

Imprivata Cortext Guide for iOS Device Users

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.

DOWNLOADING THE IMPRIVATA CORTEXT APP

1. On your device, access the App Store and search for Imprivata Cortext.
2. Download and install the Imprivata Cortext app.

SIGNING IN FROM AN EMAIL INVITATION

1. On your iOS device, open the invitation from Imprivata Cortext.
2. Tap **create an account now and get started**.
3. Type a username and password, and type the password again to confirm.
4. Tap **Create Account**.
 - A confirmation page displays with a green checkmark and your username
5. Tap **Next**.
 - If Imprivata Cortext is not installed, the App Store opens. Tap **FREE**, Tap **INSTALL APP**, enter your Apple ID password and then open Imprivata Cortext.
6. Tap **Sign In**.
7. Type your username and password and tap **Sign In**.
 - A message tells you the name of the directory to which you have been added.
8. Tap **OK**.
 - The Imprivata Cortext Inbox opens; it contains an unread message from Imprivata Cortext. Tap the message to open it.

YOUR UNLOCK CODE

For security reasons, Imprivata Cortext may be set to lock your screen after it has been inactive for a period of time. Enter a code that you can remember easily, and avoid obvious codes such as 1111 or 1234.

- **Note:** If you must use Imprivata Cortext on multiple devices, you must define the code on each device. You can use the same unlock code.

ADDING MORE DEVICES

You do not need an additional invitation to add additional mobile devices. Simply download the Imprivata Cortext app on the new device and sign in with your existing credentials.

1. Download and install the Imprivata Cortext app from the App Store.
2. Start the app, 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. Tap **Settings** and then tap **Directories**.
3. Using the invitation from the other organization, type the invitation code, then tap **Add**.

SIGNING IN/OUT OF SHARED MOBILE DEVICE

To sign in on a shared device, tap the Cortext icon and sign in as usual with your username and password.

To sign out of a shared device and close the app, tap the **Settings** icon  at the bottom of the screen. At the top of the screen, tap **Sign Out**. To confirm, tap **Sign Out and Close**. After signing out of a shared device, any registered user can start the app and sign in.

NAVIGATING THE IMPRIVATA CORTEXT APP

Within the app, navigate to the following areas by tapping the corresponding icon at the bottom of the screen.



Inbox: Access your text conversations, read and reply to messages from your contacts, or compose new messages.

Favorites: View and access the contacts you communicate with most often.

Directory: View and contact the members of your organization who have been invited to use Imprivata Cortext by your Imprivata Cortext administrator.

Settings: Manage your profile photo, callback phone numbers, and message alert sounds. If you use a shared device, sign out from the Settings screen.

YOUR AVAILABILITY STATUS

You can set your availability status that will be seen by other users in Inbox, Contact Info/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.

To set your availability status, tap your current status located at the top right corner of your Inbox, and make the appropriate selection.

FINDING A CONTACT IN THE DIRECTORY

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

- Scroll through the entries.
- Type in the search field to narrow the list. As you type letters, the available choices narrow to corresponding contacts.
- Jump to a specific letter using the list of letters on the right.

VIEWING CONTACT INFORMATION

After locating the user you want to contact, tap the user's name to open the Contact Info screen. From this screen, you can view the contact's information, send a message, add the contact to your Favorites, or call the contact's office or mobile phone (if the number is published in the directory).

SENDING A MESSAGE

From the Inbox:

1. Tap the compose icon  at the top right corner.
2. In the **To** field, type a name or keywords to search for contacts from the directory, favorites, and groups.
3. In the search results, select the contacts.
4. Compose your message and then tap **Send**.

From the Directory or Favorites list:

1. Select a contact or group.
2. Tap **Send Message** or tap the compose icon  at the top right corner.
3. Compose your message and then tap **Send**.

MESSAGING COLLEAGUES OUTSIDE OF THE NETWORK

From within the app, 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 and 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.

1. From within the app, tap the compose icon .
2. In the **To:** field, type a 10-digit US mobile number, or the name of the recipient.
 - If you type a name, and you have granted access to your phone contacts, the app searches your Imprivata Cortext directories and your phone's contact list for a match, and then checks if a mobile number is listed for the contact. Tap the contact name.
3. Type your message and tap **Send**.
 - If you are a member of more than one Imprivata Cortext directory, you will be prompted to specify the organization from which to send the message. The directory name displays with your name in the SMS text received by the recipient.

