

Imprivata Cortext Guide for Desktop Application

GETTING STARTED

To get started with Imprivata Cortext, you need an invitation from the Imprivata Cortext administrator. Invitations can either be sent by email or printed on paper. The invitation includes an expiration date, and if you do not sign in before that date, you will need to request a new invitation.


SIGNING IN FROM AN EMAIL INVITATION

1. Open the email invitation on a computer that has access to your email.
2. Click **create an account now and get started**.
3. On the Imprivata Cortext page that displays, do one of the following:

If you already have an account:

- Click **Existing User** and add a directory to your account.

If you do not have an Imprivata Cortext account:

1. Click **New Cortext User**.
2. On the Create your account page, create a username that is unique across all users from all healthcare organizations. It is recommended that you use your email address.
3. Create a password that has a minimum of 8 characters, including one uppercase letter and one number. Type the password again to confirm, and then click **Create Account**.
4. Click the Imprivata Cortext icon  on your desktop, taskbar, or start menu to open the app, and sign in with your username and password.


SIGNING IN FROM A PAPER INVITATION

In a web browser, go to **start.cortext.com**. The welcome page displays. Do one of the following procedures:

If you have previously created an Imprivata Cortext account:

- Click **Existing User** and follow the instructions to add a directory to your account.

If you do not have an Imprivata Cortext account:

1. Click **New Cortext User**.
2. Create a username that is unique across all users from all healthcare organizations. It is recommended that you use your email address.
3. Create a password that has a minimum of 8 characters, including one uppercase letter and one number. Type the password again to confirm, and then click **Create**.
4. Click the Imprivata Cortext icon  on your desktop, taskbar, or start menu to open the app, and sign in with your username and password.

ADDING MORE DEVICES

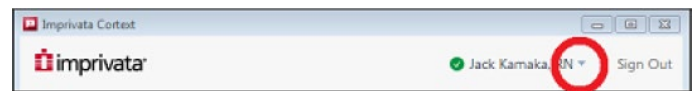
You do not need an additional invitation to add additional mobile devices.

1. On the new device, go to the Google Play store or App Store and download and install the Imprivata Cortext app.
2. Start the app, and tap **Sign In**.
3. Enter the Imprivata Cortext username and password that you used on your first device and tap **Sign In**.
 - Your Inbox opens and all account information is populated, and all directories and conversations are loaded on the new device.

ADDING ANOTHER DIRECTORY

You can utilize the same Imprivata Cortext account for multiple organizations using the app. You must have an invitation from each organization

1. Create your account and sign in from one invitation.
2. Have the invitation from the other organization available.
3. Click the down arrow next to your name.



4. Select **Settings** and then click **Add Directory**.
5. Type the 16-character invite code from your invitation.
6. Click **Add**.

SIGNING IN/OUT OF DESKTOP APPLICATION

One registered Imprivata Cortext user can sign in to the Desktop Application at one time.

To start the Desktop Application:


1. Click the Imprivata Cortext icon on your desktop or status bar.
2. Type your username and password, and then click **Sign In**.

To sign out and close the application:

1. In the top menu bar, click **Sign Out**.

NAVIGATING THE IMPRIVATA CORTEXT APP

Icons in the left menu strip of the Imprivata Cortext window:

- **Inbox:** Access your text conversations, read and reply to messages from your contacts, or compose new messages. To enter a conversation so you can read and reply to messages, click the conversation. To start a new conversation, click Compose .
- **Favorites:** Add to your Favorites list the contacts you communicate with most often.
- **Groups:** Create a group of contacts so that you can send messages to the group.
- **Directory:** View and contact the members of your organization who have been invited to use Imprivata Cortext by your Imprivata Cortext administrator.

The following options are located on the upper right of the screen:

- **Sign out:** Click to sign out of the Imprivata Cortext app. It is good security practice to Sign Out of the app if you are leaving the computer. If you close the Imprivata Cortext window without signing out, anyone could click the Imprivata Cortext icon on the computer desktop and have access to your information. While you are signed out, you cannot see newly received messages, but the messages are available when you log back in.
- **Drop-down arrow** next to you name:
 - **Your availability status**
 - **Settings:** add a directory, disable/enable your message-received alert
 - **Account:** change your password, edit your personal callback numbers


YOUR AVAILABILITY STATUS

You can set your availability status that will be seen by other users in the Inbox, Contact Info and Group Info screens, and Favorites.

- ✔ **Available:** You can send and receive messages, and receive notifications. You can send and receive messages to and from a colleague with this status.
- 🕒 **Busy:** You can send and receive messages, and receive notifications. You can send messages to a colleague with this status, but though the messages are received, the recipient may not be able to respond promptly; they can still send messages to you.
- 🚫 **Do Not Disturb:** You cannot compose or send messages. You do not receive any messages or message notifications. You can compose a message to a colleague with this status, but the message is not delivered until the recipient changes status to Busy or Available. The colleague cannot send or receive messages.
- ⊗ **Offline:** You do not select this status; contacts will see this status when you have signed out of the app. You can send a message to a colleague with this status, but the message is not delivered until the recipient signs into Imprivata Cortext.

