DIRECT Messaging

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Version 21.3

About

You can look up a recipient's DIRECT address through the national DirectTrust™ National Provider Directory without leaving OP. You can do this either when **creating a message** or through the **Address Book**. Also, you can now see the delivery status of DIRECT messages from within OP so you can know instantly whether a message has been successfully delivered or not.

- Adding a DIRECT Address While Creating a Message
- Adding DIRECT Addresses to Your OP Address Book
- Handling Duplicates
- Tracking DIRECT Message Delivery

### Adding a DIRECT Address While Creating a Message

1. Navigate to a Message using one of the methods above.
2. Next to the To box, click the **Choose Recipients** button.
3. Click the **Directory Search** button in the bottom left corner:
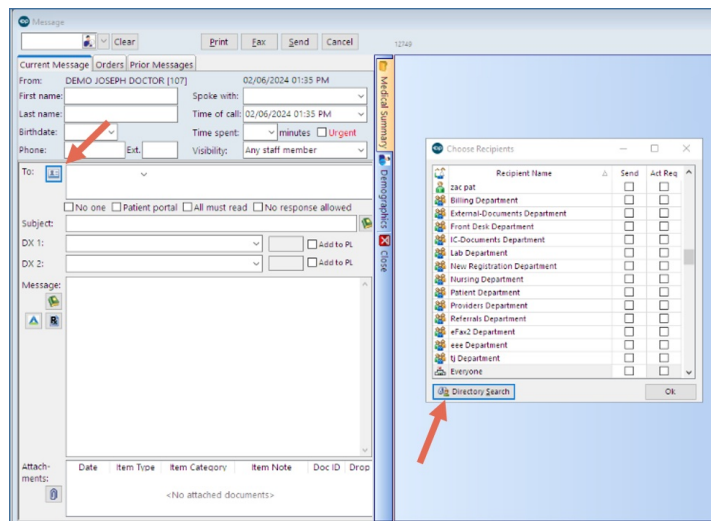
4. The Directory Search window appears:
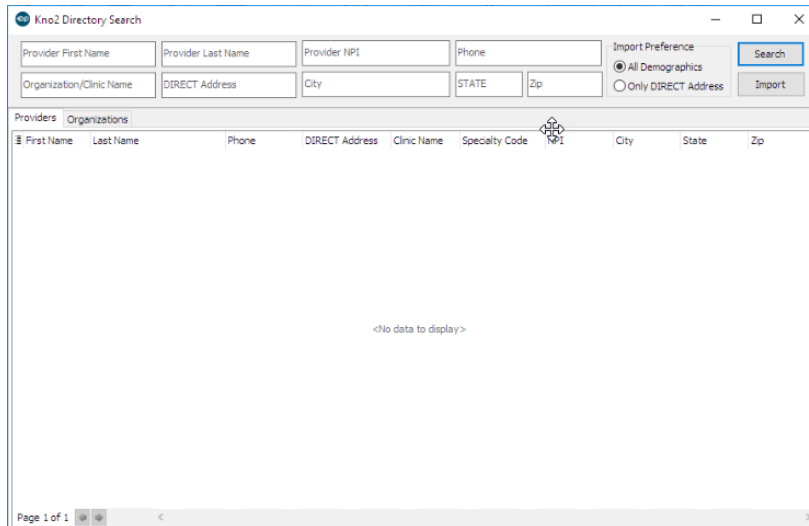
5. You can now search for a DIRECT address using any combination of **first** or **last name**, **organization**, **phone**, **state**, **NPI**, etc.
6. Click the **Search** button.
7. In the below example, the user searches for her med school classmate Wanda:
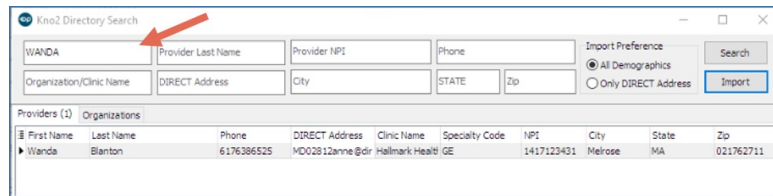
8. If this is the correct Wanda, you can send her a message! But first, you must **import her to your Address Book**
   - *NOTE*: If Wanda already exists in your Address Book but just lacks a DIRECT address, we strongly recommend using the **Adding DIRECT addresses to your OP Address Book** method below, not this method, to **prevent duplication**!
9. To import Wanda to our Address Book, click **Import**.
   - *NOTE*: Because Wanda is a new contact, we want to import all her demographic information, not just her DIRECT address. Therefore, even if your Import Preference radio button is set to Only DIRECT address, Wanda's entire demographic record, including DIRECT, will always be imported.
10. Once you click the Import button, you will see Wanda's name (after appropriate scrolling) appear in the Choose Recipients window:
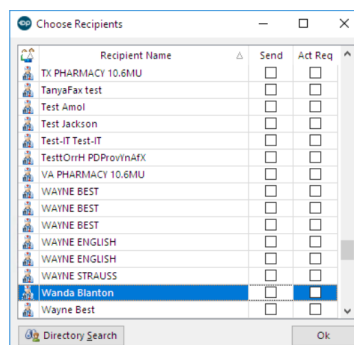
11. Now you can send her a message, as to any other DIRECT recipient, by clicking the **Send** checkbox, then clicking **Ok**.
12. Now Wanda's name appears as a recipient in your Message. Complete and send the message as you normally would.

