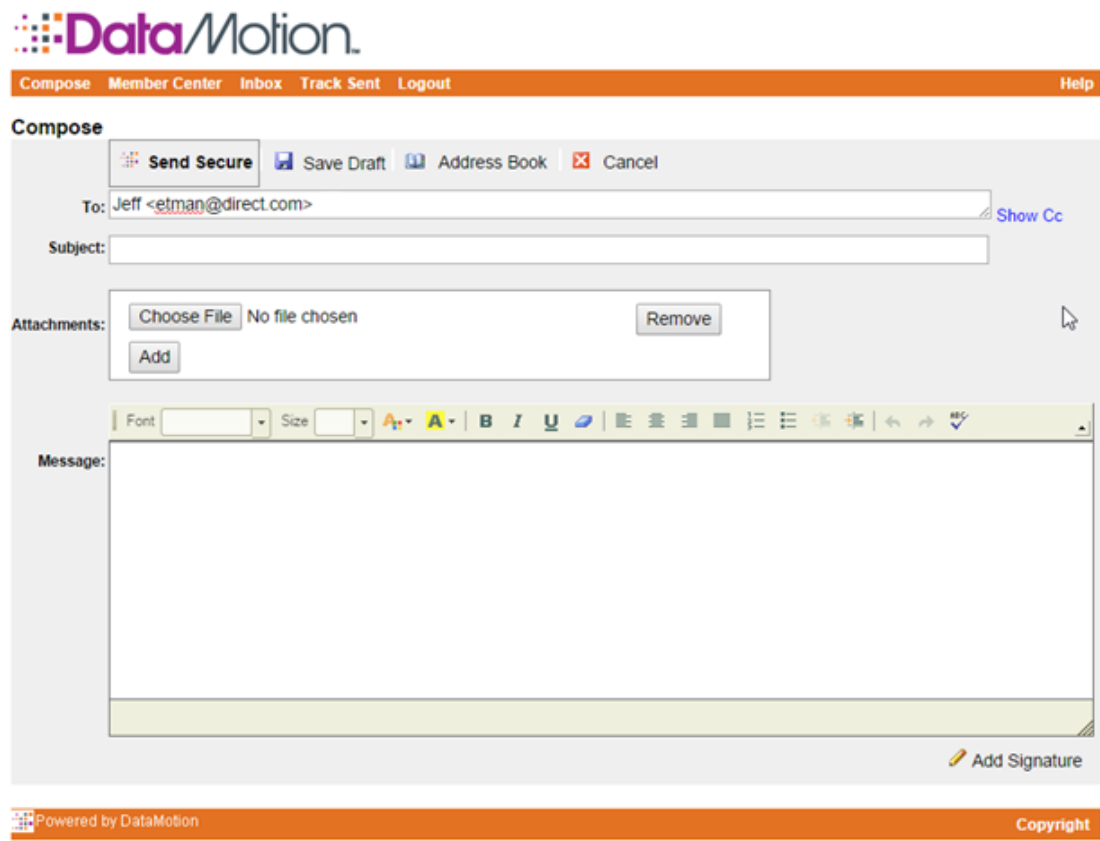
- In a recipient list when composing a message, you can type the **Nickname** of a contact in your address book, which can be used in place of the contact's address. Using a nickname is a convenient way to enter the contact in the list with less typing.

- In a recipient list when composing a message, you can also type in a **Group** name, which can be used to send to multiple recipients in the group. Using a group name is a convenient way to enter multiple recipients in the list with less typing.

- From the address book, you can select contacts for any of the recipient lists, and click **Set in Message** to place them in the respective recipient lists of a message in the Compose window. The following explains it in more detail.

Set in Message

After you have added contacts into the address book, you can select them for adding to a recipient list in messages by first clicking the **To**, **Cc**, or **Bcc** checkboxes, and then clicking the **Set in Message** button. This adds them to the respective recipient lists in the message Compose window.

You can also click the checkboxes above these columns to select all contacts displayed for adding to the desired recipient lists when you click the **Set in Message** button. If you filter the contacts first, this provides a useful way to sect groups of contacts. For example, you can type a **text filter** of "XYZ Hospital" and then click the **To** column heading checkbox to select them all as primary recipients. If you have created a distribution group, you can

also select a group filter in the Group filter drop-down menu (e.g., "Operations Team"), and then click the **To** column heading checkbox to select them all as primary recipients.

DIRECT MESSAGING HEALTHCARE PROVIDER DIRECTORY (HPD)

The DataMotion Direct Healthcare Provider Directory (HPD) is a standard feature available for healthcare professionals who use DataMotion Direct.

OPENING THE HPD

1. From the DataMotion Direct Address Book, click the **Access HPD…** button at the bottom to open the HPD.

2. This displays the HPD Search Window. The HPD allows you to look up providers' contact information, which can be especially useful when you don't know a provider's Direct address or exact name.

To search the HPD, see the *Searching The HPD* section on page 46.

SEARCHING THE HPD

Enter your desired search filter criteria and click the **Search** button.

You can search the provider or organization information, including the Name, NPI, Specialty, Location, Phone, and Fax. The NPI (National Provider Identifier) is a unique identification number for covered health care providers. The HPD uses the NPI field by searching an NPI database that matches the number you type in with similar numbers stored in the database. When you type into the Specialty field, it will display a list of specialties matching the text you enter and you can select from it, so you don't have to type the full name of the specialty.

When you enter text in the filter fields, only those HPD entries containing matching text will be displayed in the results. However, the text matching is case-insensitive and does not need to be a complete or an exact match; that is, you can enter a part of a name or number and the HPD entries **containing** the filter text you enter will be returned as a match. For example, if you enter "stein" in the Last Name filter field, the results will include Goldstein, Stein, Steinfelder, etc.

Note that the completeness of the search results depends on how the providers have identified themselves and the information they have supplied for the HPD as well as whether the

information was obtained from the providers' NPI data. For example, not all providers identify a specialty. Some Otolaryngologists may identify their specialty, but others may not. In these cases, it can be helpful to search for the specialty within the Organization Name itself; that is, you can enter "oto" in the Organization Name field to match organizations containing "oto" in their name (e.g., "Associated Otolaryngologists" or "Otolaryngology of Knowes County").

When you click the **Search** button, it displays the results in the Search Results section of the HPD Search Window.

You can refine your search criteria and click the Search button again to improve your results. To switch between the Search Results and the Search Filters sections, click the Search Filters bar at the top of the search window. To switch back to the results, click the Search Results bar at the bottom of the search window.

VIEWING ADDITIONAL PROVIDER DETAILS

1. To view provider details from within the Search Results view, select the more details button (…) on the right of the provider listing.
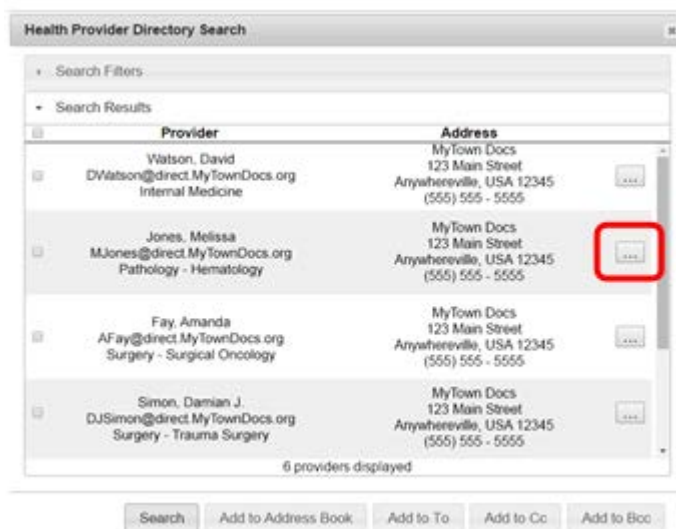
This displays a Provider Details window with additional details about the provider, including NPIs, Specialties, Fax, and Role, if available.

NOTE: Specialties are either pulled from the provider's NPI (NUCC Provider Taxonomy Code), or entered free-form upon registration with DataMotion. Free-form specialties will not have a corresponding Taxonomy Code.

2. To exit the Provider Details box, click the "X" on the top right corner.

ADDING HPD ADDRESSES TO YOUR ADDRESS BOOK
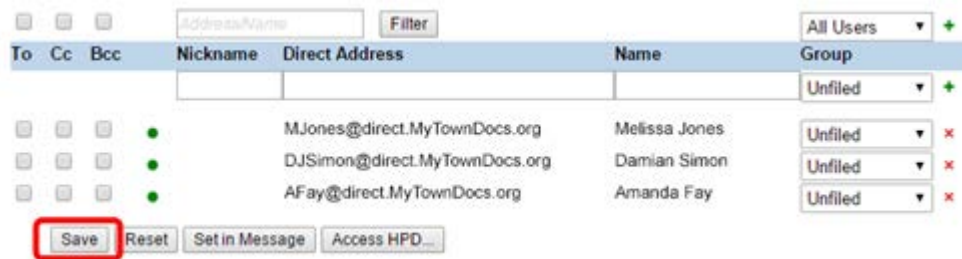
After obtaining HPD search results, you can "import" them into your address book so you can find them easily next time.

To add HPD search results (including provider Direct addresses) to your address book, you will first select the providers in the HPD and add them to your address book, and then you can save them in your address book. You can also add them to the To, Cc, and Bcc recipient lists of a message in the Compose message window.

1. In the HPD search results, select the providers you want to add to your address book by clicking the checkbox on the left of the listings. You may select as many providers as you wish, or to select all search results shown, click the top-most checkbox.
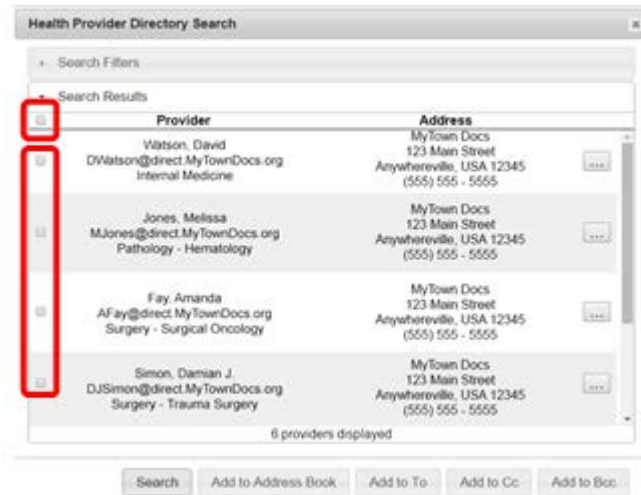
2. After you select the HPD entries, you can add them to your address book using one of the following buttons at the bottom of the search window:

   » **Add to Address Book:** This adds the selected HPD entries to your address book and returns to the address book.

   » **Add to To:** This adds the selected HPD entries to your address book and returns to the address book with these new entries selected as message ("To") recipients.

   » **Add to Cc:** This adds the selected HPD entries to your address book and returns to the address book with these new entries selected as message copy ("Cc") recipients.

   » **Add to Bcc:** This adds the selected HPD entries to your address book and returns to the address book with these new entries selected as message blind copy ("Bcc") recipients.

