Webmail Quick Start User Guide

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Helpdesk

If you encounter any problems with your NPO-HIE*Direct* Webmail account, please contact the Helpdesk:

Phone: (231) 421-8505 Mon-Fri 8am-5pm ET

Email options:

- From your standard work email: Ehxsupport@npoinc.org
- From your secure HPO-HIE*Direct* mailbox: helpdesk@npo.npo-hie.org

NOTE: if you are having a problem with your password, please contact your Organization's HPO-HIE*Direct* Administrator, they would be able to change your password.

Navigating to NPO-HIE*Direct* Webmail

Using your available web browser, open a browser window and enter the following URL:

https://mail.npo-hie.org/

Upon entering this URL you will be automatically directed to the NPO-HIE*Direct* Webmail login page. See Figure 1 below.

Figure 1: Login Screen

Logging in to NPO-HIE*Direct* Webmail

When the browser returns the NPO-HIE*Direct* Webmail login page, you may enter your login credentials. You should have been provided with a Username and Password.

Enter your credentials into their respective fields, and select Login.

Figure 2: Logging in to NPO-HIE*Direct* Webmail

Initial Login

Direct Security Acknowledgment

Upon successful login you will see the Direct Security Acknowledgment screen, as shown in Figure 3 below. This is only displayed on your first entry to the site.

Please read the Acknowledgment and select Agree.

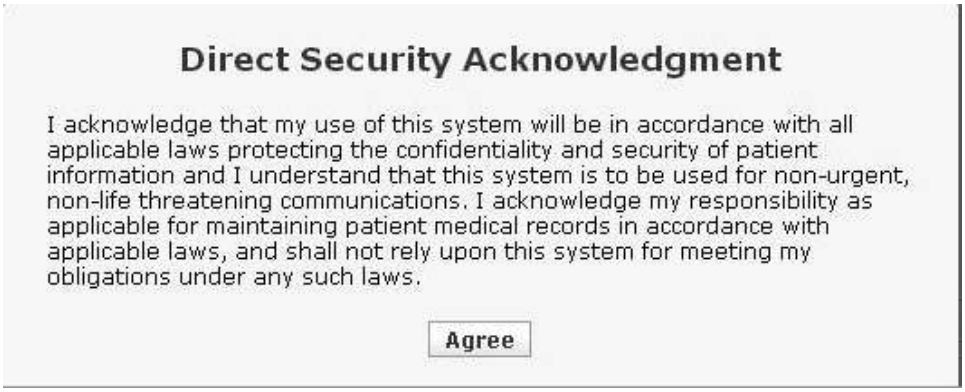


Figure 3: Direct Security Acknowledgment

Changing your Temporary Password

After accepting the Terms and Conditions you will be prompted to change your temporary password. This is only displayed on your first entry to the site. Your new password must be a minimum of 7 characters in length and include at least one number & one special character. Enter your new password, confirm the new password, and select Save.

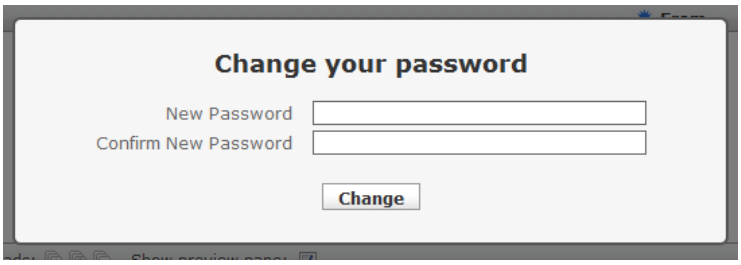


Figure 4: Change Temporary Password Screen

Updating Contact Information

After changing your temporary password you will be prompted to update your contact information. This information will be used to populate the Direct directory.

Please add your contact information as requested, and select Save.

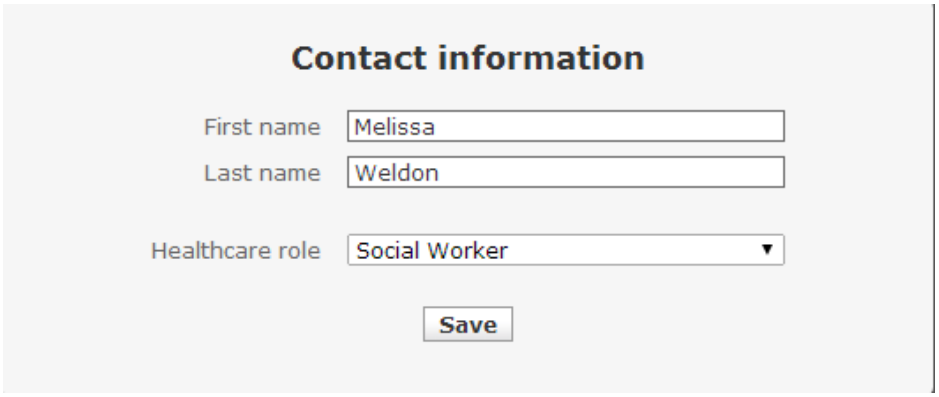


Figure 5: Updating Contact Information

NPO-HIE*Direct* Webmail Dashboard

Upon successful login you will be directed to the NPO-HIE*Direct* Webmail dashboard, shown in Figure 6 below.

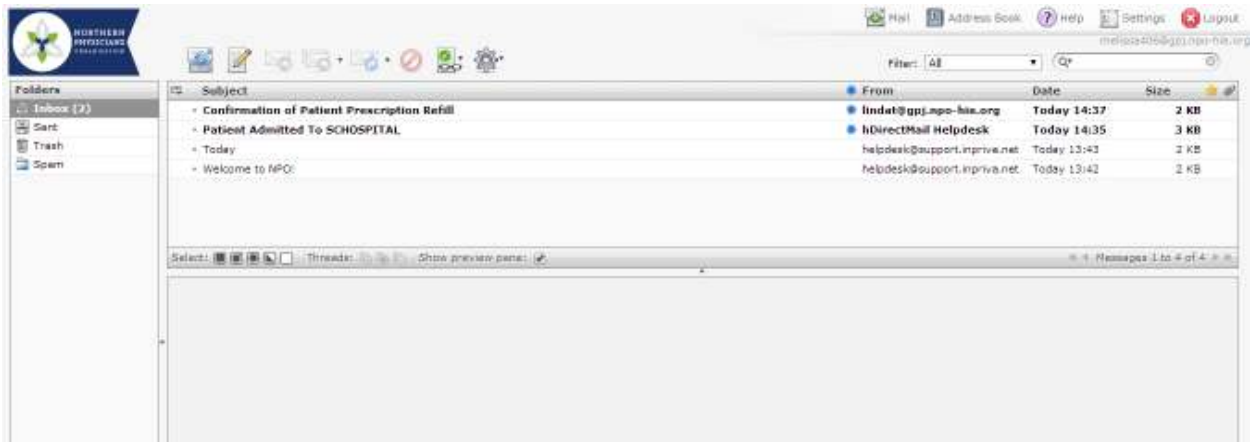


Figure 6: NPO-HIE*Direct* Webmail Dashboard

Read Messages

To read your messages, click on the Inbox folder. You will then see all messages available in your Inbox. Select the message you would like to view. The content of the message is displayed in the Viewing Pane, as shown in Figure 7 below.

