



CrystalPM - Kno2

Secure Messaging Integration Guide

Introduction:

Crystal PM's Kno2 Integration brings new features related to securing messaging, including:

- Sending and receiving faxes
- Sending and receiving messages from multiple addresses
- Unread message notifications
- The ability to manage messages from the web

The integration supports the same Meaningful Use Stage 3 functionality as the original secure email feature in CrystalPM.

Requires Crystal PM Version

5.3.14 (and above)

Integration Setup in Kno2

Upon activation of your Kno2 account, you will login to your Kno2 account at <https://kno2fy.com> to obtain your Client Key, Client Secret, and App ID.

License and Application ID for Access to API

1. Select the **Settings** gear
2. Select **Add-ons**
3. Select the **Licenses** tab
4. Select the **Enter Additional License** button
 - a. Paste the license key provided by Kno2 into the text box
5. Select **Save Changes**
6. Select the **Applications** tab
7. Highlight and copy the **App ID** (*If App ID is not shown, refresh the browser window*)
 - a. Paste and store this in a secure location (*eg - Notepad*) for later entry into Crystal

Base URI

1. Base URI will always be **https://api.kno2fy.com**
2. Copy and store in a secure location (*eg - Notepad*) for later entry into Crystal PM

Client Key & Secret

1. Select the **Settings** gear
2. Select **Organization**
3. Scroll down to the **API Settings**
 - a. Select the **Create Client Credentials** button
 - b. A confirmation window will appear
 - i. Select the **Create Client Credentials for <the current Kno2 instance>** button to continue
 - c. Store your key and secret in a secure location (*eg - Notepad*)
 - i. Select **Copy Credentials** to copy to the clipboard
 - ii. Paste and store these in a secure location (*eg - Notepad*) for later entry into Crystal PM
 - d. Select the **Disabled** button so that **Enabled will be displayed**, indicating that the service account is now enabled
 - e. Enter the IP address(es) used in your office (these are the public IP addresses of the server contacting Kno2. You can use <https://www.ipchicken.com> to find your public IP address)
 - i. Select **Save IP Addresses**

Kno2 Address Setup in Kno2

Kno2 facilitates the use fax and Direct messaging in Crystal PM. You will set up the fax numbers and Direct messaging addresses in Kno2 for use in Crystal PM.

Fax

You can port a fax number to Kno2 or obtain a new one, please refer to the email from Kno2 Support titled 'Fax Porting Form - LOA - [Organization name]' for details.

Direct Address

Your Kno2 account comes with a '*records@[yoursubdomain].direct.kno2fy.com*' address but you can create as many Direct addresses as you need. You can create these from Settings > Kno2 addresses.

1. Select the "+" sign located in the upper right-hand corner. The setup window will appear.
2. Address Type
 - a. Specify if this Kno2 address is for the Organization (default), or choose Provider if the Kno2 address is for a healthcare provider in your organization.
3. Kno2 Address
 - a. Enter the desired prefix for the Direct address. The remaining part of the address (after the @ symbol) is preconfigured in the Domain field.
4. Select Save Changes.

Email Notifications

Since CrystalPM will alert you of new messages received, we recommend disabling notifications from Kno2. This can be done by clicking on your name in the top right corner of the Kno2 website, selecting My Profile > Email Notifications > uncheck the email notification boxes > Save Changes. This will ensure you will only receive notifications in Crystal PM.

Setup (Admin):

