MaxMD's Guide for Creating and Managing Direct Addresses

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INTRODUCTION: TAKING CONTROL OF YOUR DIRECT ADDRESSES

Welcome! This guide is designed to walk you through the administrative tool for managing Direct addresses. In the past, creating and managing these addresses was a manual process, but this new tool empowers you to view, add, delete, and manage them all on your own.

Our goal is to make this process as clear and straightforward as possible. By the end of this guide, you'll be able to confidently navigate the tool and handle all of your direct address needs.

INTRODUCTION TO THE PROVISIONING TOOL

The Direct Address Provisioning and Directory Services Tool is a powerful portal designed exclusively for administrators. Its purpose is to provide centralized control over your organization's entire inventory of Direct addresses. The core functions of this tool include creating new addresses, editing existing address details, deleting addresses that are no longer needed, and managing how those addresses are represented in the national DirectTrust directory. This enables administrators to manage the complete lifecycle of their users' Direct accounts efficiently. This guide will begin with a tour of the administrator dashboard, the central hub for all provisioning and directory management tasks.

NAVIGATING THE ADMINISTRATOR DASHBOARD

The dashboard is the central hub for all administrative actions. Upon logging in, you are presented with a comprehensive, at-a-glance view of all active Direct addresses within your organization, allowing for quick assessment and management.

The key features and interactive elements of the dashboard include:

- Address List: The main component is a table where each row represents a single active Direct address.
- Address Type Icons: An icon on the far left of each row visually distinguishes between organizational addresses (e.g., referrals@domain.direct.org) and individual addresses (e.g., jane.doe@domain.direct.org).
- Expanding Address Details: Clicking on any row expands it to reveal detailed information, including the alert and activation emails, creation timestamp, and full directory information such as name, NPI, and phone number. Throughout the tool, hovering your mouse over an icon will provide a helpful definition.
- Global Search: The global search bar at the top of the interface allows for full-text searching across all data columns associated with the Direct addresses.
- Sorting and Filtering: The address list can be sorted by clicking on any column header. For instance, you can sort alphabetically by first name, last name, or organization name to easily locate records.



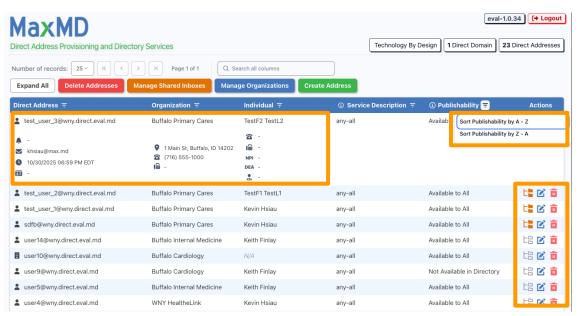


Figure 1: Dashboard for Direct Address Provisioning and Directory Services.

Highlighting the expanded information available for each address, the sorting feature

To use this tool effectively, it is essential to understand the key directory concepts that govern how addresses are shared and discovered.

UNDERSTANDING KEY DIRECTORY CONCEPTS

Before we dive into the step-by-step instructions, let's review a few key terms. Understanding this vocabulary will make using the tool much easier and more intuitive.

Term	Explanation
Direct Address	The unique address used for secure messaging, always formatted such as username@direct.domain.com combining a Username and Direct domain.
Username	The unique identifier you choose for a Direct address to the left of the @ symbol. Note: It cannot be edited after creation and supports only letters, numbers, underscores (_), and periods (.).
Direct Domain	The part of the Direct address that appears to the right of the @ symbol (e.g., direct.domain.com). You will select this from a pre-approved list provided to you.

Activation Email	A standard email address (like one from Gmail or Outlook) used to set up the account password for the first time and for any future password resets. These are only applicable for users of MaxMD's Hosted Direct mdEmail solution, not those who access their Direct addresses through an edge system such as inpatient EHR.
Alert Email	An optional, standard email address where notifications for new messages are sent. Crucially, these alert emails contain no Protected Health Information (PHI); they simply inform the user that a new message has arrived.
NPI Number	The National Provider Identifier. If you provide an individual or group NPI number, the tool validates it against the NPPES NPI registry. The applicable first name, last name or organization name associated with the NPI number must be an exact match to the name in the NPI registry.
Publishability	A setting that controls whether a Direct address is published to the DirectTrust directory. You can choose to make an address visible to all participants, only to providers, only to patients, or make it Not available in the directory at all. These options are defined by DirectTrust.

While the tool makes it easy to manage addresses, correctly configuring directory settings is essential for ensuring that other healthcare providers can find and communicate with your users. The "Purpose of Use" and "Publishability" fields are two critical settings that control an address's visibility and perceived function within the DirectTrust network.

SERVICE DESCRIPTION

The Service Description field is a standard Directory field defined by DirectTrust to help other users understand the intended clinical or administrative workflow, or purpose of use, for a given Direct address. By assigning a purpose, you provide context that helps other organizations correctly route their Direct messages. For example, by tagging an address with "ADT notifications," you are explicitly telling the other participants viewing the DirectTrust Directory, "Send your ADTs here." The list of options for Service Description is defined by DirectTrust.

Important: This field is for informational and searchability purposes only. It does not technically restrict the types of messages an address can send or receive. An address designated for "Referrals" can still receive "ADT notifications," for example.



