MedicaSoft

Feature Specification and User Guide, Part 2 Support and Admin Features

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Submitted To:

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Introduction

MedicaSoft's HealthCenter Personal Health Record (PHR) provides the core functions for the Florida Department of Health PHR. During the FDOH PHR implementation, MedicaSoft tailors HealthCenter to meet FDOH's detailed requirements and integrates the PHR into the Health Information Exchange (HIE) environment. Specifically, the User Experience Finalization task in the Implementation Plan provides an opportunity for MedicaSoft and FDOH to discuss details of FDOH's requirements and the HIE environment. This document captures the detailed requirements as discussed by MedicaSoft and FDOH.

Signatures

_____   _____
Michael Cragg, FDOH Project Manager   Date

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Mary Agens, Executive Nursing Director   Date

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0. Overview

The Florida Department of Health (FDOH) has implemented Florida Health Connect, a personal health record (PHR) for the clients of FDOH. People use Florida Health Connect to manage all of their health information, from all providers, in one place. In addition to self-managing their health information, they can allow caretakers, and family members to manage health data on their behalf.

This document describes the features provided by Florida Health Connect. It also serves as a user guide covering all basic functions of Florida Health Connect. Help Desk personnel will find it invaluable for answering questions from end users. The document provides an overview of each function of the platform, along with use cases that describe issues that a user may encounter.

The data in a user's Florida Health Connect account may come from providers, pharmacies, labs, and even smart health monitors and wearable devices. Information exchanged by FDOH member providers arrives in the user's account automatically. Additionally, the system lets users request health records from out-of-FDOH-network providers. Users may also manage appointments, to-do lists, medications, exchange secure messages with their providers, and find out more information about specific medical conditions and health maintenance.
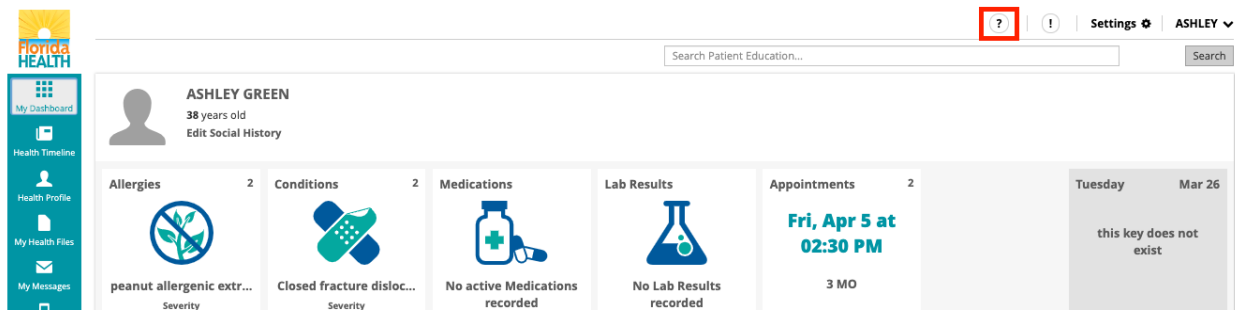
User Support

Support

Help

Use Case: User wants to find out how to use a certain feature of Florida Health Connect.

When the user is logged in, they can click the '**?**' on the top menu to view the *Help* page, which includes a link to the '*FDOH FHC Feature Specification and User Guide Part 1*'
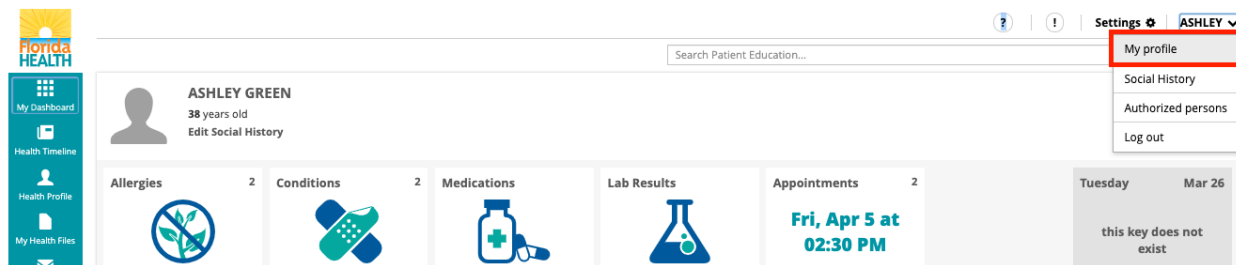

My Profile

Use Case: User wants to modify their personal settings for the Florida Health Connect site.

