

HEALTHCARE ORGANIZATION PROVISIONING ON THE DPP

The information described throughout this document is directed towards users who have administrative responsibilities within the organization, and will be in charge of performing tasks on the Direct Provisioning Portal (DPP). This document is to be used in conjunction with the additional documents provided by the DataMotion Support staff. These documents are briefly described in a [Documentation](#) section located [on page 17](#).

Your Health Care Organization will be granted the capability to provision companies onto the DPP. All companies that are created will be sub-companies or children to the initial tenant or parent company that was created by a DataMotion Officer. Upon successful creation and validation, every organization can have users created under them so long as the proper certificates are acquired. Information regarding these topics are contained in separate documents titled **Creating Users on the DPP** and **Performing Certificate Requests on the DPP** respectively. These documents are provided by DataMotion Support as supplementary material so that organizations can begin using the DataMotion Direct service as quickly as possible.

Prerequisites

Before beginning the provisioning process it is advised that the following actions be completed, and specific materials be close at hand before beginning. You should complete these prerequisites at this time if they have not been fulfilled already.

- Have an EIN, Organization NPI, or business license available.
- Have as much information regarding the organization at hand in order to make the first step easier.
- If a Trusted Agent is to be created during this process, have a signed Declaration of Identity Document on hand. If you do not have this document, you may retrieve a blank one from the Support page that can be reached via the corresponding link at the top of the web portal and to the left of your username.
- If a Trusted Agent is to be created during this process, have two government issued photo IDs saved as images (.PNG, .JPG, etc.) on a device.

NOTE: To avoid the need for two government issued photo IDs, use a passport for Photo ID.

- If you would like to add a domain during this procedure, have the appropriate domain name setup and ready for use.

First Time Users

If this is the very first time that you are interacting with the DPP, a DataMotion Officer will have performed the [Creating an Organization](#) section and all of its steps for you. If this is the case, you should go to the [Registering an Organization](#) section [on page 9](#) to complete the organizational provisioning process.

NOTE: For clarification, a first time user in this sense is the very first time that a company has any interaction with the DPP. Meaning that this will be the first time anyone in the organization is given an account to sign in and complete the process of registering their tenant company.

Creating an Organization

Creating a Healthcare Organization is the first step in the overall process to fully utilize all of the services provided by DataMotion Direct. Every organization that is provisioned on the DPP must have this process completed by either a Trusted Agent or Administrator user within the company before being able to proceed to the [Registering an Organization](#) process.

1. On the “Home” screen, select the host company for the new tenant company to be added. This will most likely be your company. Then select the Add Org button to begin the application process.

[DataMotion](#) > 1

Your Sub-Company:

Organization Name: 1	Status: Provisioned
Address: 1 1, AK 1	Phone: 1
Organization Type: Acute Care Hospital	HIPAA Compliance: HIPAA Covered Entity
Number of Seats: 100	Org Cert: Yes
Technical Contact:	Billing Contact:

Add Org Edit Org Delete Org

Please select one of the following tabs:

Tenants	Users	Domains	Certificates
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Tenants Search: Submit Clear

2. The **Create a Healthcare Organization** page will be displayed.

Create a Healthcare Organization

Welcome!

The following screens will take you through a short wizard to create a Healthcare Organization to use Direct Secure Messaging

What You'll See:

The wizard consists of 4 steps

1. Organizational Information
2. Domain Information (for Direct Addresses)
3. Authorized User Information
4. Organizational Validation

Once this application is completed, it will be submitted to the organization's Authorized User for validation, then onward to the DataMotion Registration Authority (RA) for verification and registration

What You'll Need:

At least one of the following is required

- The National Provider Identifier (NPI) of the Organization
- The Employer Identification Number (EIN) of the Organization (if you don't have/know the NPI)
- Business License (if you don't have either of the above, please have a copy of the organization's business license)

Ready?

Yes! Begin

No. I'll come back

-
3. Read this page carefully, and gather all of the materials listed under the **What You'll Need** section (if the *Prerequisites* section has been satisfied, this step is already complete).
 4. Click the **Yes! Begin** button to begin at *Step 1: Organization Information (Create HCO)*.