3. After you have added HPD entries to you address book, you can save them in your address book so you can find them easily next time. To save the addresses to your address book, click the **Save** button. If you do not save the address book, all unsaved changes (shown by green or red dots) will be discarded when you leave the address book. You can also discard the changes by clicking the address book **Reset** button.
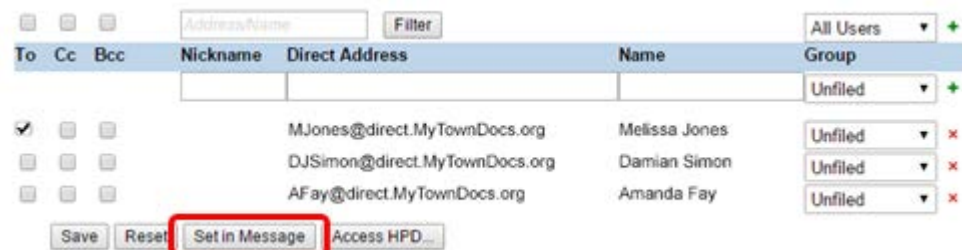
NOTE: For more information about using the Address Book, please see the DataMotion Direct User Guide.

ADDING ADDRESSES TO A MESSAGE

1. After you have added contacts into the address book, you can select them for adding to a recipient list in messages by first clicking the **To**, **Cc**, or **Bcc** checkboxes, and then clicking the **Set in Message** button. This adds them to the respective recipient lists in the message Compose window.

   NOTE: Selecting the "Add to To", "Add to Cc", or "Add to Bcc" buttons from the HPD Search Window will auto-populate these checkboxes in the address book.

2. You can also click the checkboxes above these columns to select all contacts displayed for adding to the desired recipient lists when you click the Set in Message button.

TRACKING SENT MESSAGES

In addition to viewing sent messages, DataMotion Direct enables you to find out precisely when your message was processed and delivered.

To view the tracking information for a message:

1. Click **Track Sent** on the menu bar or in the Member Center. The Track Sent folder is displayed, similar to the following:

2. Click the **Subject** of the message you wish to examine. The tracking details for the message include tracking information for the message itself (for each recipient), as well as message integrity information. The message tracking details are located below the Subject line.

3. Click on the link **Expand All Tracking Details** at the top to expand all tracking information, including message integrity details.

Click any of the **Collapse** links to hide the tracking information for that type.

See the following for more information about the Track Sent details.

TRACK SENT DETAILS WITHIN THE DATAMOTION DIRECT HISP

For messages sent to recipients within the DataMotion Direct HISP (local HISP messaging), the following status information is available for Track Sent messages:

- **Direct message has been processed successfully.**
  This indicates the message has been processed for sending, including validating the trust and security for the message.

- **Direct message has been delivered successfully.**
  This indicates the message has been delivered to the recipient address.

- **Opened.**
  This indicates the message has been opened after delivery.

  (Note: Tracking information for when a message is opened is available only for local HISP messaging.)

For example, the following illustration shows the tracking information for a Direct message that was opened by the recipient.
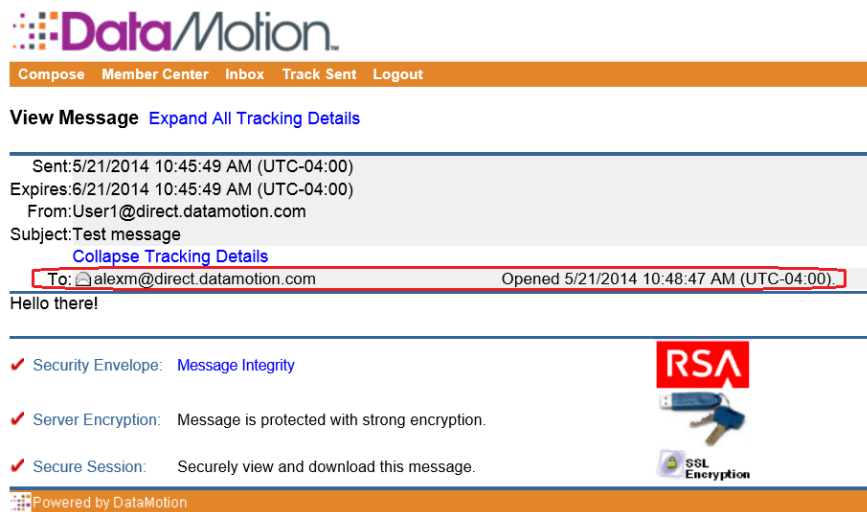
TRACK SENT DETAILS OBTAINED FROM FOREIGN HISPS

For messages sent to recipients who are subscribers of a **foreign HISP** (other than the DataMotion Direct HISP), the following status information may be provided for Track Sent messages:

- **`Direct message has been sent, waiting for delivery response.`**
  This indicates DataMotion Direct has sent the message to the foreign HISP.

- **`Direct message has been processed successfully.`**
  This indicates the foreign HISP has received, decrypted, and validated the trust and security for the message. It has taken custodianship of the message and will attempt to deliver it to the recipient.

- **`Direct message has been delivered successfully.`**
  This indicates the foreign HISP has delivered the message to the destination (the recipient). This may sometimes be referred to as being "dispatched" (to the destination).

- **`Direct message delivery has failed.`**
  This indicates one of the following:

  » The foreign HISP sent a response indicating a delivery failure.

  » DataMotion Direct did not receive within a reasonable period of time a response from the foreign HISP indicating that the message was processed successfully.

The DataMotion Direct HISP may receive additional Message Disposition Notifications (MDNs) from the foreign HISP, which are optional and indicate further processing, and these may or may not be included in the Track Sent details or added to the sender's Inbox as a separate message.

RETRACTING A SENT MESSAGE

NOTE: The Retract message feature is supported only for <u>local HISP messages</u> **(sent to recipients who are subscribers of the DataMotion Direct HISP), and it is not supported when sending messages to subscribers of** <u>foreign HISPs</u>**.**

If you realize you sent a message in error, or change your mind about its contents or who should have received it, you can retract the message as long as it has not been opened or securely delivered. If the retraction is successful, the recipient will see that the message was retracted and will not be able to open the message.

To retract an unopened message, from the Track Sent folder:

1. Select the checkbox next to the message you wish to retract.

2. Click **Retract**.
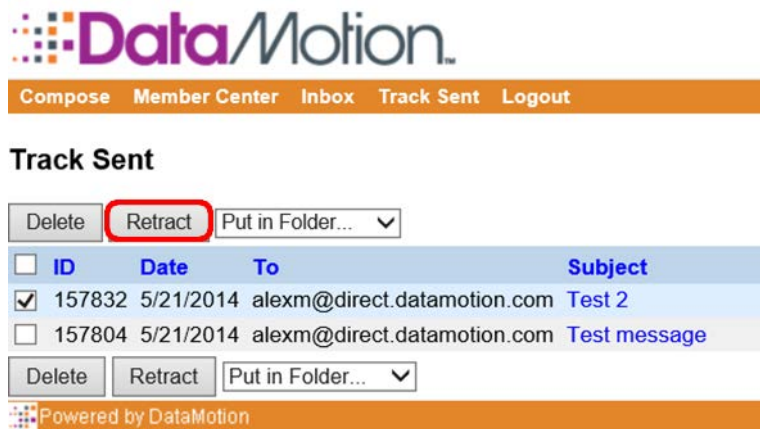
3. The message status will change to Retracted.
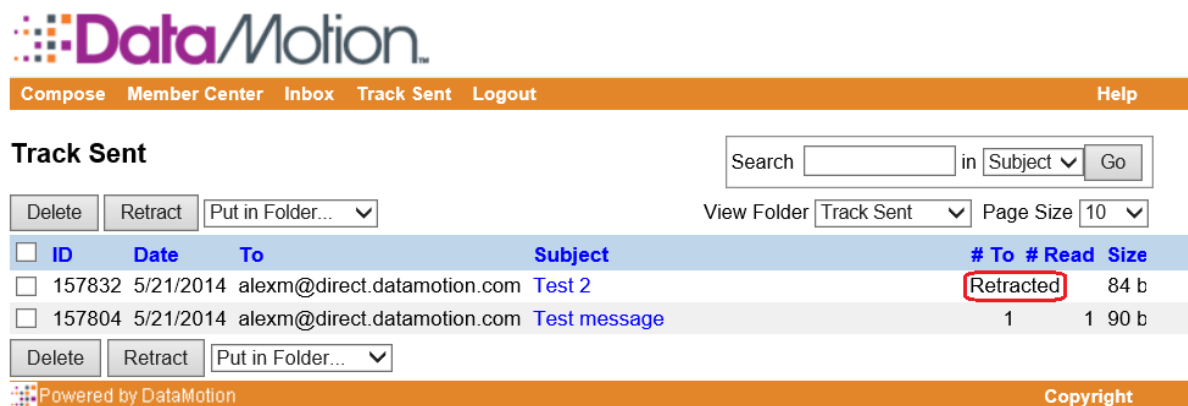
4. The status of the message will also be updated in the recipient's Inbox, similar to the following example.

RECEIVING MESSAGES

When a new Direct message is sent to you, there are multiple ways it may be delivered. By default, it is delivered as a notification message with a link.

NOTIFICATION MESSAGES IN YOUR EMAIL CLIENT

When your DataMotion Direct messaging account receives a new Direct message, DataMotion Direct will automatically send a notification message to your email notification address. This email notification message will be from a notification address on the DataMotion Direct **dmhisp.com** domain (e.g., delivery@dmhisp.com). The notification message will have the same subject line as the original message in your account, and will also contain the sender's name and instructions on how to access the secure message.

To receive the message on the DataMotion Direct Web Portal, click the link as shown in the message. This opens your web browser to the DataMotion Direct login page.

See *Getting Started with DataMotion Direct* on page 12 for a description of how to log into your account.

VIEWING MESSAGES IN YOUR WEB PORTAL INBOX

Once you have logged in, if you have new, unread messages, you will automatically be taken to the Inbox.

New unread messages are highlighted by a NEW tag to the left of the message. Click on the message subject to open it.

Once opened, a message will no longer display the NEW tag.

The **Forward**, **Reply to Sender** and **Reply to All** can be used to securely forward or reply to the message.

The **Download Message** link allows you to download a PDF copy of the message.

VIEWING ATTACHMENTS IN MESSAGES

Once you have logged in, if you have new, unread messages, you will automatically be taken to the Inbox. Click on the message subject to open it.

Once the message has opened, if the attachment is recognized as being a valid C-CDA file or .zip file containing a valid C-CDA file, a **view** link will appear next to the attachment.

Upon clicking the **view** link, a window will appear containing your file. From this window you can view the C-CDA and print the document.

A large number of other attachment types can be viewed and/or downloaded.

MESSAGE EXPIRATION AND STORAGE

DataMotion Direct Secure Messaging is primarily intended for secure data transport ("data in motion") rather than storage ("data at rest"). However, DataMotion Direct provides limited retention of messages and attachments. The expiration time for messages you send and receive is 1 year. Account storage usage is calculated based on sent messages. Received messages do not

count in the storage calculation. The Member Center displays Account Details that show allowed and available disk space/storage for the account.

You can see the message expiration date/time in the header information when viewing the message from either the Track Sent folder for sent messages or the Inbox folder for received messages.