Click on the profile name in the top right corner of the screen. From the drop-down menu, select '**My profile**' from the three options listed.

A pop-up window will appear with options to modify user details, including password and second factor user authentication, and to add personal information.

Enter any changes in personal information, including

- Name
- Date of birth
- Gender
- Home, mobile, and work phone
- Email address
- Mailing address

To save the changes, click the '**Save**' button on the bottom of the pop-up window.
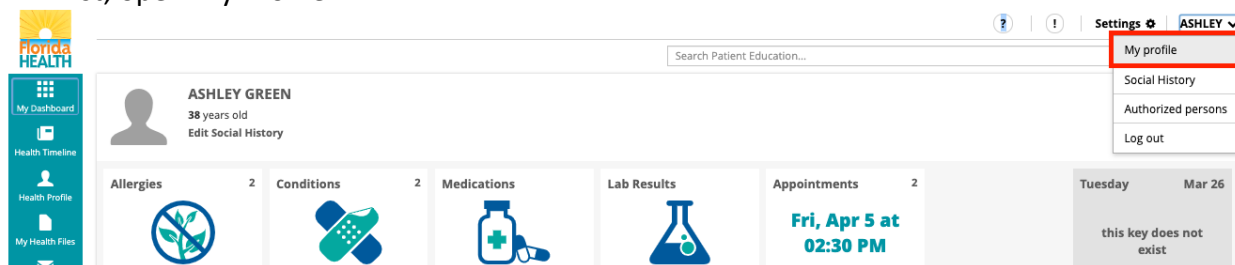
To close the pop-up window, click the '**X**' on the top right of the pop-up window or the '**Close**' button at the bottom of the pop-up window.

Set Two-Factor Authentication

For additional login security, you may turn on two-factor authentication. Thereafter, when you try to login the system will ask you to enter a code it has sends to either your email or mobile phone.

First, open My Profile:

The system opens the *User profile* page. Find the *Second factor authentication field* and select either *Email* or *SMS*. To receive the code by mobile phone, select SMS, then Save.

The system sends the token to your mobile phone and open the *Token* dialog. Enter the code.

Your account is now configured for two-factor authentication. Hereafter, when you login to the system you will first be sent a token that you must then enter to gain access to your account.

Settings

Use Case: User wants to personalize user settings.

Click the *'Settings'* button on the top menu. A pop-up window will appear with options to modify user preferences.
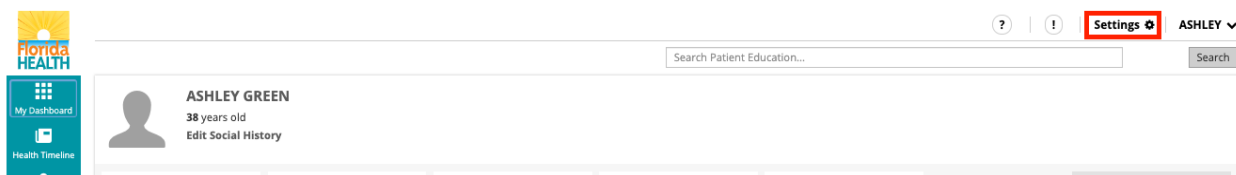
Click the down arrow next to the Preferred Units of Measure section to toggle:

Feature Specification and User Guide for the FDOH PHR

- Height/Length (cm, inch)
- Weight (kg, ounce)
- Temperature (°C, °F)

Click the down arrow next to the Notifications section to select options for alerts. Click the box corresponding to the following to allow the system to send notifications when:
- a DIRECT message is received
- health data is received
- a message from the administrator is received

Click the down arrow next to the Message Receipts section to select options for read receipts.

Click the box corresponding to the selected frequency of requesting or sending a read receipt. Request a read receipt for all sent messages.