Step 1: Organization Information (Create Organization)

Create a Healthcare Organization

Step 1: Organization Information

If you know the NPI of the HCO, please enter it here to pre-populate the HCO's profile

NPI data is collected from the National Plan and Provider Enumeration System (NPPES) database organized by The Centers for Medicare & Medicaid Services (CMS). This publicly available information will be used to verify this organization, as well as pre-populate the organization's profile. Information in the NPPES database is updated monthly. If you believe there is an error with the data returned, please contact CMS.

NPI:

Include this HCO and its users in the Healthcare Provider Directory

If the HCO does not have an NPI, please enter the Organization Name. You may supply additional information if available, but it is not required.

Name*:

Address:

City: State:

Postal Code: Country:

Phone: Fax:

Initial Seat Count:

Organization Type: HIPAA Compliance Type:

Is this a Sole Proprietor? Yes No

Allow Tenant Co-branding of the Messaging Portal? Yes No

Will this company use XDR? Yes No

User Types

ONC: Clinical Non-Clinical

Meaningful Use: EP Non-EP

Support Contacts

Technical Contact

First Name:

Last Name:

Email:

Phone:

Billing Contact

First Name:

Last Name:

Email:

Phone:

1. If you know the NPI of the HCO you are trying to add, enter it into the NPI field to pre-populate most of the information on this page.
 - » If not, then manual input of the data will be required.
2. Enter the information of the HCO to be added into the appropriate fields. Only the Name field is required.
 - » It is recommended that you input as much information for as many fields as possible. Doing so will speed up the *Registering an Organization* process later on.


- » User Types: These define the types of users within the organization, for ONC/MU2 reporting. If the organization consists of both Clinical and Non-Clinical users, select Clinical. Similarly, if the organization consists of both EP (Eligible Professionals) and Non-EP, select EP.
 - » Support Contacts: The information in this section is optional; however, in the case that any technical or billing issues arise, contact information here will greatly expedite solving any issues.
3. Select Next, and proceed to *Step 2: Domain Information (Create HCO)*.

NOTE: Clicking the Next button will commit the creation of this HCO to the DPP. This means that the registration process for this organization must be completed with the Name that it was given in this step. Please ensure that the name of this organization is correct to avoid having to restart this process.

Step 2: Domain Information (Create Organization)

Create a Healthcare Organization

Step 2: Domain Information

A Direct-specific domain is required for Direct Secure Messaging. 

- Does this organization want to use its own (or its parent organization's such as an HIE) domain?

Example: DrBrown@direct.familypractice123.myHIE.org

Benefit: Direct address that clearly shows organizational affiliation

Tradeoff: Requires domain ownership to be confirmed by the owner and some domain configuration by IT admin

- Or would this organization like to use a domain provided by DataMotion?

Example: DrBrown@direct.familypractice123.dmhisp.com

Benefit: Simple, single-step process without any domain verification and configuration


Tradeoff: Direct address shows that DataMotion is the HISP

Domain:

Certificate Type

Please note:

- Organizational certificates cover all users who belong to the same organization.
- Address certificates cover individual users regardless of their organizational affiliation (each user needs to be ID-vetted).
- The same domain cannot be used for both organizational certificates and address certificates.

With which type of certificate will this domain be used? Organization Address 

Back

Next

1. Select the first radio button to add your own company domain or the second radio button to use a DataMotion domain.
2. Select your certificate type.

- » If Address was chosen, you can only select the “Or would this organization like to use a domain provided by DataMotion?” option.
 - » If Organization is chosen you can only select the “Does this organization want to use its own (or its parent organization’s such as an HIE) domain?” option.
3. Enter your domain in the **Domain** field.
 4. Click Next to move to *Step 3: Authorized User (Create Organization)*.

Step 3: Authorized User (Create Organization)

Create a Healthcare Organization

Step 3: Authorized User

A Regular Admin is responsible for the overall administration of this company's account. Things like: ?

