



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

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Date

Date



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.



Florida HEALTH						Search Patie	ant Edu	ration		Settings 🌣 My pro	ASHLEY 🗸
HEALIH My Dashboard Health Timeline	38 yea	LEY GR ars old ocial Hist								Social H Author Log out	rized persons
Health Profile	Allergies	2	Conditions	2	Medications	Lab Results		Appointments Fri, Apr 5 at 02:30 PM	2	esday this key do exis	

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

Use	rname	testAshle	ey1			
Secure e-mail a	ddress	testAshle	ey1		0	direct.fdh.medicasoft.us
Pa	ssword	1				
Retype Pa:	ssword					
Google Authent	ication					
A	ccount					
Secono authentication n	l factor nethod	None	Emai	I S	MS	
Demo A	ccount	Y	′es			
Prefix					Rac	e
First Name	ASHLEY			E	thnicit	ty
Middle Name					eferre	-
Last Name	GREEN				nguag	
Previous				Home	Phon	e ()
Name				Mobile	Phon	ie ()
Suffix				Work	Phon	e ()
Birth Date	01/01/198	31 🗰			E-ma	il
Gender	Male	Female			Addres	123 Main Street
Birth Sex	Male	Female	► 0 ×			
					Cit	Boston
					JS Stat	te MA Zip 02218 -

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.

Med	icaSo	ft 🎾

Jser profile				Ľ
Use	rname test	shley1		
Secure e-mail a	ddress test/	shley1	0	direct.fdh.medicasoft.us
Pa	ssword			
Retype Pa	ssword			
Google Authent A	ication			
Seconc authentication n	factor N	one Em	ail SMS	
Demo A	ccount	Yes		
Prefix			Race	
First Name	ASHLEY		Ethnicity	
Middle Name			Preferred	
Last Name	GREEN		Language Home Phone	
Previous			Mobile Phone	
Name Suffix			Work Phone	
Birth Date	01/01/1981		E-mail	
Gender	Male Femal		Address	
Birth Sex	Male Femal	5 0 ×		125 Main Screet
DIFTH SEX	rena	<u> </u>	City	Boston
			US State	
			US State	MA 210 02218

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:

Florida						Search Patier	nt Education			Settings 🌣 My profil	
	ASH	LEY GR	EEN							Social His	-
My Dashboard	· · · ·	ars old Social Hist	ory							Log out	ed persons
L Health Profile	Allergies	2	Conditions	2	Medications	Lab Results	Appointments	2	Т	uesday	Mar 26
My Health Files					.		Fri, Apr 5 a 02:30 PM			this key doe exist	s not

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.



User profile		×
Username	testAshley1	
Secure e-mail address	testAshley1 @ direct.fdh.medicasoft.us	
Password		
Retype Password		
Google Authentication Account		
Second factor authentication method	None Email SMS Use: Mobile Phone	۳
Demo Account	Yes	

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

User profile	Token X	×
Username	A text message containing the token has been sent to your phone.	
Secure e-mail address Password	34-	dicasoft.us
Retype Password	Close Resend Token Save	
Google Authentication Account		
Second factor authentication method	None Email SMS Use	Mobile Phone
Demo Account	Yes	

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.

					? (Settings 🌣	ASHLEY 🗸
Florida HEALTH				Search Patient Education			Search
My Dashboard	2	ASHLEY GREEN 38 years old Edit Social History					

Click the down arrow next to the Preferred Units of Measure section to toggle:



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

Settings		×
O Preferred units of measure		
Height/Length Unit	cm	inch
Weight Unit	kg	ounce
Temperature Unit	°C	۴
Notifications		
O Message receipts		
Data export		
O Widgets		
O Modules		
Health Profile Categories		
My Appointments		
O To Do's		
Preferred interface language	English US	•
	C	Close Save

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



Settings					×
O Preferred units of me	easure				
O Notifications					
Allow system to send notifications for:	🗆 He	RECT Mess alth Data F essage fron	Received	rator	
Remind me about:	🗆 Up	coming ap	pointment		*
	🗆 Due task				v
Notification method:	🔲 Em 🔲 SM (email		Use s not set)		Ŧ
Message receipts					
O Data export					
© Widgets					
Modules					
Health Profile Catego	ories				
O My Appointments					
O To Do's					
Preferred interface langu	age	English U	S		•
				Close	Save

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

Settings	×
O Preferred units of measure	
O Notifications	
O Message receipts	
For any message received including a read	Always
receipt, send a read receipt:	Never
	Ask every time
O Data export	
© Widgets	
O Modules	
Health Profile Categories	
O My Appointments	
To Do's	
Preferred interface language English US	•
	Close Save

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.