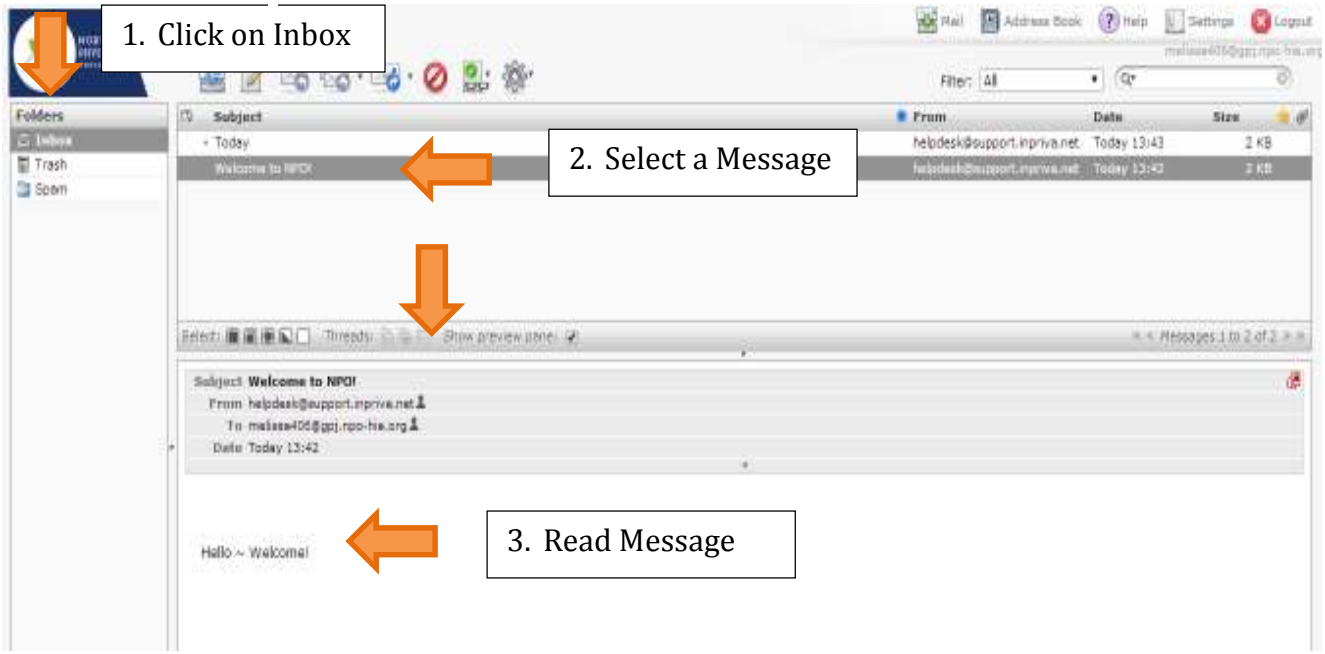


Figure 7: Read Messages

Create a New Message

To compose a new message click on the Create a New Message button in the Mailbox toolbar, as shown in Figure 8 below.

Figure 8: Create a New Message

After clicking the Create New Message button you will see the following screen:

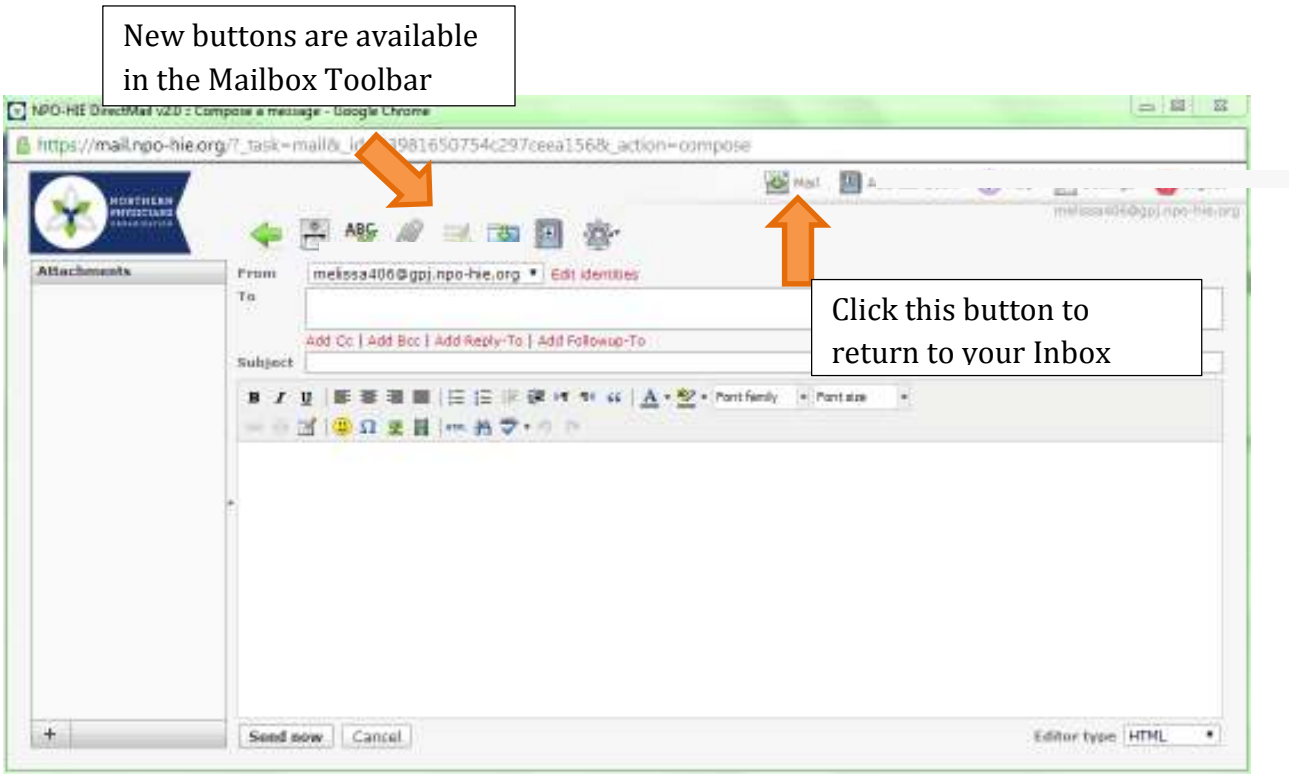


Figure 9: New Message Screen

You will notice that the Menu Toolbar is still available. You may select the "Mail" button to return to your Inbox.

The "From" field displays the Direct mail address that will be used when sending the message.

The "To" field displays the Direct mail address for the message recipient.

The "Subject" field displays the subject matter of the message.

The Message pane below the Subject field contains the message content.

The Attachments pane, on the far left, displays all files that will be sent with the message.

All of these fields are complete in Figure 10 below.