- Completing/verifying this application
- Adding/Modifying users
- Running reports

A Trusted Agent (TA) is an administrator with additional privileges: a TA is responsible for **Requesting Certificates**, required for all Direct users. A TA must also be identity vetted. ?

Each company requires at least one administrator. Would you like to add a Regular Admin for this company or a Trusted Agent (TA)?

- Regular Admin
 Trusted Agent (TA) Admin
- Create a brand new TA Admin
 Use an already established TA Admin

First Name:

Last Name:

Direct Messaging Address:

Email Address:

The Authorized User will be tasked with performing administrative and TA functions for the HCO.

1. Select either TA Admin or Non-TA Admin for the **Please select the role of this user.**
 - » Please note that if Non-TA Admin is selected the HCO will not have a Trusted Agent. This means that the HCO will be unable to perform any trust based functions including user provisioning.
2. If TA Admin was selected in the previous step, one of the options next to **Please select one:** must be chosen.

- » Selecting **Create a TA Admin** user at the HCO will prompt the creation of a new TA which requires the steps listed in the [Step 3: Authorized User \(Register Organization\)](#) to be completed.
- » Selecting **Assign a TA Admin** from an existing HCO will prompt the following:

Select a TA:

Organization:

Phone:

Contact Email:

- » Use the **Select a TA:** drop-down to choose the TA for the HCO. The **Organization**, **Phone**, and **Contact Email** will be auto populated upon selection.

3. Click Next to move to [Step 4: Verify Your Organization \(Create Organization\)](#).

Step 4: Verify Your Organization (Create Organization)

Create a Healthcare Organization

Step 4: Verify Your Organization

The Direct Project was built on trust. In order to use Direct Secure Messaging, the HCO must be verified. Please meet at least one of the criteria listed below:

NPI:

EIN:

Business License Submitted

Terms of Service for Digital Certificates

DataMotion, Inc. is an EHNAC accredited Certificate Authority ("DataMotion CA") and Registration Authority ("DataMotion RA") as well as an EHNAC accredited Health Information Services Provider ("DataMotion HISP", or "HISP"), (collectively, "DataMotion").

Applicant is a HIPAA covered entity or business associate or an individual provider engaged in healthcare related services individually or on behalf of an entity or healthcare organization ("Applicant"), and requires use of X.509 v.3 digital certificate(s) issued by DataMotion CA for use of Direct Exchange services of the HISP for its

I agree to the terms above

1. Input either the organization's NPI or EIN into the appropriate field. If it is not possible to submit the previous choices, then use the **Submit** button to email the license to DataMotion.
2. Click the **I agree to the terms above** checkbox.

3. Click Next to complete the process.

NOTE: Once an Organization is validated by a DM Officer, only the co-branding, HPD options, and the contact information can be edited. Please ensure that all information is properly entered into the portal before selecting the Submit button.

Registering an Organization

Successful creation of an HCO will send a notification email to the TA that was designated during the creation process that informs them an HCO requires registration. If a new TA was created for this HCO then that TA will have to create a password before they are brought to the appropriate registration page. In either case successful login will navigate the TA to the Register a Healthcare Organization page and display a page outlining the general procedure and the information you must have prepared in order to meet the requirements of the registration process. If you do not have all of the required information being asked for on the page, it will not be possible to complete the process.

Register a Healthcare Organization

Welcome!

Most of this wizard has been pre-filled for you, but we'll still need some of your input. For the information that was pre-filled, please verify that it is accurate and correct. For the blank parts of the application, please follow the directions on-screen to fill them out.

What You'll See:

The wizard consists of 4 steps

1. Organizational Information
2. Domain Information (for Direct Addresses)
3. Authorized User Information
4. Organizational Validation

Once this application is completed, it will be submitted to the organization's Authorized User for validation, then onward to the DataMotion Registration Authority (RA) for verification and registration

What You'll Need:

Please have the following handy:

- The National Provider Identifier (NPI) of the Organization (pre-filled, if applicable)
- The Employer Identification Number (EIN) of the Organization (if you don't have/know the NPI)
- Business License (if you don't have either of the above, please have a copy of the organization's business license)
- Your individual NPI (if applicable)
- Your valid Government-issued photo ID (Driver's License, State ID, US Passport)

Note: if the device you're using does not have a camera, please have a picture of the ID and a recent picture of yourself easily accessible

Ready?