Settings	×
O Preferred units of measure	•
O Notifications	
O Message receipts	
O Data export	
Enter your Direct secure messag record (PHR) system.	ge address on your provider's personal health
	Add
Ø Widgets	
O Modules	
O Health Profile Categories	
O My Appointments	
O To Do's	
Preferred interface language	English US 🔹
	Close Save

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.

Settings		×
 Preferred units of measure Notifications Message receipts 		
© Data export		
© Widgets		
Available widgets	Visible widgets	*
 Modules Health Profile Categories My Appointments 	 Heart Rate Health Files 	
O To Do's		
Preferred interface language	English US Close Sa	• ve



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 popup 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

Accoun	t Profile	3
1.1	What are the required fields in my account profile? What is this information used for?	3
Second	Factor Authentication	5
1.2	What is the second factor authentication method?	5
Langua	ge Preference	5
1.3	-	
Direct I	Messaging	5
1.4	What is Direct messaging?	5
1.5	How is Direct messaging integrated within Florida Health Connect™?	6
Passwo	rd / Username	
1.6	I've forgotten my password. How do I reset it?	6
1.7	I've forgotten my username. How do I retrieve it?	8
Detiont	Education	0

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.

da TH					Search Patie	nt Education			Searc
board	ASHLEY GR 38 years old Edit Social Hist								
nofile h Files	Allergies 2 peanut allergenic extr Severity	Conditions 2	Medications	Lab Results	Appointments 2 Fri, Apr 5 at 02:30 PM 3 MO	Blood Pressure	Heart Rate 4	Health Files 2 Vitals.docx Mar 22, 2019	Tuesday Mar 2 this key does not exist
ments os ty	Exercise	Immunizations 3	Procedures 2 Records a construction of the second	Respiratory Rate	Sleep 3	2 98.2 °F Feb 1, 2019	To Do List No future active to do list recorded.	Visits	Health Tips U.S. Measles Cases Hit 314 This Year WebMD Health
ony res	Weight 2 152 Ib 0.000 oz Feb 1, 2019								

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.

Florida						Admin
<u>n</u>	Users					
Users	Name	Account type	•	Status All 👻		Add
History	County	- MRN				
Reports						
\$	Username	Last Name	First Name	County MRN	Туре	Status
Configuration	administrator	Admin	Admin		Administrator	active
	adminJai	RAO	JAI		Administrator	active
Unregistered Patients	AnothePP	ANOTHE	PP	Baker - HMS02 0253631544	Patient	active
	BANDISWA	VAT	SWA		Patient	active
	harnevhy	RADNEV	IAMERSON		Datient	activo

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.

Florida HEALTH						Adm
L Users	Users					
=	Name	Account type		Status All		Add
History	County	- MRN	All			
di 👘	county	WIG V	Administrator			
Reports			Patient			
\$	Username	Last Name	Practice Admin	County MRN	Туре	Status
onfiguration	administrator	Admin	Admin		Administrator	active
	adminJai	RAO	JAI		Administrator	active
Unregistered Patients	AnothePP	ANOTHE	PP	Baker - HMS02 0253631544	Patient	active
	BANDISWA	VAT	SWA		Patient	active
Мезсиге	barneybx	BARNEY	JAMERSON		Patient	active



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.

							Admin 🗸
Florida HEALTH							
22	Users						
	Name	Account type		Status			Add
History	County	- MRN			All		
Reports					Active Expired		
*	Username	Last Name	First Name	Co	Inactive Locked	Туре	Status
Configuration	administrator	Admin	Admin		LOCKED	Administrator	active
. :≡	adminJai	RAO	JAI			Administrator	active
and the second s				-			

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.

Florida							Admin 🗸
22	Users						
Users	Name	Account type	•	Status All	•		Add
History	County	- MRN					
Reports							
\$	Username	Last Name	First Name	County	MRN	Туре	Status
Configuration	administrator	Admin	Admin			Administrator	active
. :=	adminJai	RAO	JAI			Administrator	active

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.

