

Enable Multi-Factor Authentication (MFA) for the EHR

Overview

Multi-Factor Authentication (MFA) is a feature in the Criteriaions Browser application. It adds a layer of protection to the sign-in process while accessing the application when utilized. This protection is crucial for accessing and managing network environments remotely.

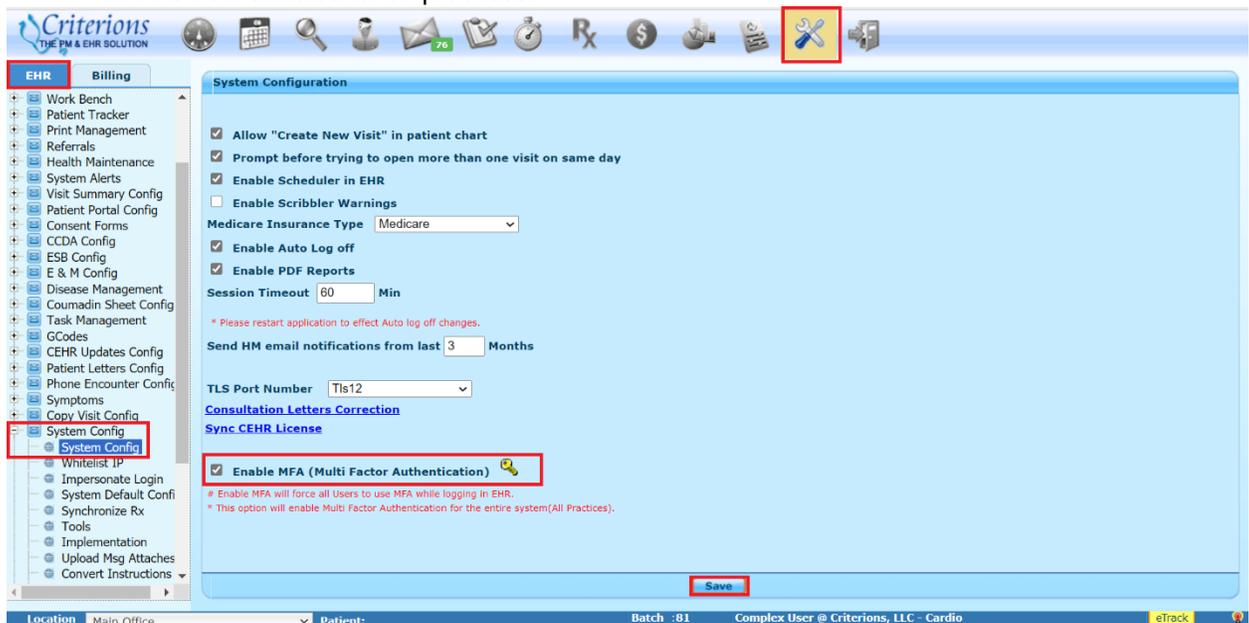
The users provide an additional identity code verification received via email or text to a cell phone. The email address or cell phone number information is pre-set in the Criteriaions software for each user.

Content

1. How to Enable Multi-Factor Authentication (MFA).
2. Self-Registration and Verification of Cell Phone Number.
3. Self-Registration and Verification of Email Address.
4. Accessing the User Setup Screen.
5. Descriptions of the User Setup Options.
6. Requiring MFA to log into the program for specific users is optional.

Setup Procedure

1. How to Enable Multi-Factor Authentication (MFA), MFA is an optional feature that requires activation.
 - i. Click on the **Admin** icon on the Toolbar.
 - ii. Select the **EHR** tab, and select **System Config**.
 - iii. Select **System Config**, then **System Config**. The screen will display. Towards the bottom of the screen is an option to select **Enable MFA (Multi-Factor Authentication)**.
 - iv. To enable MFA, place a checkmark in the **Enable MFA** checkbox.
 - v. Click **Save**.
 - vi. MFA is now enabled for all practices.



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2. Self-Registration and Verification of Cell Phone Number

- i. Once the MFA feature is enabled, no further action is required immediately. Instead, the user can generate a Verification Code and access the program independently.
- ii. The users can log into the program as usual and be prompted to enter a cell phone number to **Register** with the program.

- iii. When the user provides a cell phone number and clicks on **Send Code** during login, the program will generate a text to their cell phone with a Verification Code that they can now enter in the **Enter Verification Code** field and click on **Verify Code** (in the same screen) to complete the Login process. They will simultaneously verify the cell phone number provided as their number.

The cell phone number is automatically stored in their User Setup screens and marked as verified. The user's cell phone number registration and verification process is completed.

