



Community Portal
User's Guide
V1.1

4.01.15

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1. Introduction

This document provides a Direct account user, documentation on the community portal features available to them.

2. System Overview

- The community portal is a web-based application for receiving and authoring Direct messages within HISPDirect. The portal also allows viewing of transitions of care documents.
- All of these functions are available via the REST API
- Only authorized users will have access to these administrative functions
- All functions are available after authorized login into the portal by user

3. Account Management Services

The community portal allows a user to:

1. Set their time zone
2. Act as a delegate.
3. Change their password.

3.1 Setting their Time Zone

Description	Provide ability for the user to set their timezone. Message times displayed in the portal will be adjusted to this timezone.
Menu Operation	Community Portal / Account / Info <ul style="list-style-type: none"> • Navigate to the account / info page. • Choose the desired time zone. • Select “Set Timezone”

The screenshot displays the RosettaCommunity web application. On the left is a dark sidebar with navigation links: Account (2), Info (selected), Logout, MEDICAL RECORDS, Documents (2), MESSAGING, and Messages (3). The main content area has a light gray header with the RosettaCommunity logo and a settings icon. Below the header, the 'Account' section shows a welcome message for 'patient.a@direct.hispdev1.hispdirect.com' and statistics for 18 Documents and 357 Activities. A breadcrumb trail shows 'Account'. The 'Profile' section indicates the user is logged in and shows the 'Time Zone' dropdown menu set to 'America / New_York [EDT -04:00]'. An orange button labeled '> Set Timezone' is at the bottom of the profile section.

3.2 Act as a Delegate

Description	Provide capability to act as a delegate for another user. This allows the user to read and author messages on behalf of another HISPDirect user. Delegate roles must be authorized by an administrator in the administrative portal for this function to be available
Menu	Community Portal / Account / Info
Operation	<ul style="list-style-type: none"> • Navigate to the account / info page. • Choose the desired role. • Select “Change Role”

COMMUNITY PORTAL

- Account 2
- Info
- Logout

MEDICAL RECORDS

- Documents 2

MESSAGING

- Messages 3

RosettaCommunity

Profile

You are currently logged in as user: patient.a@direct.hispdev1.hispdirect.com

Time Zone:

America / New_York [EDT -04:00] ▼

> Set Timezone

Change Role:

Self ▼

> Change Role

3.3 Change Password

Description	Allows a user who has logged into the community portal, to change their password. Note: they must know their existing password
Menu	Community Portal / Account / Info
Operation	<ul style="list-style-type: none"> • Navigate to the account / info page. • Scroll down to “Password” section • Enter current password, the new password, and a confirmation • Select “Change Password”

The screenshot shows the Rosetta Community portal interface. On the left is a dark sidebar with navigation links: 'Account' (2), 'Info', 'Logout', 'Medical Records' (Documents: 2), and 'Messaging' (Messages: 3). The main content area has a header with the 'RosettaCommunity' logo and a 'Change Role' dropdown menu. Below this is a '> Change Role' button. The 'Password' section is highlighted with a dark header. It contains three input fields: 'Current Password:', 'New Password:', and 'Confirm New Password:', each with a masked password (dots). Below these fields is a '> Change Password' button.

4. Document Viewing Services

Community Portal users are Direct account users. When a transition of care document is sent to a user's Direct account, the document is available for viewing, downloading or forwarding on to other Direct accounts

The community portal allows a user to:

1. List Health Documents: a list of all documents received
2. View Health Document: view a document within the portal
3. Download Health Document: download the document
4. Forward Health Document: send a Direct message with the document
5. Refresh Document List: refresh the list of documents

4.1 List Health Documents

Description	Lists all the health documents sent to this user that haven't been deleted. Provides easy sorting and searching for particular documents.
Menu	Medical Records / Documents / List
Operation	<ul style="list-style-type: none"> • Navigate to the Documents / List page. • All table elements are searchable by typing in the search field. • Each column is sortable by clicking on the up or down arrows in the column headers. • Actions column has buttons which allow user to "view", "download" or "send" the document

COMMUNITY PORTAL

Account 2

MEDICAL RECORDS

Documents 2

List

Refresh

MESSAGING

Messages 3

RosettaCommunity

Health Document List

All of the health documents you've been sent.