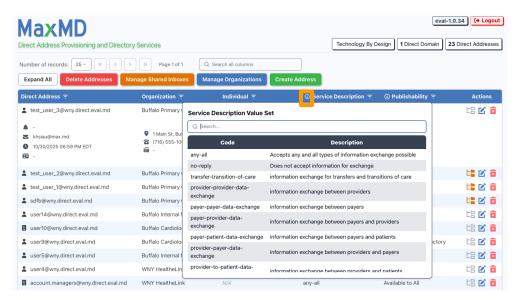


Figure 2. The Service Description Value Set is established by

PUBLISHABILITY

The Publishability setting directly controls whether a Direct address is published to the national DirectTrust directory and, if so, who can see it. This is the primary mechanism for controlling an address's visibility. The available options set by DirectTrust are:

- Available to all participants
- Available to providers only
- Available to patients only
- Not available in Directory



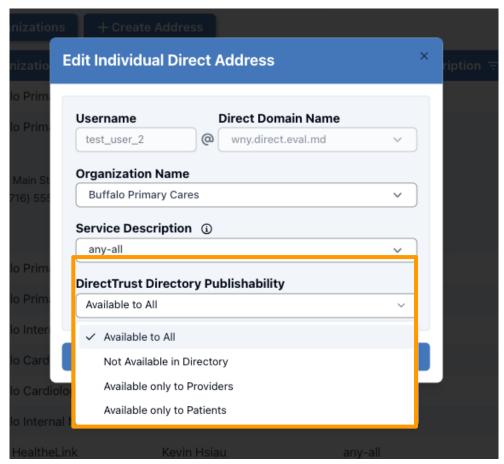


Figure 3: After selecting the edit icon on the right of the screen, you can update information such as the DirectTrust Directory Publishability flag.

IMPORTANT NOTE ON DIRECTORY UPDATES

Any new addresses created or changes made to existing directory information (such as name, organization, or publishability status) are contributed by MaxMD to the national DirectTrust directory via an automated process that runs once every 24 hours in an overnight batch process. The practical impact of this is that changes made in the tool today will be reflected in the public directory tomorrow. Third party Directory participants are expected to obtain their own updated copy of the DirectTrust Directory to be able to see the contributed changes.

Understanding Alert and Activation Emails

When creating or editing an address, you will encounter two distinct email fields. It is important to understand their different functions.

Email Type	Description



Alert Email	This is an optional, non-secure email address that receives a simple notification whenever a new message arrives at the Direct address. This email can be an individual's work email or a generic, shared inbox like frontdesk@hospital.org or a nurse's workstation inbox. This flexibility allows organizations to tailor their notification workflows. Crucially, this notification contains no Protected Health Information (PHI).
Activation Email	This is an email address required for customers with MaxMD's Hosted Direct mdEmail solution which is used for MaxMD to send the secure link for setting and resetting the user's password for the webmail client.

Managing Existing Direct Addresses

This section covers the routine administrative tasks of modifying and removing existing Direct addresses. It is crucial to understand the rules and consequences associated with these actions to avoid unintended data loss or disruption of service.

EDITING AN ADDRESS

To edit the details associated with a Direct address, locate the address in the dashboard and click the edit icon. This will open a form where you can modify directory information.

⚠ WARNING: A Direct Address Cannot Be Renamed

The username and domain of a Direct address are fixed and cannot be edited after creation. If a user's name changes or a different username is required, you must delete the old address and create a new one.

You can, however, edit other affiliated information, such as the organization name, individual's first and last name, phone number, and other directory details.

DELETING AN ADDRESS



To delete one or more addresses, select the corresponding checkboxes in the address list and click the delete button. You will be prompted to confirm this action.

⚠ WARNING: Deletion is Permanent

Deleting a Direct address is a permanent action that cannot be undone. This action removes the address from the system and deletes all associated inbox data, including all sent and received messages. If your only goal is to remove an address from public view while preserving its inbox, do not delete it. Instead, edit the 'Publishability' setting to 'Not available.'

After modifying addresses, you may also need to manage the organizations they belong to.

CREATING AND MANAGING ORGANIZATIONS

Before you can create Direct addresses for a new practice, department, or participating entity, you must first add that entity as an "Organization" within the tool. This creates a record that can then be associated with one or more individual or organizational Direct addresses.

To add a new organization:

1. Navigate to the "Manage Organizations" section of the tool.



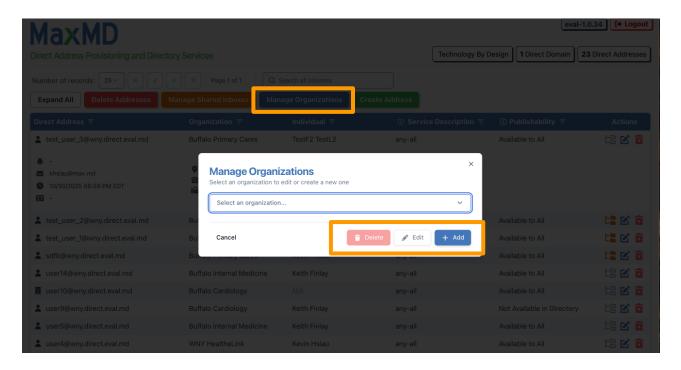


Figure 4: After selecting Manage Organizations from the dashboard, you can select an organization from

- 2. Click the "Add" button.
- 3. Fill out the organization's details, such as name and address.

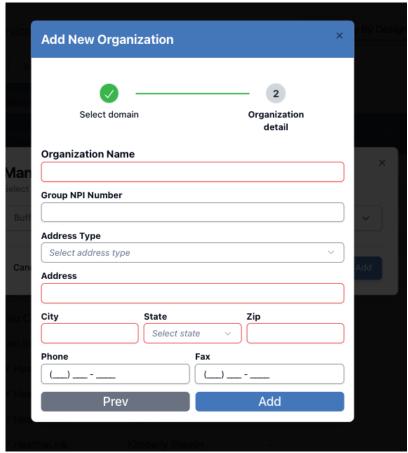


Figure 5: To add a new organization, complete the required fields and select Add.

When entering an NPI number, please be aware of the following validation rule:

- The NPI field is optional.
- If an NPI number is entered, the tool will validate it against the national NPI registry.
- If the NPI is found in the registry, the Organization Name you enter in the tool must be an exact match to the official name listed in the NPPES NPI registry. If the Organization Name entered does not match due to the NPI Registry being incorrect you must first correct the entry in the NPI Registry.

DELETING ORGANIZATIONS

Deleting an organization action is permanent and results in the complete removal of the organization and all associated data. To ensure this action is deliberate, the system presents the following critical warning:

"Deleting this organization will delete all direct addresses currently associated with this organization, including all data in the direct address mailboxes."