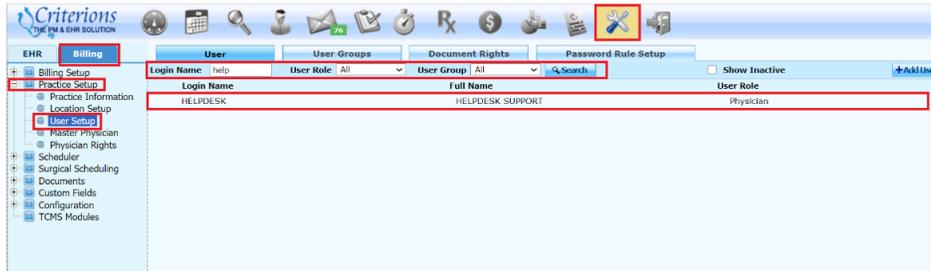
3. Registering and Verifying an Email Address.

- i. Later, the user's email address can be added to their User Setup screen and **Saved**. Once saved, no further action is required. When the users select **Verify and Send Code**, they will be provided with either texting their cell phone number or an email to their stored email address.

The first time they select email as a delivery option, they will automatically begin verifying the email address as their own by using the Verification Code (within 15 minutes) to access the program.

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4. You are accessing the User Setup Screen. In order to change the MFA option per user.
 - i. Click on the **Admin** icon on the Toolbar.
 - ii. Select the **Billing** Tab.
 - iii. Select **Practice Setup**, then **User Setup**.
 - iv. Search for Login Name, User Role, or User Group. Then **Select** the User.



5. Descriptions of the User Setup Options.
 - i. You will see the user's Multi-Factor Authentication option in the center of the User's Setup screen.

Multi Factor Authentication

1 **Email Address** 5 **Save Email to Verify.**

2 **Cell Phone** + 6 **Save Phone to Verify.**
 (Country Code) (Phone Number)

3 **Require MFA to Login**

4 **Only require MFA once a day**

1) Email Address: The user's email address can be entered here and saved. Once saved, the email address is **registered**. The user can log into the program and generate a Verification Code within an email to the email address. The generated code can be used within 15 minutes to access the Criterions program. Only one email address can be used.

2) Cell Phone: The user's cell phone number can be entered here and saved. Once saved, the phone number is **registered**. The user can log into the program and generate a Verification Code within a text message sent to the cell phone. The generated code can be used within 15 minutes to access the Criterions program. Only one cell phone number can be used. The phone number's "Country Code" field defaults to a "1" for USA.

NOTE: The user can have information in both fields and will have the option to select which should be used when signing in for delivery of a Verification Code.

NOTE: If only one field contains saved information, it will be the only usable delivery method for a Verification Code.

NOTE: Verification Codes are usable for up to 15 minutes after generating them.

NOTE: Registering a cell phone number through the Setup screen can be bypassed. See [Self-Registration and Verification of Cell Phone Number on Page 2.](#)

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- 3) Require MFA to log in: This option is selected by default but can be removed. If desired, the user will retrieve a Verification Code to log into the program. If not specified, the user will not be required to retrieve a Verification Code to log into the program anytime.
- 4) Only require MFA once a day: If this option is selected, the user must retrieve a Verification Code to log into the program only once during the access date and every day afterward. This option can only be selected if option number **C** is also specified.
- 5) Save EMail to Verify: This default message **Save EMail to Verify** changes to **Send Code to Verify EMail** once an email is entered into the Email Address field and **Saved**.

Add User Active Save

Login Name: SUPPORT User ID:

Last Name: SUPPORT First Name: HELPDESK

Full Name: HELPDESK SUPPORT

Gender: Male Female

Reset Password Unlock User Selected Pt Access

User Role: Physician Nurse Staff Manager

Multi Factor Authentication

Email Address: support@criteriaions.com Save EMail to Verify.

Cell Phone: + Save Phone to Verify.
(Country Code) (Phone Number)

NOTE: No further action is required at this point. Once the email address is **saved**, the user can log into the program anytime and generate a Verification Code to log in. The email address is automatically verified when the user logs into the program and uses a generated Verification Code.

- ii. Alternatively, once the email address is **Saved**, the **Send code to verify email** feature can be clicked. Then an email is immediately issued to the user's email address with a Verification Code.

Multi Factor Authentication

Email Address: support@criteriaions.com

criterionsehr.myehr123.com says

A verification code has been sent to your registered/saved EMail address.

- iii. The Verification Code is sent to the user's email address.



Enable Multi-Factor Authentication (MFA) for the EHR

- iv. Also, in the User Setup Screen, the **Send Code to Verify EMail** button changed once the code was sent, providing two new buttons with options. One option offers the ability to **Resend Code** (if needed).

Multi Factor Authentication

Email Address: support@criteriaions.com

Buttons: Resend Code, Verify Code

- v. The other option offers the ability to enter the code sent to the user's email address and click on **Verify Code** button to complete the verification process.

Multi Factor Authentication

Email Address: support@criteriaions.com

Code: 451710

Buttons: Resend Code, Verify Code

Multi Factor Authentication

Email Address: support@criteriaions.com

Status: (Verified)

- 6) Save Phone to Verify: This default message **Save phone to verify** changes to **Send code to verify phone** button once a phone number is entered into the Cell Phone field **Saved**.