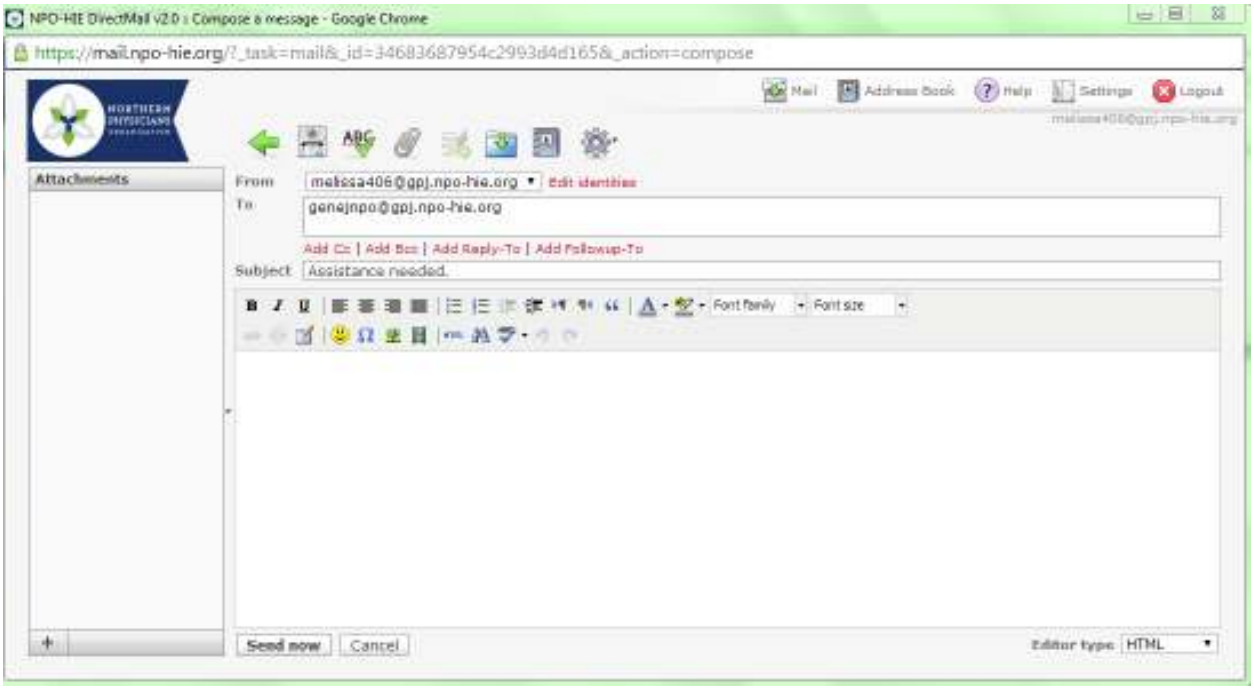


Figure 10: Elements of Compose New Message Screen

Attach a File

To add an attachment to a message, click the paper clip icon in the Mailbox Toolbar. Navigate to the documents you would like to include with your message, select the appropriate documents, and click Open.

When you add attachments to a message, all attachments are listed in the Attachments pane. If you click the red icon to the left of the attachment, that attachment will be removed from the list

and will not be sent to the recipient. To add another attachment, simply click the paper clip icon in the Mailbox toolbar.

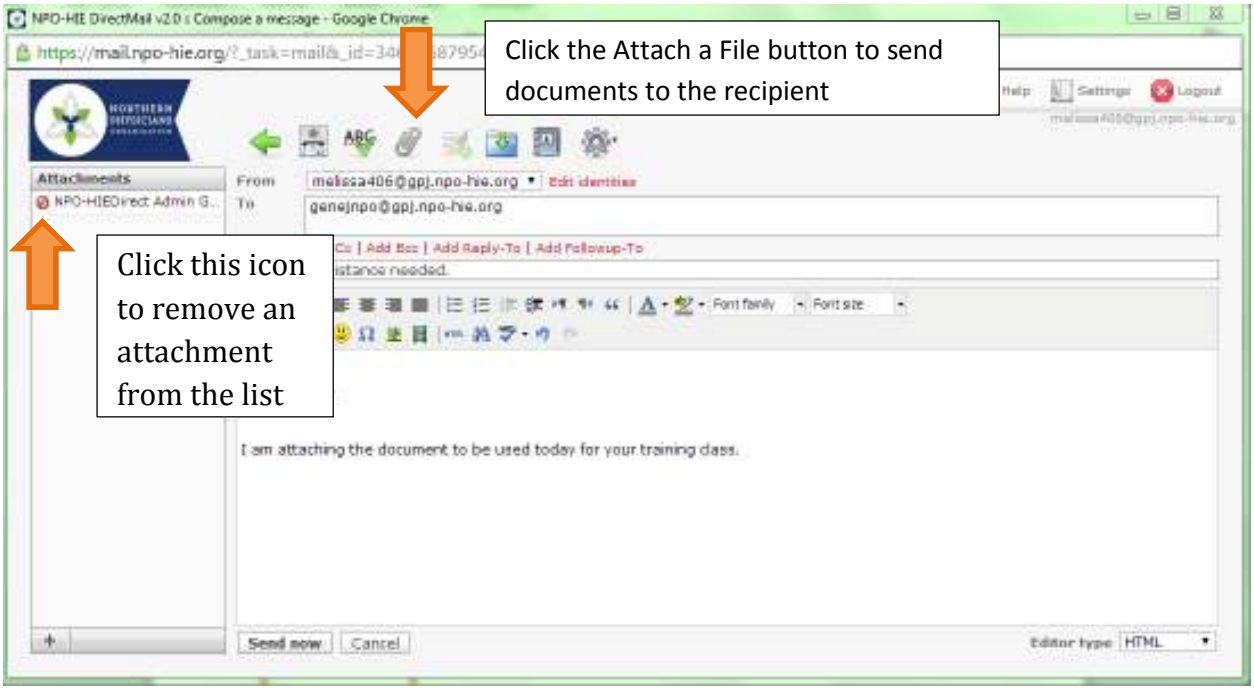


Figure 11: Adding Attachments

Instructions for Searching for a Contact while Composing a Message can be found in the section titled Search.

Address Book

The Address Book contains information about your contacts; allows you to add, delete or edit contacts; as well as import or export contact lists.

To navigate to the Address Book, click the Address Book button in the Menu toolbar in the upper right corner of your screen, as shown in Figure 12 below.

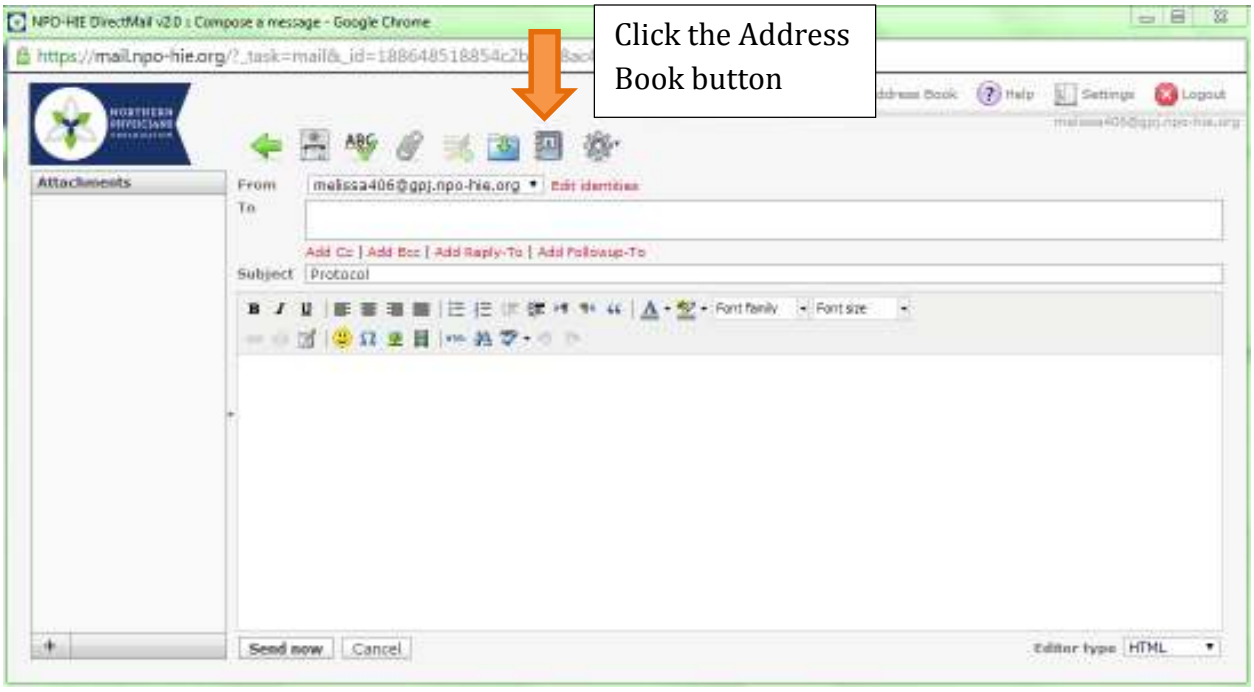


Figure 12: Address Book Button

When you click on the Address Book button, you will see the screen shown in Figure 13 below.