To finalize the deletion, a mandatory confirmation step is required. The user must type the word delete into a confirmation field to proceed. This critical safety control, a best practice seen in major cloud platforms, prevents accidental data loss by requiring an explicit, non-clickable confirmation.

Once an organization is created, it will appear in the dropdown menu during the address creation workflow, which is detailed in the next section.

CREATING A SINGLE DIRECT ADDRESS

This is the most straightforward method for creating one Direct address at a time, perfect for adding a new individual or a single organizational mailbox.

CREATING AN ADDRESS FOR AN INDIVIDUAL

Follow these steps to provision a new direct address for a single person.

 Login to https://www.maxmdirect.com.eval.max.md/direct/DirectAddressProvisioningAndDirectoryServices with your Username and Password.

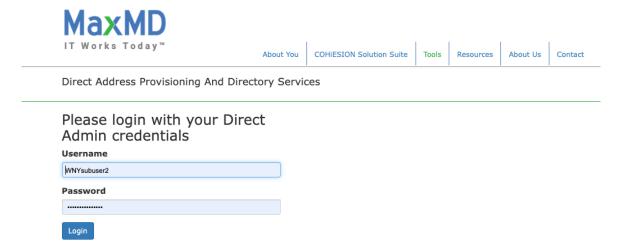


Figure 6: MayMD I agin screen for the Direct Admin Tool

2. **Chose Address Type** Select Create Address from the top menu, then select Individual Addresses



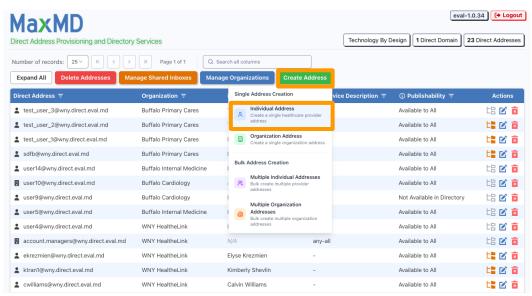


Figure 7: Create Address button dropdown menu which shows the options for creating a single address for an individual or an organization.

- 3. **Choose a Username** Remember, the username you select is permanent and must only contain letters, numbers, underscores, or periods. Direct addresses are NOT case-sensitve.
- 4. **Select an Organization** From a list of available organizations, choose the one the individual is affiliated with.

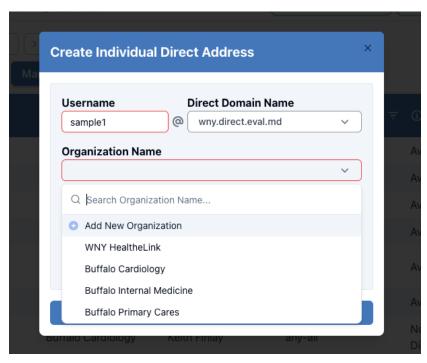


Figure 8: After adding in the Username and Direct Domain Name,

5. If needed, select Add New Organization from the drop down list. Complete the information required in the fields and select Add. Return to step 4 above and complete the individual's information.

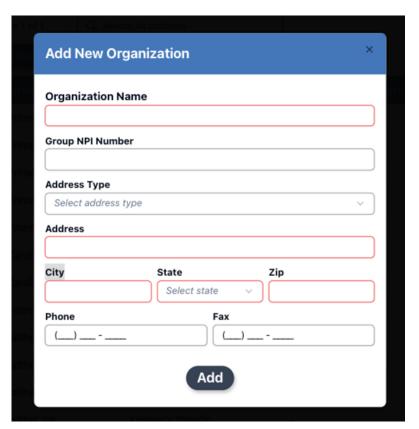


Figure 9: Adding a new organization during Direct

- 6. **Enter Individual Details** Fill out the required information for the individual. Key fields include:
 - NPI Number (Optional): If you enter an individual NPI, the tool will validate it to ensure the first name and last matches those found in the NPPES NPI Registry for that NPI number. If the first name and last name entered does not match due to the NPI Registry being incorrect you must first correct the entry in the NPI Registry.
 - Activation Email (Required for MaxMD Hosted Direct mdEmail customers): This is where the password setup instructions will be sent.
 - Alert Email (Optional): This is where non-PHI notifications about new messages will be sent.

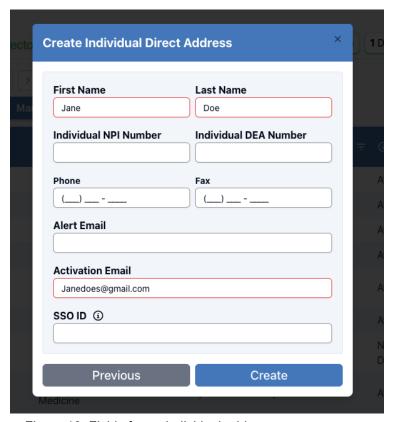


Figure 10: Fields for an individual address

7. **Confirm and Create** Once all the information is entered correctly, confirm your choices to create the Direct address.

CREATING AN ADDRESS FOR AN ORGANIZATION

This process is very similar to creating an individual Direct address but requires less information because it isn't affiliated with a specific person. You will simply provide a username and the relevant organizational details to complete the setup.

1. **Chose Address Type** Select Create Address from the top menu, then select Organization Addresses



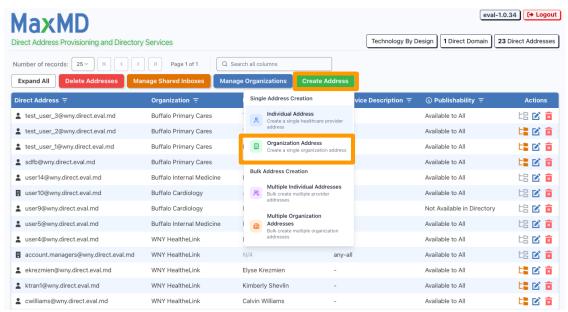


Figure 11: To create a single Organization Address, select Create Address and

- 2. **Choose a Username** Remember, the username you select is permanent and must only contain letters, numbers, underscores, or periods. Direct addresses are NOT case-sensitve.
- 3. **Select an Organization** From a list of available organizations, choose the one the organization is affiliated with.
- 4. Enter Other Details Fill out the required information for the individual. Key fields include:
 - Activation Email (Required for MaxMD Hosted Direct mdEmail customers): This is where the password setup instructions will be sent.
 - o Alert Email (Optional): This is where non-PHI notifications about new messages will be sent.
- 5. **Confirm and Create** Once all the information is entered correctly, confirm your choices to create the Direct address.