Send a read receipt in response to any message that requests a read receipt (always, never, ask every time)

Click the down arrow next to the Data Export section to select an email address to send all data downloads.
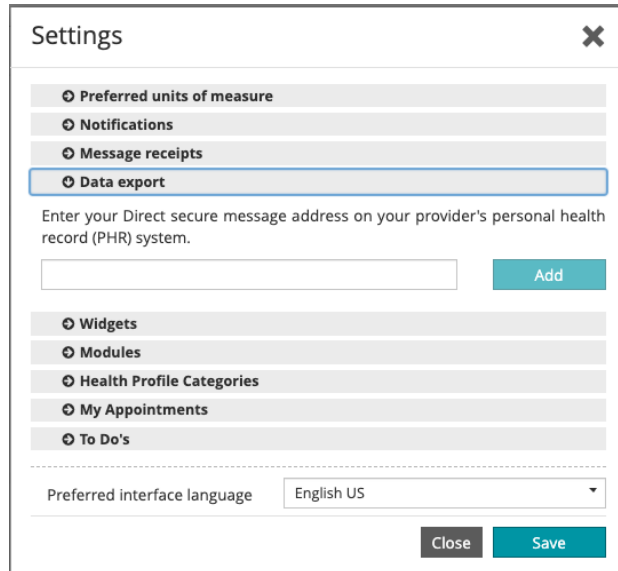
Click the down arrow next to the Widgets section to select the icons displayed on the *My Dashboard* page. Click the down arrow in the Preferred Interface Language box at the bottom of the pop-up window to change the site language.
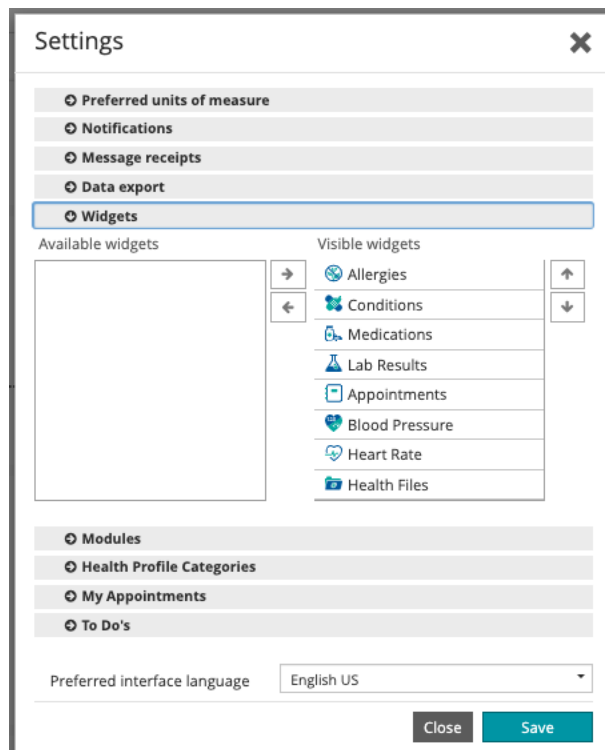
Contact Us

Use Case: User wants to contact user support for the website.

Click the '**Contact Us**' button at the bottom of the screen. A pop-up window will appear with phone and email contact information.

For email support, click on the right side to get a New Message pop-up window.

To send an email, type the subject and the message in the body of the pop-up window.

To leave without saving edits, or to close the pop-up window, click the **'X'** button on the top right corner of the pop-up window or click the **'Close'** button on the bottom of the pop-up window.

To save the message without sending, click the **'Save Draft'** button on the bottom of the pop-up window.

To send the message, click the **'Send'** button on the bottom right corner of the pop-up window.

FAQs

Use Case: User wants to see if their question has been asked previously on Florida Health Connect.

Click the '***FAQs***' button at the bottom of the screen. This will open up a new tab on the browser with a list of the frequently asked questions.

Frequently Asked Questions

Privacy Policy

Use Case: User wants to find out how their information is being safeguarded.

Click the '***Privacy Policy***' button at the bottom of the screen. This will open up a new tab on the browser displaying the Florida Health Connect's privacy policy.

Terms and Conditions

Use Case: User wants to read over the Terms and Conditions for Florida Health Connect.

Click the '***Terms and Conditions***' button at the bottom of the screen. This will open up a new tab on the browser displaying the Florida Health Connect's terms and conditions.

II. Admin Features

Users

Once users log in, they land at the site's homepage. The *Users* page allows users to view their recent site activity. Users can click the icons on the **teal** sidebar to navigate between the categories of their profile.