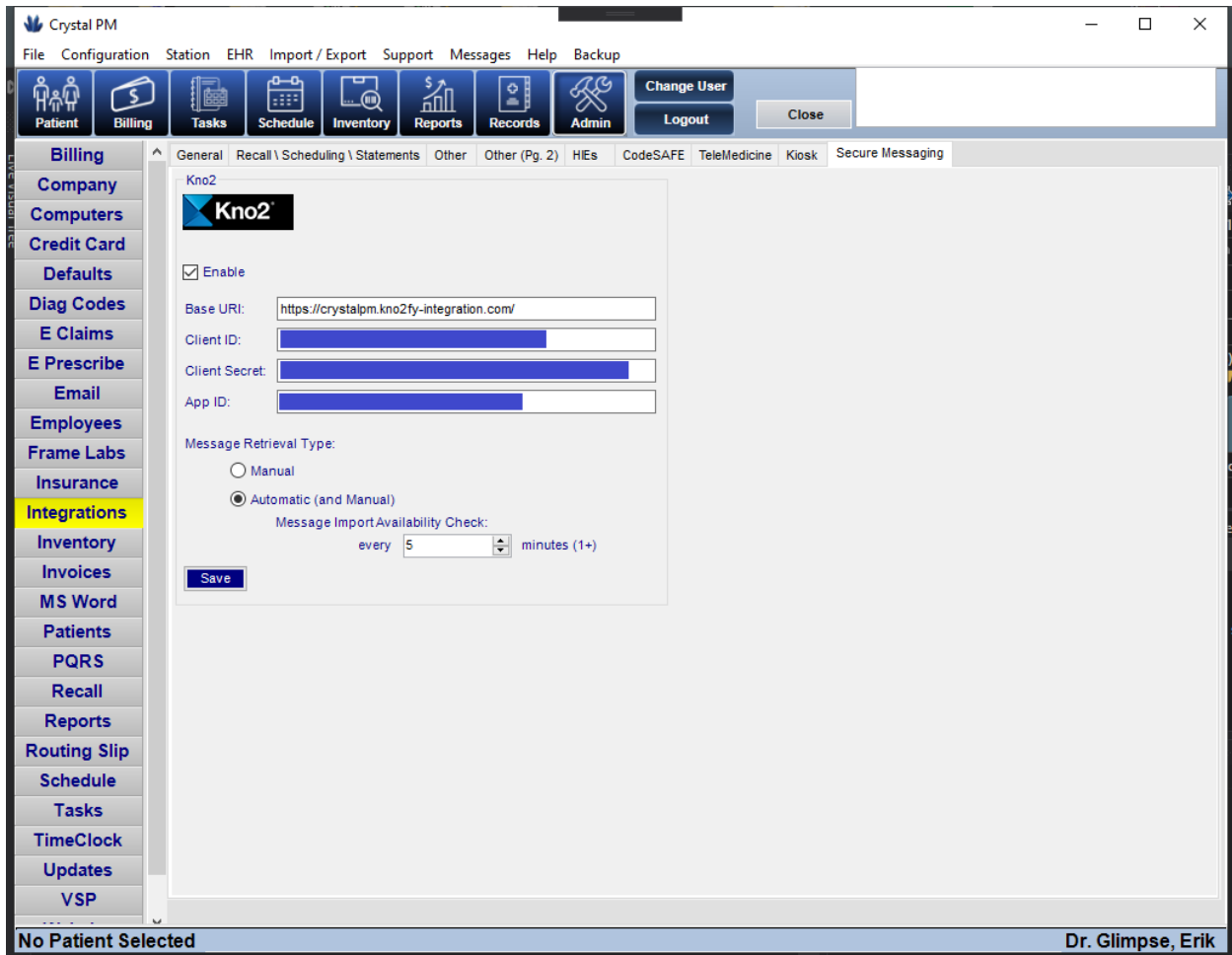
To enable the integration in CrystalPM with these credentials, navigate to **Admin->Integrations->Secure Messaging**.

Enter Credentials copied into secure location (*eg – Notepad*) into the integration settings

- **For Base URI: Use <https://api.kno2fy.com>**

Choose if you want to set CrystalPM to automatically retrieve messages on a specific interval (e.g. every 5 minutes), and click the **“Save”** button.

In either **“Manual”** or **“Automatic”** retrieval modes, you have the option to manually retrieve new messages.



Setup (User):

From this point, **the integration will need to be enabled per user**. Next, navigate to **Admin->Employees**, and edit the employees you wish to include with the integration. In the Employee Edit window, navigate to the **Integrations tab** page on the right and scroll down.