Documents / List

15

epic

Date	Description	Source	Actions
2015-04-07 10:27:54 EDT	Epic - John Smith	patient.a@direct.hispdev1.hispdirect.com	view print
2015-04-07 10:28:16 EDT	Epic-org copy	patient.a@direct.hispdev1.hispdirect.com	view print

1-2 of 2 (filtered from 18 total entries)

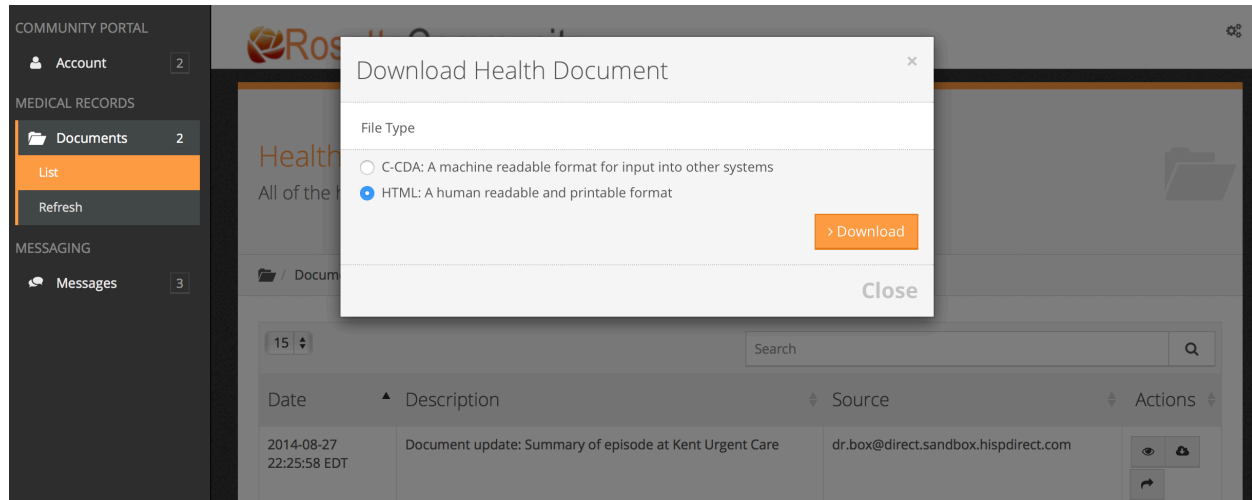
4.2 View Health Document

Description	View a document in the document list.
Menu	Medical Records / Documents / List -> View Button
Operation	<ul style="list-style-type: none"> Navigate to the Documents / List page. Select the “view” button, in the actions column of the document you want to view. A page with the health document will appear The document can be printed by selecting the “print” button with the printer icon on the top right of the page.

Kent Urgent Care: Health Summary			
Patient	Isabella Jones		
Date of birth	May 1, 1947	Sex	Female
Race	White	Ethnicity	Not Hispanic or Latino
Preferred Language	English		
Contact info	Primary Home: 1357 Amber Drive Beaverton, OR 97006, US Tel: (816)276-6909	Patient IDs	1 2.16.840.1.113883.4.6 123-101-5231 2.16.840.1.113883.4.1
Document Id	Test CCDA 1.1.1.1.1.1.1.1		

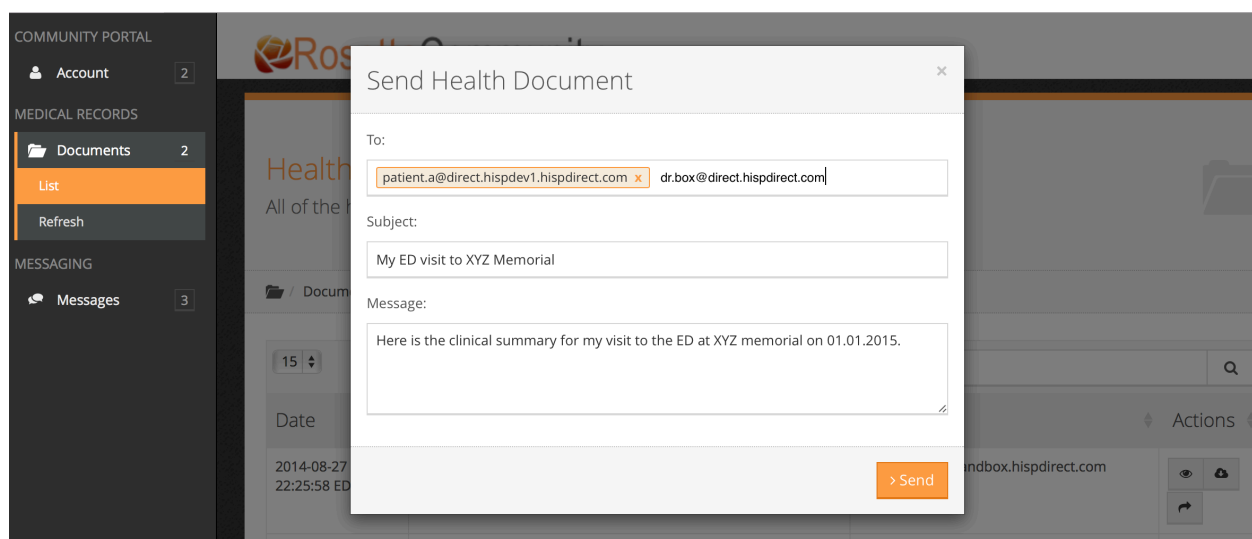
4.3 Download Health Document

Description	Download a document in the document list.
Menu	Medical Records / Documents / List -> Download Button
Operation	<ul style="list-style-type: none"> • Navigate to the Documents / List page. • Select the “download” button, in the actions column of the document you want to download. • A dialog will appear with a choice of file formats: <ul style="list-style-type: none"> ○ Choose machine readable format to download the XML, or ○ Choose human readable format to download in HTML • Click the “download” button • The file will download from the browser to your computer