To set your availability status, click the drop-down arrow next to your username and select your appropriate status.

FINDING A CONTACT IN THE DIRECTORY

Contacts are listed alphabetically by last name. To locate a contact click  and then perform one of the following actions:


- Page through the entries using the backward and forward arrows that are located at the bottom of the Directory list.
- Type in the search field to narrow the list. As you type, the available choices narrow to contacts whose first name, last name, or description fields below the name start with those letters.

VIEWING CONTACT INFORMATION


To view contact information, click the contact's name in the Directory list. The listing expands to show details. Office and mobile phone numbers are shown if they are in the directory.

SENDING A MESSAGE

From the Favorites, Groups or Directory:

1. Hover over the contact or group name and click .
2. A new message opens with the name of the contact in the **To** field. Compose the message and click **Send**.
 - If a conversation exists for the contact or group, the message is added to it. If there is no existing conversation, a new one displays in the Inbox list.

From the Inbox, do either of the following actions:

- Click  located at the top of the Inbox. In the **To** field, type the contact or group name. At the bottom of the screen, enter a new message, and then click **Send**.
- OR-
- Click an existing conversation, type a new message and then click **Send**.

MESSAGING COLLEAGUES OUTSIDE OF THE NETWORK

From the Imprivata Cortext app on an Android or iOS mobile phone, you can send a message to a recipient who is not a member of your Imprivata Cortext directories.

The recipient receives an SMS text message that contains a link to a secure webpage. When the recipient clicks the link, the web browser on the recipient's phone opens and displays the message. The recipient can send a reply from within the webpage.

Out-of-Network Messaging and the Desktop and Web Applications

You can initiate an out-of-network message only from the Imprivata Cortext app on an Android or iOS mobile phone. However, you can continue the conversation from the Imprivata Cortext Desktop or Web Application. Sign in to the Desktop or Web Application and open the conversation. You can send additional out-of-network messages to the recipient, and read and respond to the recipient's replies within the conversation.

STATUS OF MESSAGES THAT YOU SEND

Messages that you have sent display on your screen in a text bubble on the right side of the message area. For messages to a single recipient, information over the message bubble includes:


- **If the message is unread:** A closed envelope icon and the timestamp when the message was sent.
- **If the message has been read:** An open envelope icon and the time that the recipient opened the conversation containing the message.
- A drop-down arrow that has options to Forward or Delete the message.


STATUS OF MESSAGES TO MULTIPLE RECIPIENTS

The header of the message bubble contains a timestamp, an envelope icon, and a drop-down arrow.

- The timestamp is updated after all the recipients have read the message.
- The envelope remains closed until all the recipients have read the message.
- Numbers under the message bubble show how many recipients have read the message.
- The drop-down arrow has options to view message details, Forward or Delete the message.

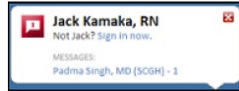
RESENDING UNSENT MESSAGES

A red exclamation point icon  on your message indicates that it was not sent. This can happen if there is a temporary loss of signal at the time you tried to send the message.

- **To resend an unsent message:** In the header of the message bubble, click  and select **Resend Message**.

RECEIVING MESSAGES AND MESSAGE NOTIFICATIONS

If you are signed in to the desktop application, but are not active in it, and you receive a message, a message notification displays in the lower part of your computer screen. The message notification is enabled by default. You can disable it in Settings.




In the Imprivata Cortext window:

- When you receive a new message, a number displays (or increments) on the Inbox icon in the menu strip, and on the right side of the conversation in the Inbox list.
- New conversations, and existing conversations that receive a new message display at the top of the list in your Inbox.

FORWARDING MESSAGES

You can forward a message, including an attached photo or callback request, to another contact or a group of contacts. The message displays in the recipient's Inbox with your name as the sender. You are able to edit the text if there is a need to add context.


To forward a message:

1. Click  and select **Forward Message**.
2. In the new message that opens, provide contact names, optionally add text, and then click **Send**.


DELETING MESSAGES AND CONVERSATIONS

Deleted messages and conversations no longer display on your screen, but other members of the conversation continue to see them in their Inboxes. Deleting a conversation does not delete the conversation from other users' inboxes or from the Imprivata Cortext archive.

To delete an entire conversation and all of its messages:

1. Select the conversation in the Inbox and then click the Delete icon  located in the upper right corner of the screen.


To delete a message:

1. In the message header, click  and select **Delete Message**.
 - If the message you are deleting is part of a conversation that contains more than one message, only the message you delete is removed. The other messages remain on your screen.
 - If the message is only one in a conversation, deleting it removes the conversation from your Inbox.

PHOTOS

You can view and forward photos that you receive. A reduced version of the photo displays in the message. To view it full size, click the photo. Photos must be in JPEG format, with a maximum size of 260 KB.


To send a photo:

1. Start a new message.
2. Click  and select the photo.
3. Add optional text and click **Send**.

CALLBACK REQUESTS

Callback requests let you include an embedded phone number as part of a message to request that the recipient calls you back at that number.