Add User

Active: Save: [Save] Close: [Close]

Login Name: SUPPORT User ID: []

Last Name: SUPPORT First Name: HELPDISK

Full Name: HELPDISK SUPPORT

Gender: Male Female

Reset Password: Unlock User: Selected PT Access:

User Role: Physician Nurse Staff Manager

Multi Factor Authentication

Email Address: [] Save Email to Verify.

Cell Phone: + 1 (212)555-1212 Save Phone to Verify.

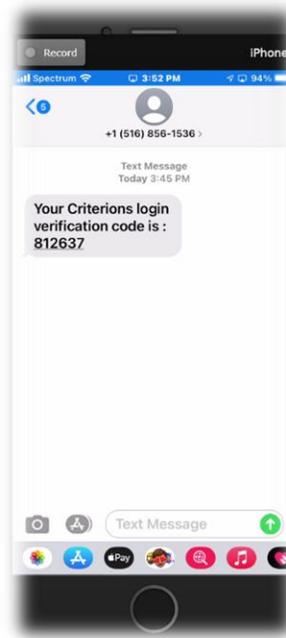
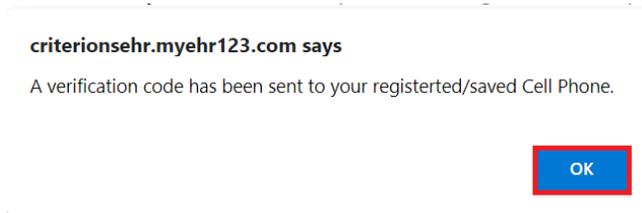
NOTE: No further action is required at this point. Once the phone number is **Saved**, the user can log into the program at any time and generate a Verification Code to log in. The phone number is automatically verified when the user logs into the program and uses a generated Verification Code (see Self-Registration and Verification of Cell Phone Number on Page 2).

- vi. Alternatively, once the phone number is **Saved**, the **Send Code to Verify Phone** feature can be clicked, and a text message is immediately issued to the user's phone with a Verification Code

Cell Phone: + 1 (212)555-1212

Buttons: Send Code To Verify Phone

Enable Multi-Factor Authentication (MFA) for the EHR



- vii. Also, in the User Setup Screen, the **Send Code to Verify Phone** button changed once the code was sent, providing two new buttons with options. One offers the ability to **Resend Code** (if needed).

Cell Phone

(Country Code) (Phone Number)

- viii. The other offers the ability to enter the code sent to the user's phone and click on **Verify Code** button to complete the verification process.

Cell Phone

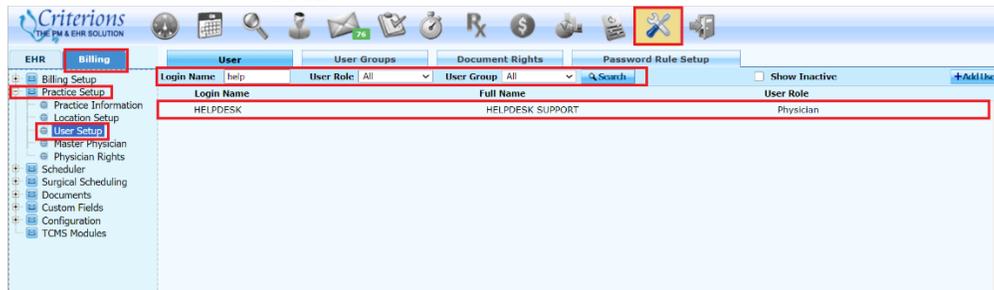
(Country Code) (Phone Number)

Cell Phone (Verified)

(Country Code) (Phone Number)

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6. Requiring MFA to log into the program for specific users is optional. However, there is a selection available on the User Setup screen.
 - i. To remove the individual user's requirement.
 - a. Access the User Setup Screen.
 - 1) Click on the **Admin icon** on the Toolbar.
 - 2) Select the **Billing** Tab.
 - 3) Select **Practice Setup**, then **User Setup**.
 - 4) Search for Login Name, User Role, or User Group. Then **Select** the User.



- b. **Uncheck** Require MFA to Login to remove the individual user's requirement.
- c. Click **Save**.

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- ii. Restricting the requirement of using MFA more than once a day for specific users or suspending the use of MFA for today or a particular time or user are also available in their User Setups.
 - a. Select **Only require MFA once a day**.
 - b. Click **Save**.

Edit User
Active Save Close

Login Name	<input type="text" value="MARK"/>	User ID	<input type="text" value="130"/>
Last Name	<input type="text" value="MARK"/>	First Name	<input type="text" value="TEST"/>
Full Name	<input type="text" value="TEST MARK"/>		

Gender Male Female

Reset Password Unlock User Selected Pt Access

User Role Physician Nurse Staff Manager

Multi Factor Authentication

E-Mail Address *Save EMail to Verify.*

Cell Phone *Save Phone to Verify.*

(Country Code) (Phone Number)

Require MFA to Login

Only require MFA once a day

Login Access Time

Login Restriction Start Time : End Time :

Group rights for each location
 Expand All

- Allergy Office
- Clinic One2
- Clinicname