Figure 13: Address Book Screen

Groups

The Groups pane allows you to differentiate between different contact groups in your Address Book. By default, the following groups are listed:

- Personal Addresses
- NPO-HIE*Direct* Addresses
- Automatically Collected Addresses

Personal Addresses consists of addresses that may be in network or out of network. You may make changes to these addresses. These can be imported from your current address books.

NPO-HIE*Direct* Addresses consists of all Direct addresses in a format similar to what you would see in a phone book. There may be multiple Direct Address groups such as a statewide group, NwHIN, etc. These cannot be changed by the user. This is a sample of what a Provider Directory would look like, it is not currently available in the "live" server version. Currently the only address book folders that are shown are the 'Personal' & 'Automatically Collected' ones.

Automatically Collected Addresses consists of addresses that are not currently contained in either of the other groups, but have been used.

Contacts

The Contacts pane displays the contacts for the selected group. To view the contacts for a group, click on the group name in the Groups pane. The system will automatically return all contacts in that group. See below.

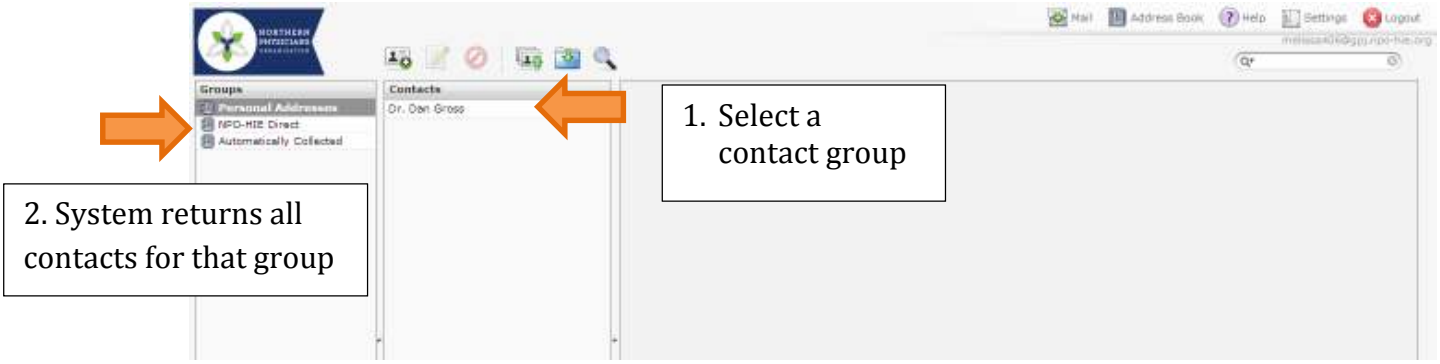


Figure 14: Contacts

Contact Properties

Once the system has returned the contact list for the selected group, you may then select a contact from the list. Once you select a contact the system will display the details for that contact, as shown below.

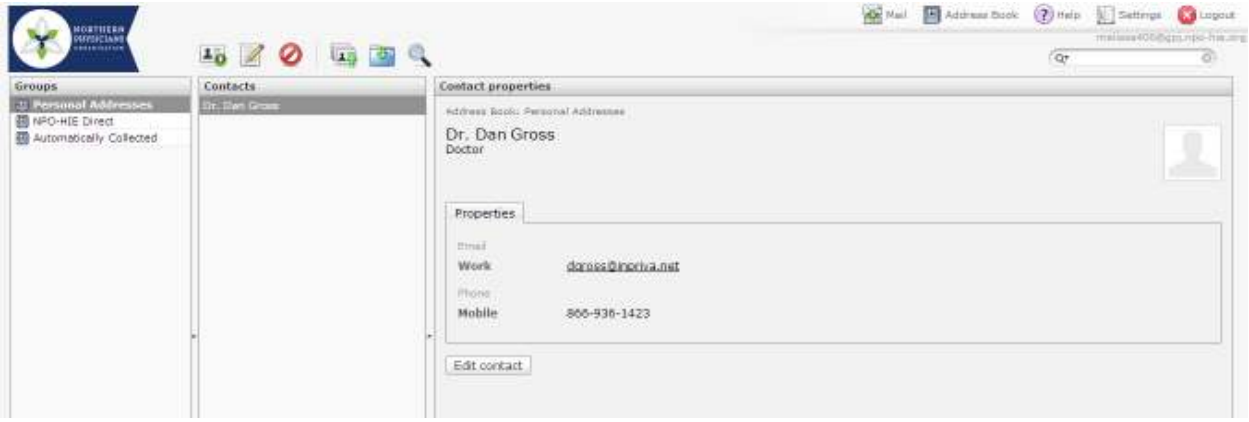


Figure 15: Contact Properties

Add a Contact

To add a contact, select the group to which the contact will be added. Then click the Add Contact button.