4.4 Forward Health Document

Description	Forward a document in the document list to another Direct address
Menu	Medical Records / Documents / List -> Send Button
Operation	<ul style="list-style-type: none"> • Navigate to the Documents / List page. • Select the “send” button, in the actions column of the document you want to forward. • A dialog will appear asking for the recipient, the subject and an message to provide • NOTE: a list of recipients can be provided by including commas between Direct addresses • Click on the “Send” button, to forward the document to the recipients



4.5 Refresh Document List

Description	The portal creates a list of all documents upon login. Hitting “refresh” will include any new documents received since login, or remove any documents that have been deleted.
Menu	Medical Records / Documents / Refresh
Operation	<ul style="list-style-type: none">• Navigate to the Documents / Refresh menu item.• Portal will refresh the list, and return to the list view

5. Messaging Services

Community Portal can send and receive any kind of Direct message – including those without an attached datafile. When a message is sent to a user's Direct account, the message is available for viewing, replying or forwarding. Attachment files can be downloaded as well.

The community portal allows a user to:

1. *List Messages*: a list of all messages received
2. *View Message*: view a message within the portal
3. *Compose Message*: create a new message
4. *Reply-to or Forward Message*: respond to a message
5. *Delete Message*: delete a Direct message
6. *Refresh Message List*: refresh the list of messages
7. *List User Activity*: auditable list of user's activities

5.1 List Messages

Description	Lists all the messages sent to this user that haven't been deleted. Provides easy sorting and searching for particular documents.
Menu	Messaging / Messages / List
Operation	<ul style="list-style-type: none">• Navigate to the Messages / List page.• All table elements are searchable by typing in the search field.• Each column is sortable by clicking on the up or down arrows in the column headers.• Actions column has buttons which allow user to “view”, or “delete” the message

Direct Message List

RosettaCommunity

Compose 45 Messages

/ Messages / List

Date	From	Subject	Actions
2015-03-26 23:06:04 EDT	patient.b@direct.hispdev1.hispdirect.com	test 3	[Eye] [X]
2015-03-26 22:51:43 EDT	test1@org1.direct.hispdev1.hispdirect.com	test send with CC 2 with attachment	[Eye] [X]
2015-03-26 22:42:11 EDT	test1@org1.direct.hispdev1.hispdirect.com	test subject with CC	[Eye] [X]
2015-03-26 14:46:19 EDT	test1@org1.direct.hispdev1.hispdirect.com	test	[Eye] [X]

5.2 View Message

Description	Display the message and any attached files.
Menu	Messaging / Messages / View
Operation	<ul style="list-style-type: none"> View the message content and attachments. Attachments are listed with links to download the attachments. “Reply To” and “Forward” buttons on top right allow messaging. “Delete” button on top right will delete the message

Direct Message

Secure Direct message sent to patient.a@direct.hispdev1.hispdirect.com

/ Messages / View

From: patient.b@direct.hispdev1.hispdirect.com | 2015-03-26 23:06:05 EDT [Reply] [Forward] [Delete]