To enable the integration, check the **“Enabled for User”** check box. If you want the user to receiving notifications on the bottom right of their screen, check the **“Notification of unread messages”** check box. Then **choose which addresses they’ll be able to send and receive messages for**. Available addresses will be available in the combo box. Select one and click the **“Add”** button. To remove an address, select an address in the list and click the **“Remove”** button. Notice that these addresses can include fax numbers.

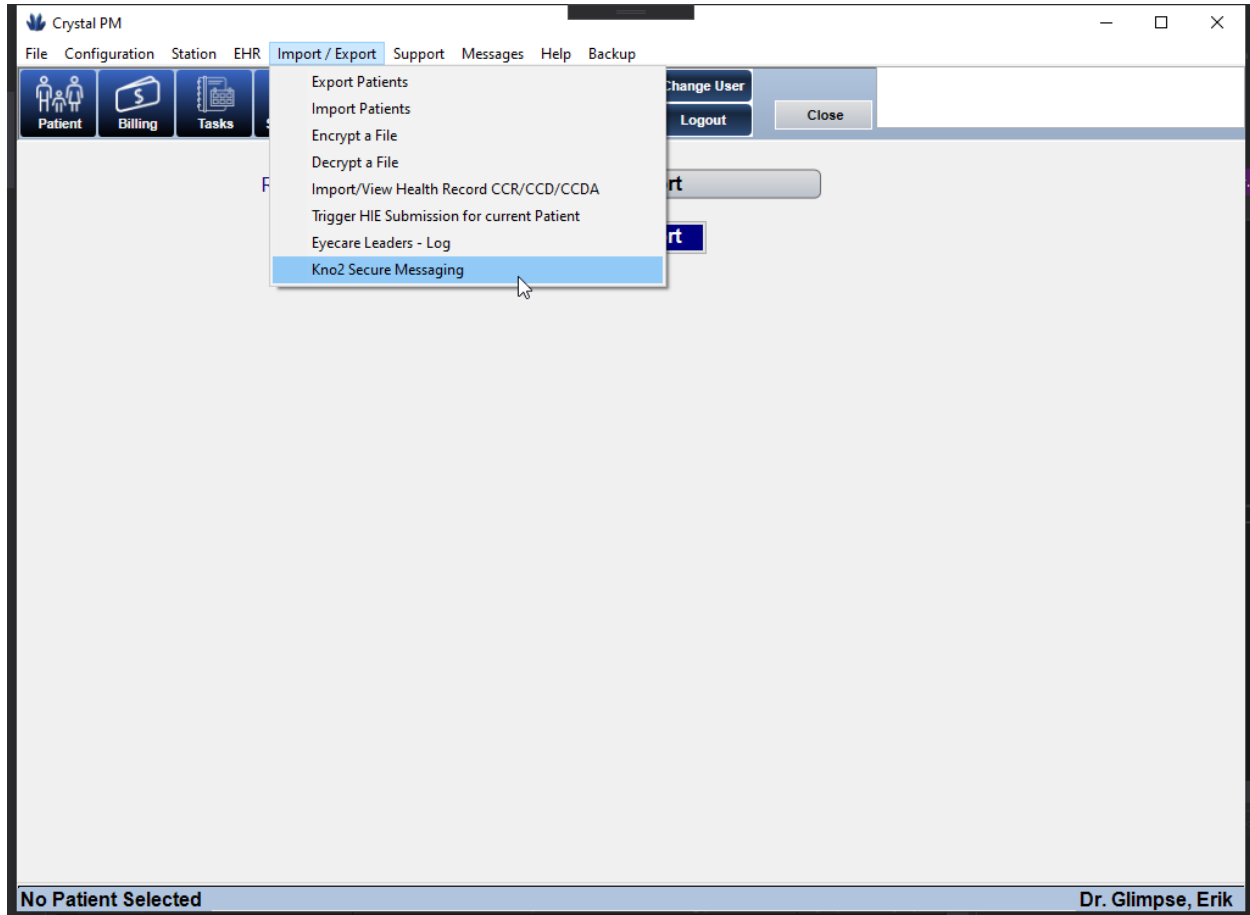
When you’re done assigning addresses, click the **“Update”** button to save your changes to the user’s settings.