Expiration of a message causes the message and any attachments to be permanently deleted. If you are the sender, the message will be deleted from your Track Sent folder (or subfolder). If any recipients are DataMotion HISP users, the message will also be deleted from their Inbox folders. This occurs regardless of whether the message was opened.

Senders can protect their sent messages from being deleted from the Track Sent folder upon expiration by moving them to the Track Sent Archive folder. The **Archive folder** allows storage of sent messages for as long as the account exists. If you move a sent message to the Archive folder, it protects only the original message in your account. Upon expiration, the message will be deleted from the DataMotion HISP accounts of anyone who received the message.

TIP: To save a message that you have received, you can download it before it expires by using the Download Message function when viewing the message. You can also save message attachments by clicking on the attachment and selecting Save.

5
DataMotion Direct for Tablets

This information describes how to set up and use DataMotion Direct for tablets (e.g., Apple iPad* device), including how to receive and send secure messages from within the native mail application. It includes the following main topics:

- *DataMotion Direct for Apple iPad* (60)

DATAMOTION DIRECT FOR APPLE IPAD

DataMotion Direct can be accessed from your Apple iPad* device to allow you to receive and send secure messages from within the native mail application.

CONFIGURING DATAMOTION DIRECT ON THE IPAD

DataMotion Direct for a mobile device is comprised of a POP3 service that allows you to download all your incoming secure messages and an SMTP service which allows you to send new secure messages.

The following step-by-step instructions describe how to configure DataMotion Direct on your iPad using the Mail app.

1. From the iPad Home Screen, select **Settings**.
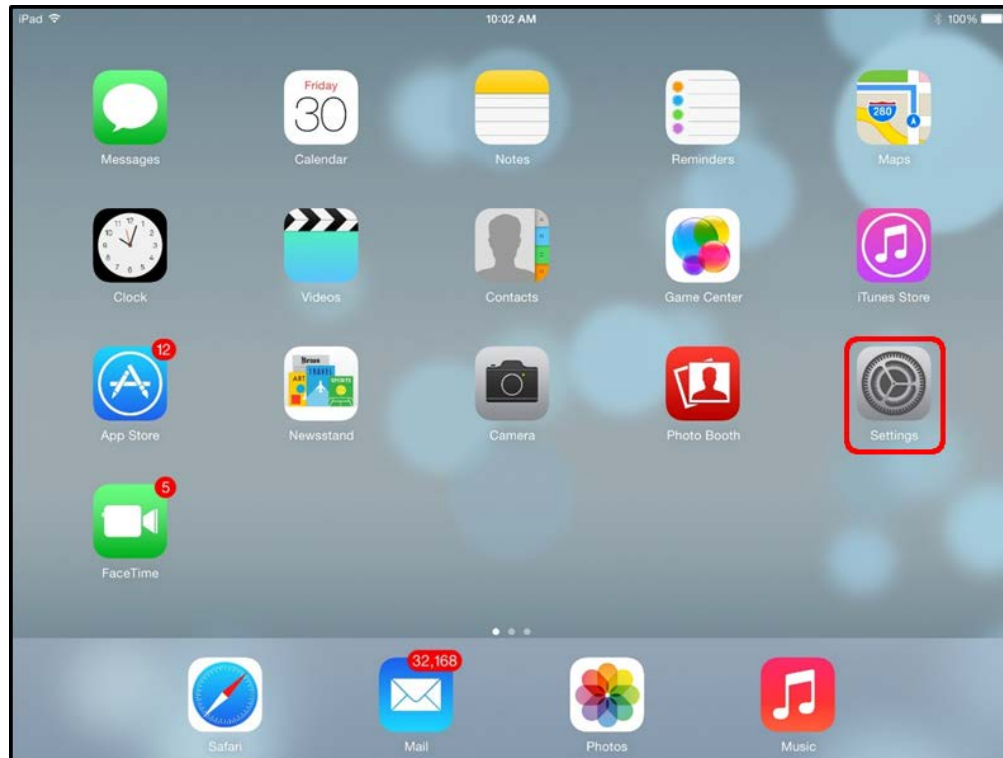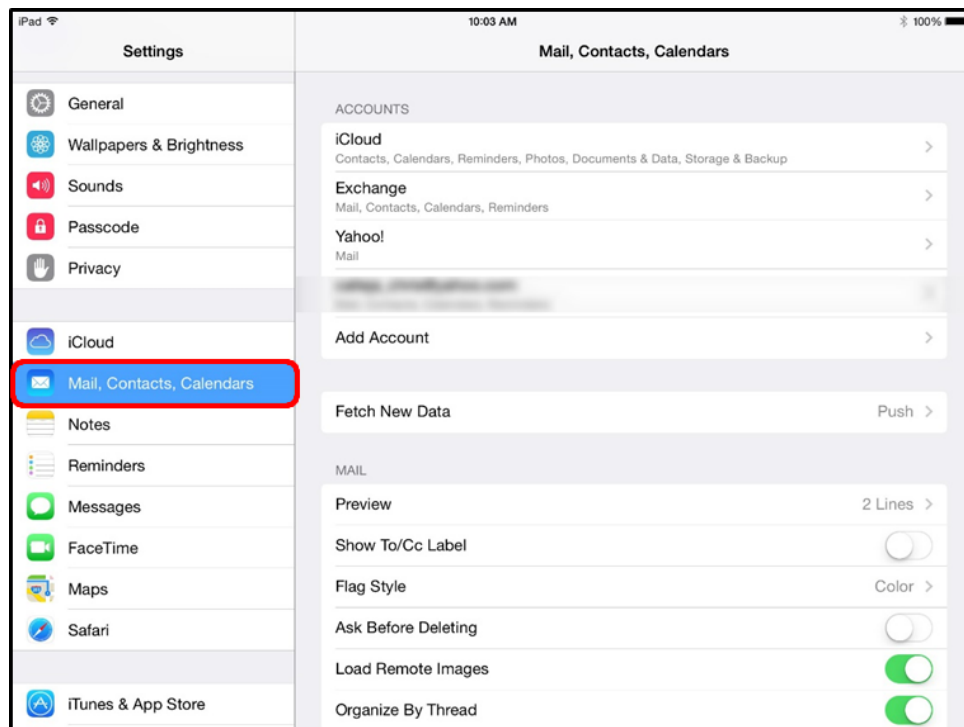
2. Select the Mail, Contacts, Calendars option.

3. Select the **Add Account…** option (at the bottom of any Mail Accounts you already have).
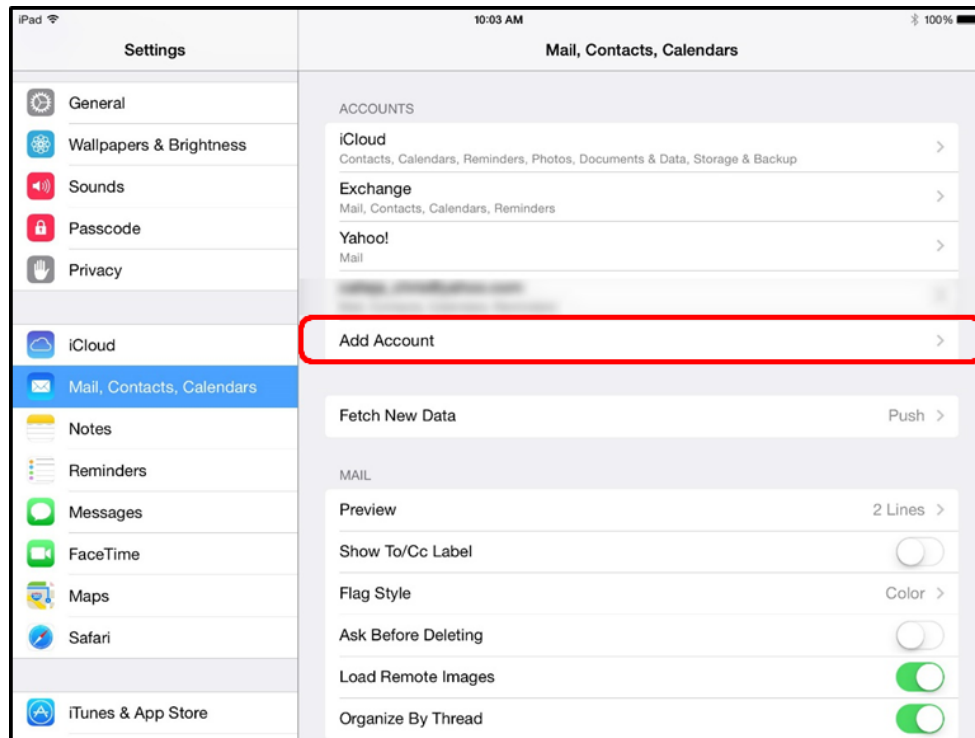
4. Select **Other** as the type of account.
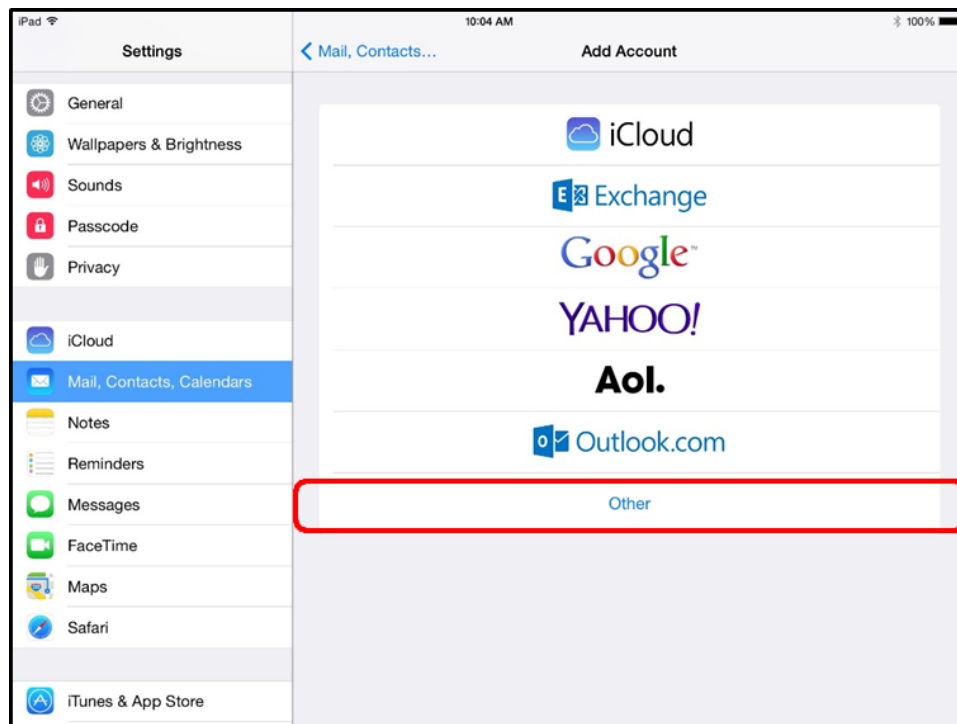
5. Select the **Add Mail Account** option under Mail.
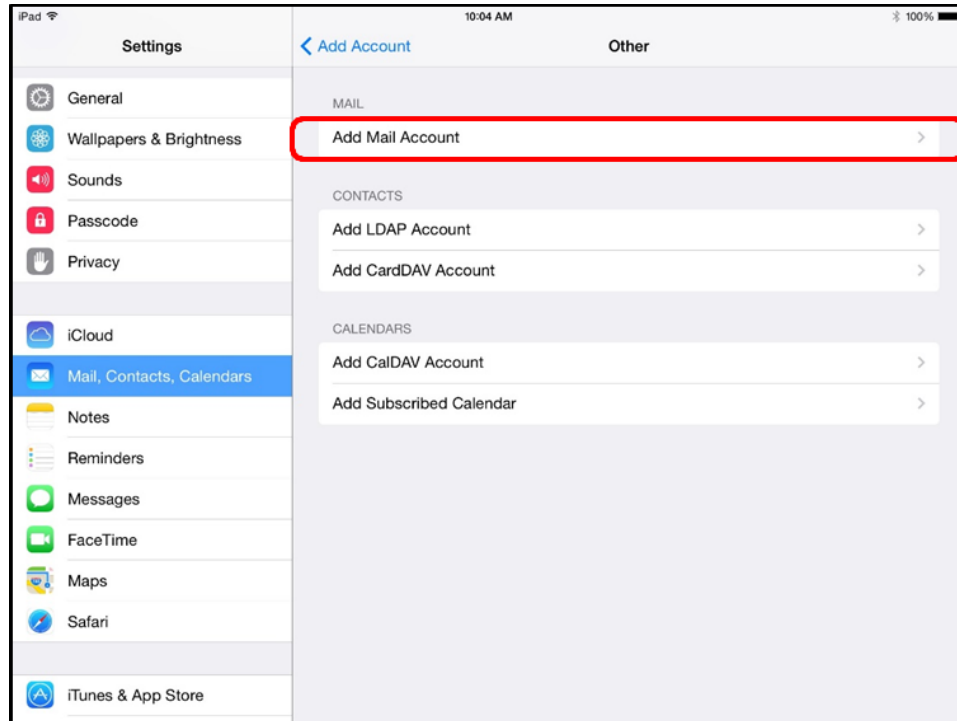
6. Enter the following information:
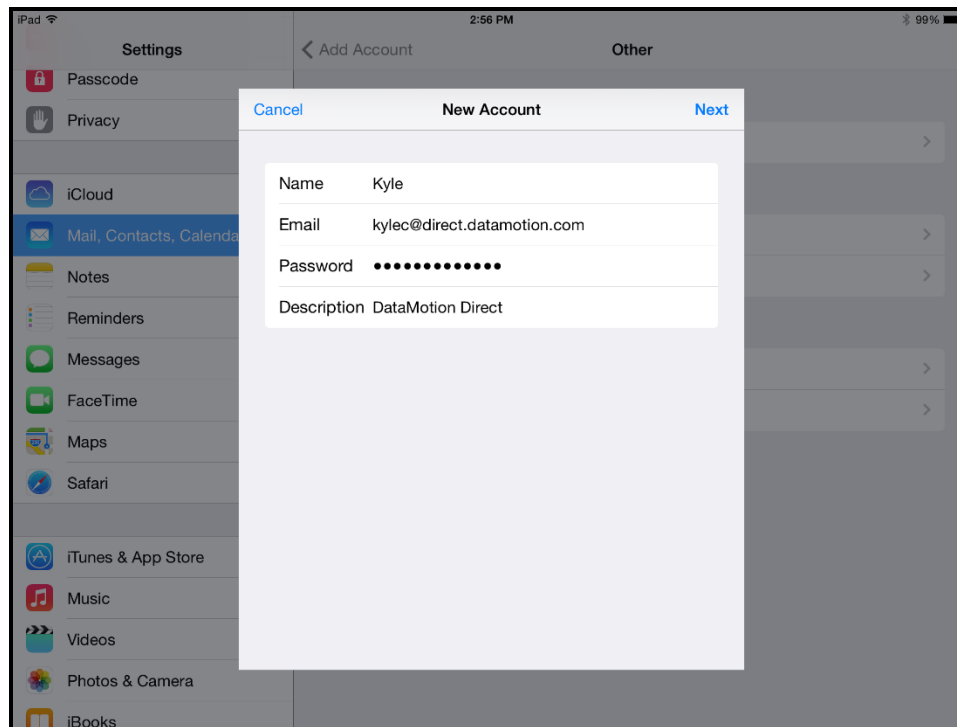
» **Name**: Your name