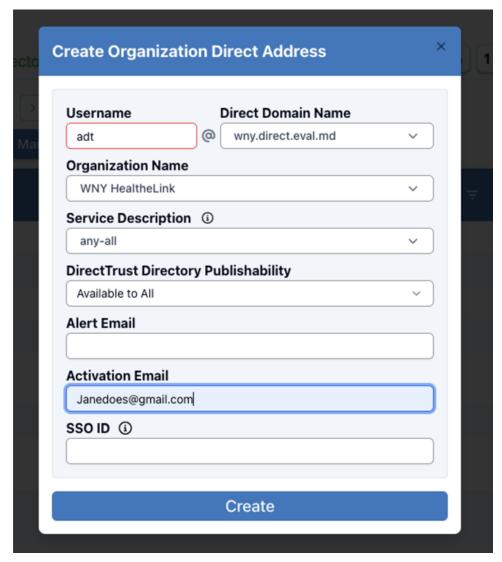


Figure 12: Inputs for creating an Organization Direct Address

Creating single Direct addresses is simple, but for adding many users at once, the bulk creation tool is the most efficient option.

CREATING MULTIPLE ADDRESSES AT ONCE (BULK CREATION)

This workflow is designed to save you significant time when you need to create multiple Direct addresses affiliated with a single organization. It's important to know that you can only provision Direct addresses for one organization at a time. For example, if you need to create 10 Direct addresses for a cardiology practice and 8 Direct addresses for a primary care office, you must run the bulk creation process twice—once for each organization.

Once you have logged in and are on the Administrator Dashboard, follow these steps to initiate the bulk creation process:

- 1. From the Dashboard, select Create Address from the top menu.
- 2. From the dropdown menu, choose either Multiple Individual Addresses or Multiple Organization Addresses, depending on your needs.

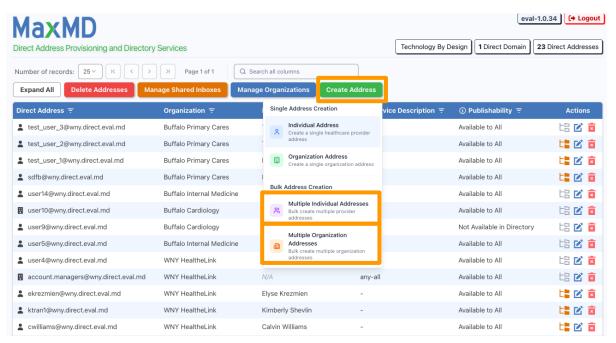


Figure 13: From the Dashboard, select Create Address icon, then Multiple Individual Addresses or Multiple Organization Addresses for bulk address creation

STEP 1: INITIAL SELECTION

After launching the bulk creation workflow for individuals, you must make two initial selections.

- 1. Choose the Direct Domain: From the dropdown menu, select the Direct domain (e.g., direct.domain.com) that will be used for all the new Direct addresses. This list contains pre-configured domains available to you.
- 2. Select the Organization: Choose the single organization or location that all the new Direct addresses will be associated with for this specific bulk creation process. The details of this organization, such as its name and phone number, will be linked to each new Direct address in the directory.



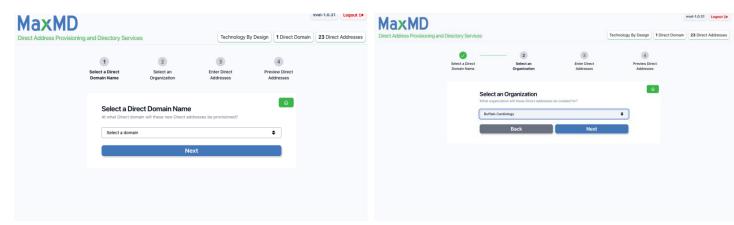


Figure 14: Initial steps for bulk creation of Individual or Organizational Direct Addresses

How to Enter User Information

The tool offers two distinct methods for entering the user information needed to create the Direct addresses.

OPTION A: CREATE DIRECT ADDRESSES BY USERNAME

This option is ideal if you already have a list of specific usernames you want to assign.

- 1. Select the "Create Direct addresses by username" option
- 2. In the text box provided, enter each unique username on a new line.
- 3. Be mindful of the required formatting. All direct addresses are formatted as username@direct.domain.com. The text box only requires the username portion. The following characters are supported:
 - Upper and lowercase letters (a-z, A-Z)
 - Integers (0-9)
 - Underscores (_)
 - Periods (.)
- 4. Spaces, exclamation points, dashes, and other special characters are not allowed in usernames.

By Username You can copy a list of unique usernames from a spreadsheet or document and paste them directly into the tool. Make sure there is only one username per line.

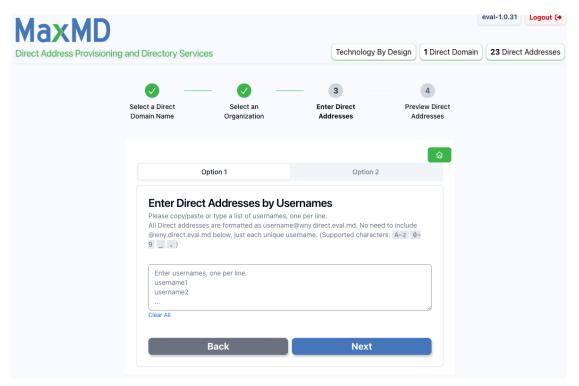


Figure 15: Example of Option 1, creating Direct Addresses by Usernames

OPTION B: CREATE DIRECT ADDRESSES BY FIRST AND LAST NAME

This option is useful when you have a list of names and want the system to generate usernames for you based on a consistent format.

