Getting Started with Your Direct Messaging Webmail Client

October 2025

201.963.0005
support@max.md
www.max.md

Table of Contents

Introduction: Welcome to Your Secure Mailbox

Welcome! This document is your guide to the core features of the webmail client for Direct Secure Messaging. While many functions will feel familiar to anyone who has used a standard email application, this client integrates powerful, specialized tools designed to streamline clinical workflows and ensure the highest standards of secure communication.

Our goal is to help you feel confident as you send, receive, and manage your secure messages. Let's get started.

1. The Basics: Navigating Your Mailbox

The webmail client is designed to be intuitive, with a layout and features that resemble standard email, making it easy to learn and use. This section covers the initial steps of accessing your Direct Secure Messaging account and provides a high-level overview of the webmail interface. It will familiarize you with the layout and key components of your mailbox, including the folder list, message list, preview pane, and main menu.

Access to the webmail client is managed through your organization's single sign-on (SSO) process. This assumes you have already successfully logged in and are viewing your main mailbox screen.

The webmail client's main interface is designed for intuitive navigation and is organized into four primary components:

- **Folder List**: The left-hand panel where you can navigate between your Inbox, Sent, Trash, and any custom folders you create.
- **Message List**: The central column that displays a list of all messages contained within the currently selected folder.
- **Message Preview Pane**: The right-hand area where the full content of a selected message is displayed.
- **Main Menu Toolbar**: A toolbar located at the top of the screen containing primary action buttons like Compose, Reply, Forward, and Delete.

With a clear understanding of the interface, you are now ready to perform core mailbox operations.

1.1. Reading and Viewing Messages

When you log in, you will see your main inbox view. Messages are listed in the panel on the left. When you select a message from the list, its contents will appear in the main viewing panel on the right.

Each message is composed of a few key parts:

- **Message Header:** Located at the top, this area shows you critical information like the sender's address, the subject line, and the date the message was received.

- **Message Body:** This is the main content area where the text of the message is displayed. The message body may be rendered in plain text or HTML depending on its composition and the local settings in your webmail client.
- **Attachments:** Any files attached to the message will be listed and available for download, typically shown both near the header and at the bottom of the message body.

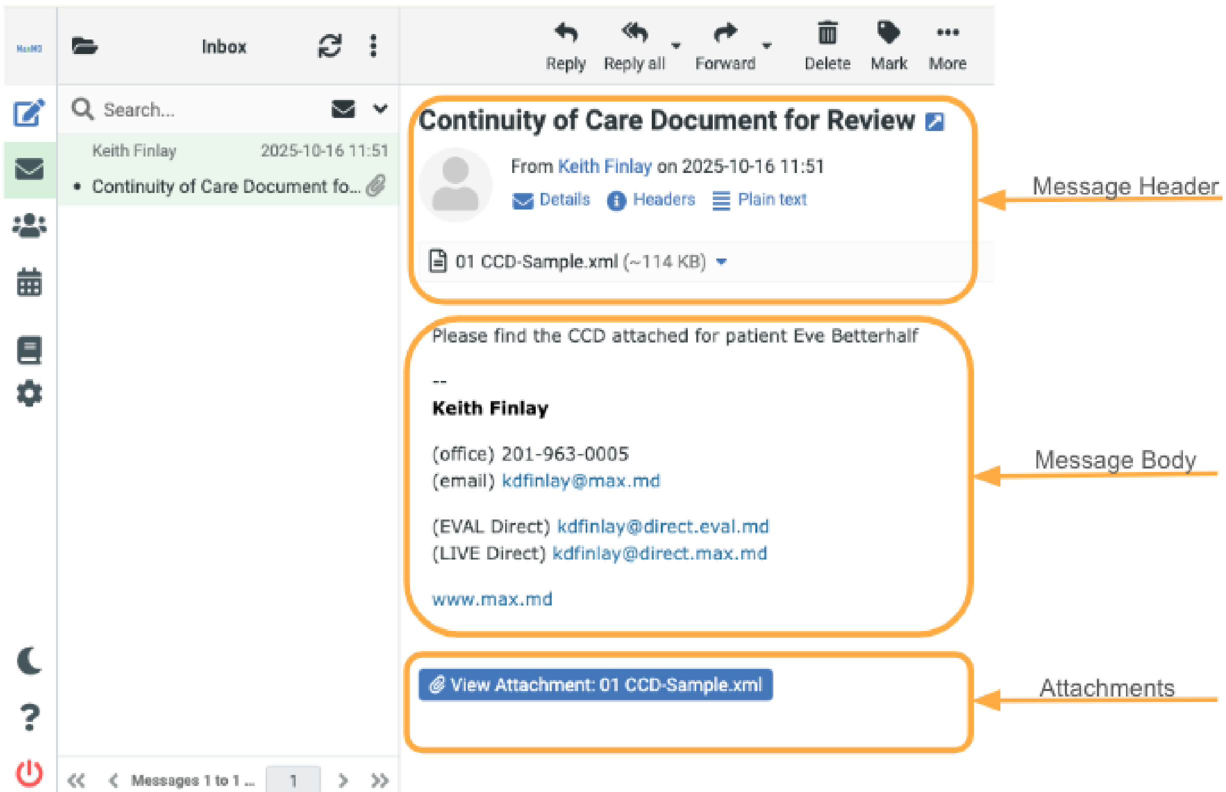


Figure 1: Inbox sections

- Within the message header, you can select "details" to view the sender's and recipient's addresses, which can be expanded for more information. Additionally, to see the sender's full Direct address, hover your mouse cursor over their name in the message header. By clicking on the sender’s name, a pop up menu will open to easily add the contact to your address book or to compose a new message.

Figure 2: Header details

- Selecting the "Headers Icon" provides additional technical information related to the Direct Message.