Search by Name

From the **teal** sidebar, select the *Users* page. Click in the Name field to search for specific patients' or administrators' accounts.

Search by Account Type

From the *Users* page, click on the drop-down menu for Account Type to search activity by account types. There are three types of accounts: Administrator, Patient and Practice Admin.
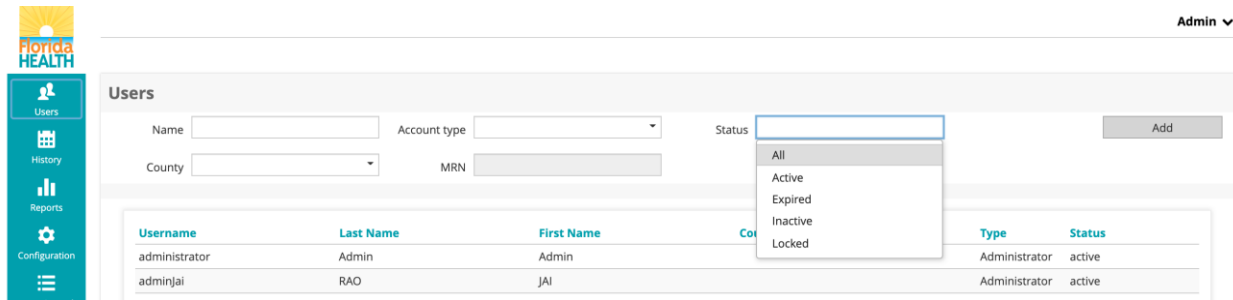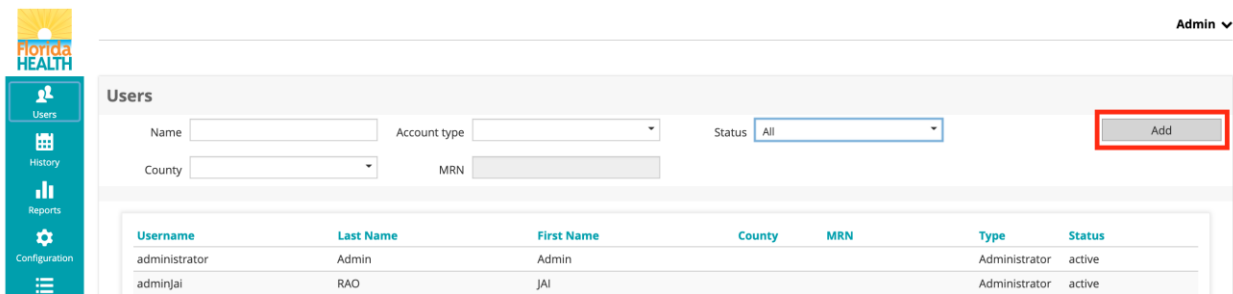
Search by Status

From the *Users* page, click on the drop-down for Status to search for activity by status. Status includes Active, Expired, Inactive and Locked.

Adding a New User

From the *Users* page, click on the '***Add***' button to add a new account. Select the appropriate account type on the the dropdown menu. Then a pop-up window will appear.

The top half of the pop-up window contains fields related to the login information (Username, Password, Authentication Method, and Account Status)*,* while the bottom half contains fields for the display information (Family Name, Given Name, E-mail).

To save the information, click the '*Save*' button on the bottom right corner of the pop-up window.

Editing an Existing User

To edit user details, click the name of the selected user*.* A pop-up window will appear.

Changes may be made to the following fields: Password, Status, Family Name, Given Name, and Email. The remaining fields are all unchangeable once the account has been created.

To save the changes press the '*Save*' button on the bottom right corner of the pop-up window.

To exit without making any edits, or to close the pop-up window, click either the **'X'** button on the top right corner of the pop-up window or the **'Close'** button on the bottom right corner of the pop-up window.