- 1. Select the "Create Direct addresses by First and Last Name" option.
- 2. Enter each person's first and last name, separated by a space, with one name per line.
 - Important: Do not include middle names, titles, or suffixes (e.g., Jr., MD).
- 3. From the dropdown menu, select a standard naming convention (e.g., First.Last) for the system to use when creating the usernames.
- 4. You can also choose "Customize later," which will leave the username field blank on the next screen, allowing you to enter each username manually later.
- 5. Handling Double First Names: The tool processes names based on the first space it encounters. For individuals with double first names (e.g., Mary Joe Smith), you must enter the full first name in the first field ("Mary Joe") to ensure it is processed correctly, as the system is not designed to interpret multi-word first names automatically. You can review and edit this on the next screen if necessary.

By First and Last Name You can copy and paste a list of first and last names. Ensure each name is on its own line with the first and last name separated by a space. The tool then allows you to choose a standard naming convention (e.g., first.last) to automatically generate all the usernames for you.

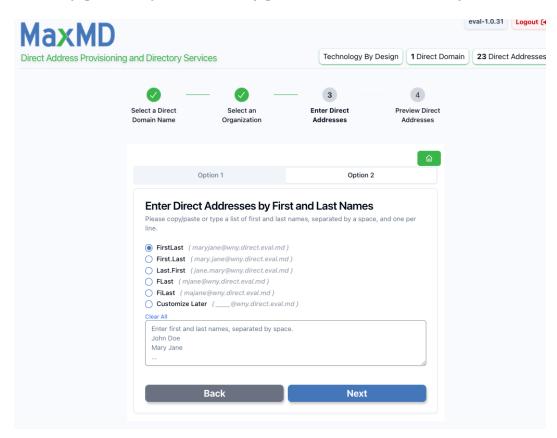


Figure 16: Example of Option 2: adding multiple names for bulk creation by first and last name. Select the format for the username from the options in the list.

Using the Preview Page to Finalize Details

After you enter the usernames or names, you will be taken to a "Preview Page." Think of this page as the efficiency and accuracy hub for the entire bulk creation process. Mastering its features, like "Bulk Edit" and "Set Default Values," is the key to saving the most time while ensuring all data is correct.

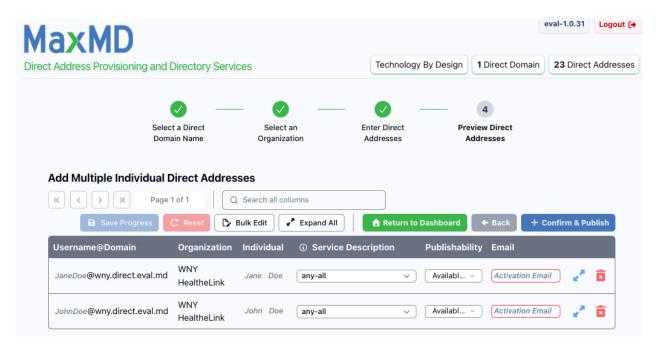


Figure 17: Review details and add Activation Email addresses for the bulk created Direct Addresses

1. **Review and Edit** You can expand each user's entry to see all the available fields. Simply click on a field to edit the information. Required fields that are missing information will be highlighted in red.

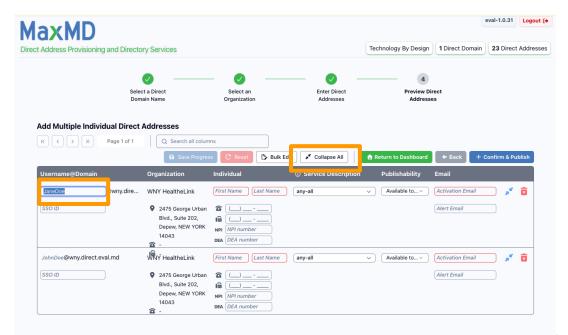


Figure 18: Toggle between Expanding and Collapsing All fields to confirm and add additional

2. **Use Bulk Edit for Efficiency** The "Bulk Edit" feature is a major time-saver. It allows you to paste an entire column of data from a spreadsheet or other external source—like NPI numbers or activation emails—and apply it to all users at once.

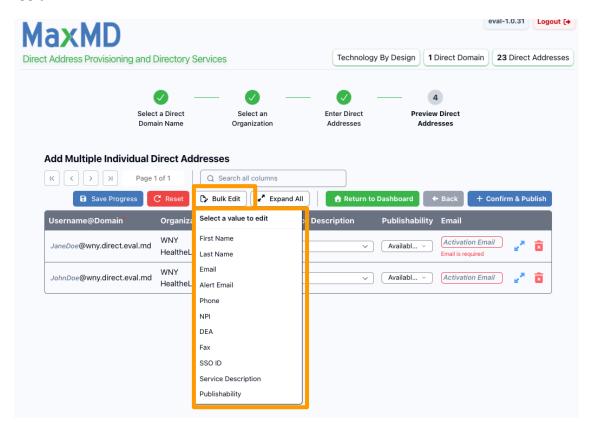


Figure 19: Bulk Edit allows for updating multiple records at once by selecting the Bulk Edit button on the top menu

3. Set Default Values For fields with a set list of options (like "Publishability" or "Purpose of Use"), you can select a default value that will apply to every user in the list. This allows you to set a standard for everyone and then edit by exception for any specific users who need a different setting. This can be done using the Bulk Edit feature as shown above, or updating fields on individual records.