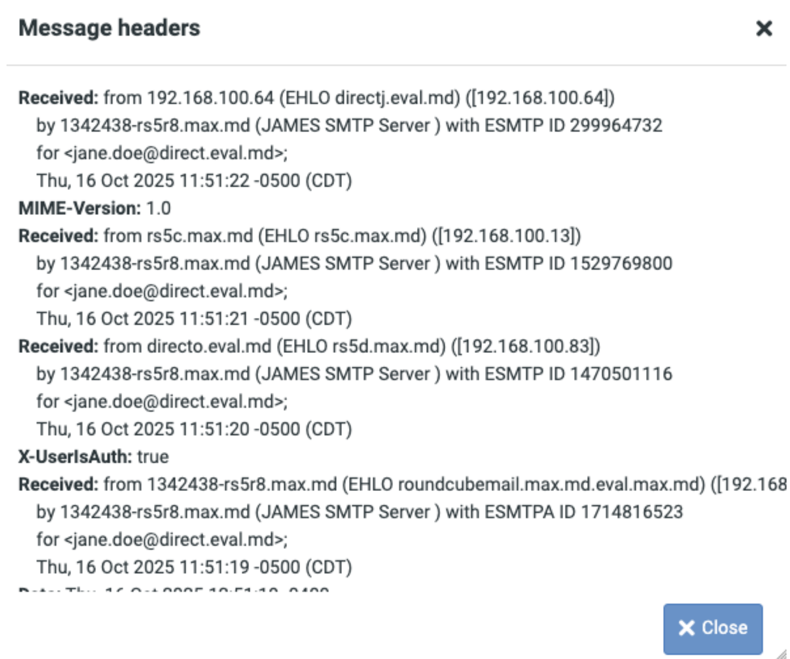


Figure 3: Message header details

1.2. The C-CDA Viewer: A Powerful Tool for Clinical Documents

In a clinical setting, quickly parsing patient data is critical. To support this, a standout feature of this mail client is its built-in, one-click viewer for C-CDA (Consolidated Clinical Document Architecture) files, a common standard for clinical documents. The viewer includes three different style sheets to change how the document is presented.

The ONC style sheet is particularly powerful, offering several interactive features to help you navigate complex documents efficiently:

- **Clickable Table of Contents:** Quickly jump to specific sections of the document without endless scrolling.

- **Drag-and-Drop Sections:** Rearrange the sections of the document on your screen to prioritize the information most relevant to you.
- **Collapsible Sections:** Hide sections you don't currently need to see, allowing you to focus on what's important.

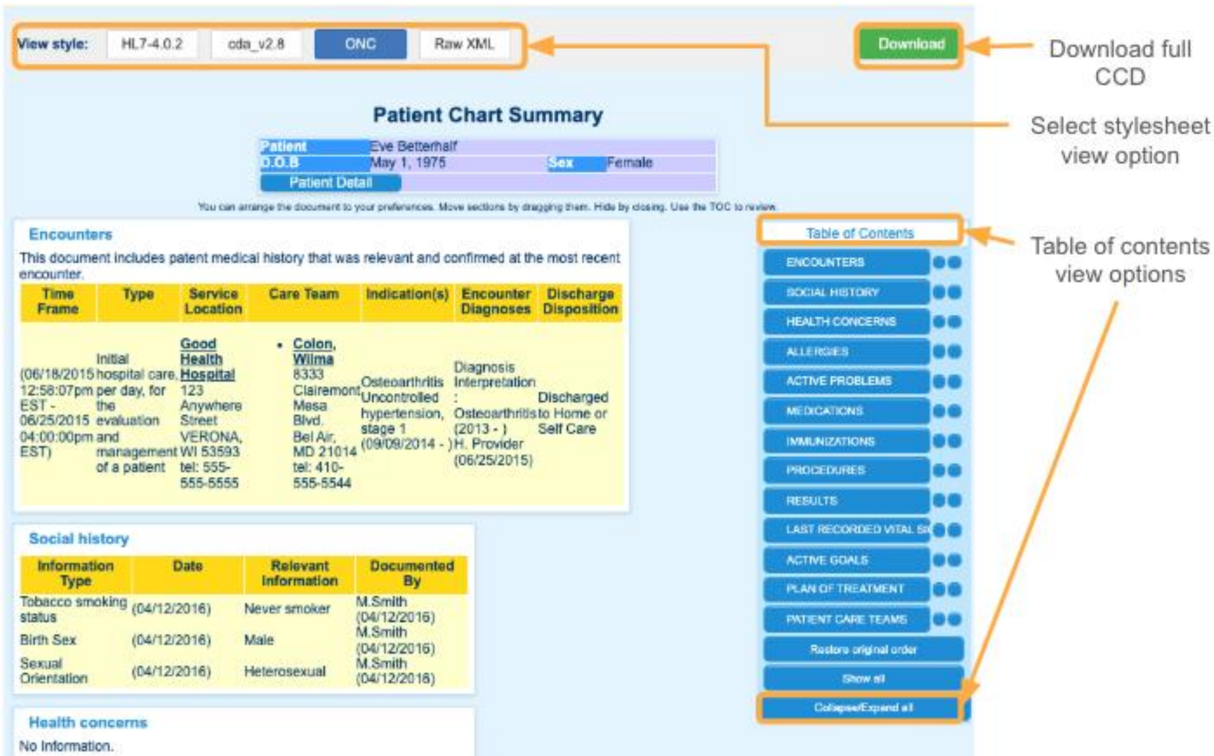


Figure 4: CCD viewer options

1.3. Taking Action on Messages

The client provides a full suite of standard actions you can take on any message. Standard email actions are available in the Main Menu Toolbar. After selecting a message, you can:

Action	What It Does
`Reply`	Send a response directly back to the original sender.

`Reply All`	Send a response back to the original sender and others copied on the message.
`Forward`	Send a copy of the message and any attachments to a new address.
`Delete`	Move the message to the Trash folder.
`Mark`	Provides options to add a visual flag to the message to mark it for follow-up.
`More`	Provides a menu additional options for message management
`Move to Folder`	Relocate the message to a different folder for organization.
`Download`	Saves the entire message as a file (.eml) or saves selected attachments individually to your computer.