Adding DIRECT Addresses to Your OP Address Book

Updating existing entries with DIRECT Addresses

1. If you already have an entry for an individual in your Address Book, but you'd like to see whether they have a DIRECT address, naviage to the Address Book (F4), and find their entry.
2. Select the **ellipsis (...)** button next to the DIRECT Email field.

- This will show the Directory Search window (data provided by KNO2). As described above in**Adding a DIRECT address while creating a message**, you can search and filter by a variety of demographic fields. Because you already have an existing Address Book entry, you may just want to add the DIRECT address to your existing entry. On the other hand, you may have an incomplete/outdated record for this provider. Thus, you can choose to either:
    - Import just the DIRECT address listed, OR:
    - Import, and possibly overwrite, all of the demographic information

3. To import just the DIRECT address, set the radio button to**Only DIRECT Address**.
4. To import everything (including the DIRECT address), set the radio button to**All Demographics**.

Adding New Entries to Your Address Book from KNO2

1. If you have no existing entry whatsoever in your Address Book for an individual, you can create a brand new entry in your Address Book by clicking the **New** button at the top of the Address Book.
2. A blank **Edit Address** entry will appear. In the Address tab, click the**ellipsis (...)** button.
3. **Search** and **import** as described above.
4. Because this is a brand new entry, the**entire demographic record from KNO2**will be imported even if you click Only DIRECT Address (i.e. the radio button choice is ignored in this case.)

Handling Duplicates

Sometimes you may try to import a record for a contact which already has a perfect 100% DIRECT address match that's present in your Address Book.

If this is the case, you will see a popup window, stating "**A contact with same DIRECT email present in Addressbook. Would you like to update the existing contact?**"

- Clicking **Yes** means that you will*update the existing contact in your Address Book*(that already has that DIRECT address) to match what's in the KNO2 directory. This option is recommended if you have scant contact information, or if you're pretty sure your contact information is less current than KNO2's.
    - As described above,**your entire Address Book entry will be overwritten. You will not be able to tell what was "old" and what was "new." If you have more current/recent information than the KNO2 directory has, this could potentially cause your Address Book entries to become inaccurate**.
- Clicking **No** means that you will*create a new contact with this demographic information and the DIRECT address*Thus, you will have **two** records in your Address Book with the same DIRECT address.
    - This option is recommended if you're not sure whether your contact information is more or less accurate than the KNO2 record. Once you determine which is accurate, you can Delete or Archive the old/out of date entry.
- Clicking **Cancel** terminates the import process.

Tracking DIRECT Message Delivery

You can now track the delivery of DIRECT messages.