» **Email:** <your DataMotion Direct message address>

» **Password:** <your DataMotion Direct password>

» **Description**: DataMotion Direct

7. Select **Next**.
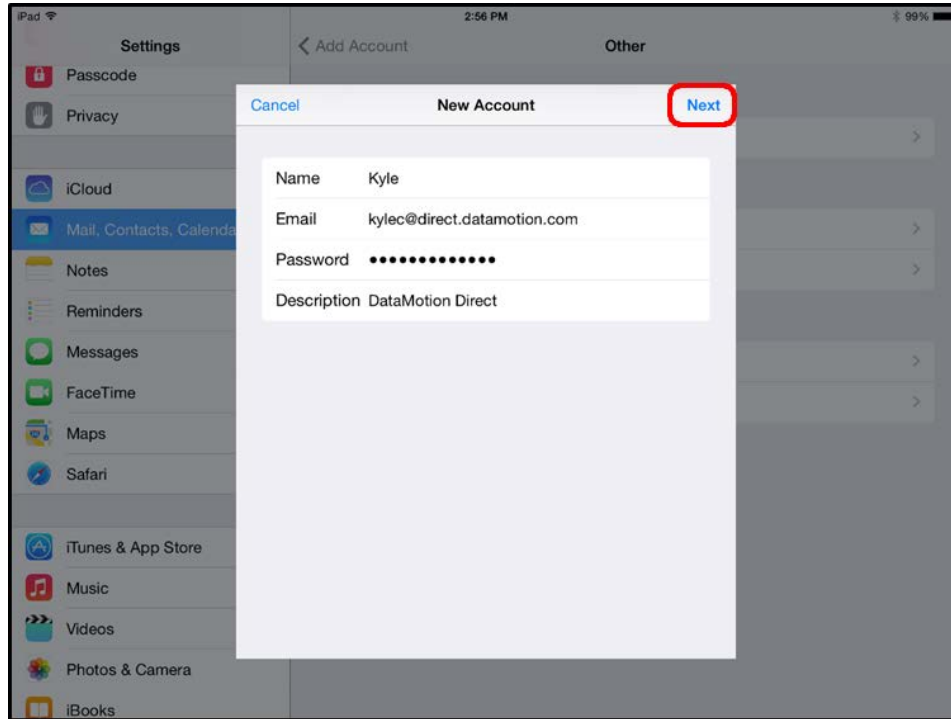
8. Select **POP**. It should be blue once it is selected.

9. Under **Incoming Mail Server**, enter the following information:

» **Host Name:** ssl.dmhisp.com

» **User Name:** <your DataMotion Direct message address>

» **Password:** <your DataMotion Direct password>

10. Under **Outgoing Mail Server**, enter the following information:
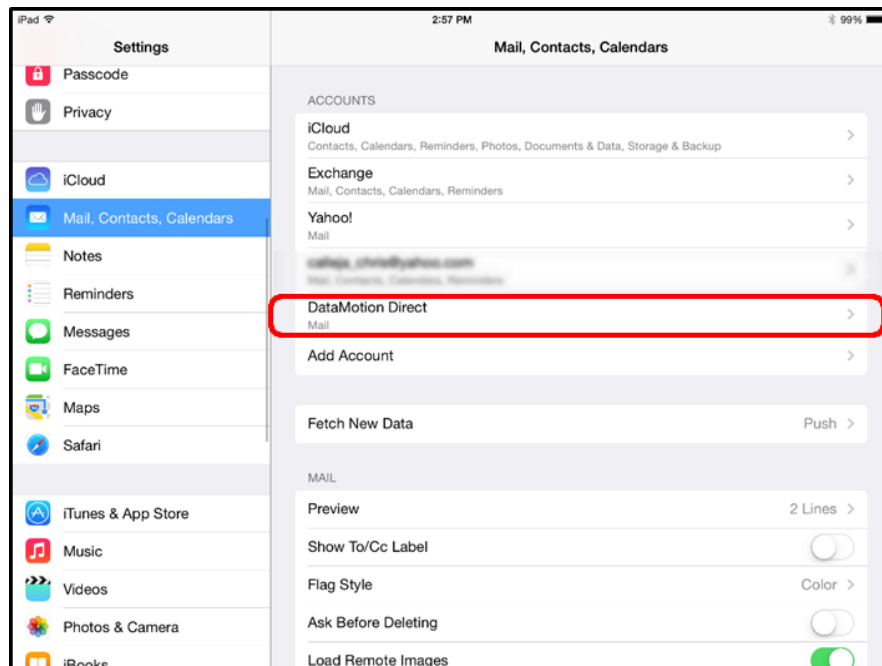
> » **Host Name:** ssl.dmhisp.com
>
> » **User Name:** <your DataMotion Direct message address>
>
> » **Password:** <your DataMotion Direct password>

11. Select **Save**. The account information will be verified.

12. The account should now be listed in your Accounts list as DataMotion Direct.
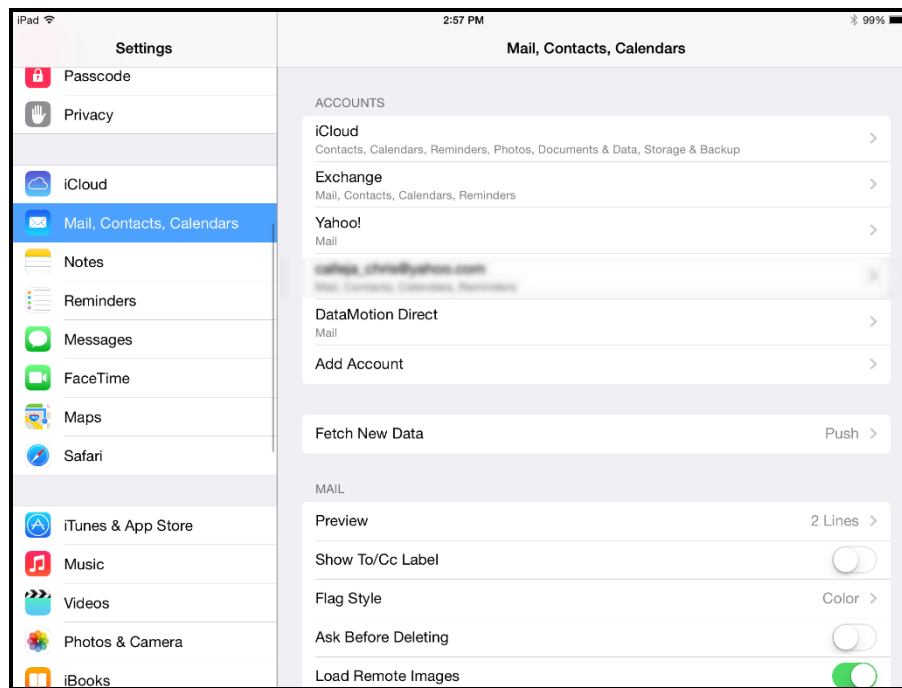
13. To continue with the configuration, click **DataMotion Direct**.