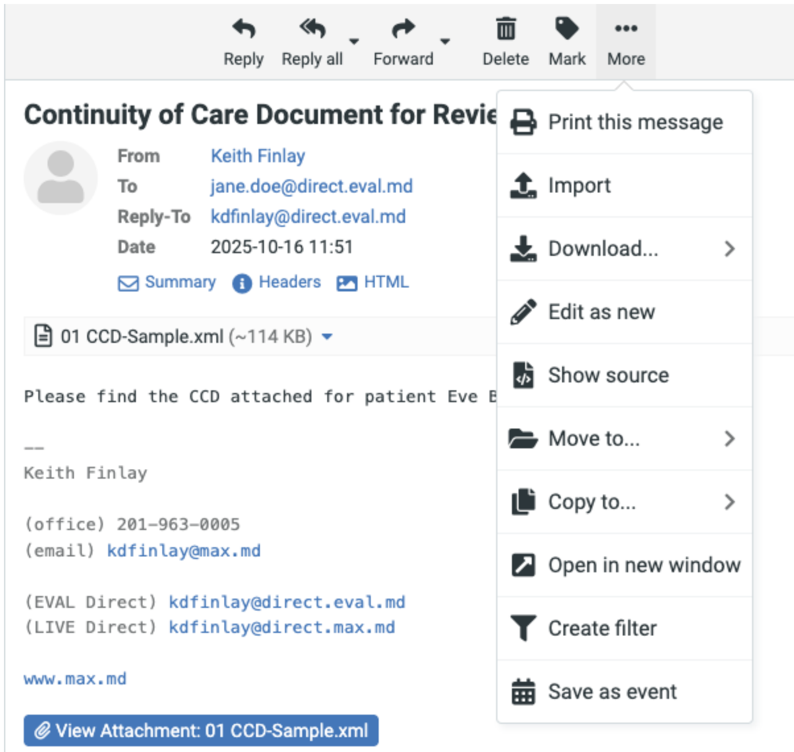


Figure 5: Additional selections for message management

A Critical Insight on Message Status

You can organize your inbox by marking messages as unread or flagging them as important. These actions change the message's appearance in your message list to help you track tasks and priorities. Marking a message as "unread" or "flagged" is a tool for your personal inbox management only. These actions happen within your inbox and have **no effect** on the Direct protocol itself. The protocol is solely concerned with confirming that a message has been successfully delivered to the recipient's mailbox. Therefore, you can confidently use flags and the 'unread' status for your personal task management without affecting the official delivery status of the message.

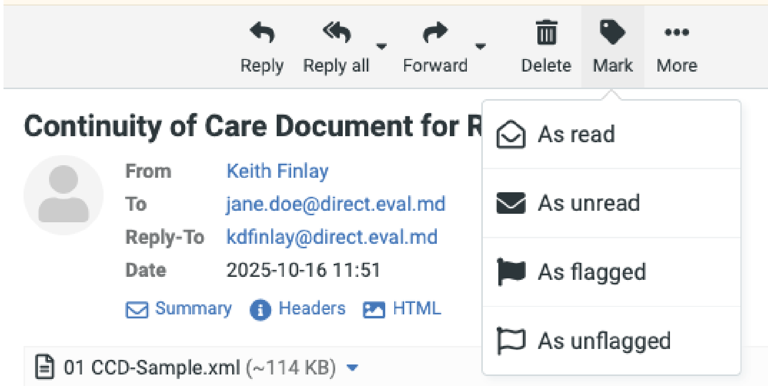
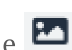


Figure 6: Options to mark messages

1.4. Composing and Sending a New Message

This section outlines the complete process for creating and sending a new Direct message, from addressing the message and formatting its content to adding attachments and leveraging pre-written responses for efficiency.

To create a new message, follow these steps:

1. **Addressing the Message:** Click the Compose button in the main toolbar. In the new message window, enter the recipient's Direct address into the To field. To add a recipient from your personal contacts, click the "people" icon next to the address field to open your local address book:
    - Personal Addresses: Personal Addresses refer to the contacts stored in the user's local address book. This feature is part of the standard webmail client functionality that requires documentation. The contacts feature currently available is a local address book specific to each individual user.
    - Collected Recipients: Recipients who are not in the personal address book can often be found through the DirectTrust Directory.
2. **Formatting the Message Body:** You can switch between two composition modes by selecting the  icon at the top left of the message body. Plain Text mode provides a simple text editor, while HTML mode enables rich text formatting like fonts, colors, and sizes. The message editor supports both Plain Text and HTML modes. To switch from Plain Text to HTML for rich formatting, click the picture icon. To switch from HTML back to Plain Text, click the 'X' icon.
3. **Attaching Files:** To attach a file, such as a clinical document or image, click the attachment icon on the Options and attachments section on the right side of the screen. This will open your computer's local file system, allowing you to browse for and select the file you wish to send.

To create a new message, you'll use the composition window. It includes several useful features to enhance your messages:

- **HTML vs. Plain Text:** By default, you may be in plain text mode. You can switch to the HTML editor to format your text with different fonts, colors, and styles for a more professional look. The default message body mode can be adjusted in your settings.

- **Attaching Files:** Click the attach icon to open your computer's file browser, allowing you to select one or more files to include with your message.
- **Response Templates:** To save time on repetitive replies, you can create and save pre-written "canned responses" that can be inserted into a message with a single click.

