

## PERFORMING CERTIFICATE REQUESTS ON THE DATAMOTION DIRECT PROVISIONING PORTAL

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 information is to be used in conjunction with the additional documents provided by DataMotion Support. These documents are briefly described in a [Documentation](#) section located [on page 5](#).

Every Health Care Organization will be provided the capability to perform certificate requests for the various domains that are on the system, provided that the organization has at least one Trusted Agent and one validated domain. The user and the proper domain should have been established during the create organization process described in the **HealthCare Organization Provisioning on the DPP** document provided. These certificates will be used for users that are added to the DPP as described in the **Creating Users on the DPP** document which was also provided.

### Prerequisites

Before performing any certificate requests on the DPP, 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 HCO fully created and registered on the DPP.
- Have a Trusted Agent user present within the HCO (for first time users, this user will be created during the create/register organization process). If you need to create one, follow the instructions in the **Adding a New Trusted Agent** section in the **Creating Users on the DPP** document.
- Have a validated domain for use with either an address certificate or organization certificate (for information on how to get a validated domain if you do not have one already, see the appendix located [on page 5](#)).
- If you are submitting an address certificate request, a Direct user created with the Address certificate type selected, must be present on the DPP. See the **Creating Users on the DPP** document and refer to the **Direct User Covered by an Address Certificate** section.

### Certificate Requests

When a TA has been successfully created, or one is already present, certificates can be requested via the **Certificates** tab. Only Direct users may be granted a certificate at the end of a successful certificate request. It is not possible to give any type of certificate to an Administrator or Trusted Agent user. In the event that there are no Direct users it will not be possible to apply a certificate.

There are two types of certificates available for generation. Address certificates are meant for adding Direct users that must have a single valid recipient for communication. The generated certificate as a

result is exclusively tied to that single Direct user and no one else. Organization certificates on the other hand will allow an HCO to add as many Direct users as they wish (within seat count limits) to the DPP under the same certificate. This certificate is most commonly used by organizations with a large number of users in a single location such as a hospital.

The following sections describe the process to acquire a certificate.

## Organization Certificate Request

Requesting an organization certificate requires a TA that is either assigned to the company, or there is one already present within the company. The domain that is going to be used for the organization certificate must also be validated in order to make this request. If you do not have a valid domain for organization certificates see the appendix [on page 5](#). The TA can make the request by using the **Request Org Cert** field below.

1. On the Home page, click the **Certificates** tab, then press the **Request Org Cert** link.

<b>Organization Name:</b> Hospital Test	<b>Status:</b> Provisioned
<b>Address:</b> 1 Test Rd Test, AK 07825	<b>Phone:</b> 2013436221
<b>Organization Type:</b> Non-hospital Clinical Lab	<b>HIPAA Compliance:</b> HIPAA Covered Entity
<b>Number of Seats:</b> 1	<b>Org Cert:</b> Yes
<b>Technical Contact:</b>	<b>Billing Contact:</b>

Tenants
Users
Domains
Certificates
Request Org Cert
Request Address Cert

2. Select which **TA** will be responsible for the request.
3. Select the domain from the **Available Domains** drop-down.
4. Click the **Create certificate for the selected domain** checkbox to autofill the Subject field.
5. Select the **Lifetime** of the certificate. The lifetime can be 1, 2, or 3 years.

**NOTE: If the domain has not been validated successfully, the fields to make the request will be inaccessible.**

## Request Organization Certificate

Please enter the following information:

TA:

Subject:

Available Domains:

Create certificate for the selected domain

Lifetime (years):

6. Click the **Submit** button.

**NOTE: Submitting a request for an organization certificate will cause a transaction to be generated, meaning that you will be billed when this action occurs. Please ensure that all of the information being sent in the request is accurate to avoid unwanted transactions.**

A DataMotion Officer will handle and approve the request upon receiving it from the web portal. The approved request is submitted to the DataMotion CA/RA and properly generated. Once the certificate is successfully validated, it will be provisioned on the DPP, and can be used to add users going forward.

## Address Certificate Request

Requesting an address certificate is performed in largely the same way as a requesting an organization certificate. A TA user and a validated domain are required in order to perform this task. It is worth noting that the recipients of address certs can only be **Validated** Direct users (see the **Creating Users on the DPP** document for information regarding this task). For example the user must have the Status circled in the image below:

Tenants Users Domains Certificates Add User Bulk Import

Users

Results 1 - 4 of 4 Records Display:

Account Access:

	Name	Direct Messaging Address	Account Access	Status
del edit	2, 2	2@2.com	TA	Validated
del edit	Miller, Kevin	2admin@2.com	Admin	Provisioned
del edit	Doe, John	myaddresscertuser@five.com	User	Provisioned
del edit	Smith, Bob	myaddresscertuser3@five.com	User	Validated

1. On the Home page, click the **Certificates** tab, then the **Request Address Cert** link.

<b>Organization Name:</b> Hospital Test	<b>Status:</b> Provisioned
<b>Address:</b> 1 Test Rd Test, AK 07825	<b>Phone:</b> 2013436221
<b>Organization Type:</b> Non-hospital Clinical Lab	<b>HIPAA Compliance:</b> HIPAA Covered Entity
<b>Number of Seats:</b> 1	<b>Org Cert:</b> Yes
<b>Technical Contact:</b>	<b>Billing Contact:</b>

2. Select which user will receive the address certificate from the **Subscriber:** drop-down. Their Direct address will be populated automatically and cannot be edited.
3. Select the lifetime of the certificate using the **Lifetime (years):** drop-down. You can select either 1, 2, or 3 years.
4. Click the **Submit** button.

## Request Address Certificate

Please enter the following information:

Subscriber:

Direct Address:

Lifetime (years):

**NOTE: Unlike the Organization Certificate, submitting a request for an Address Certificate is not a billable event, meaning that no transactions will be generated from these submissions.**

A DataMotion Officer will validate the request, completing the process. When a submission is successful, the user whose address was entered into the Direct Address field, will be fully activated. From this point forward they will be able to send/receive Direct messages.

## 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: Domain Validation

This appendix contains information for acquiring valid domains to be used for certificate requests and user creation on the DPP.

Perform the following steps to validate a domain:

1. On the Home screen click the **Domains** tab.
2. Click on the **Add Domain** link.

Please select one of the following tabs:



Domains


Results 1 - 4 of 4 Records

Name	Cert Type	Status	Date Added
four.com	Address	Validated	02/17/2016
three.com	Organization	Validated	02/17/2016
two.com	Address	Validated	01/29/2016
one.com	Organization	Validated	01/21/2016

3. Select the first radio button to add your own company domain or the second radio button to use a DataMotion domain.
4. 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.
5. Enter your domain in the **Domain** field.

## Add Domain

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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](mailto: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](mailto: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

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**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 

## 6. Click **Submit**.

Upon successful validation by a DataMotion Officer, the domain will be available for certificate requests and for users who must have address certificates.

## 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.

- *HealthCare Organization Provisioning on the DPP:* This document specifically describes the process to create and register a HealthCare Organization on the DataMotion Direct Provisioning Portal.
- *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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