14. Scroll down and select **SMTP**.

15. Select **ssl.dmhisp.com**.

16. Verify the following information.

» **Server:** On

» **Host Name:** ssl.dmhisp.com

» **User Name:** <your DataMotion Direct message address>

» **Password:** <your DataMotion Direct password>

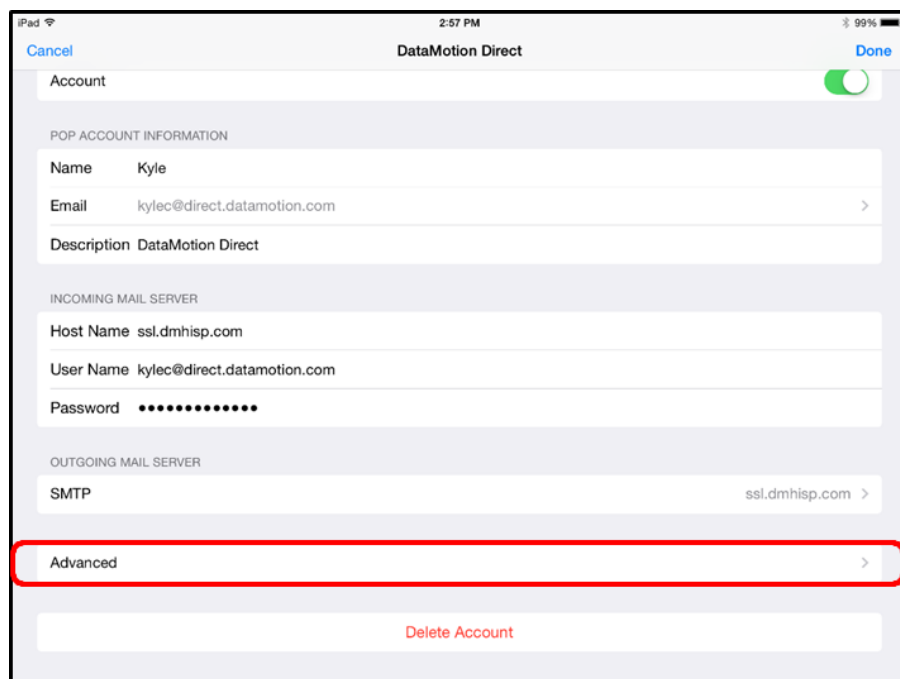» **Use SSL:** On

» **Authentication:** Password
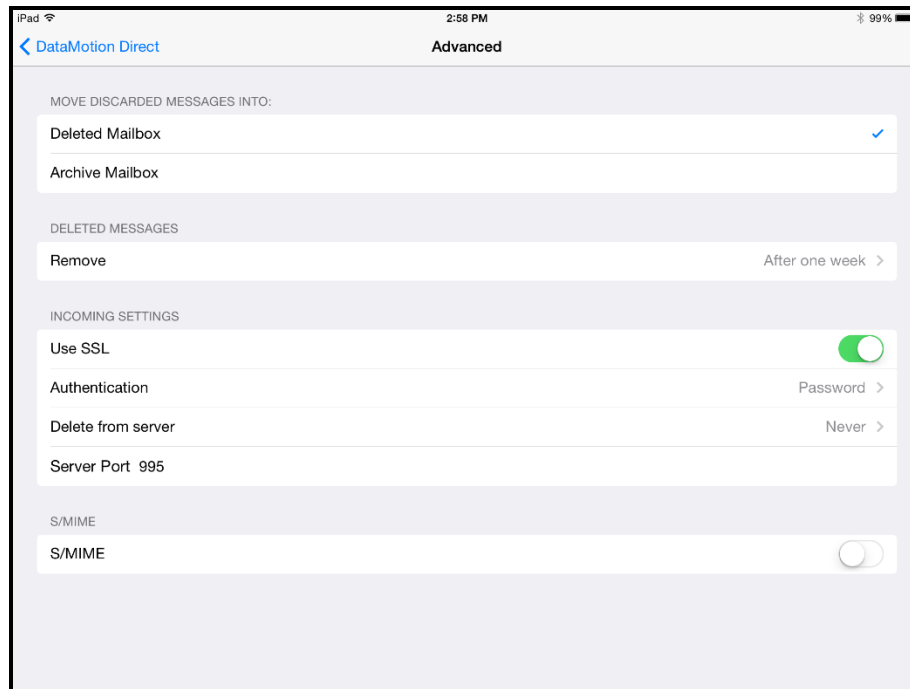
» **Server Port:** 587

17. Click **Done**.

18. Select **DataMotion Direct**.
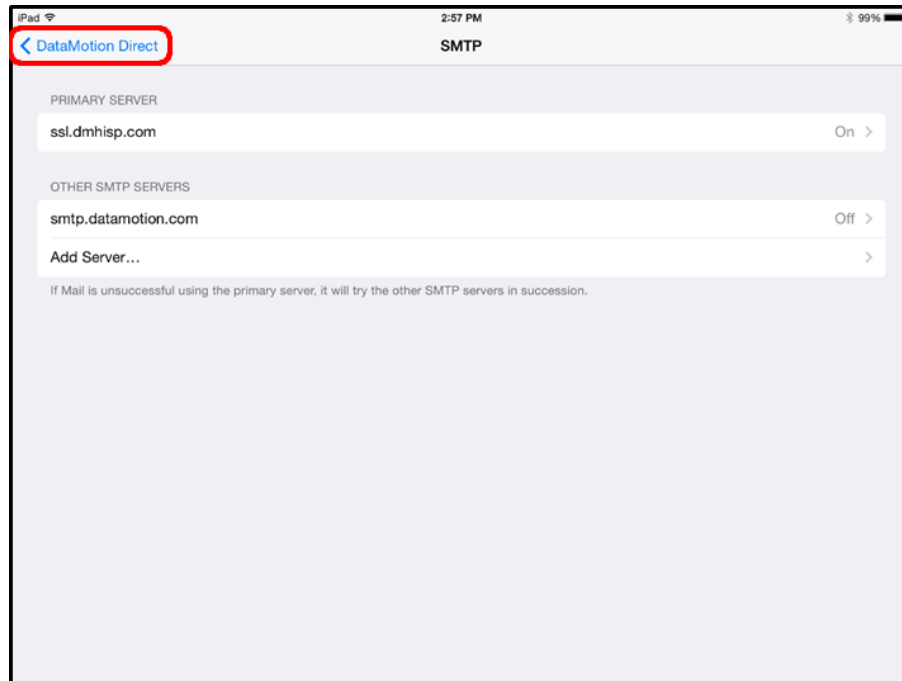

19. Scroll down and select **Advanced**.

20. Verify the following information.

» **Remove:** After one week

» **Use SSL:** On

» **Authentication:** Password

» **Delete from Server:** <your choice>

   » **Never:** (Default.) When you delete messages from your device Inbox, your messages will be retained on the DataMotion Direct server (and web portal) until they expire or you manually delete them there.

   » **When removed from Inbox:** When you delete messages from your device Inbox, your messages will also be deleted from your Inbox on the DataMotion Direct server and will be placed in the Trash folder. If you don't delete them from your device, they will be retained on the server until they expire or you manually delete them using the web portal.

   » **7 Days:** When you delete messages from your device Inbox, they will be retained in your Inbox on the DataMotion Direct server for 7 days, after which they will be placed in the Trash folder. If you don't delete them from your device, they will be retained on the server until they expire or you manually delete them using the web portal.

» **Server Port:** 995

21. Click **DataMotion Direct** to commit the changes.
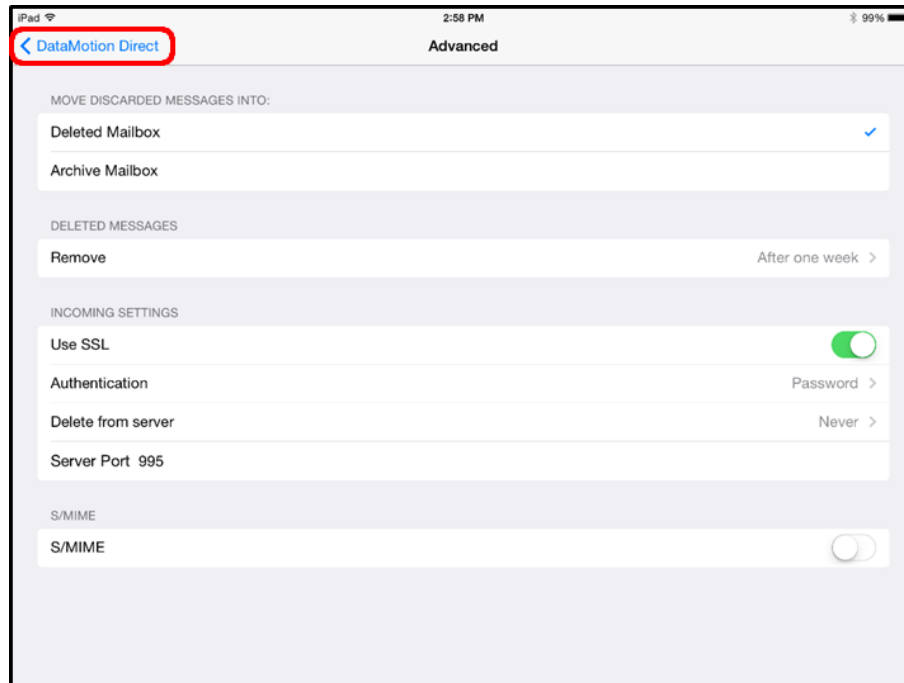
USING DATAMOTION DIRECT ON THE IPAD

Now that you have set up your DataMotion Direct account, you can use it to receive and send secure messages.

Receiving Secure Messages

When you open the Mail app on your iPad, you will see an account called DataMotion Direct. All your secure messages will be downloaded into this account where you can read them like typical mail messages sent to any other accounts on your device. Like your other accounts, messages will be automatically downloaded from the server and made available to you. You will not need to click on delivery notices to access your messages through a web browser, but will have direct access to them in your email client.

> **NOTE: Your device does not display** <u>Push Notifications</u> **for incoming DataMotion Direct messages, because this capability is not supported when using POP3. To check for new messages, refresh your message list manually.**

Sending Secure Messages

With your DataMotion Direct account configured on your iPad, you can send secure messages directly from your device. When you compose a new message or reply to an existing message, simply select the DataMotion Direct account as the **From** address and it will be sent securely.

6
DataMotion Direct for Smartphones

This information describes how to set up and use DataMotion Direct for smartphones (iPhone, Android devices, etc.), including how to receive and send secure messages from within the native mail application. It includes the following main topics:

- *DataMotion Direct for Apple iPhone* (below)
- *DataMotion Direct for Android* (below)

## DATAMOTION DIRECT FOR APPLE IPHONE

DataMotion Direct can be accessed from your Apple iPhone* device to allow you to receive and send secure messages from within the native mail application.

### CONFIGURING DATAMOTION DIRECT ON THE IPHONE

DataMotion Direct for a mobile device is comprised of a POP3 service that allows you to download all your incoming secure messages and an SMTP service which allows you to send new secure messages.