To initiate a callback request:

1. Start a new message from the Directory, Favorites, or from inside an existing conversation.
2. Click the phone icon , located to the left of the message text box.
3. In the Callback Request pop-up box, click the number that you want the recipient to use to call you back.
 - If you click **Custom**, the Callback Number dialog box opens for you to provide a number. Type the number and click **Add**.
 - If you did not provide personal callback numbers in your Account information, only the Custom field is available in the Callback Request pop-up box.
4. The call back request displays in the message area. You can type a message to accompany the request.
5. Click **Send**.
 - A callback request is sent to the contact. The callback number displays inside the message bubble, along with any text that you included.
 - To respond to a callback request, place the call as a regular phone call.

ADDING A FAVORITE

To add a favorite from a conversation with a contact:

- In the conversation header, click the empty star so that it turns yellow.

To add a favorite from the Directory:

- Click the contact's name to show the contact's information. Click the star so that it turns yellow.



REMOVING FAVORITES

Deleting contacts from Favorites does not delete them from the Imprivata Cortext Directory. You can continue to exchange messages with them, and if you want to, add them back to Favorites.

To remove a contact from your favorites, click the yellow star (so it becomes empty) from any of the following locations:

- In the Directory, in the contact's information.
- From the Favorites list.
- In the heading of a conversation with the contact.

INITIATING A MESSAGE TO MULTIPLE CONTACTS

- From the Inbox, click the compose icon  and add contacts in the To field; or
- From the Directory of Favorites list, click the Compose bubble  for each contact or group that you want in the conversation

To view all contacts in a group, click the conversation header, or from Favorites, click the group name.

To start a separate conversation with a person, click a contact.

To start a new message thread with a group you had a previous conversation with, click the conversation in your Inbox and send a new message.

CREATE A GROUP FROM A GROUP CONVERSATION

The group favorite will contain all of the message recipients. If you and any recipients belong to more than one organization, the Organization setting is the one you chose when you sent the original message.

To save members of a conversation as a group favorite:

1. Click Inbox and select the message whose multiple recipients you want to save as a favorite group.
2. In the message header, click the star.
3. In the **Add a Group** dialog box, provide an optional **Name** for the group, and then click **Save**.
 - The group favorite is added to your Groups list and your Favorites list.

CREATE A GROUP IN THE GROUPS LIST

1. In the left menu bar, click **Groups**, and in the heading of the Groups list, click **Add a Group**.
2. Type a Name for the group.
3. In the **Add to Group** field, type the names of the contacts that you want to add to the group.
 - As you type, the available choices narrow in the same way as when you search for contacts.
4. Click the contact name to add it to the group.
5. If you and any of the contacts you select belong to more than one organization, the Archive to the Following Directory field becomes available. Select the organization where the patient being discussed is receiving care, or select **None**.
6. Click **Save**.
 - The group is added to your Favorites list and your Groups list.

REMOVE A GROUP FROM FAVORITES

1. Click Favorites and then click the name of the group to expand the group information.
2. Click the yellow star.
3. Confirm the deletion.
 - The group is removed from your Groups and Favorites lists. Any messages that you previously sent to the group continue to display in your Inbox, but the conversation header shows the names of the group recipients, not the name of the group.

EDITING A GROUP

In a group that you create, you can add or remove contacts, and change the name of the group.

To edit a group that you have created:

1. Click Favorites or Groups and then click the name of the group to show group information.
2. Click **Edit**.
3. In the **Edit Group** dialog box, make appropriate changes.
4. Click **Save**.


GROUP INFORMATION IN THE MESSAGE HEADER

To show information about group members from the message header, click the expand arrow. The full name of each group member displays. To view information about a contact, click a name.

STATUS OF GROUP MESSAGES THAT YOU SEND

As with messages you send to a single contact, the header of the message bubble contains a timestamp, an envelope icon, and a drop-down arrow.

- The timestamp is updated after all recipients have read the message.
- The envelope remains closed until all the recipients have read the message.
- Numbers under the lower left corner of the message bubble show how many recipients have read the message.
- The drop-down arrow contains options to view message details and Forward or Delete the message.

To view details, click  in the message header and select Message Details.

To view information about a user, click the information icon .

SETTING YOUR CALLBACK NUMBERS

1. Click the down arrow next to your name and select **Account**.
2. In the Personal Callback Numbers section, click **Edit Numbers**.
3. Provide your numbers and click **Save**.

CHANGING YOUR PASSWORD

1. Click the down arrow next to your name and select **Account**.
2. Click **Change Password**.
3. Type your old password, the new password two times, and click **Save**.

YOUR MESSAGE RECEIVED ALERT

If you are signed in to the desktop application, but are not active in it, and you receive a message, an alert displays on your computer screen. The alert is enabled by default.

To turn off Message Received alerts so that they no longer display when you receive a new message:

1. Click the down arrow next to your name and select **Settings**.
2. On the **Settings** page, **Alerts** section, clear the **Message Received** checkbox.