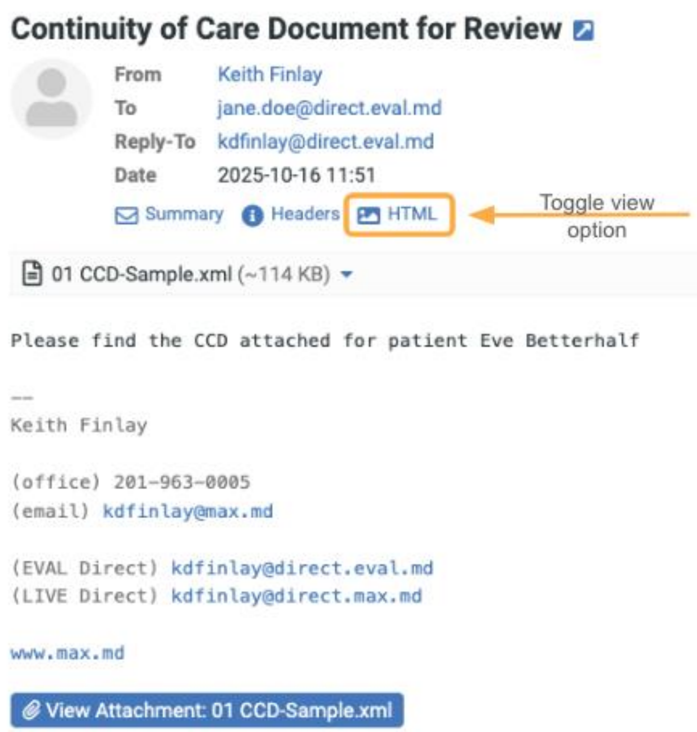


Figure 7: How to change from HTML to Plain text view

2. A Key Feature for Teams: Shared Inboxes

A shared inbox is a powerful feature that allows one user (a "delegate," such as a nurse) to access and manage the messages within another user's inbox (e.g., a doctor) or a generic inbox (e.g. ADTalerts) directly from their own account. This is essential for clinical workflows where team members need to manage communications on behalf of a provider or from an organization-level or workflow-specific Direct address inbox.

2.1. How to Access and View a Shared Inbox

Access to a shared inbox must be set up by an administrator. Once an administrator has granted you access, users will automatically be subscribed to shared inboxes as they are created. If a user is currently logged into their webmail client at the exact time a new shared folder is created, they will need to log out and log back in for the changes to take effect and see the new shared inbox.

To update which of your Shared Inboxes are viewable

1. **Navigate to Settings:** Go to `Settings` and then select `Folders`.
2. **Subscribe to the Folder:** In your list of folders, you will see all shared inboxed, typically named in the format share_username, where the username corresponds to username@direct.domain.com of the Direct address inbox being shared. Click the "subscribe" icon next to it.
3. **View the Shared Inbox:** Once you subscribe, the shared inbox will appear in your main folder list on the left-hand side of the mail screen, ready for you to access.
4. **Unsubscribe to the Folder:** Follow the directions above and click the "subscribe" icon so that it is grey and the shared inbox will no longer appear in your main folder list.

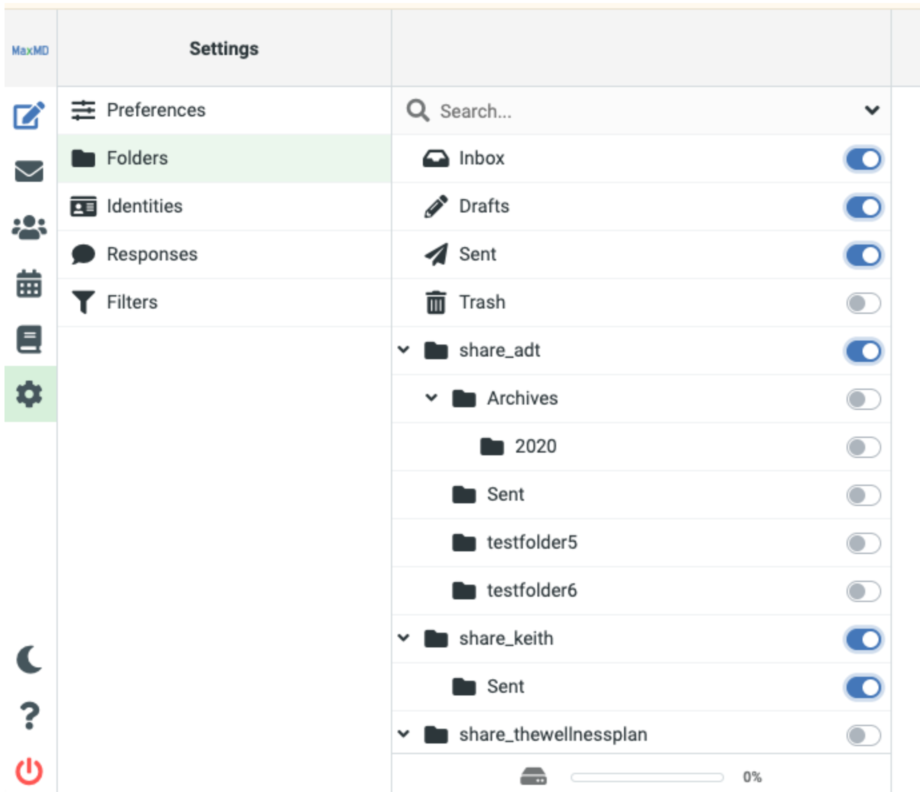


Figure 8: Toggle options for shared folders to show

2.2. Sending Messages from a Shared Inbox

Important: Ensuring Accountability

When you reply to or forward a message from within a shared inbox, the message will be sent from your own logged-in Direct address, not from the address of the inbox's owner. This is a critical security and accountability feature. It ensures there is always a clear record of which user (the delegate) took the action on behalf of the other (the doctor).

Beyond team features like shared inboxes, you can also customize the client to fit your personal workflow through settings and filters.

3. Customizing Your Experience

The webmail client allows you to personalize your settings to streamline your work, from managing your sender identity to automating your inbox with rules.

3.1. Managing Your Identity and Signature

The Identities section under `Settings` is your hub for managing how you appear to others. Here, you can set your:

- Display Name: The name recipients will see.
- Organization: Your affiliated organization.
- Reply-To Address: An optional address you can specify if you want replies to your messages to be sent to a different inbox (e.g., a central team address instead of your personal one).

You can also create a professional signature in this section. Using the built-in HTML editor, you can format your signature with different fonts, colors, and styles.