The following step-by-step instructions describe how to configure DataMotion Direct on your iPhone using the Mail app.
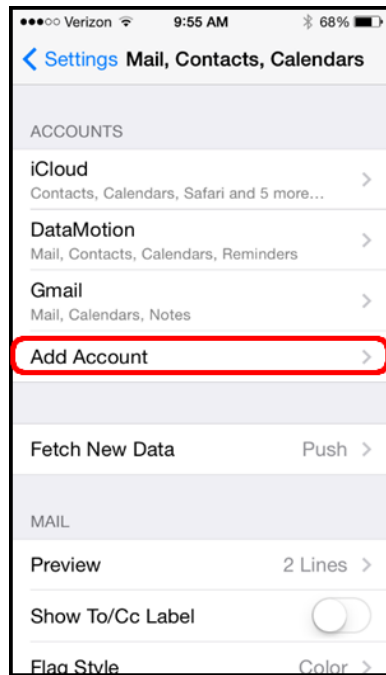
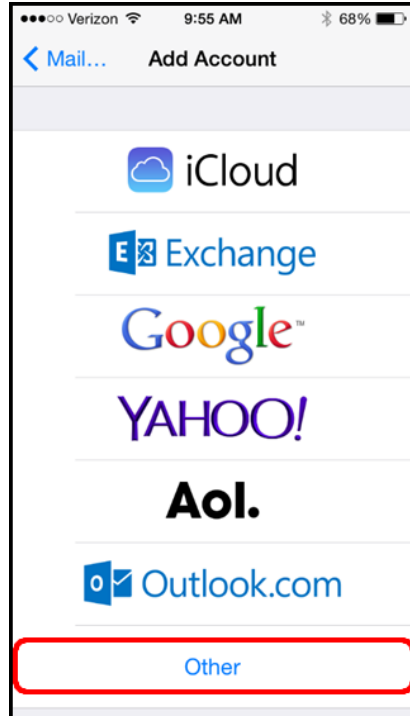1.   From the iPhone Home Screen, select **Settings**.
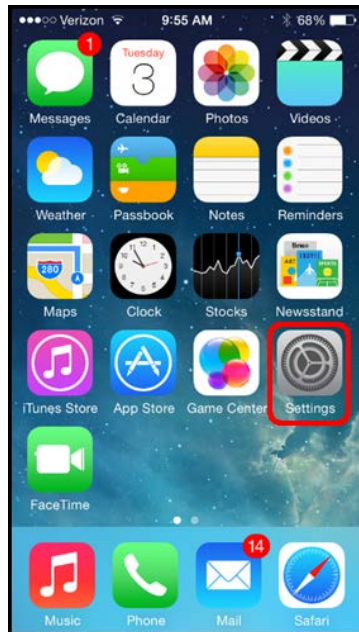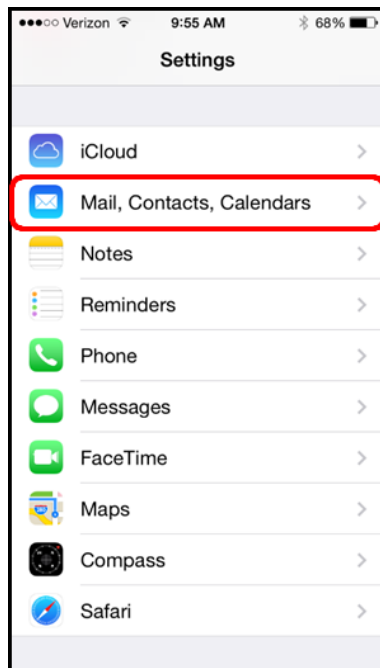
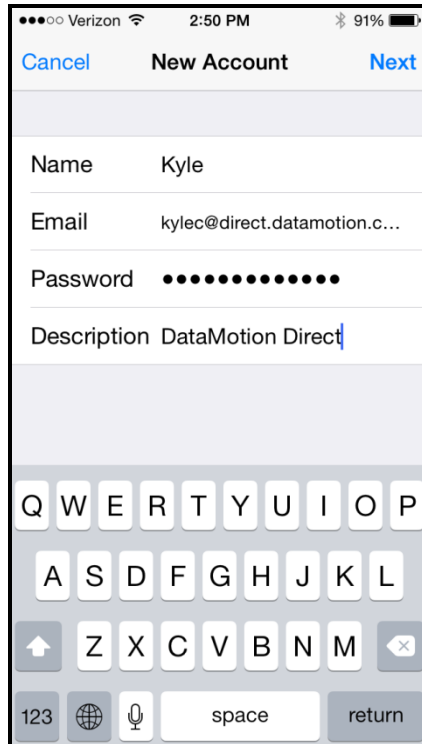2.   Select the Mail, Contacts, Calendars option.

3. Select the **Add Account…** option (at the bottom of any Mail Accounts you already have).
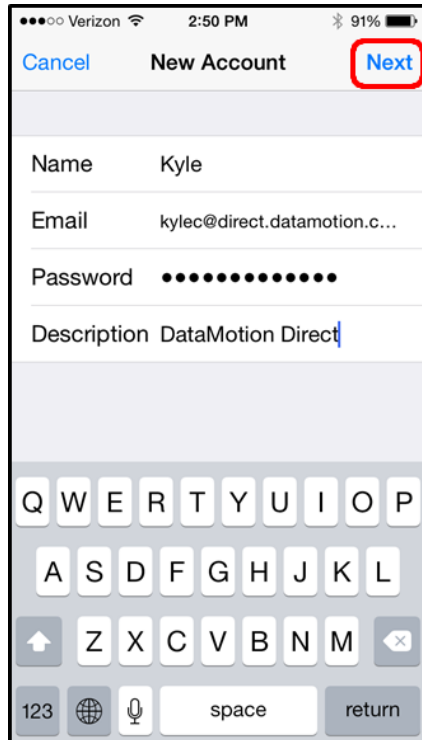

4. Select **Other** as the type of account.

5.   Enter the following information:

»   **Name:** Your name

»   **Email:** <your DataMotion Direct message address>

»   **Password:** <your DataMotion Direct password>

»   **Description:** DataMotion Direct

6. Select **Next**.

7. Select **POP**. It should be blue once it is selected.

8. Under **Incoming Mail Server**, enter the following information:

» **Host Name:** ssl.dmhisp.com

» **User Name:** <your DataMotion Direct message address>

» **Password:** <your DataMotion Direct password>

9. Under **Outgoing Mail Server**, enter the following information:

» **Host Name:** ssl.dmhisp.com

» **User Name:** <your DataMotion Direct message address>

» **Password:** <your DataMotion Direct password>

10. Select **Save**. The account information will be verified.

11. The account should now be listed in your Accounts list as DataMotion Direct.

12. Click **DataMotion Direct**.
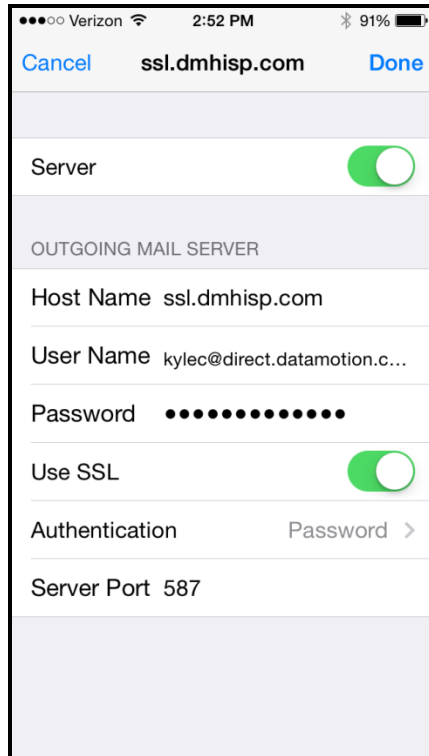
13. Scroll down and select **SMTP**.
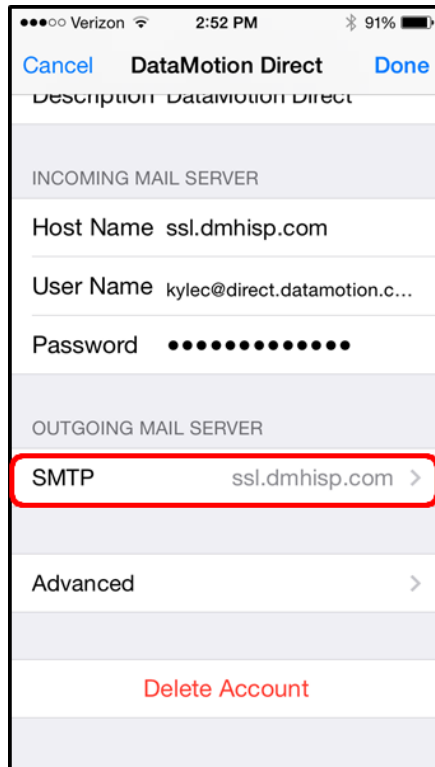
14. Select **ssl.dmhisp.com**.