The screenshot shows the 'Employee Edit' window with the 'Integrations' tab selected. The main form contains fields for Name (Last: Glimpse, First: Erik), Address, Contact Numbers, Email, Password, and various provider information fields like Blue Cross #, Medicare #, Medicaid #, CHAMPUS ID, etc. The 'Integrations' panel on the right has three sections: 'Eyecare Leaders - iMedicWare' with 'Enabled for User' checked; 'eClinicalWorks - MI7 Solutions' with 'Notification of patient files not imported' checked; and 'Kno2 - Secure Messaging' with 'Enabled for User' and 'Notification of unread messages' checked. Below these is an 'Addresses (Receiving/Sending)' section with a dropdown menu showing '2086391317' and an 'Add' button. A table below the dropdown lists addresses: '2086391317', 'records@crystalpm.direct.kno2fy-integration...', and 'testing@crystalpm.direct.kno2fy-integration...'. At the bottom of the integrations panel are 'Clear All (No Access)' and 'Master Admin' checkboxes.

Main Window:

To display the main window of the integration, click the “Kno2 Secure Messaging**” menu item in the menu bar under “Import /Export.”

****If this menu item does not show up initially, restart Crystal.**



Notification of Unread Messages:

When new messages have been retrieved, and it hasn't been read by any user that's assigned to the receiving address, a notification of the number of unread messages will appear in the bottom-right corner of the screen.



Compose (View Existing Message):

Viewing an existing message will mark it as read for any user assigned to the receiving address and read for the current user.

The sender's address, receiving address, subject, body, attachments, and patient demographics are displayed for the message.

If the message contains patient demographics, it means that it relates to a specific patient. In that case, it's recommended that you assign the message to a specific patient in CrystalPM. You can do so by clicking the "Find" button next to "Patient" on the right and choosing a matching patient from CrystalPM.

The screenshot shows the 'Kno2 Secure Messaging' application window. The 'Messages' tab is active, and the 'Compose' sub-tab is selected. The message details are as follows:

- From:** testing@crystalpm.direct.kno2fy-integration.com
- To:** testing@crystalpm.direct.kno2fy-integration.com
- Subject:** Test12
- Body:** Test12

There is an 'Is Urgent' checkbox which is currently unchecked. An 'Attachments' table is displayed on the right side:

File Name	Document Type	Size
New Text Do...		3
New Text Do...		9939

Below the attachments table is an 'Import' button. The 'Patient' section on the right contains the following fields:

- Patient:** [Empty field] **Find**
- First Name:** Test_AOA
- Middle Name:** [Empty field]
- Last Name:** Test_AOA
- Gender:** M
- Date of Birth:** 01/01/1980

At the bottom of the patient section are 'New' and 'Delete' buttons.

Compose (View Existing Message -> Attachments):

Attachments included in the message are displayed in the top-right.

You can view an attachment immediately in the default program by double-clicking an attachment in the list.

To import an attachment, click an attachment in the list and click the "Import" button. This will give you the option to import the file "To Patient Files" or "As CCD (discrete patient data)."

If the attachment is a CCD, which should be an XML file, clicking the "As CCD" option will allow you to import discrete data into an existing patient or create a new one based on the demographics in the message.

The screenshot shows the 'Kno2 Secure Messaging' application window in 'Compose' mode. The message header includes 'From: testing@crystalpm.direct.kno2fy-integration.com', 'To: testing@crystalpm.direct.kno2fy-integration.com', 'Subject: Test12', and 'Body: Test12'. An 'Attachments' table is visible in the top right, listing two 'New Text Do...' files with sizes of 3 and 9939. An 'Import' button is highlighted, and a dropdown menu is open, showing options 'To Patient Files' and 'As CCD (discrete patient data)'. Below the dropdown, a patient information form is partially visible, with fields for Patient ID, First Name (Test_AOA), Middle Name, Last Name (Test_AOA), Gender (M), and Date of Birth (01/01/1980). 'New' and 'Delete' buttons are at the bottom.