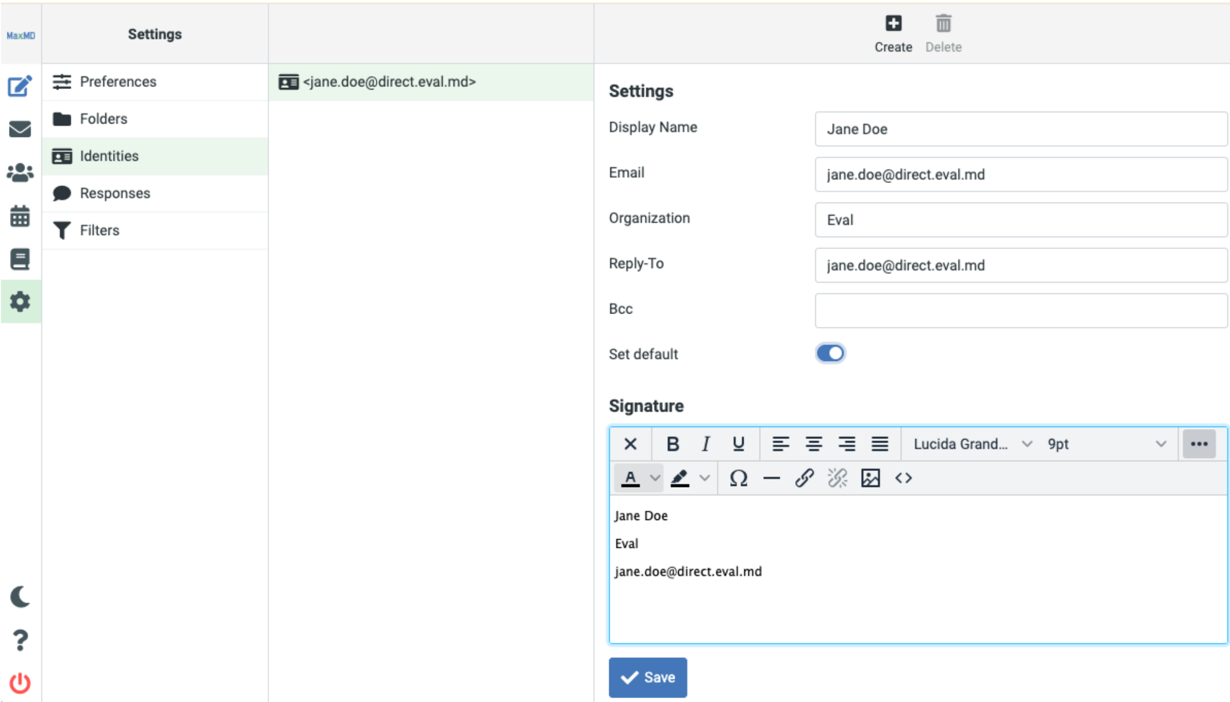


Figure 9: Settings to adjust identity and signatures

3.2. Automating Your Workflow with Filters

To manage high-volume inboxes and ensure no message is missed, you can create filters—powerful rules that automate actions on incoming messages based on criteria you define. This can save significant time and ensure messages are handled correctly.

Here are two common examples of how to use filters:

1. Setting Up a "Vacation" Auto-Responder This rule automatically replies to any message sent to you with a pre-written response.
   - Navigate to `Settings > Filters`.
   - `Create` a new filter rule.
   - For the condition, set it to apply to `all messages`.
   - For the action, choose `Reply with message`.
   - Write your "out of office" message in the text box and save the rule.

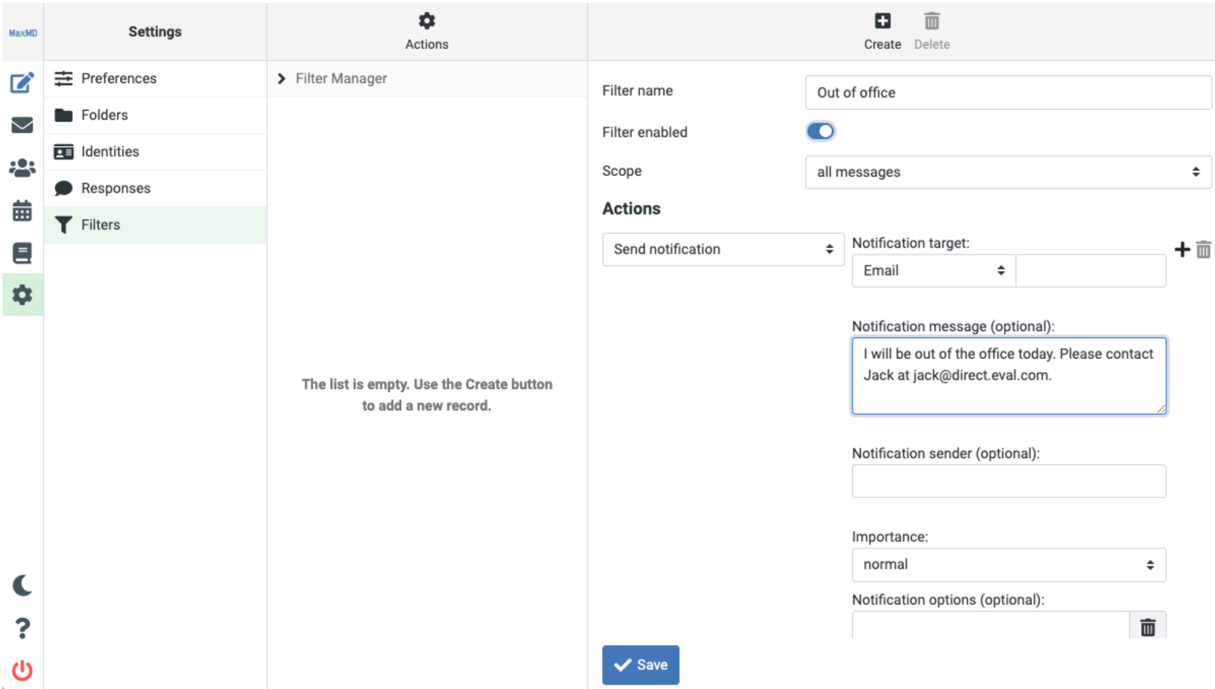


Figure10: Steps for setting an out of office notification

2. Redirecting Messages to a Colleague This rule automatically forwards certain messages to another team member's Direct address.
   - Navigate to `Settings > Filters`.
   - Create a new filter rule.
   - For the condition, specify the criteria (e.g., from a specific sender or with a certain subject).
   - For the action, choose `Redirect message to`.
   - Enter your colleague's Direct address and save the rule.