15. Verify the following information.

» **Server:** On

» **Host Name:** ssl.dmhisp.com

» **User Name:** <your DataMotion Direct message address>

» **Password:** <your DataMotion Direct password>

» **Use SSL:** On

» **Authentication:** Password

» **Server Port:** 587

16. Click **Done**.
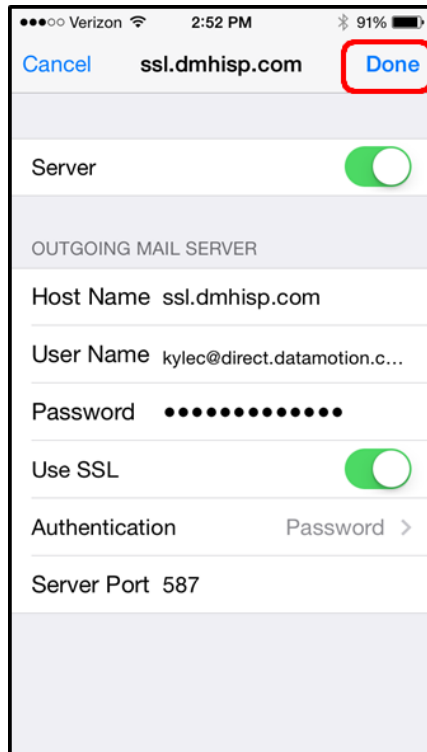
17. Select **Back**.

18. Scroll down and select **Advanced**.

19. Verify the following information.

» **Remove:** After one week

» **Use SSL:** On

» **Authentication:** Password

» **Delete from Server:** <your choice>

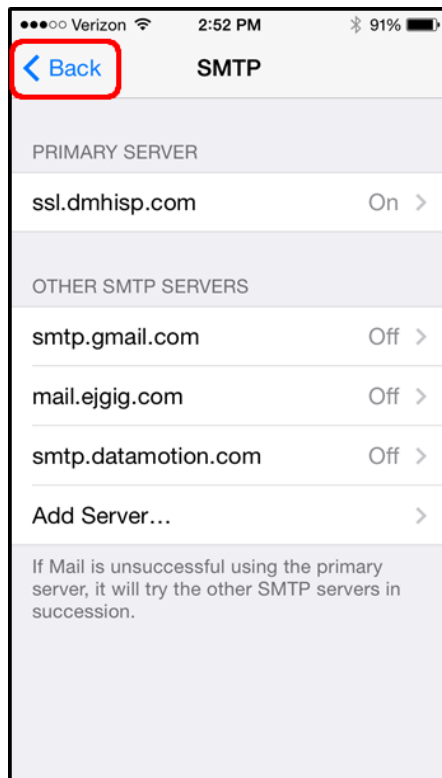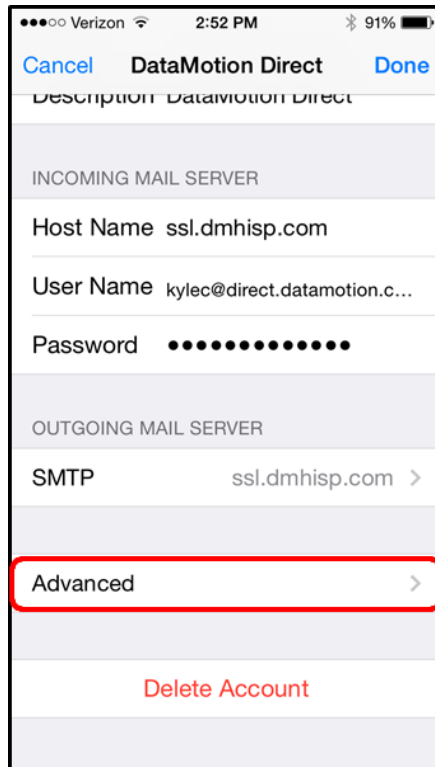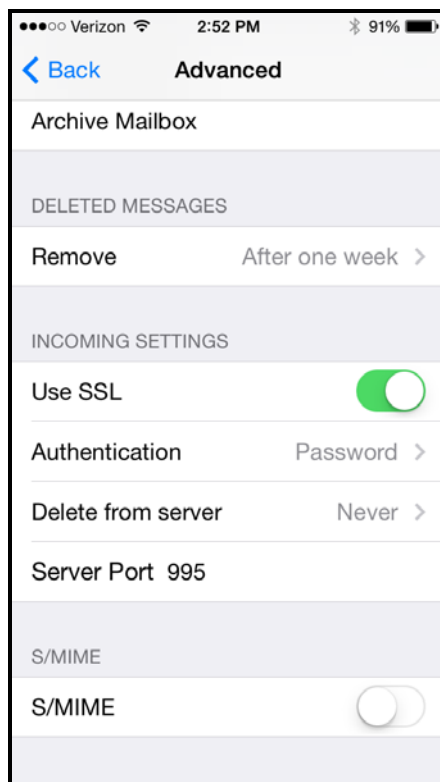　» **Never:** (Default.) When you delete messages from your device Inbox, your messages will be retained on the DataMotion Direct server (and web portal) until they expire or you manually delete them there.

　» **When removed from Inbox:** When you delete messages from your device Inbox, your messages will also be deleted from your Inbox on the DataMotion Direct server and will be placed in the Trash folder. If you don't delete them from your device, they will be retained on the server until they expire or you manually delete them using the web portal.

　» **7 Days:** When you delete messages from your device Inbox, they will be retained in your Inbox on the DataMotion Direct server for 7 days, after which they will be placed in the Trash folder. If you don't delete them from your device, they will be retained on the server until they expire or you manually delete them using the web portal.

» **Server Port:** 995

20. Click **Back** to commit the changes.

DataMotion Direct for Smartphones
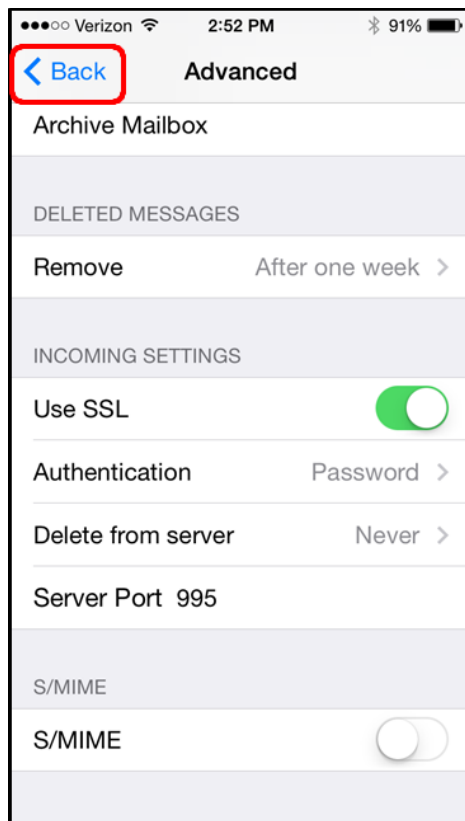
USING DATAMOTION DIRECT ON THE IPHONE

Now that you have set up your DataMotion Direct account, you can use it to receive and send secure messages.
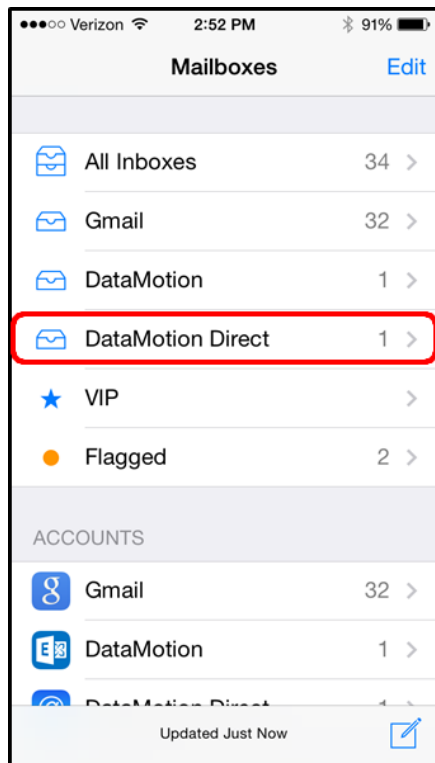
Receiving Secure Messages

When you open the Mail app on your iPhone, you will see an account called DataMotion Direct. All your secure messages will be downloaded into this account where you can read them like typical mail messages sent to any other accounts on your device. Like your other accounts, messages will be automatically downloaded from the server and made available to you. You will not need to click on delivery notices to access your messages through a web browser, but will have direct access to them in your email client.

NOTE: Your device does not display <u>Push Notifications</u> for incoming DataMotion Direct messages, because this capability is not supported when using POP3. To check for new messages, refresh your message list manually.

Sending Secure Messages

With your DataMotion Direct account configured on your iPhone, you can send secure messages directly from your device. When you compose a new message or reply to an existing message, simply select the DataMotion Direct account as the **From** address and it will be sent securely.

DATAMOTION DIRECT FOR ANDROID

DataMotion Direct can be accessed from your Android* device to allow you to receive and send secure messages from within the native mail application.

## CONFIGURING DATAMOTION DIRECT ON AN ANDROID

DataMotion Direct for a mobile device is comprised of a POP3 service which allows you to download all your incoming secure messages and an SMTP service which allows you to send new secure messages.

The following step-by-step instructions describe how to configure DataMotion Direct on your Android device using the Email app. These steps assume you are using the default Android Email app, and that it has not been skinned by the manufacturer.
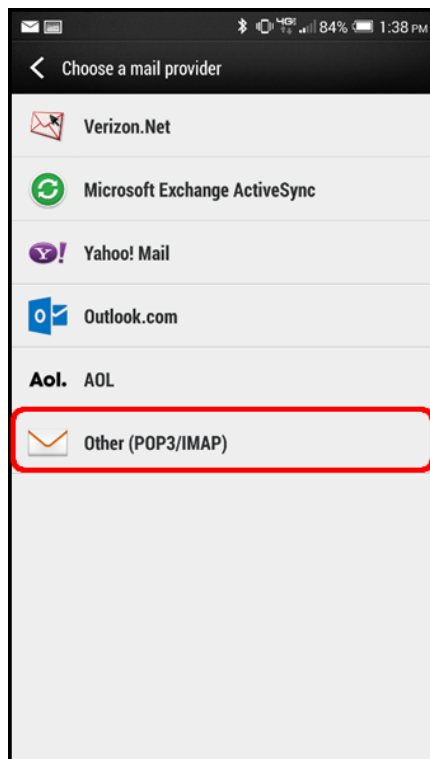
1. From the Android Home Screen, open the **Email** app.
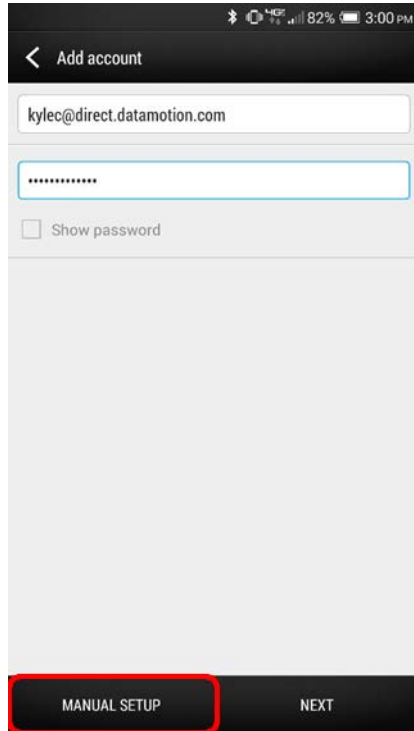2. Click the **Menu** button.
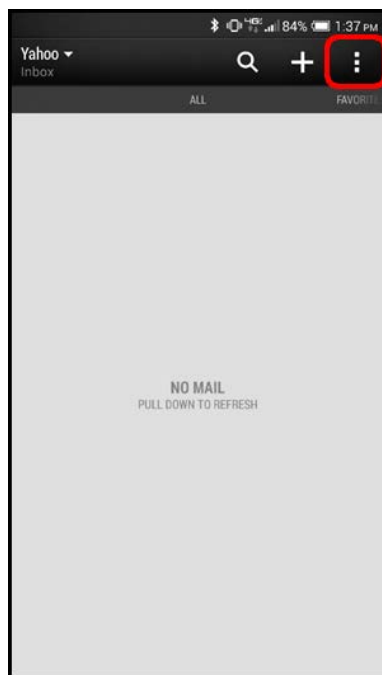
3. Select **Add account** from the menu.
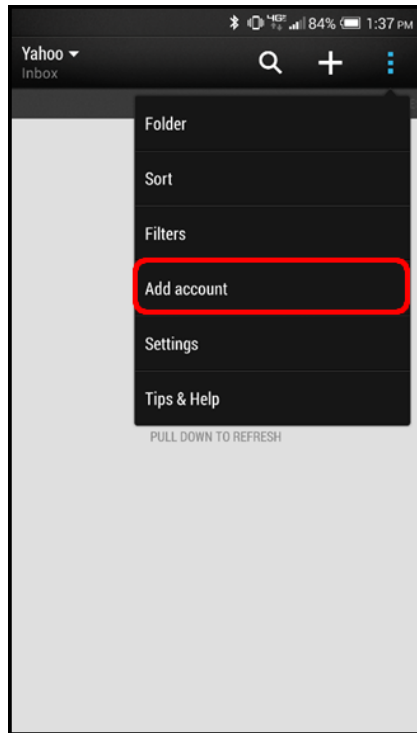
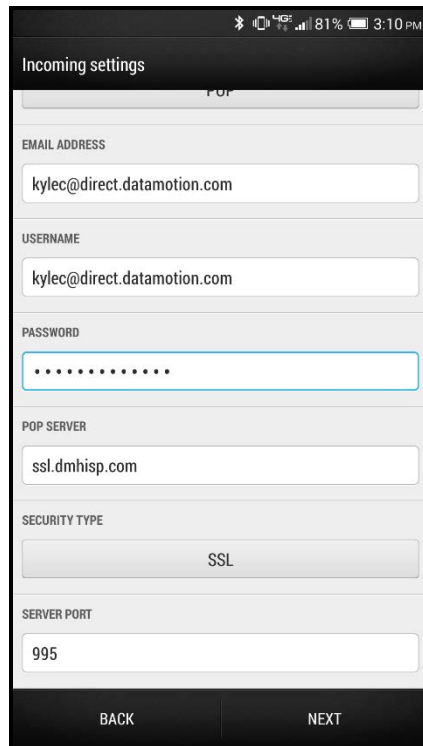4. Select **Other (POP3/IMAP)** from the menu.