Yes! Begin

Please note that clicking the Yes! Begin button will prompt the acceptance of a Terms of Service. Once the terms are agreed to, the registration process will start at [Step 1: Organization Information \(Register Organization\)](#).

Step 1: Organization Information (Register Organization)

Register a Healthcare Organization

Step 1: Organization Information

If you know the NPI of the HCO, please enter it here to pre-populate the HCO's profile

NPI data is collected from the National Plan and Provider Enumeration System (NPPES) database organized by The Centers for Medicare & Medicaid Services (CMS). This publicly available information will be used to verify this organization, as well as pre-populate the organization's profile. Information in the NPPES database is updated monthly. If you believe there is an error with the data returned, please contact CMS.

NPI:

Include this HCO and its users in the Healthcare Provider Directory

If the HCO does not have an NPI, please enter the Organization Name. You may supply additional information if available, but it is not required.

Name*:

Address*:

City*: State*:

Postal Code*: Country*:

Phone*: Fax:

Initial Seat Count*:

Organization Type: HIPAA Compliance Type:

Is this a Sole Proprietor? Yes No

Allow Tenant Co-branding of the Messaging Portal? Yes No

Will this company use XDR? Yes No

User Types

ONC: Clinical Non-Clinical

Meaningful Use: EP Non-EP

Support Contacts

Technical Contact

First Name:

Last Name:

Email:

Phone:

Billing Contact

First Name:

Last Name:

Email:

Phone:

1. If the NPI was not previously entered or there are still fields left empty, input accurate information for the remaining fields marked with an * symbol.

2. Select the **Organization Type** of the HCO. You can select either Acute Care Hospital, Ambulatory Practice/Entity, Non-hospital Clinical Lab, or Other Health Care Related Organization.
3. Select the **HIPAA Compliance Type** of the HCO. You can select either HIPAA Covered Entity, HIPAA Business Associate, or Other HIPAA Entity.
4. Choose if the HCO is a Sole Proprietor.
5. Decide if the HCO will be allowed to have its tenants cobrand the Direct Messaging Portal.
6. Choose if the HCO will use XDR.
7. Select the User Types present within the HCO.
 - » User Types: These define the types of users within the organization, for ONC/MU2 reporting. If the organization consists of both Clinical and Non-Clinical users, select Clinical. Similarly, if the organization consists of both EP (Eligible Professionals) and Non-EP, select EP.
8. Input information for the HCO's Support Contacts if applicable.
 - » This step is not required, however, in the case that any technical or billing issues arise, contact information here will greatly expedite solving any issues.
9. Click Next to proceed to ***Step 2: Domain Information (Register Organization)***.

Step 2: Domain Information (Register Organization)

Register a Healthcare Organization

Step 2: Domain Information

A Direct-specific domain is required for Direct Secure Messaging. 

Does this organization want to use its own (or its parent organization's such as an HIE) domain?

Example: DrBrown@direct.familypractice123.myHIE.org

Benefit: Direct address that clearly shows organizational affiliation

Tradeoff: Requires domain ownership to be confirmed by the owner and some domain configuration by IT admin

Or would this organization like to use a domain provided by DataMotion?

Example: DrBrown@direct.familypractice123.dmhisp.com

Benefit: Simple, single-step process without any domain verification and configuration


Tradeoff: Direct address shows that DataMotion is the HISP

Domain:

Certificate Type

Please note:

- Organizational certificates cover all users who belong to the same organization.
- Address certificates cover individual users regardless of their organizational affiliation (each user needs to be ID-vetted).
- The same domain cannot be used for both organizational certificates and address certificates.

With which type of certificate will this domain be used? Organization Address 

[Back](#)

[Next](#)

1. Select the first radio button to add your own company domain or the second radio button to use a DataMotion domain.
2. Select your certificate type.
 - » If Address was chosen, you can only select the “Or would this organization like to use a domain provided by DataMotion?” option.
 - » If Organization is chosen you can only select the “Does this organization want to use its own (or its parent organization’s such as an HIE) domain?” option.
3. Enter your domain in the **Domain** field.
4. Click Next to proceed to *Step 3: Authorized User (Register Organization)*.