Subject: test 3

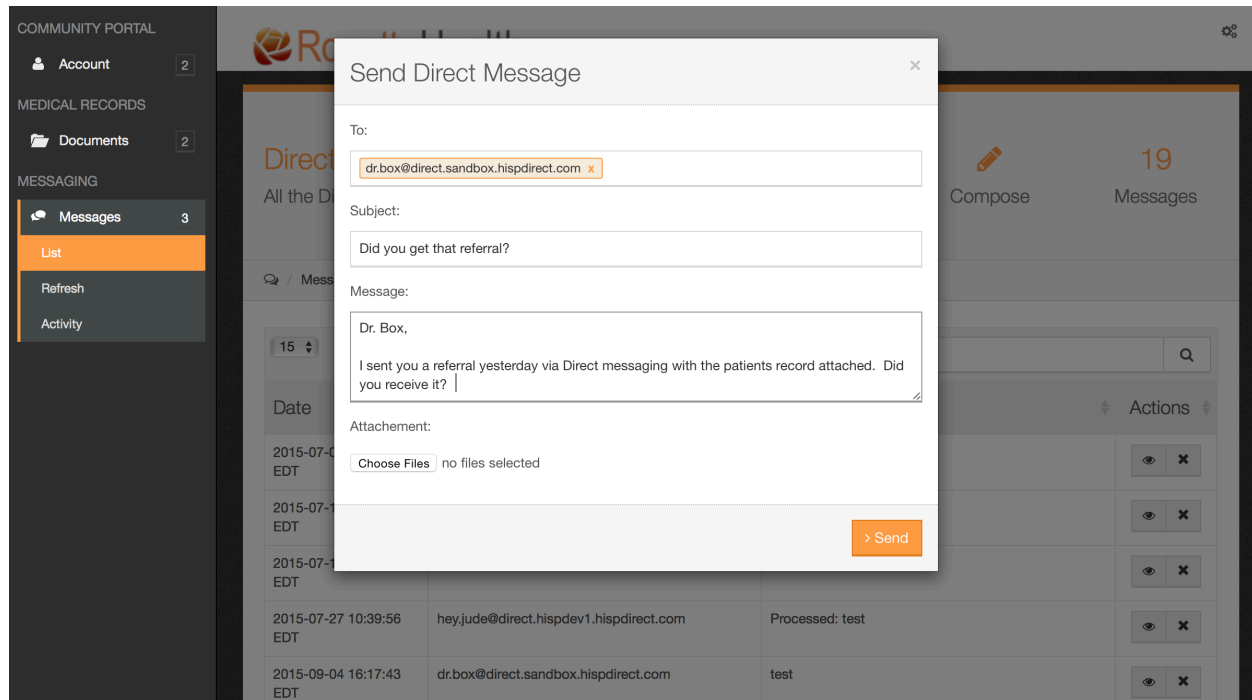
test 3

Attachments:
[ccda-Kent-Urgent-Care-5.xml](#)

5.3 Compose Message

Description	Compose a new message and optionally attach a document.
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Menu	Messaging / Messages / List -> Compose
Operation	<ul style="list-style-type: none"> Go to the messages list. Select “Compose” in the top banner Fill out information in dialog for recipients, subject, body and any attachments Select the send button



5.4 Reply-to or Forward Message

Description	Reply-to or Forward an existing message.
Menu	Messaging / Messages / View
Operation	<ul style="list-style-type: none"> View the message content and attachments. Select button for “Reply To” or “Forward” Fill out information in dialog for recipients, subject, body and any attachments Select the send button

COMMUNITY PORTAL

Account 2

MEDICAL RECORDS

Documents 2

MESSAGING

Messages 3

Send Direct Message

To: patient.a@direct.hispdev1.hispdirect.com x

Subject: FWD: test 3

Message: This is a forwarded message

Attachments: Choose Files ccda-Kent...are-3.html

> Send

5.5 Delete Message

Description	Delete an existing message.
Menu	Messaging / Messages / View
Operation	<ul style="list-style-type: none">Select “delete” button from either the message list or message view pages.Confirm that you want to delete the message.Click the “Delete” button

Delete Direct Message

Please confirm:

☒ Yes, I want to delete this message and any associated attachments.

> Delete

Close

5.6 Refresh Message List

Description	The portal creates a list of all messages upon login. Hitting “refresh” will include any new messages received since login, or remove any messages that have been deleted.
Menu	Messaging / Messages / Refresh
Operation	<ul style="list-style-type: none"> Navigate to the Messages / Refresh menu item. Portal will refresh the list, and return to the list view

5.7 List User Activity

Description	The portal creates an audit trail of all significant user activities. This includes any access, download or sending of PHI, as well as other activities.
Menu	Messaging / Messages / Activity
Operation	<ul style="list-style-type: none"> Navigate to the Messages / Activity menu item. All table elements are searchable by typing in the search field. Each column is sortable by clicking on the up or down arrows in the column headers.

COMMUNITY PORTAL

- Account 2
- MEDICAL RECORDS
- Documents 2
- MESSAGING
 - Messages 3
 - List
 - Refresh
 - Activity**

RosettaCommunity

Activity Log

List of activities that viewed, downloaded or shared patient's health information

/ Messages / Activity

15 Search

Time Stamp	Event Type	Patient	Description
2014-08-27 21:42:02 EST	VIEW	patient.a@direct.hispdev1.hispdirect.com	Document ccda-Kent-Urgent-Care.xml viewed by user dr.box@direct.sandbox.hispdirect.com
2014-08-27 21:51:23 EST	VIEW	patient.a@direct.hispdev1.hispdirect.com	Document ccda-Queen-Anne-Medical.xml viewed by user dr.box@direct.sandbox.hispdirect.com
2014-08-27 21:51:45	DOWNLOAD	patient.a@direct.hispdev1.hispdirect.com	Document ccda-new-chapter.html downloaded by user dr.box@direct.sandbox.hispdirect.com