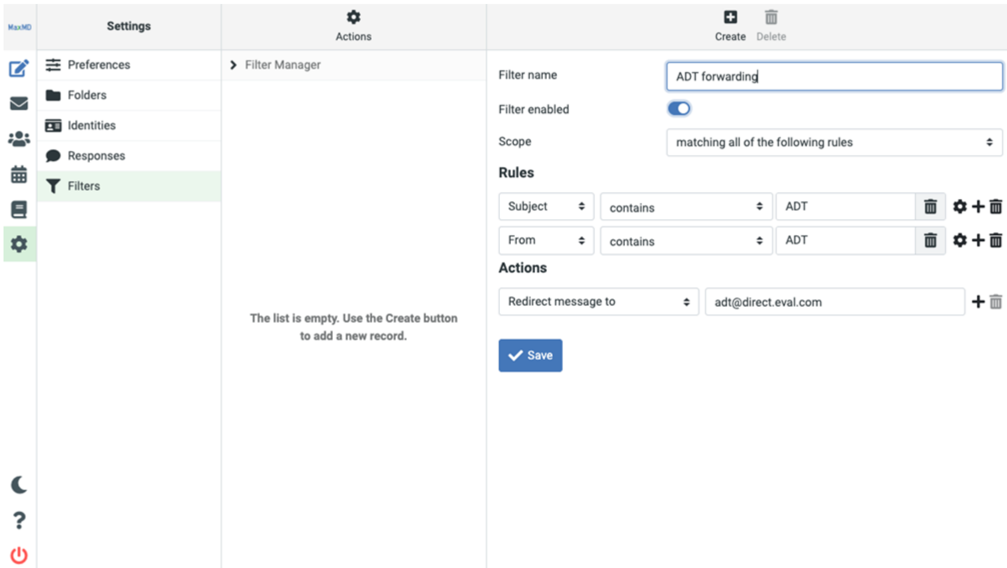


Figure 11: Options to set up forwarding messages

3.3. Organizing with Folders

You can create custom folders to better organize your messages. For example, you might create a folder specifically for "ADT Alerts" to keep them separate from your main inbox.

- Navigate to `Settings > Folders`.
- `Create` a new folder.
- Add a folder name (e.g., from a specific sender or with a certain subject).
- Select the Parent folder to nest the new folder, or leave blank to have the folder appear at the main level.
- Select your view mode to be List or Threads and save the rule.

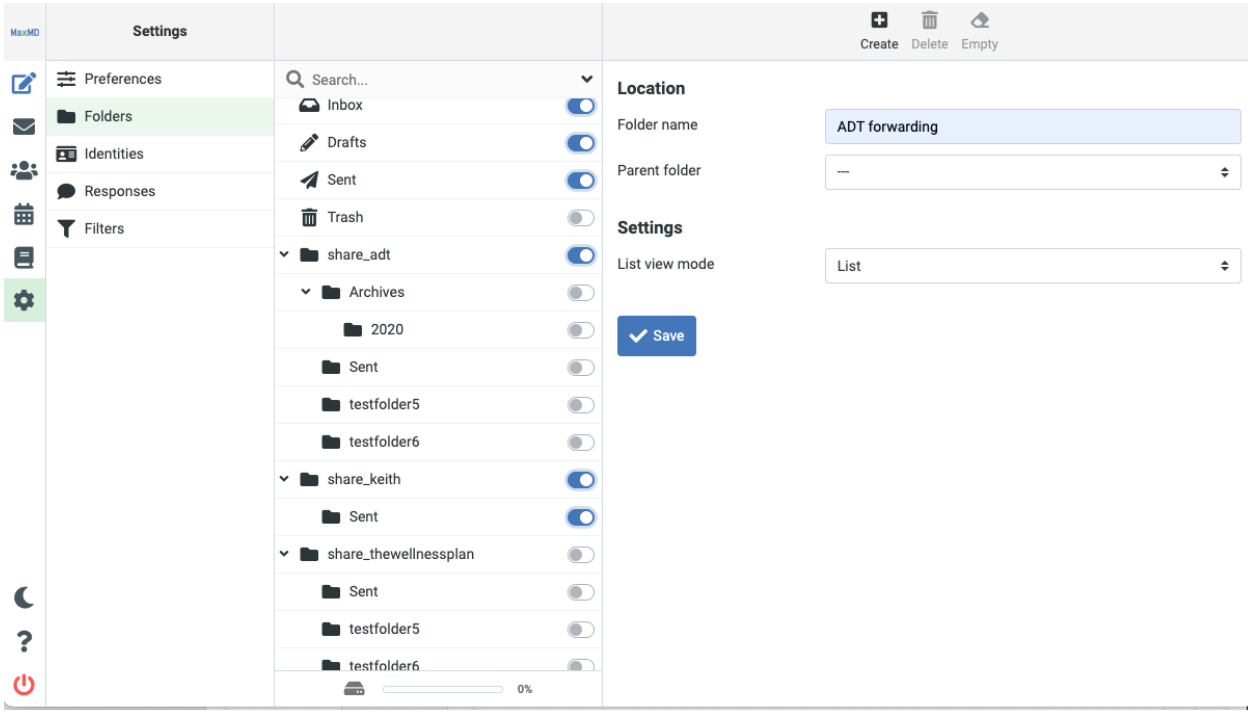


Figure 12: Setting to create a new folder

4. Managing Your Contacts

The `Contacts` feature in this webmail client serves as your local, personal address book. Any contacts you save here are visible only to you and are meant for your own convenience.

By selecting the `DirectTrust Directory` icon on the left side of the screen you can search for Direct addresses by name, location, organization, NPI, etc.

Think of `Contacts` as your personal speed-dial for frequent collaborators, while the `DirectTrust Directory` will be your comprehensive network-wide search tool for discovering new providers or other counterparties and their Direct addresses.

By the end of this section, you will master the three primary methods for adding contacts to your account.

You will learn how to:

- Create a single contact
- Import a list of contacts
- Search the Direct Trust Directory

Let's begin by exploring where your contacts live and how to keep them organized.

4.1 Getting Started: Finding and Organizing Your Contacts

To begin, you can access your contacts by selecting **"contacts on the left side of the screen."** This is your main dashboard for viewing and managing all your saved individuals and groups.