1. To start, within the Message Center, click on the**Sent Messages** tab.
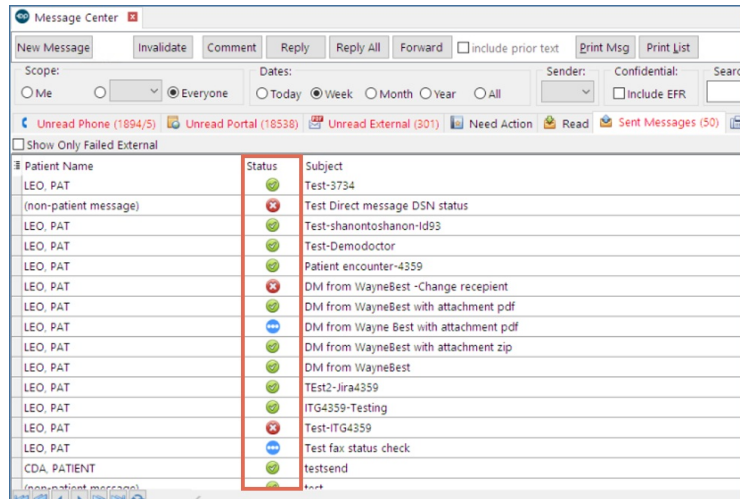
2. The new **Status** column displays the delivery status of a message. *NOTE*: A message's delivery status is not the same as whether a message has been read or acted upon by the recipient(s).

- DIRECT messages (i.e. sent from someone within your practice/organization to someone outside your organization, such as a specialty practice or a hospital) will show one of three markers in this column:
    - A **green checkmark icon** indicates the message has been delivered successfully. In-house messages (e.g. sent from a triage nurse at your practice to a clinician at your practice) will always show a green check mark, since those are instantly delivered within OP.
    - A **blue dots icon** indicates the message is en route/delivery is in progress.
    - A **red X icon** indicates the message delivery has failed.
- Sometimes a user might send copies of the same message to multiple recipients, e.g. one in-house person and two external (DIRECT) recipients. Although only one colored icon is displayed, OP tracks the delivery of each copy independently.

3. By clicking the **icon**, the user can see that in this case, an Internal recipient, Shannon Test, and one of the DIRECT recipients, records@OPMEDID1, have both received the message (Status: Success). The delivery of the copy addressed to the other DIRECT recipient (tany@fmail.com) is still pending (Status: In Progress.)

- When multiple recipients have been CC'd on a single message, the single Status icon color will show as follows:
    - If all recipients have received the message, the icon will show **green**;
    - If any recipient's copy has failed delivery, the icon will show **red**;
    - If any recipient's copy is pending delivery, and no recipient's copy has failed delivery, the icon will show **blue**.
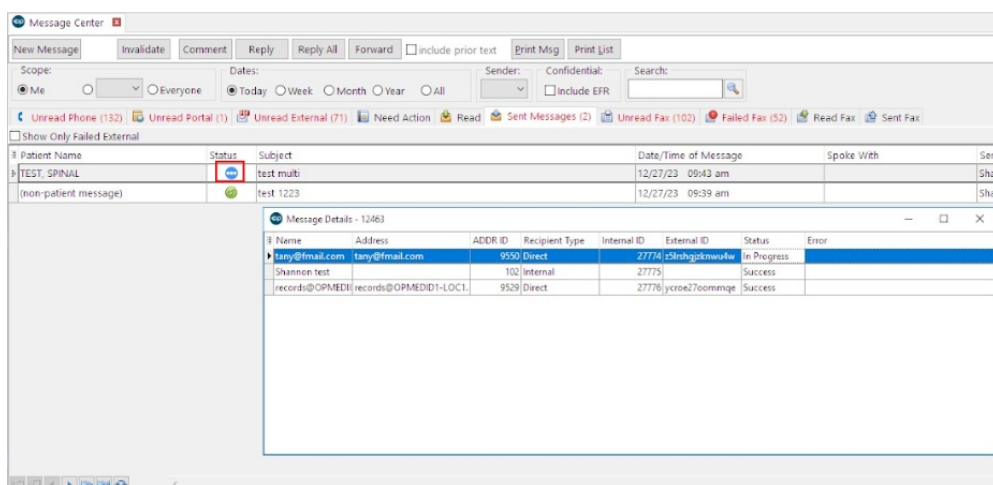
4. To quickly view any/all messages that have failed to deliver, you can click the **Show Only Failed External checkbox** in the Sent tab.