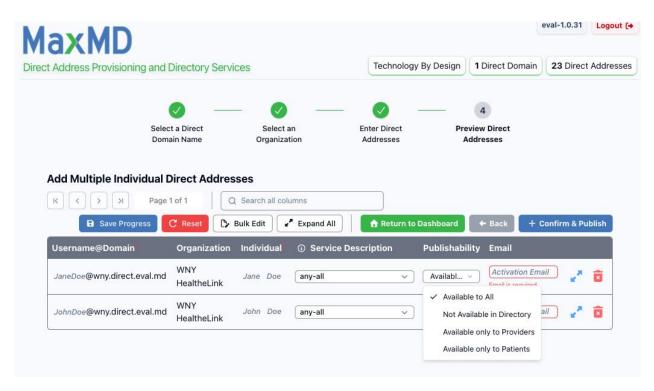


Figure 20: Updating the Publishability flag on individual addresses

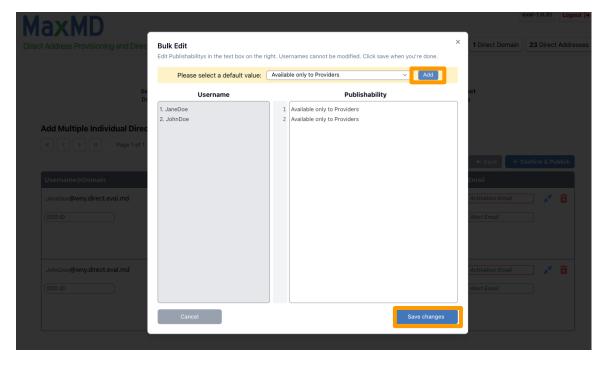


Figure 21: By using the Bulk Edit feature, the selected value can be updated for all newly

- 4. **Pasting a List of Unique Values:** For fields that require a unique value per user, such as an individual NPI number, you can copy an entire column of values from a spreadsheet and paste it directly into the bulk edit text box. The system will apply the first value from your copied list to the first user in the preview, the second value to the second user, and so on sequentially down the list. Ensure your spreadsheet column is in the same order as the users on the preview page. Rows can be skipped if the selected value is not applicable for certain users.
- 5. **Handle Validation Errors** The tool actively validates information. For example, if an individual NPI number is entered and the individual's first or last name does not match the NPI registry, an error message will appear. To resolve this, you must edit the user's name to be an exact match with the official NPI registry. If the first name and last name entered does not match due to the NPI Registry being incorrect you must first correct the entry in the NPI Registry.

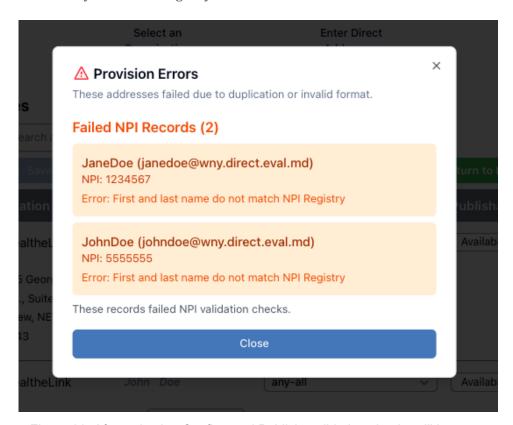


Figure 22: After selecting Confirm and Publish, validation checks will be run and errors must be corrected prior to publishing the Direct addresses.

6. **Confirm and Publish** Once all information is correct and errors are resolved, click the "Confirm and Publish" button. The total count of your organization's Direct addresses will update to reflect the new additions. Newly created Direct addresses will be contributed to the DirectTrust Directory overnight where applicable.

BULK CREATING ORGANIZATIONAL ADDRESSES

The process for creating multiple organizational Direct addresses (e.g., practicename@ or workflow-specific e.g. referrals@) is nearly identical to the individual workflow but is more streamlined due to the nature of the addresses. Organizational addresses will be edited, updated, have activation emails added, and confirmed and published on the dashboard, following the same procedure as individual addresses.

• The only option for entering data is By Username, as organizational addresses are not affiliated with individuals with first and last names.

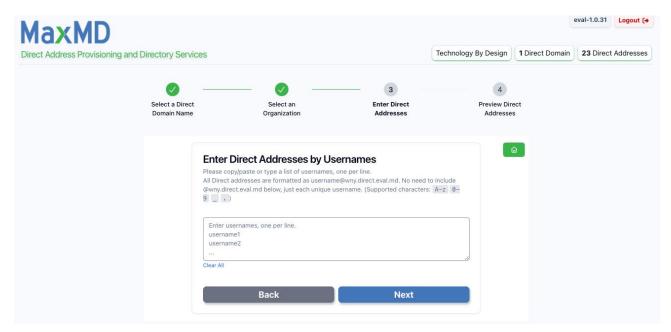


Figure 23: To bulk create Organization addresses, enter usernames for the organization level addresses in the text box

Once your Direct addresses are created, the tool also provides simple ways to manage them over time.

Managing Your Direct Addresses

Creating addresses is just the first step. The administrative tool also allows you to perform ongoing management tasks to keep your directory information accurate and up-to-date.

WHAT YOU CAN AND CANNOT FOIT

After a Direct address has been created, some information can be changed, while other parts are fixed.

Editable Information Fixe	ed Information
---------------------------	----------------



Organizational Name	Username
Directory Information (Street Address, Phone, etc.)	Direct Domain Name
Publishability Settings	

Because the Username and Domain are fixed, the only way to change them is to delete an existing address and create a new one with the correct information.



Figure 24: By selecting the edit icon from the dashboard for a published Direct address, the record will show all editable options

How to Delete an Address

WARNING: DELETION IS PERMANENT

Deleting a Direct address is an irreversible action. It will permanently erase the Direct address and all associated inbox data forever. The tool will show a confirmation warning before you finalize the deletion to ensure it is not done by accident.

As you manage your addresses, keep in mind how your changes are reflected in the wider network.

Follow these steps to delete a Direct address:

- 1. Navigate to the list of all Direct addresses.
- 2. Locate the specific Direct address you wish to delete.
- 3. Click the corresponding delete icon (e.g., a trash can symbol).
- 4. Carefully read the confirmation warning that appears.
- 5. If you are certain, confirm the action by typing DELETE to finalize the deletion.

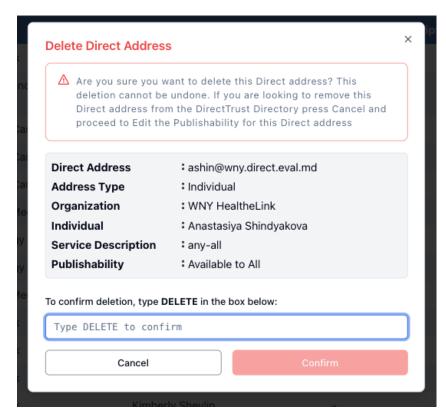


Figure 25: Warning prior to deleting a Direct Address

Managing Shared Direct Address Inboxes

The shared inbox management system allows administrators to grant access to a user's inbox to others or delegate access from an inbox to multiple users. This functionality facilitates collaborative workflows and ensures appropriate access to shared information.