To confirm the receipt of an out-of-network message:

- Out-of-network messages are sent via SMS. You do not receive an error message if an SMS transmission fails to complete. To confirm that your message has been received and read, check the timestamp and envelope icon on the message bubble in the conversation.

MESSAGING COLLEAGUES OUTSIDE OF THE NETWORK

Note: Out-of-network messaging can only be initiated from the Imprivata Cortext app on an iOS or Android mobile device. However, you can continue the conversation from the Imprivata Cortext Desktop or Web application.

STATUS OF MESSAGES THAT YOU SEND

Messages that you have sent display in a text bubble on the right side of the conversation. The header of the message bubble contains:

- **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.

STATUS OF MESSAGES TO MULTIPLE RECIPIENTS

The header of the message bubble contains:

- **Unread Message:** A closed envelope icon and the timestamp when the message was sent.
- **Message has been read:** Numbers under the message indicate how many recipients have read the message. After all recipients have read the message, the timestamp is updated and the icon displays as an open envelope.

To view message status: Tap and hold the message bubble and then select **Message Status** (a list of recipients displays).

- An open envelope and timestamp read receipt indicate the user has read the message.
- A closed envelope indicates that the user has not read 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:** Tap the message and then tap **Resend**.

RECEIVING MESSAGES AND MESSAGE NOTIFICATIONS

You are alerted when a new message is received. The alert type depends on whether Imprivata Cortext is currently active.

When Imprivata Cortext is Inactive (closed):

- You receive your selected Imprivata Cortext alert.
- The number of unread messages that displays on the app icon increases.
- A banner notification displays at the top of your screen.

When Imprivata Cortext is Active (open):

- You receive your selected Imprivata Cortext alert.
- The number of unread messages on the Inbox icon at the bottom of the screen increases.
- The number of new messages outside the conversation displays on the Inbox button.

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:

- Tap and hold the message bubble and then tap **Forward**.
- 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. On the conversation you want to remove, swipe sideways from right to left, and then tap **Delete**.

To delete a message:

1. From the Inbox, open the conversation and tap a sent or received message.
 - A menu displays at the bottom of the screen.
2. Tap **Delete**.

SENDING AND VIEWING PHOTOS

Attaching a photo in the Imprivata Cortext app is the same as attaching a photo in a regular text message. However, photos taken inside the app are not saved outside of Imprivata Cortext and do not exist in the device's photo gallery.



1. Tap  at the left of the message area, then tap **Take a Photo** to snap a photo with the phone's camera or **Choose an existing photo** to upload from your photo gallery.
2. After you snap or select the photo and enter the accompanying message text, you can continue to edit the text, remove the photo (by tapping the white X in the red circle), or replace it, before you tap **Send**.
 - The sent image displays along with the text inside the message bubble. The full image can be viewed by tapping it and then manipulating it as you typically would on an iOS device. The image can not be saved to the device's photo gallery after it is in Imprivata Cortext; this is a measure provided to protect PHI.

MAKING CALLS AND CALLBACK REQUESTS

Callback requests allow you to embed a phone number as part of a Imprivata Cortext message so that the recipient calls you back at that number. The recipient can call you back with two taps, one on the phone number and the other to confirm.

To make a call or send a callback request:

Tap the phone icon  at the top right of your conversation screen or New Message screen.

Call the contact directly:

Tap Call Mobile or Call Office. The contact's numbers are available only if they are published in the directory.

Send a callback request:

- Tap **Request Callback - My Mobile** or **Request Callback - My Office**. Your callback numbers are available if you have defined them in your Account Information.
- Tap **Custom Request Callback** and type a number of your choice and then tap **Done**.