Edit Patient

Username	BillTest
Secure e-mail address	BillTest @ direct.dev.fdohpatientportal.org
Password	
Retype Password	
User must change password at next logon	☐
Second factor authentication method	None / Email / SMS
Demo Account	Yes / No
Status	Active / Inactive Last login: 07/10/2019 04:06 PM

Prefix		Race	▼
First Name	BILL	Ethnicity	▼
Middle Name		Preferred Language	English US
Last Name	DOE		
Previous Name		Home Phone	(727)254-0725
		Mobile Phone	(727)254-0725
Suffix		Work Phone	(___)___-____
Birth Date	07/14/1964	E-mail	
Gender	Male / Female	Address	3108 56TH ST S
Birth Sex	Male / Female		
County	Calhoun - HMS07	City	GULFPORT
MRN	8357331421	US State	FL Zip 33707 - ____

Close   Save

History

The *History* page allows for the user to see all previous site activity that occurred on the site.

Search by Username

From the **teal** sidebar, select the *History* page. Type in the Username field to search for archived activity for a particular user.

Search by Subject

From the *History* page, type in the Subject field a username to search archived activity of the user (login information, attempts, changes, etc.).

Adjust Timeframe of Inquiry

Adjust the timeframe of the inquiry by selecting one of the presets ('*1d*,' '*1w*,' '*1m*,' '*3m*,' '*1y*,' '*All*,' '*Custom*,' or '*Today*'). Click '**<**' to move to the previous page and click '**>**' to move forward.

View by Type

From the *History* page, the type of inquiry can be adjusted between '***All***,' '***Read***,' or '***Changes***.'

Viewing an Entry

From the *History* page, click on the date and time to see the exact details of that event. A History Details pop-up window will appear.

The top section of the pop-up window includes information regarding the *Date, Operation, User, Application* and *Document type*. While information regarding the Document Details will be displayed on the bottom section.
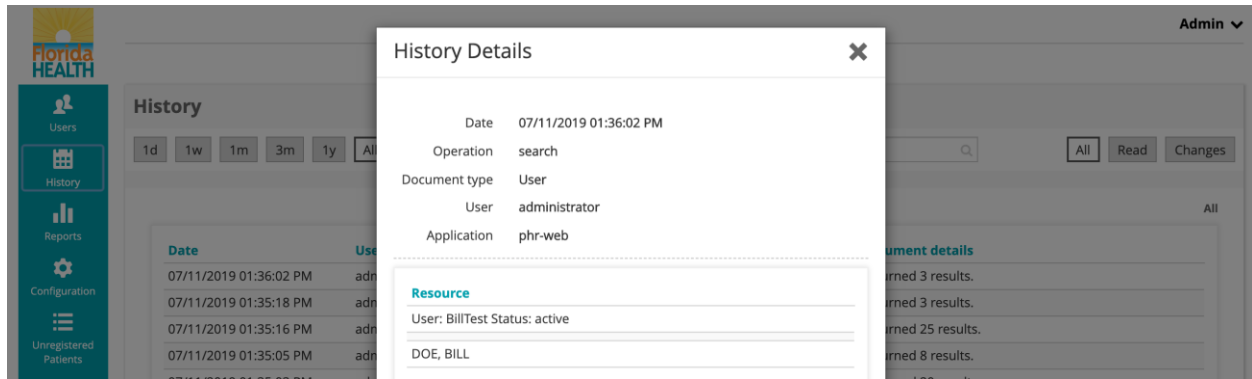
Configuration

This page allows for the administrative user to change the legal documentation and security settings of the site.

Editing by Document Type

From the **teal** sidebar select the *Configuration* page. On the *Configuration* page, under the *'Policy Documents'* tab, select the document to be edited from the drop-down menu, either Terms and Conditions or the Privacy Policy.
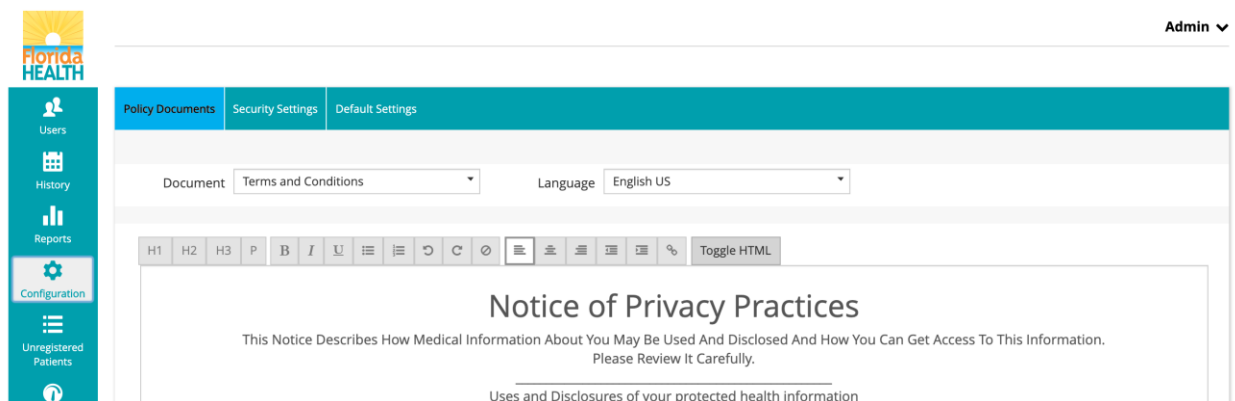
From the *Configuration* page, select the Language (English, Haitian Creole, or Spanish) from the drop-down menu. Once the document and language have been selected, it can be edited within the text box.