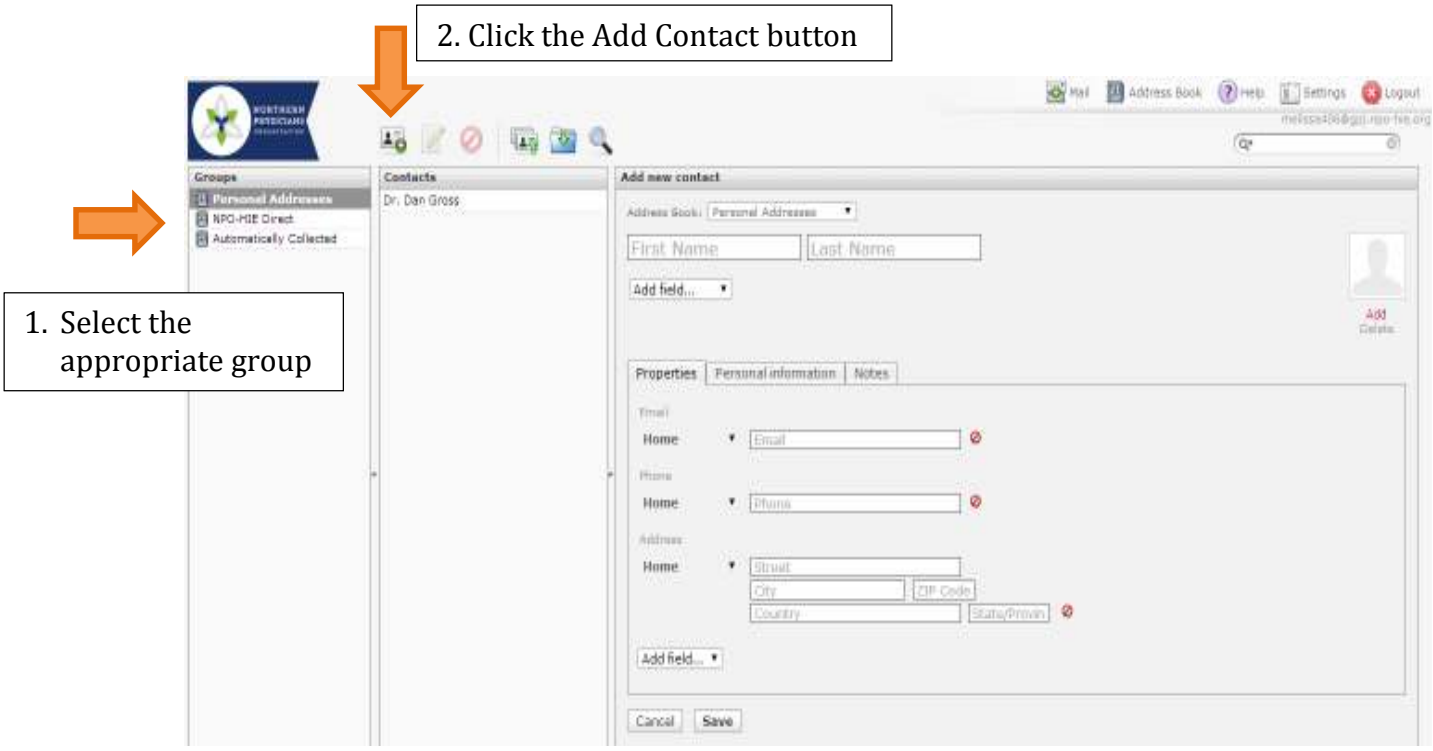


Figure 16: Add Contact Button

After clicking the Add Contact button the Add New Contact screen will be displayed.

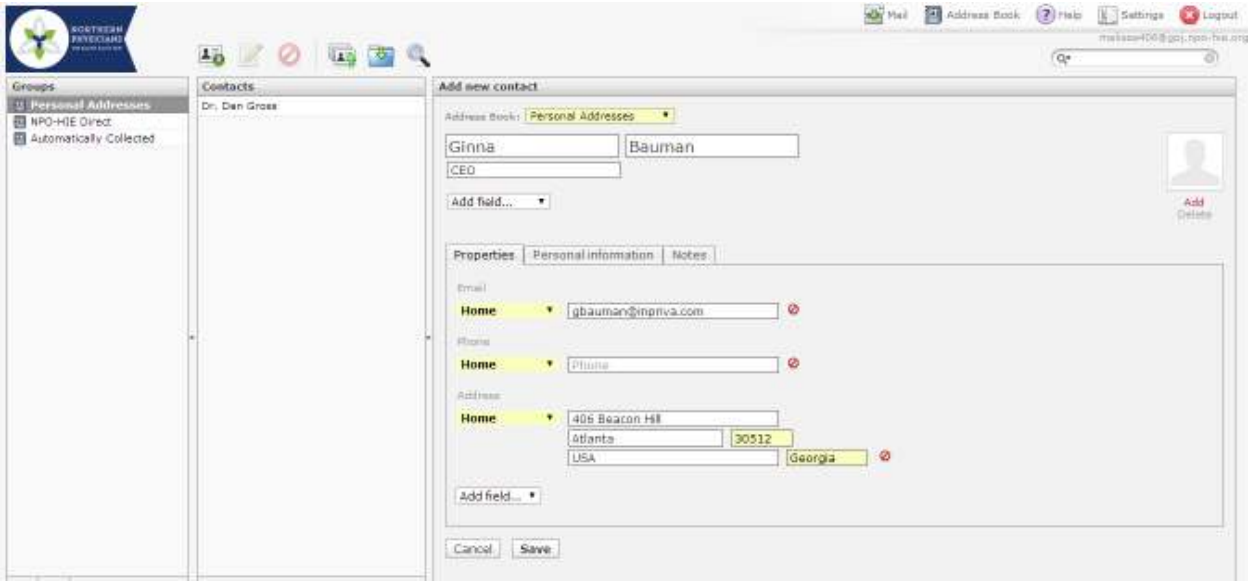


Figure 17: Add New Contact Screen

Using the dropdown box, select the Address Book/Contact Group to which the contact should be added, if different than the one displayed.

Enter the contact first and last name.

If additional fields are required, select the Add Field drop down box, as shown below.

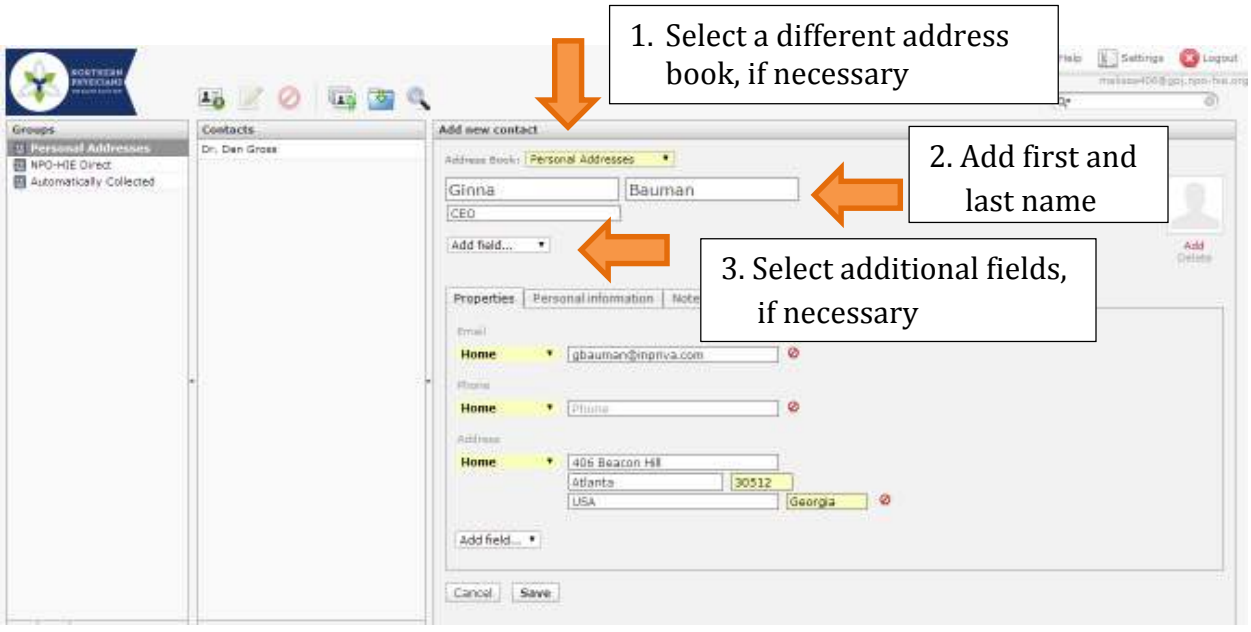


Figure 18: Adding Fields to New Contact

To add email address, phone number and mailing address, you may first use the drop down box to specify if the information is to be associated with Work, Home or Other.

Add the necessary contact information.

In the event you need to delete any of these contact details, you may click the red icon beside the appropriate field, as shown below.

You may select the Add Field drop down box to add additional fields for Phone, Email, Address, Website, or IM.

When you have finished entering information, select Save.

If you decide not to save the contact information, select Cancel. If you select Cancel the information will not be added to your Address Book.

Delete a Contact

To delete a contact, navigate to the appropriate contact name. Select contact name and click the Delete Selected Contact button.