*After you select or enter your callback request and enter any accompanying text, you can continue to edit the text, remove the callback request (by tapping the blue rectangle and then tapping **Remove**), or replace the text, before tapping **Send**.*

To make a call from the Directory or Favorites list:

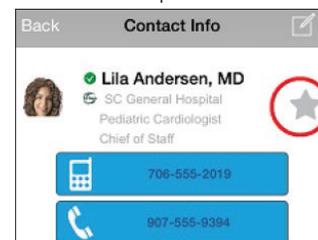
Locate the contact and tap the name to the Contact Info screen. Tap a number to place the call. The contact's mobile and/or office numbers are available only if they are published in the Imprivata Cortext Directory.

ADDING A FAVORITE

Open the Contact Info page in one of the following ways:

- **From the directory**, search and tap the contact's name.
- **In a conversation with the contact**, tap the contact's name in the header.

On the Contact Info screen, tap the **star**. The star turns yellow.



REMOVING FAVORITES

To remove a contact from your Favorites list, go to the Favorites tab and then do either of the following:

- From the Favorites list, swipe sideways from right to left across a contact and tap **Delete**. To cancel the delete, swipe sideways from left to right.
- From the Contact Info or Group Info screen, tap the star so it turns white.

INITIATING A MESSAGE TO MULTIPLE CONTACTS

1. Do either of the following:
 - Go to your Inbox and tap , and then add contacts in the **To** field. -OR-
 - If you have previously created the group, tap **Favorites**, tap the group name, and tap .
2. Compose the message and tap **Send**.

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

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

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

NOTE: You cannot add recipients to an existing group message. If you want to add or remove contacts from a group, you must first add the group to Favorites, and then edit the group. You can then send new messages to the favorite group.

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. Tap the list of names in the header of the conversation.
2. On the Contact Info screen, tap the star icon. The star turns yellow and the field that lists participant names becomes selected so you can optionally type a group name.
3. To save your new group to your Favorites list, tap **Done**.

CREATE A GROUP IN FAVORITES

1. In Favorites, tap the plus icon and add the names you want in the group.
2. Type a name for the group and then tap Done. The group is added to your favorites list.
3. You can then select the group from Favorites and compose a message to the group.

REMOVE A GROUP FROM FAVORITES

1. Tap **Favorites**, tap the **Groups** tab, and tap the group you want to remove.
 2. On the Contact Info or Group Info screen, tap the yellow star so it turns white. Click **Yes** to confirm.
- The group is removed from your Groups and Favorites list. Any messages that you previously sent to the group display in your Inbox, but the conversation header shows the names of the group recipients, not the name of the group.

EDITING A GROUP

1. Tap **Favorites**, tap the group, and tap **Edit**.
2. On the Edit Group page:
 - To add a contact, type the name of a contact to add, and then select the contacts from the list that displays.
 - To remove a contact, tap the contact name and then tap the backspace key  on the keyboard.
3. Tap **Done**.

GROUP INFORMATION IN THE MESSAGE HEADER

1. In the Inbox, tap the conversation to open it.
2. Tap the conversation header.
 - The Group Info page displays with a list of group participants. Groups saved as favorites display with a yellow star.

ADDING OR CHANGING YOUR PHOTO

Tap Settings, tap Account and tap  on the photo. You can:

- **Choose an existing photo** from the photo gallery.
- **Take a photo** with the camera.
- **Delete the photo** and return to the default avatar.

SETTING YOUR CALLBACK NUMBERS

1. Tap **Settings**.
2. Tap **Account**.
3. Tap **Callback Numbers** and enter your numbers.
4. When you are finished, tap **SAVE**.

CHANGING YOUR PASSWORD

1. Tap **Settings**.
2. Tap **Account**.
3. Tap **Change Password**.
4. Type your existing password, the new password two times, and tap **Change Password**.

ADJUSTING MESSAGE ALERT SOUNDS

Open **Settings**, set **Alerts On**, and then tap **Alerts - Details**.

To adjust the settings for your message alert sounds:

1. In the **Message Received** area, set **Sound ON** and then tap **Select Sounds** to show the list of available sounds.
2. Make your selection.

Repeat Alerts:

1. Set **Sound ON** and make your selections.
2. Set **Repeat Alerts** to **ON** and make your selections.

CHANGING YOUR UNLOCK CODE

1. Go to **Settings**.
2. Tap **Unlock Code**.
3. Follow the instructions, entering your old code, and then your new code two times.