To save the changes, click the *'Save'* button on the bottom right corner of the screen.
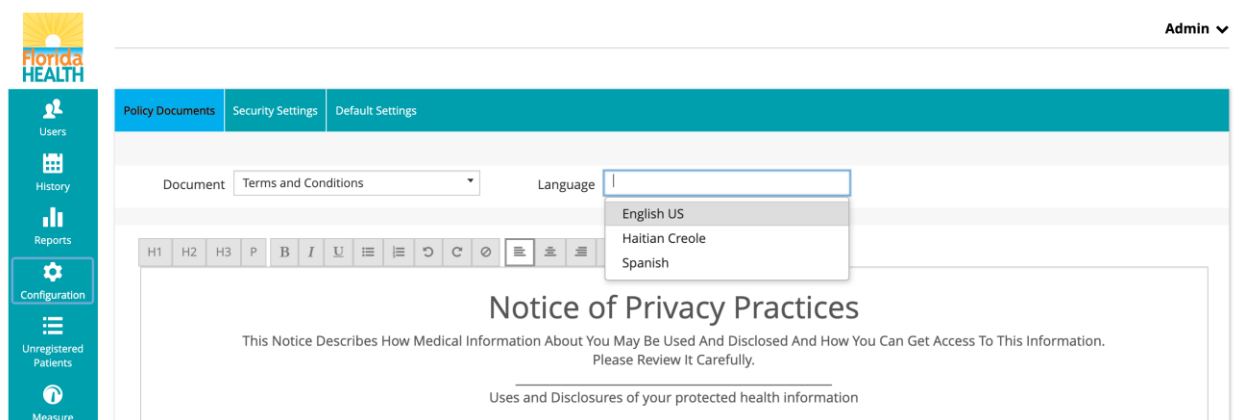
Editing Security Settings

From the *Configuration* page, under the **'Security Settings'** tab, select the type ('**Rules**' or '**Custom**') to be edited from the drop-down menu.

The '**Rules**' button will display two sections; the top half relates to password validation while the bottom half relates to account expiration.

Password Validation provides options for rules to create a password:
- At least one upper case letter
- At least one lower case letter
- At least one number
- At least one special character
- Minimum length
- Maximum length
- Display (instructions for creating password)

Account Expiry has options for rules pertaining to the account itself:
- Account Expiry (days)
- Password Expiry (days)
- Password History Length
- Password Expiry remaining (days)
- Maximum Number of Sessions
- Activation code expiry (days)
- Max Number of Admin Sessions
- Maximum Failed Login Attempts

To save the changes made press the **'Save'** button on the bottom right corner of the screen.

The **'Custom'** button display two sections; the top half relates to password validation while the bottom half relates to account expiration.

Password Validation provides options for rules to create a password:
- Regex (Regular Expression for password validation)
- Display (instructions for creating password)

Account Expiry has options for rules pertaining to the account itself:
- Account Expiry (days)
- Password Expiry (days)
- Password History Length
- Password Expiry remaining (days)
- Maximum Number of Sessions
- Activation code expiry (days)
- Max Number of Admin Sessions
- Maximum Failed Login Attempts

To save the changes made press the **'Save'** button on the bottom right corner of the screen.

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Updated: 7/12/19

Revision History	
7/12/19	Updated screenshots