Pro-Tip: Organize with Groups

Before adding new people, it's helpful to understand groups. Groups allow you to organize individual Direct addresses, making it easier to manage different sets of contacts.

You can perform several actions with groups:

- **Create a new group:** Select the **hamburger menu**, choose **'add group'**, type in a name, and it will appear under your personal address book.
- **View a group:** Simply select the group's name to see the Direct addresses it contains.
- **Rename and delete** existing groups as needed.

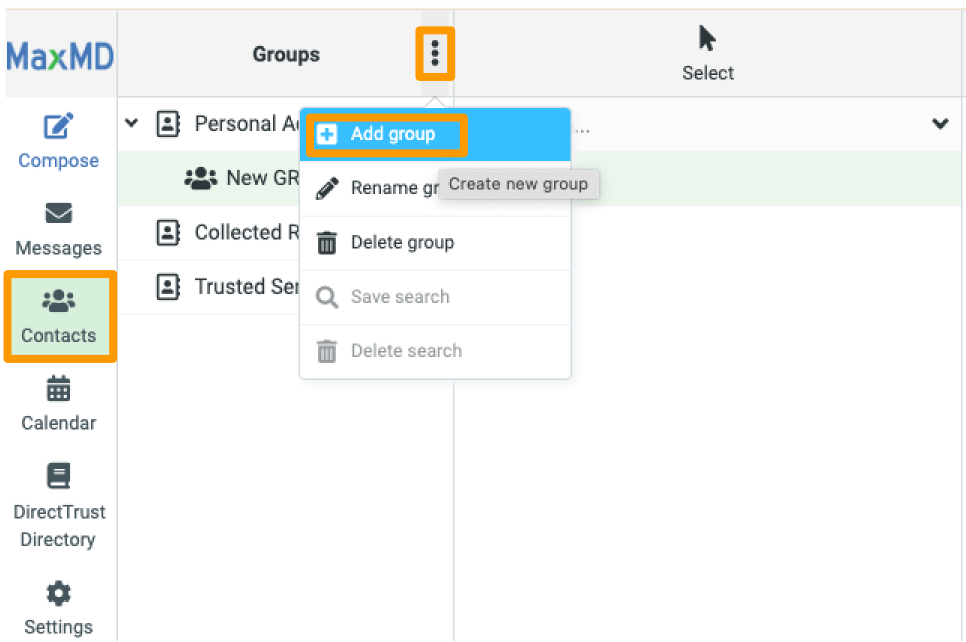


Figure 13: Select Contacts from the main menu on the left, then select the three dots (aka hamburger) menu next to the Groups to add a new group

Now that you know how to organize your contacts, let's explore the three ways to add them.

4.2 The Three Methods for Adding Contacts

Below are the three core methods you can use to build your contact list, each suited for a different situation.

4.2.1 Method 1: Add from the Direct Trust Directory

This powerful feature allows you to find and add verified contacts from a secure, trusted network without needing their information beforehand.

Here's how to use the directory:

1. Select the **Direct Trust Directory icon** on the left side of the menu.
2. Use the search fields to find the contact you are looking for.
3. Select the desired contacts from the search results.
4. Add them directly into your MaxMD Webmail contact book.

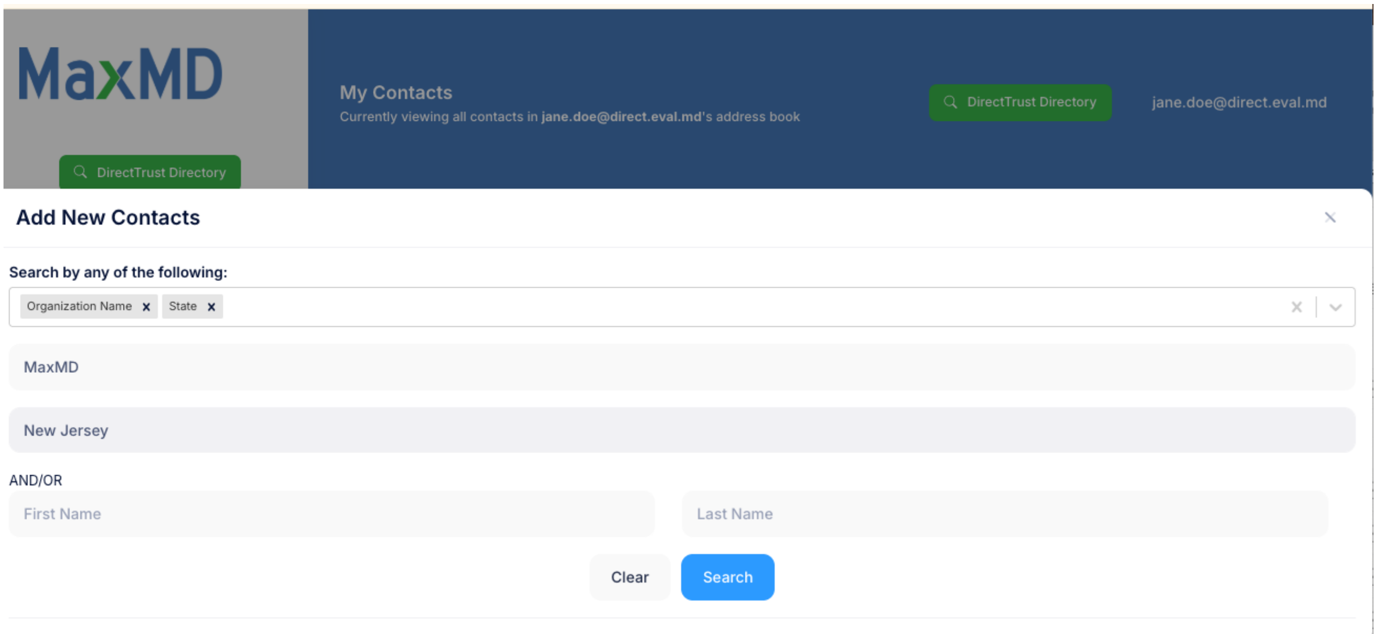


Figure 14:: View of the new tab that opens when selecting the DirectTrust Directory icon; Select multiple

You can use a variety of criteria to narrow your search, making it easy to find exactly who you need.