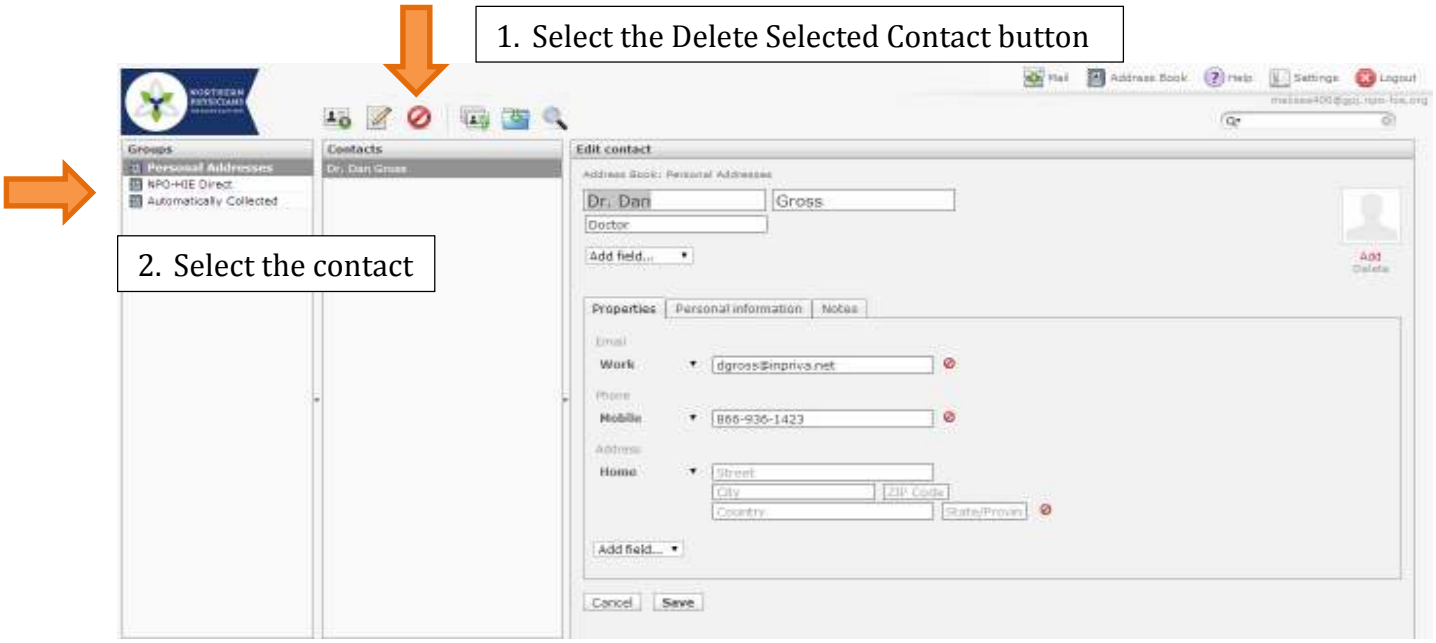


Figure 20: Delete a Contact

After selecting the Delete Selected Contact button, the system will ask you to confirm this request.

You may select Cancel to return to the Contact screen, or select OK to delete the contact. Once the contact is deleted, they cannot be recovered.

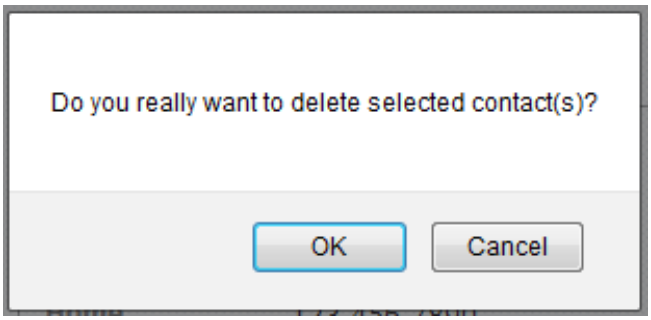


Figure 21: Confirm Request to Delete Contact

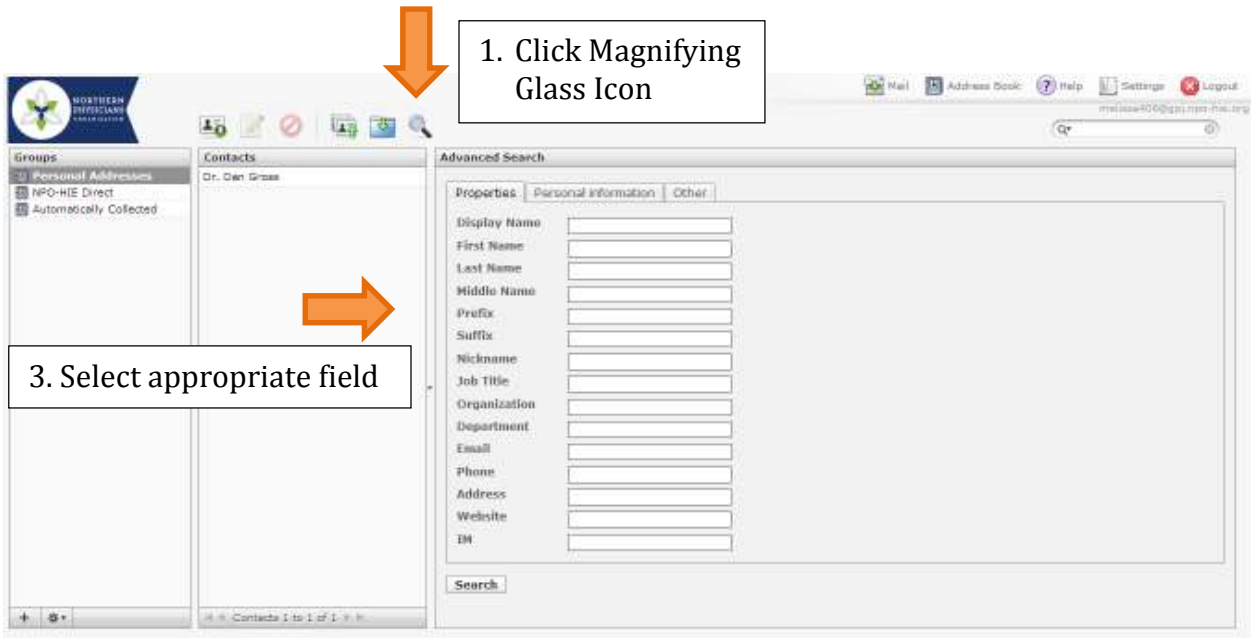
Instructions for searching for a Contact in the Address Book can be found in the following section, titled Search.

Search

Search for a Contact while Composing a Message

To search for a contact in the Compose Message screen, click the Address Book icon in the Mailbox Toolbar. Enter the criteria in the search field, select the appropriate user, and select if the user should be added to the Bcc, Cc, or To field.

The system will return the addresses based on the Display Name and any portion of the Direct Email Address. If you know the organization's Subdomain (i.e. 'NPO' for Northern Physicians Organization) the system will return all those users for the subdomain **npo-hie.inpriva.net**.