Step 3: Authorized User (Register Organization)

This step of the process varies depending on the decision made during the Step 3: Authorized User (Create Organization) part of the process. If the decision was to have a TA assigned to the HCO being created then this entire step is not required. If the decision was to create a new TA for this HCO, then this step must be followed in its entirety.

Register a Healthcare Organization

Step 3: Authorized User

Identity Information

As the Trusted Agent (TA) for this HCO, you will be responsible for requesting certificates and registering Direct Address for the users within your company. In order to become a TA, the DataMotion Registration Authority (RA) must verify your identity. The information below is required, unless otherwise noted.

First Name*:	<input type="text"/>	Last Name*:	<input type="text"/>
Contact Email*:	<input type="text"/>		
Home Address*:	<input type="text"/>		
	<input type="text"/>		
City*:	<input type="text"/>	State*:	<input type="text" value="ID"/>
Postal Code*:	<input type="text"/>	Country*:	<input type="text" value="United States"/>
DOB (mm/dd/yyyy):	<input type="text"/>	SSN (last 4):	<input type="text"/>
Photo ID Type*:	<input type="text" value="Drivers License"/>		
State*:	<input type="text" value="ID"/>		
ID Number*:	<input type="text"/>		
Expiration Date*:	<input type="text"/>		
Upload completed and signed "Declaration of Identity" document (.pdf, .png, .jpg, .tif)			
<input type="button" value="Browse..."/> No file selected.			
<input type="button" value="Back"/>		<input type="button" value="Next"/>	

- Enter accurate information into all fields on this page that have a * symbol.
 - The Photo ID Type drop-down contains the types of ID that are acceptable for submission which are a Driver's License, Passport, or State ID.
 - In some cases a second ID may be required depending on which Photo ID Type was selected. This only occurs for certain states.

NOTE: To avoid the need for two government issued photo IDs, use a passport for Photo ID.

- Upload the signed DoID which must be in one of the formats specified on the page (.pdf, .png, .jpg, and .tif are currently accepted).
- Click Next to proceed to *Step 4: How would you like your alerts to be communicated?*

NOTE: Ensure that the DoID being submitted is fully accurate and validated (signed by a notary or existing Trusted Agent) before clicking the Next button. If not then the entire process will have to be restarted beginning with Step 1: Organization Information (Create Organization). This is because once the DoID is submitted during this step, it is not possible to remove it and submit a different one.

Step 4: How would you like your alerts to be communicated?

Register a Healthcare Organization

Step 4: How would you like your alerts to be communicated?

Alerts include notifications about certificate requests, identity validation results, and other administrative notifications.

Select at least one:

- Email Notifications
- Web Notifications

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Next

1. Select how notifications should be received.
 - » Email Notifications will send all relevant notifications to the email address provided during Step 3: Authorized User (Register Organization).
 - » Web Notifications will submit all notifications to the web UI itself.
2. Click **Next** to proceed to [Step 5: Verify Your Organization \(Register Organization\)](#).

Step 5: Verify Your Organization (Register Organization)

The information provided during this step should match the information that was provided during [Step 4: Verify Your Organization \(Create Organization\)](#) part of the process. It is possible to change the information during this step if desired, however it is not advised. The reason for this being that when the organization is reviewed by a DataMotion Officer it could cause some confusion to as why there is a discrepancy present in this step if the information provided is not congruent in both steps. This does not mean that the registration will be a failure, but it could cause delays in the validation process.

Register a Healthcare Organization

Step 5: Verify Your Organization

The Direct Project was built on trust. In order to use Direct Secure Messaging, the HCO must be verified. Please meet at least one of the criteria listed below:

NPI:

EIN:

Business License Submitted

Back

Next

1. Enter either the NPI, EIN, or Business License of the organization being registered.

- » Submitting the Business License will open an email client on your computer when the Submit button is clicked. Attach the organization's Business License to this email and send it to the designated party at DataMotion. Once that task is completed, click the **Business License Submitted** checkbox.