Search By	Examples
Organization	Organization Name, Organization NPI
Individual	Individual NPI, Direct Address, Phone Number

Location	State, Zip Code
Other	Specialty, HISP Operator

This is the best way to connect with other identity proofed individuals and verified organizationsverified professionals in the Direct Trust network. The following table will help you decide which of these three methods is right for you.

4.2.2 Method 2: Create a Single Contact

This method is perfect for adding individual contacts one at a time, especially when you want to include specific details about them.

Here is the step-by-step process:

1. Select the **create icon** in your contacts.
2. Add the contact's information in the provided fields.

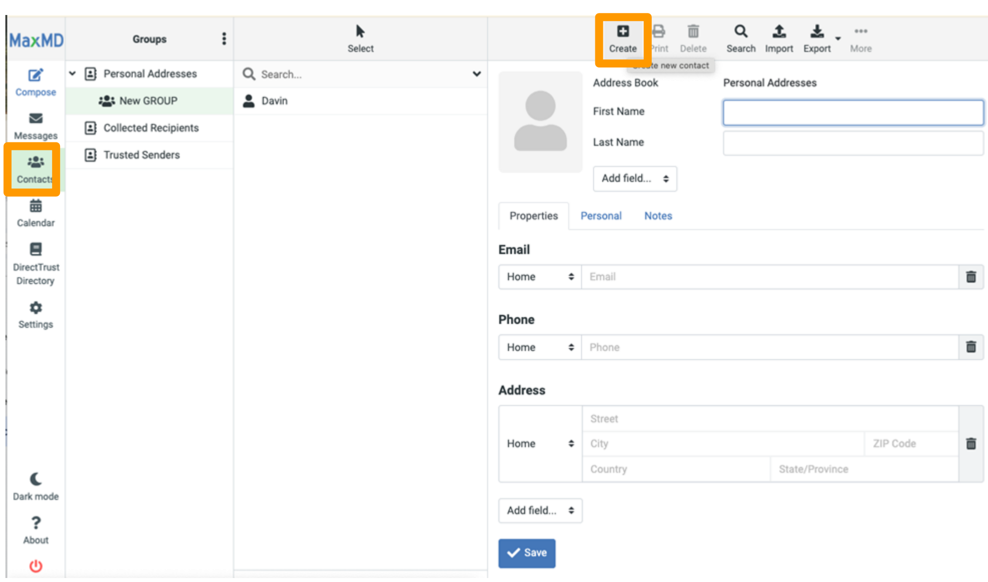


Figure 15: Select Contacts, then Create to add one contact

You can fill in several key pieces of information:

- First and Last Name

- Direct Address
- Street Addresses
- Phone Number
- Personal Information and Notes

This is the most direct way to add a single person to your address book while including detailed, personalized notes.

4.2.3 Method 3: Import a List of Contacts

This method is ideal for quickly adding multiple contacts at once from a list you already have, saving you significant time.

Follow these steps to import your list:

1. Select the **import icon**.
2. Use the **browse tab** to find and upload your contact file. The file must be a **CSV** or **vCard** file.
3. From the same window, you can assign all the imported contacts to a specific group.
4. Click the **Import** button within the window to finalize the upload.

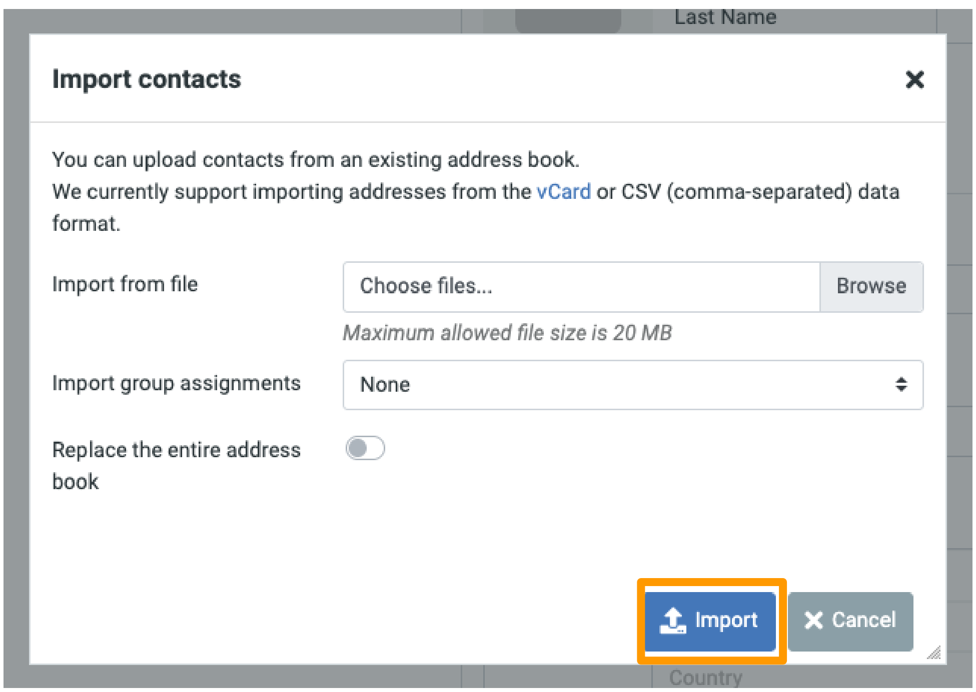


Figure 15: After selecting the import icon in the Contacts book, browse for the appropriate folder on your device, assign a group if applicable, and select the

This method is a major time-saver for anyone who has their contacts already organized in a file from another program.

4.3 Which Method Should You Use? A Quick Reference

This table provides a quick summary to help you choose the best method for any situation.

Method	Best For...	What You Need
Add from Directory	Finding and adding new, verified professional contacts.	Information to search for them (e.g., name, specialty, NPI).
Create a Single Contact	Adding one person at a time with detailed personal notes.	The individual's contact details (name, Direct address, etc.).
Import a List	Adding many contacts at once from another program.	A contact file in **CSV** or **vCard** format.

With these options at your fingertips, you're ready for any contact management task.