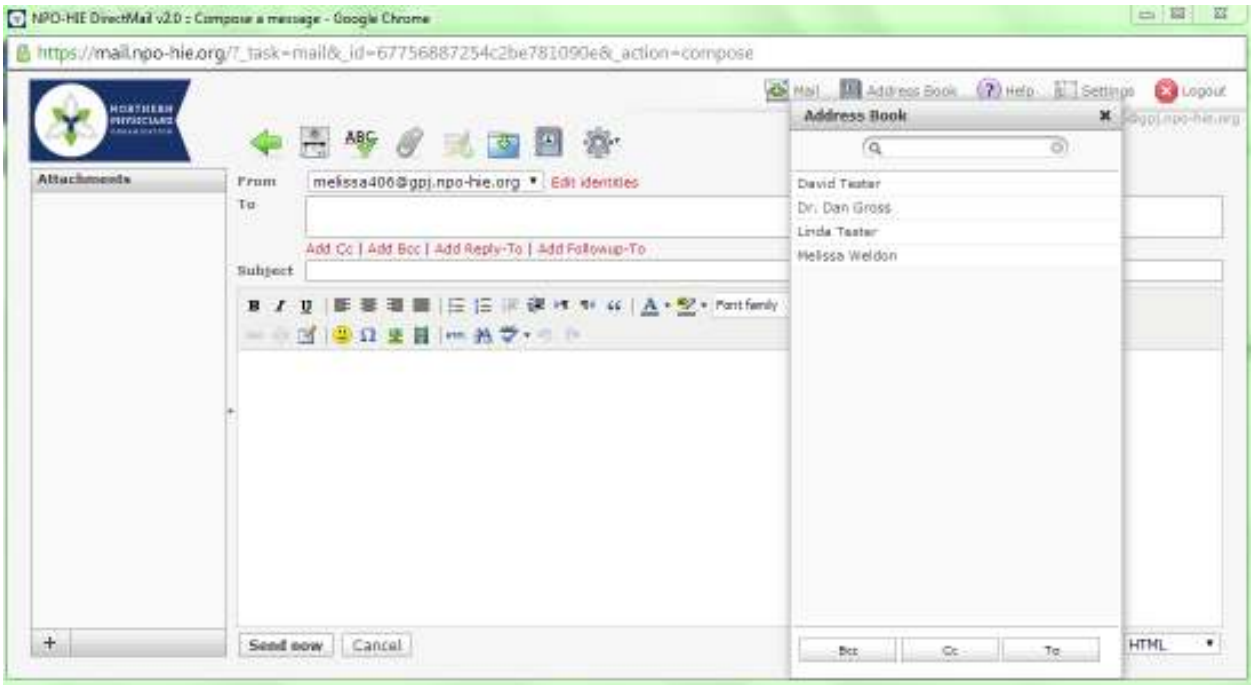


Figure 22: Search for Contact in Compose Message Screen

Search for a Contact in the Address Book

To search for a contact, click the Address Book button in the Menu toolbar. Click the magnifying glass icon in the search bar. The screen will display the following options: Display Name, First Name, Last Name, Email, and All Fields. We recommend selecting All Fields for your search. Enter full or partial name or email, and click Enter.

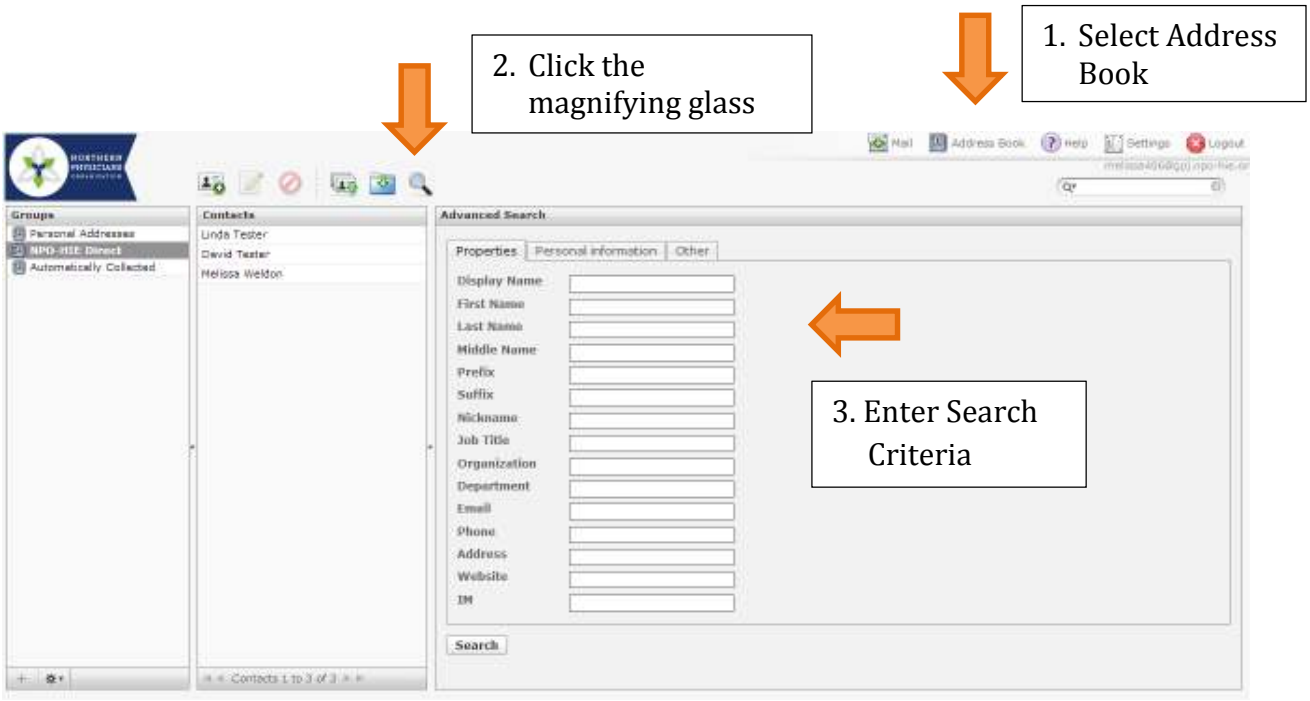


Figure 23: Search for a Contact

The system will return a list of users that match the search criteria. Select the appropriate user and the system will return details for the selected contact.

Figure 24: Contact Details

Change your Password

It is a good practice to change your password at least every three (3) months. To do so, click the Settings button in the Menu toolbar.

Select the Password tab.

The system will display the Change Password screen, as shown in Figure 22 below.

Figure 25: Change Password Screen

Your new password must be a minimum of 7 characters in length and include at least one number & one special character. Enter your current password, new password, and confirm the new password. Select Save.

Update Notification Emails

To receive notification in a non-Direct email account that you have received a message in your NPO-HIE*Direct* account, click the Settings button in the Menu toolbar.

Select the Notifications tab.

Enter up to twenty (20) email addresses that you would like to receive notification emails. Click Add.

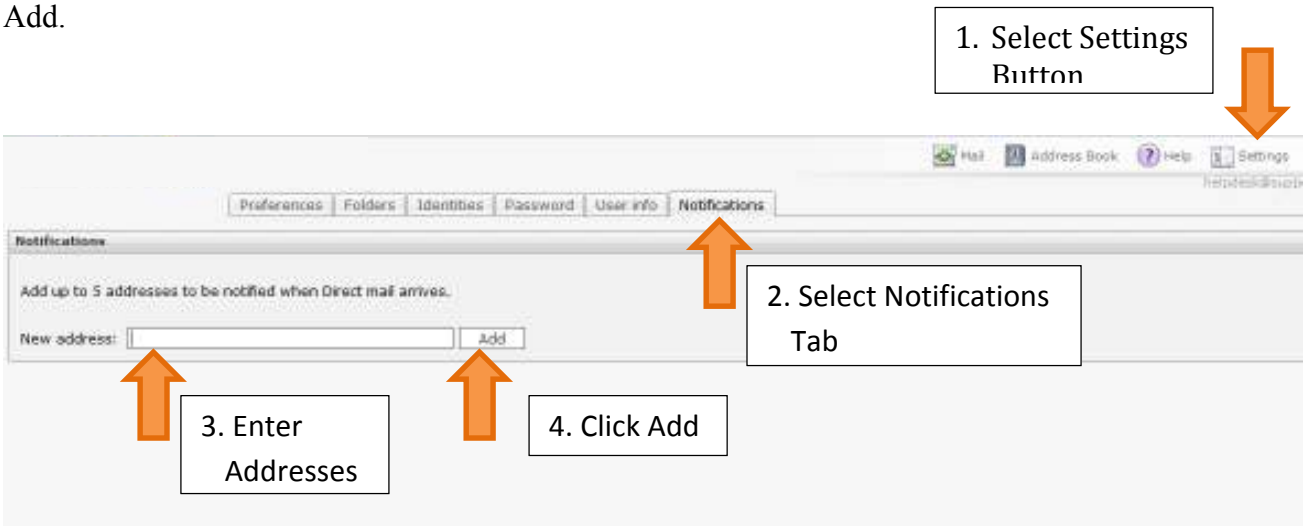


Figure 26: Change Notification Email Screen

Create a Signature

To create a signature for you NPO-HIE*Direct* account, click the Settings button in the Menu toolbar. Select the Identities tab. In the Settings tab, enter your Display Name and click Save.