UNDERSTANDING THE SHARED INBOX INTERFACE

The user list now includes visual indicators in the 'Actions' column to signify the shared inbox status for each Direct Address. These icons provide a quick at-a-glance reference:

- Orange Filled Icon: Indicates that shared folders exist for the Direct Address.
- Gray Hollow Icon: Indicates that no shared folders currently exist for the Direct Address.

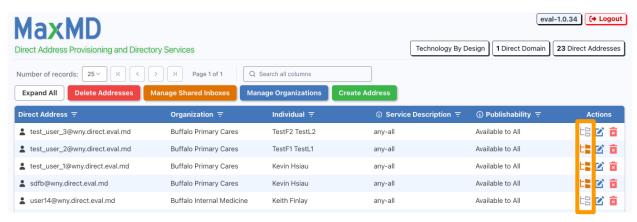


Figure 26: Shared inbox icons show on the right of the dashboard

CORE CONCEPTS: GRANTING VS. DELEGATING ACCESS

The system uses two distinct permission concepts—"granting" and "delegating"—to control inbox access. Understanding the difference is critical for proper administration. When managing Direct address inboxes for a team or organization, you'll often encounter terms like 'granting access' and 'delegating access'. At first, they might seem confusingly similar, but they represent two distinct ways to share information.

The purpose of this guide is to simply and clearly explain the difference between these two actions. By the end, you'll be able to confidently choose the right option for managing your shared inboxes.

Permission Type	Description & Example
Granting Access	This action allows a specific user to see someone else's inbox. The system describes this as: "I want Calvin to see someone else's inbox." Example: Access is granted to Calvin so he can view Kimberly's inbox.



Delegating Access	This action allows other users to see a specific user's inbox. The system describes this as: "I want someone else to see Calvin's inbox."
	Example: Calvin's inbox is delegated to Trisha, allowing her to view its contents.

GRANTING ACCESS: GIVING A USER A WINDOW INTO OTHER INBOXES

Granting access is the action of giving one specific user permission to see someone else's inbox. This approach is person-focused. It creates a one-to-many relationship: you start with one user and give them a window into many inboxes.

Use Grant Access when you want to answer the question: "I want Calvin to see someone else's inbox."

To make this clear, let's use an example with two individuals:

- Calvin: The user we are managing.
- Kimberly: The owner of an inbox Calvin needs to see.

In this scenario, Calvin has been granted access to Kimberly's inbox. This means Calvin can now see the contents of Kimberly's inbox.

Why It Matters: A Real-World Scenario

This is perfect for situations where one person needs to monitor multiple mailboxes as part of their job. For example, imagine Calvin is a nurse who supports three different healthcare providers. To do his job effectively, he would be granted access to all three of their inboxes.

So, granting is about giving one person access to other inboxes. But what if you need to do the opposite?

DELEGATING ACCESS: LETTING OTHERS LOOK INTO A SPECIFIC INBOX

Delegating access is the action of allowing another user, or multiple other users, to see the contents of one specific inbox. This approach is inbox-focused. It creates a many-to-one relationship: you start with one inbox and allow many users to look inside it.

Use Delegate Access when you want to answer the question: "I want someone else to see Calvin's inbox."

Let's look at an example with a different relationship:

- Calvin's Inbox: The specific inbox that needs to be shared.
- Trisha: The user who needs to see Calvin's inbox.

In this case, Calvin's inbox has been delegated to Trisha. This means Trisha can now see the contents of Calvin's inbox.

Why It Matters: A Real-World Scenario

This is ideal for a central or group inbox that a whole team needs to monitor. For instance, an organization might also have a central "ADT Alerts" inbox. To ensure the whole team is aware of these alerts, access to that single inbox would be delegated to all relevant team members.

Managing Permissions for a Single Direct Address

Administrators can manage permissions for an individual user directly from the user list by clicking the corresponding share icon.

MANAGING AN ADDRESS WITH EXISTING SHARES (ORANGE ICON)

1. Click the orange filled icon. The system first displays the existing configuration, showing "Other inboxes which this user can see" (Granted permissions) and "Other users which can see the inbox for this user" (Delegated permissions).

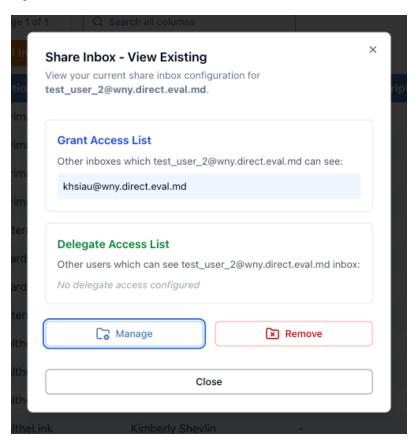


Figure 27: Viewing existing access granted and delegated to the selected user

- 2. Select the Manage button to add new permissions.
- 3. To add new permissions, select either the Grant Access or Delegate Access option.