File Name	Document Type	Size
New Text Do...		3
New Text Do...		9939

Import

To Patient Files
As CCD (discrete patient data)

Patient:

Patient ID:

First Name: Test_AOA

Middle Name:

Last Name: Test_AOA

Gender: M

Date of Birth: 01/01/1980

New Delete

Compose (Send New Message):

To create and send a new message, click the “New” button in the bottom-right of the “Compose” tab page.

Choose the address you’d like to send from in the “From” combo box.

Type or paste the addresses you’d like to send to in the “To” text box.

If the message is related to a particular patient, click the “Find” button and select a particular patient. When a patient is selected, the existing “Body” text will be cleared and the patient’s demographics will be copied into the “Body” text.

You have the option to mark the message as urgent by checking the “Is Urgent” check box.

You can designate the message as a request for a summary of care CCD for a particular patient. It’s required to select an existing patient from CrystalPM beforehand.

Kno2 Secure Messaging

Messages Compose

From: 2086391317

To:

Subject:

Body:

Is Urgent

Is Request for Summary of Care CCD

Attachments:

File Name	Document Type	Size

Add Remove

Patient

Patient: Find

First Name:

Middle Name:

Last Name:

Gender:

Date of Birth: 11/06/2019

New Send Save as Draft

Compose (Send New Message -> Add Attachments):

To add attachments to a message, click the “Add” button under “Attachments.” You’ll then have the option to include any “File” available on the system. If an existing patient from CrystalPM is assigned to the message, you’ll have the option to include a “Patient File” and “Summary of Care CCD.”

Choosing “Patient File” will allow you to select a file saved to the patient’s files.

Choosing “Summary of Care CCD” will automatically generate a Summary of Care CCD based on the patient and add it to the message. You’ll be required to select a receiving provider and an option to set the “Reason for Referral.”

Kno2 Secure Messaging

Messages Compose

From: 2086391317

To:

Subject:

Body:

Is Urgent

Is Request for Summary of Care CCD

Attachments:

File Name	Document Type	Size

Add **Remove**

File
Patient File
Summary of Care CCD

Patient ID:

First Name:

Middle Name:

Last Name:

Gender:

Date of Birth: 11/06/2019

Find

New **Send** **Save as Draft**

Compose (Send New Message, continued):

When you've included all of the desired information, you can click the "Send" button to immediately send the message. The message will be viewable from that point in the "Sent" category in the "Messages" tab page.

You also have the option to save the message as a draft to be modified and sent later on by clicking the "Save as Draft" button.

You can resume modifying and sending the message later on by viewing "Draft" category in the "Messages" tab page and double-clicking the saved message.

After a message is sent, it can't be modified or sent again. The only change that can be made is what patient from CrystalPM is assigned to it.

Kno2 Secure Messaging

Messages Compose

From: 2086391317

To:

Subject:

Body:

Is Urgent

Is Request for Summary of Care CCD

Attachments:

File Name	Document Type	Size

Add **Remove**

Patient

Patient: **Find**

First Name:

Middle Name:

Last Name:

Gender:

Date of Birth: 11/06/2019

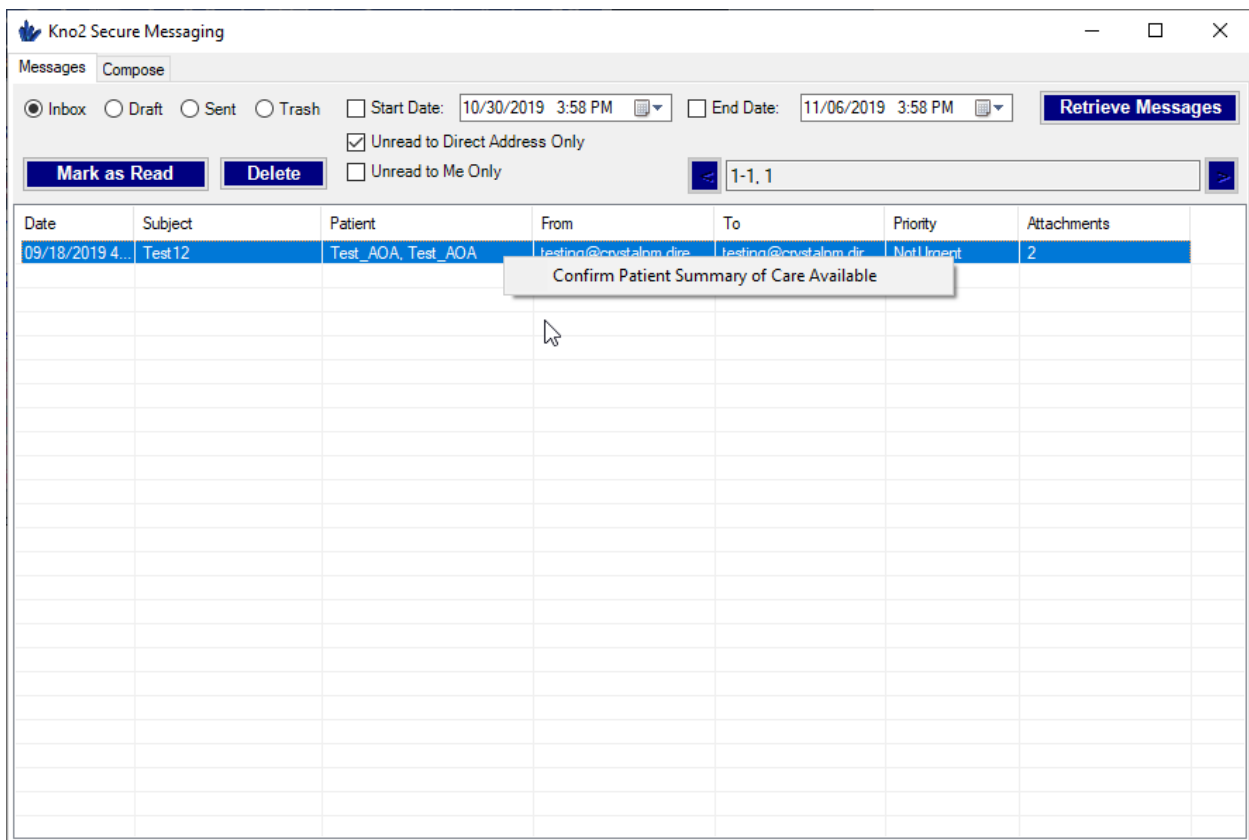
New **Send** **Save as Draft**

Meaningful Use Stage 3 Functionality:

We've already discussed most of the MU3 related functionality. This includes attaching a "Summary of Care CCD" to a message and sending it, sending a message as "Request for a Summary of Care CCD", and importing an attachment as a "CCD (discrete patient data)."

The last related part is to confirm that a received message contains a Summary of Care CCD for a particular patient. Before performing this action, a message needs to be assigned to a patient in CrystalPM, so you will need to view the message and assign the patient first. Then right-click the message in the "Inbox" and click the "Confirm Patient Summary of Care Available" option.

The required data for the "Meaningful Use Report (2018)" will be logged when performing these actions.



The screenshot displays the 'Kno2 Secure Messaging' application window. The interface includes a top navigation bar with 'Messages' and 'Compose' tabs. Below this is a filter section with radio buttons for 'Inbox', 'Draft', 'Sent', and 'Trash'. There are also date range filters for 'Start Date' (10/30/2019 3:58 PM) and 'End Date' (11/06/2019 3:58 PM), along with a 'Retrieve Messages' button. A 'Mark as Read' and 'Delete' button are visible, along with a checkbox for 'Unread to Direct Address Only' and another for 'Unread to Me Only'. A search bar shows '1-1, 1'. The main area is a table with columns: Date, Subject, Patient, From, To, Priority, and Attachments. A single message is listed with the following details:

Date	Subject	Patient	From	To	Priority	Attachments
09/18/2019 4...	Test12	Test_AOA, Test_AOA	testino@covstalm.dir	testino@covstalm.dir	Not Urgent	2

A context menu is open over the message, showing the option 'Confirm Patient Summary of Care Available'. A mouse cursor is positioned over this option.