5. Enter the following information and click **Manual Setup**:
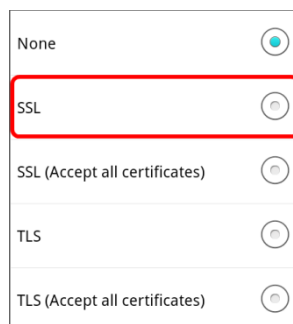
» **User Name:** <your DataMotion Direct message address>

» **Password:** <your DataMotion Direct password>
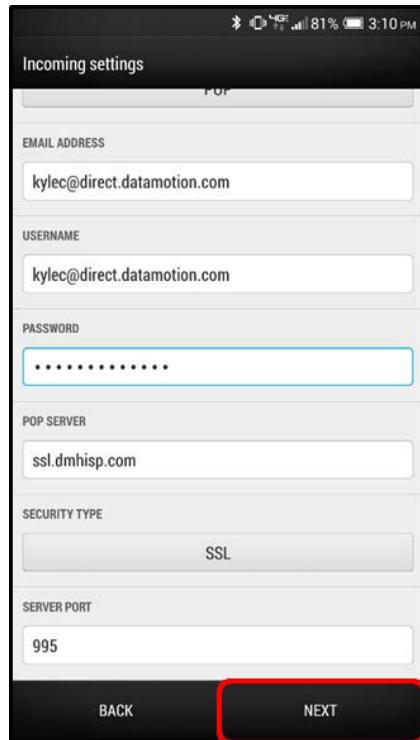
6. For **Incoming server settings**, enter the following information:

» **Protocol:** POP

» **Email Address:** <your DataMotion Direct message address>

» **UserName:** <your DataMotion Direct message address>

» **Password:** <your DataMotion Direct password> – this should already be entered

» **POP server:** ssl.dmhisp.com

» **Server Port:** 995 - this will change when you select the correct Security type

» **Security Type:** SSL – don't select to "Accept all certificates"
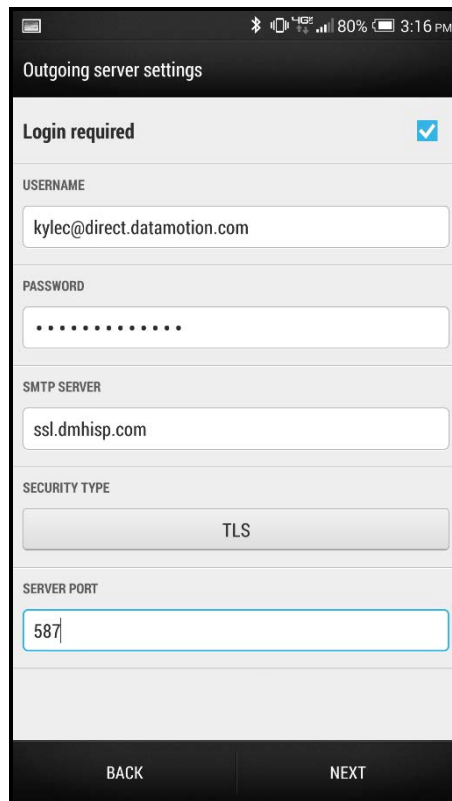
7. Select **Next**.

8. For **Outgoing server settings**, enter the following information:

> **SMTP Server**: ssl.dmhisp.com

> **Security Type:** TLS - don't select to "Accept all certificates"

> **Server Port:** 587

> **Require sign-in:** checked

> **UserName:** <your DataMotion Direct message address> – this should already be entered

> **Password:** <your DataMotion Direct password> – this should already be entered

9. Select **Next**.

10. Enter **DataMotion Direct** as the **Name** for this account to distinguish it from your other accounts, and select **Finish Setup** to complete the setup.
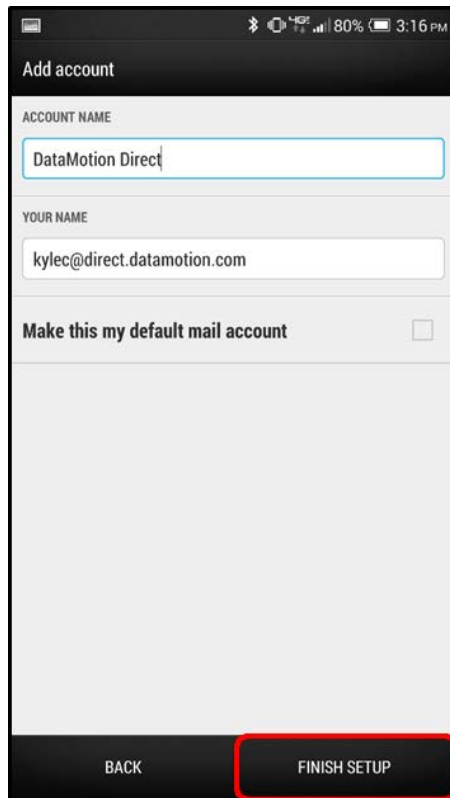
11. The account should now be listed in your Accounts list as DataMotion Direct.

12. You may do the following optional steps if you want to configure whether your messages should be deleted from the DataMotion Direct server when you delete them from your device Inbox. (The delete from server default is Off, which means do not delete them from the server.)

- Select your Direct account from the drop down.

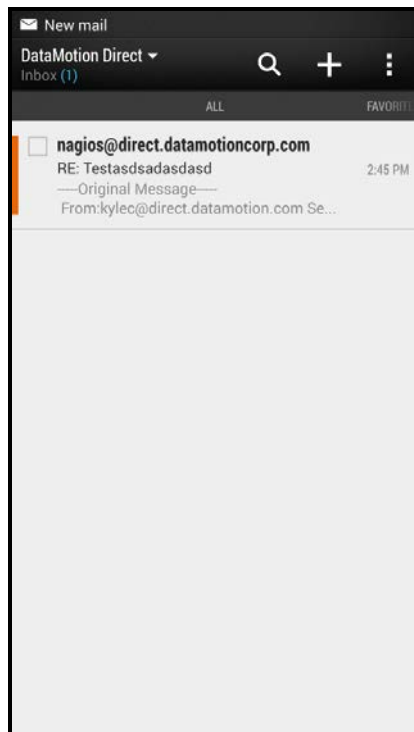- Click the **Menu** button and click on **Settings**.

- Select **Sync, Send & Receive**.

- Scroll down to the bottom of the page and select the desired setting for **Delete mail on server**:

  » **Off:** (Default.) When you delete messages from your device Inbox, your messages will be retained on the DataMotion Direct server (and web portal) until they expire or you manually delete them there.

  » **On:** When you delete messages from your device Inbox, your messages will also be deleted from your Inbox on the DataMotion Direct server and will be placed in the Trash folder. If you don't delete them from your device, they will be retained on the server until they expire or you manually delete them from the web portal.

USING DATAMOTION DIRECT ON AN ANDROID

Now that you have set up your DataMotion Direct account, you can use it to receive and send secure messages.
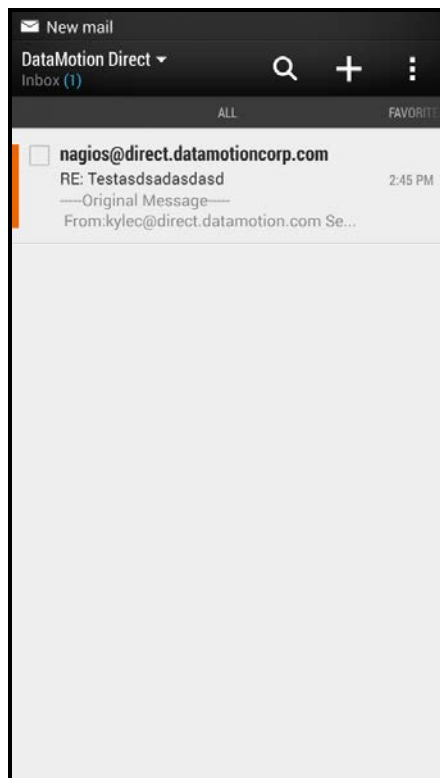
Receiving Secure Messages

When you open the Email app on your Android device, you will see an account called DataMotion Direct in your accounts list. All your secure messages will be downloaded into this account where you can read them like typical mail messages sent to any other accounts on your device. Like your other accounts, messages will be automatically downloaded from the server and made available to you. You will not need to click on delivery notices to access your messages through a web browser, but will have direct access to them in your email client.

> **NOTE: Your device does not display** <u>Push Notifications</u> **for incoming DataMotion Direct messages, because this capability is not supported when using POP3. To check for new messages, refresh your message list manually.**

Sending Secure Messages

With your DataMotion Direct account configured on your Android device, you can send secure messages directly from your device. To send a secure message, open the DataMotion Direct account and compose a new message. The new message will automatically be sent securely to the recipient.

7
DataMotion Direct for Desktop Clients

DATAMOTION DIRECT POP3 CONFIGURATION

DataMotion Direct integrates into any desktop or mobile email client using secured POP3 and SMTP connections. When these protocols are enabled, users can send and receive secure messages directly to and from their email client without installing any extra software.

The table below provides the information necessary to configure your email client. Substitute your DataMotion Direct messaging address where you see <your DataMotion Direct message address>.

Mail Server	Settings
Incoming Mail Server	**Server Type**: POP3 **Server**: ssl.dmhisp.com **Use SSL**: Yes **Port**: 995 **Authentication**: <your DataMotion Direct message address> and <your DataMotion Direct password>
Outgoing Mail Server	**Server**: ssl.dmhisp.com **Use TLS**: Yes (select TLS or STARTTLS) **Port**: 25 or 587 **Authentication**: <your DataMotion Direct message address> and <your DataMotion Direct password>

NOTE: Messages delivered to your email client via the DataMotion Direct POP3 and SMTP service will be removed from your account on the DataMotion Web Portal.

*   *   *

This represents the end of the *DataMotion Direct User Guide*.