

Overview

Multi-Factor Authentication (MFA) is a feature in the Criterions 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 Criterions 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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Γ	EHR Billing	System Configuration		
	Work Bench Print Management Referrals Health Maintenance System Alerts Visit Summary Config Consent Forms Config ESB Config ESB Config ESB Config ESB Config ESB Config Disease Management Coumadin Sheet Config Task Management GCodes CotHR Updates Config Patient Letters Config Patient Letters Config System	System Conriguration Allow "Create New Visit" in patient chart Prompt before trying to open more than one visit on sart Enable Scheduler in EHR Enable Scribbler Warnings Medicare Insurance Type Medicare Enable Auto Log off Enable Auto Log off Enable PDF Reports Session Timeout 60 Min * Please restart application to effect Auto log off changes. Send HM email notifications from last 3 Months TLS Port Number Tls12 Consultation Letters Correction Sync CEHR License Enable MFA (Multi Factor Authentication) * Enable MFA will foce all Users to use MFA while logging in EHR. * This option will enable Multi Factor Authentication for the entire system(All Pro-	ne day	
	Location Mala Office	Detiont	Batch :81 Complex User @ Criterions. LLC - Cardio	eTrack
	Main Office	✓ Patient:	batch for complex osci @ criterions, LEC curulo	ender 9



- 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.

Please Register you	r device now .		
			ок
M	ulti Factor Authentic	ation - Register	Device
Verify your o	ell phone number to	enable Multi Fact	or Authentication
	We will send a verification	on code to this nur	mber.
Enter Cell Phone	number: + 1		Send Co
	Country Code	e Cell Phone	
An SMS authentic Enter it below Enter Verificati	cation code will be set v to enable Multi Facto on Code:	nt to the phone r or Authentication	number you provide using this device.
			_

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 <u>automatically</u> 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.

Multi F	actor Authentication – Verification
Validate Using EMail Address	support@criterions.com
O Validate Using Cell Phone	+ 1 Country Code Cell Phone
Ve	erify and Send Code Close



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

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EHR Billing	User	User Groups	Document Rights Pass	word Rule Setup	
🕂 🔤 Billing Setup	Login Name help	User Role All	✓ User Group All ✓ Q Search	Show Inactive	+Add User
- 🐸 Practice Setup	Login Name		Full Name	User Role	
Oractice Information	HELPDESK		HELPDESK SUPPORT	Physician	-
Codulor Security Coductor Security Master Physician Physician Rights Scheduler Surgical Scheduling Documents Configuration Configuration TCMS Modules					

- 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 + 1 (Country Code) (Phone Number)	6 Save Phone to Verify.
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.



- 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.



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.



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

Criterions Login Verification Code





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@criterions.com		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@criterions.com	Resend Code 451710 Verify Code						
	Multi Factor Authentication							
EMail Address	support@criterions.com	(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.



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

Call Phone	+ 1	(212)555-1212	Send Code To Verify Phone
Cell Phone	(Country Code)	(Phone Number)	



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 + 1 (Country Code)	(212)555-1212 (Phone Number)	Resend Code Verify Code	
viii. The other offers the at Code button to comple	bility to enter the code ser te the verification proces	nt to the user's phone and click on <i>Verif</i> s.	у У
Cell Phone + 1 (Country Code)	(212)555-1212 (Phone Number)	Resend Code 713476 Verify Code	
Cell Phone + 1	(212)555-1212	(Verified)	

(Country Code) (Phone Number)



- 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.

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EHR Billing	User	User Groups	Document Rights	Password R	ule Setup	
🗉 🗉 Billing Setup	Login Name help	User Role All	✓ User Group All	 Q.Search 	Show Inactive	+Add User
Practice Setup	Login Name		Full Name		User Role	
Practice Information	HELPDESK		HELPDESK SU	PPORT	Physician	
Haster Physican Physican Rights Scheduler Surgical Scheduling Surgical Scheduling Coursents Coursents Coursentields Configuration TCMS Modules						

b. Uncheck Require MFA to Login to remove the individual user's requirement.

c. Click Save.

Edit User			Ac	tive 🗹 🚺	🖬 Save 🌗	Close	
Login Name	JKEENER	Use	er ID	117			
Last Name	KEENER	Firs	st Name	JAMES			
Full Name	JAMES KEENER						
Gender	🔿 Male 🔾	Female					
Reset Password		Unlock User 📃			Selected Pt	Access	
User Role							
		— Multi Factor Authe	ntication				
EMail Address james.keener@criterions.com Send Code To Verify EMa							
Save Phone to						o Verify.	
Cell P	(Country Cod	le) (Phone Number)					
	Require MFA to Lo	ain 🗆					
Univ re	equire MFA once a	day 🔄					
			-Login Access	i Time —			
		Start Time :	08:00:00 AM	٠			
Login Rest	riction	End Time :	06:00:00 PM	ò			
				•			
User mapping	Select		~				
Group rights for	each location					Expand A	
Clinic Name					^		
Lung Office							
Main Office MiniCert							
+ Newl or					*		
4					+		



- 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 X C	lose 🍳				
Login Name	MARK	User ID	130						
Last Name	MARK	First Name	TEST						
Full Name	TEST MARK								
Gender	🖲 Male 🔵 Fema	le							
Reset Password		Unlock User 📃		Selected Pt A	ccess 🗌				
User Role	Jser Role 🛛 Physician 🔿 Nurse 🖲 Staff 🔿 Manager								
EMail A Cell Only	Multi Factor Authentication EMail Address Save EMail to Verify. Cell Phone + 1 Save Phone to Verify. (Country Code) (Phone Number) Require MFA to Login Only require MFA once a day								
🗌 Login Rest	Login Restriction Start Time : 08:00:00 AM • End Time : 06:00:00 PM •								
Group rights f	or each location			🗌 Expand	All 🛞				
 Allergy Office Clinic One2 Clinicname 	3				•				