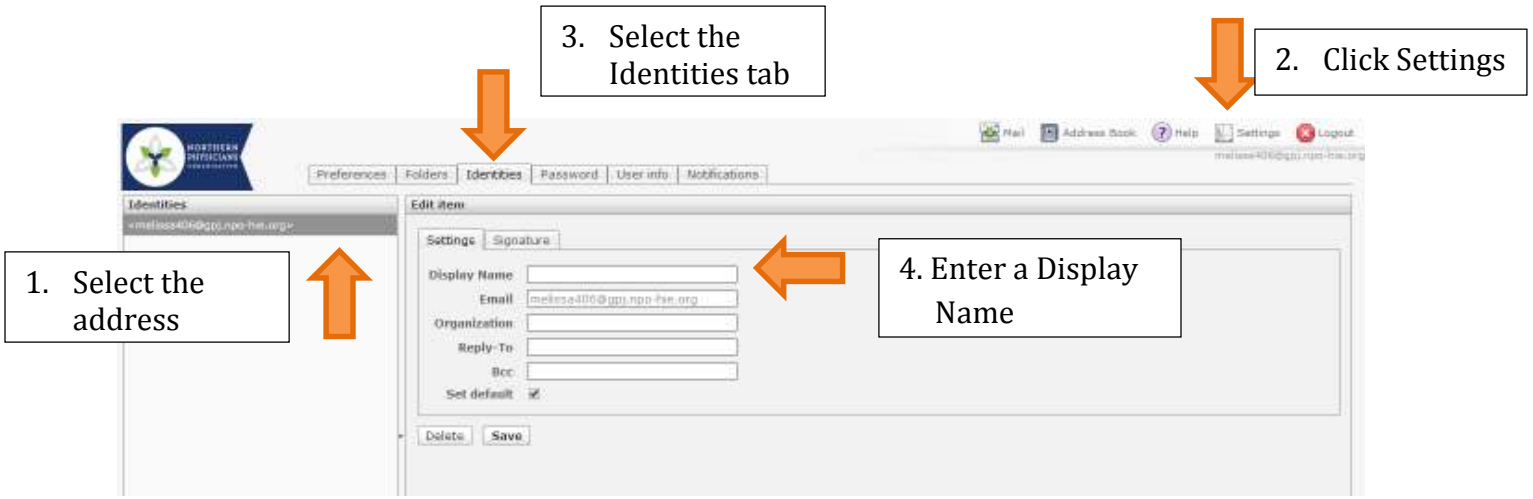


Figure 27: Add Display Name

Now, select the Signature tab. Click the HTML Signature box to enable rich text options such as hyperlinks, bold, italics, horizontal bar, etc. Add your signature and click Save.

Figure 28: Create your Signature

Spellcheck Preferences

To set Spellcheck options, click the Settings button in the Menu toolbar. Select the Preferences tab, and select Composing Messages. The second option category is Spellcheck options. Here, you can select if the system should check the spelling before sending a message, ignore words with symbols, ignore words with numbers, and ignore words with all letters capitalized.

Make your selections, scroll to the bottom of the page, and click Save.

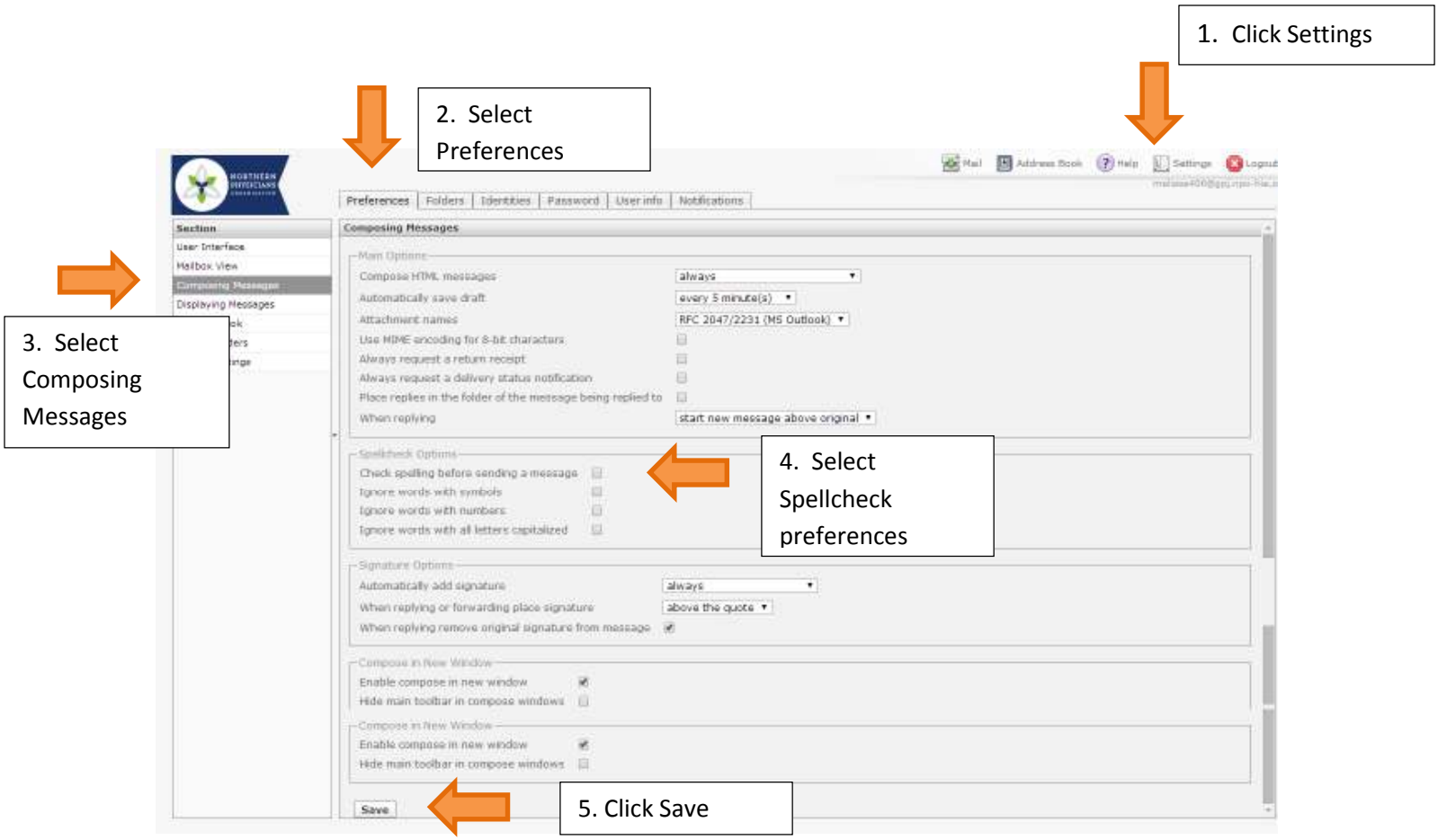


Figure 29: Spellcheck Options