2. Click **Next** to complete the application.

Register a Healthcare Organization

Completed.

Your application has been successfully completed with the Transaction ID: 0000000006

What now?

Click on "Finish" to submit this application to the Registration Authority (RA) for validation. Once submitted, you will receive an email with the validation results. If successful, you can begin requesting certificates and provisioning Direct users.

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Finish

3. Click the **Finish** button to submit the registration to DataMotion for validation.

Glossary

Throughout this document numerous terms have been used that correspond to specific user roles, functions, and technical terms that are used on the DataMotion Direct Provisioning Portal. This section provides an overview of these terms for reference.

- Direct Provisioning Portal (DPP) – Acronym used for the DataMotion Direct Provisioning Portal. This is the more common name that the portal is referred by within the DataMotion HISP.
- DataMotion Officer – An individual within the DataMotion HISP that is responsible for performing validation checks on domains, certificates, and users.
- Administrator (Admin) – The user role on the DPP that is normally used to administer the companies to which the user with the role is a part of or is the parent of within the company hierarchy.
- Trusted Agent (TA) – The only user that is able to perform certificate requests on the DPP for the creation of users on a specific domain.
- Declaration of Identity Document (DoID) – A validation form that is used to prove the identity of the user that is to be given a Direct Address or the status and powers of a TA.
- Comma Separated Value (CSV) – File format type used to submit a spreadsheet containing the information of users to be added on the DPP.

Appendix

During the creation and registration processes described in this document, there are a number of requirements listed which contain elements not fully detailed during the instructions. These requirements are presented during *Step 1: Organization Information (Create Organization)* and are as follows:

- Organization Type:
 - » Acute Care Hospital – The organization is a short-term hospital facility with appropriate medical staff and equipment to provide diagnosis, treatment, and care
 - » Ambulatory Practice/Entity – The organization is an outpatient medical practice commonly viewed as a traditional doctor’s office, but can include other outpatient outlets such as emergency clinics.
 - » Non hospital Clinical Lab – The organization is a diagnostics laboratory that performs imaging (MRI, CT, PET, etc.) or clinical diagnostics such as bloodwork tests.
 - » Other Health Care Related Organization – Can be any other health care related facility that does not fit into the descriptions of the other three organization types.
- HIPAA Compliance Type:
 - » HIPAA Covered Entity – Defined as a Health Plan, Health Care Clearinghouse, or Health Care Provider that electronically transmits health information. If the

Organization Type selected falls into one of these categories, select this compliance type.

- » HIPAA Business Associate – Defined as an individual person or entity (company, group of persons) that provides services to a HIPAA Covered Entity where protected health information is involved. If the Organization Type selected provides any form of service to an organization where protected health information is involved and that organization is considered a covered entity, then select this Compliance Type.
- » Other HIPAA Entity – Can be defined as a hybrid entity which meets the qualifications of a Covered Entity but only for certain sections of the organization. Common examples would include university’s which possess medical research laboratories or hospitals as extensions to the university itself.
- User Types:
 - » ONC (Clinical vs. Non-Clinical) – The clinical user is selected if the users within an organization provide healthcare services directly to patients including diagnosis, treatment, care, etc. If no users within the organization do provide such healthcare services to patients, select Non-Clinical.
 - » Meaningful Use (EP vs. Non-EP) – Refers to whether the users within an organization are considered eligible professionals by guidelines set by CMS (the Center for Medicare & Medicaid Services). These guidelines are listed [HERE](#) for convenience. Should none of the users within the organization meet these guidelines select Non-EP.

Documentation

This section provides a brief overview of the documents provided by the DataMotion Support staff that provide essential instructions to be used in conjunction with this document.

- *Performing Certificate Requests on the DPP:* This document specifically describes the process of requesting certificates using the DataMotion Direct Provisioning Portal. Includes information and instructions for Organization and Address based certificates.
- *Creating Users on the DPP:* This document specifically describes the process of adding users to the DPP. It includes instructions for every user type on the DPP.

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