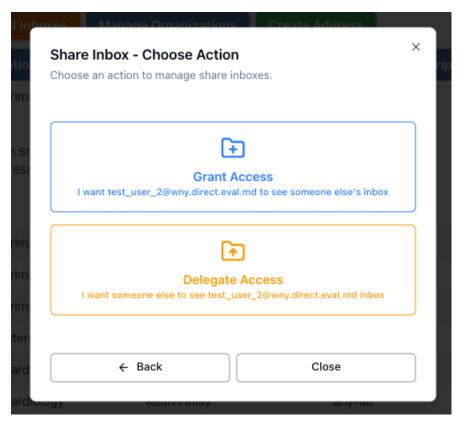


Figure 28: Select the appropriate option for Granting or Delegating Access

4. Select one or more other users from the provided list to whom access will be granted or delegated.

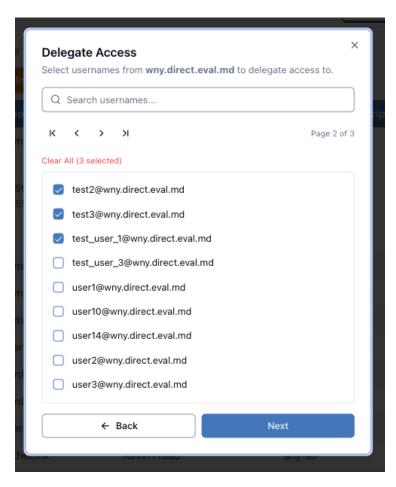


Figure 29: Select users to either Delegate or Grant access

5. To remove permissions, select the 'Remove' option next to either the 'Granted' or 'Delegated' list. You will then be prompted to select the specific permissions you wish to revoke from a checklist.



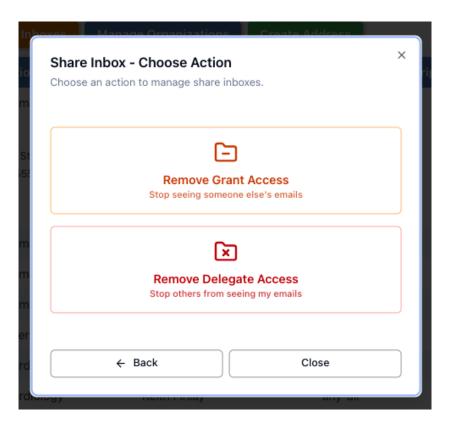


Figure 30: Select appropriate icon for removing access

CONFIGURING AN ADDRESS WITH NO SHARES (GRAY ICON)

Clicking the gray hollow icon bypasses the initial viewing step, as no existing relationships are present. The user is taken directly to the options to Grant Access or Delegate Access to begin establishing new sharing rules.

After selecting the appropriate addresses, confirm addresses to finalize.



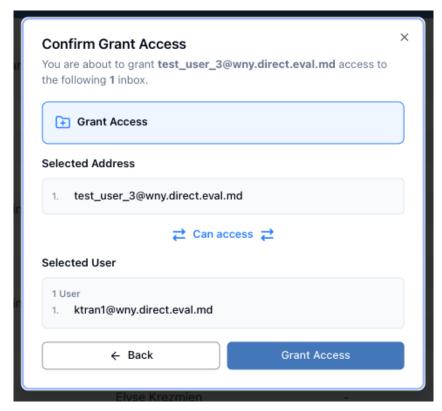


Figure 31: Confirm addresses prior to granting or delegating access to additional users

MANAGING PERMISSIONS FOR MULTIPLE USERS (BULK ACTIONS)

To efficiently manage permissions for multiple users simultaneously, use the "Manage Shared Inboxes" button. This feature is not just a time-saver; it is a critical tool for implementing role-based access control and streamlining user onboarding and offboarding processes.

Workflow for Bulk Actions:

1. Click the "Manage Shared Inboxes" button.



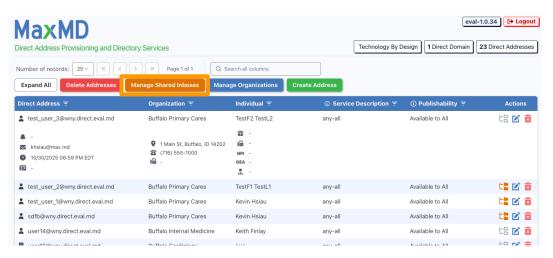


Figure 32: Select Manage Shared Inboxes

2. Select the appropriate domain from the dropdown list. Note: Administrators who manage multiple domains will see all of them listed here; all subsequent user selections will be filtered by the chosen domain.

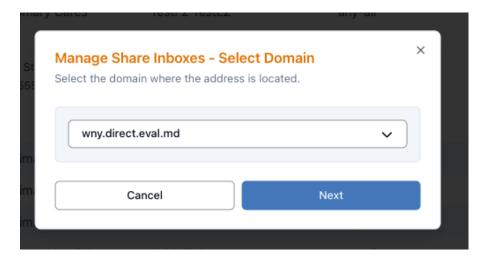


Figure 33: Select the domain for the shared inboxes

- 3. Select the Direct addresses of multiple users from the list.
- 4. Choose the desired action: Grant Access ("I want these users to see someone else's inboxes") or Delegate Access.
- 5. Select the target inbox(es) that the users selected in step 3 will receive access to.
- 6. Confirm the action to apply the permissions to all selected users.



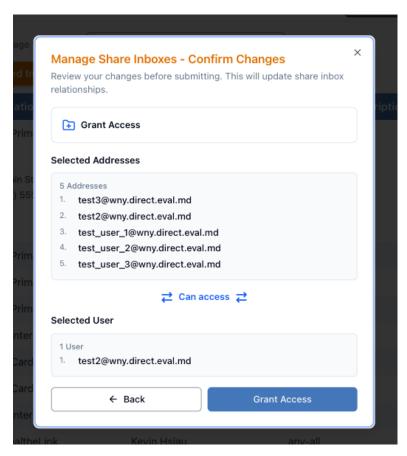


Figure 33: Confirm share settings for multiple addresses then select Grant Access

This bulk action feature is valuable for common administrative use cases:

- Delegating Access to a Shared Inbox: Easily delegate access for an ADT alerts inbox to a large group of new users at once.
- Granting Access for a Support Role: Grant a nurse access to the inboxes of the three providers they support in a single, efficient action.

ONE FINAL, IMPORTANT DETAIL

The 24-Hour Directory Update Cycle

Any change you make in the tool—creating a new Direct address, updating directory information, or changing publishability settings—is contributed by MaxMD to the centralized DirectTrust directory. These updates are contributed in a batch overnight process.

This means that a change you make today will be reflected in the DirectTrust Directory tomorrow. Once MaxMD contributes changes to the DirectTrust Directory it is incumbent on other Directory participants to ensure their copy of the DirectTrust Directory is up to date.