Florida		Add Patient				×		Admin 🗸
HEALIH Users History	Users Name	Userna Secure e-mail addr Passw	ress	@ dir	ect.dev.fdohpatientportal.org	•		Add
Reports	County	Retype Passw User must cha password at next log	inge gon					
Configuration	Username administrator	Second fac authentication met		Email	SMS		Type Administrator	active
Unregistered	adminJai AnothePP		atus Active	Inactive			Administrator Patient	active
Patients	BANDISWA	Prefix		Race			Patient	active
Measure Reports	barneybx benchleybarney	First Name		Ethnicity		•		active
	BettyBetta BillTest	Middle Name		Preferred Language		Q	Patient	active
	brownsami	Previous		Home Phone Mobile Phone	()		Patient	active
	BrownTest brownvip	Suffix		Work Phone	()		Patient Patient	active
		Birth Date Gender	Male Female	E-mail		- 8		
			Male Female					
		County	•	City US State	▼ Zip -	- 1	FAQs Privacy	Policy Terms and Conditions
						_		

Editing an Existing User

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

						Admin
Florida HEALTH						
L Users	Users					
	Name	Account type	Patient	Status All		Add
History		×				
11	County	 MRN 				
Reports						
\$	Username	Last Name	First Name	County MRN	Туре	Status
Configuration	AnothePP	ANOTHE	PP	Baker - HMS02 0253631544	Patient	active
				Baker - HWI302 0255051544		
	BANDISWA	VAT	SWA		Patient	active
Unregistered Patients	barneybx	BARNEY	JAMERSON		Patient	active
	BettyBetta	TEST	BETTA	Baker - HMS02 0241015202	Patient	active
\mathbf{O}				Calhoun - HMS		
Measure Reports	BillTest	DOE	BILL	07 8357331421	Patient	active
	brownsami	BROWN	SAMI	Taylor - HMS62 6253900607	Patient	active

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							×
Use	rname	BillTest					
Secure e-mail a	ddress	BillTest		@	dire	ct.dev.fdohpatientportal.org	
Pa	ssword						
Retype Pa							
User must of password at nex							
Seconc authentication n	l factor nethod	None	Email			SMS	
Demo A	ccount	Yes	No				
	Status	Active	Inacti	ve		Last login: 07/10/2019 04:06	PM
Prefix				Rad	ce		•
First Name	BILL			Ethnici	ity		•
Middle Name				referre anguag		English US	Q
Last Name	DOE			e Phor		(727)254-0725	
Previous Name				e Phor		(727)254-0725	
Suffix			Wor	k Phor	ne	()	
Birth Date	07/14/19	64 🔛		E-ma	ail		
Gender	Male	Female		Addre	SS	3108 56TH ST S	
Birth Sex	Male	Female	×				
				Ci	ity	GULFPORT	
County	Calhoun -		•	US Sta	ite	FL • Zip 33707 -	
MRN	8357331	421					
						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.

rida							
LTH							
e rs	History						
	1d 1w 1m 3m 1	y All 🖣 🕨	Custom Today	Username	Q Subj	iect Q	All Read Ch
tory							
tory							
tory	Date	User	Operation	Status	Application	Document details	
itory	Date 07/11/2019 01:36:02 PM	User administrator	Operation search	Status Success	Application phr-web	Document details Returned 3 results.	
borts							

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.).

la H							
	listory						
- 1	1d 1w 1m 3m 1y		Custom Today	Username	Q. Subj	ect Q	All Read C
y							
Y							
y S	Date	User	Operation	Status	Application	Document details	
s	Date 07/11/2019 01:36:02 PM	User administrator	Operation search	Status Success	Application phr-web	Document details Returned 3 results.	

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.



History					
1d 1w 1m 3m	iy All 🖣 🕨	Custom Today Username	e Q Subje	ect Q	All Read
	User	Operation Status	Application	Document details	
Date 07/11/2019 01:36:02 PM	User administrator	Operation Status search Success	Application phr-web	Document details Returned 3 results.	
Date			phr-web		

View by Type

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

lorida IEALTH							Adr
EALTH 2	llisterre						
Users	History						
History	1d 1w 1m 3m 1	y All	Custom Today	Username	Q. Subje	ect Q	All Read Char
leports	Date	User	Operation	Status	Application	Document details	
\$	07/11/2019 01:36:02 PM	administrator	search	Success	phr-web	Returned 3 results.	

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.

Florida							Admin 🗸
Florida HEALTH							
L Users	History						
History	1d 1w 1m 3m 1	y All 🖣 🕨	Custom Today	Username	Q Subj	ect Q	All Read Changes
dt							All
Reports	Date	User	Operation	Status	Application	Document details	
Configuration	07/11/2019 01:36:02 PM	administrator	search	Success	phr-web	Returned 3 results.	
	07/11/2019 01:35:18 PM	administrator	search	Success	phr-web	Returned 3 results.	

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.



					Admin 🗸
Florida HEALTH		History Details	×		
Users	History 1d 1w 1m 3m 1y A	Date 07/11/2019 01:36:02 PM Operation search Document type User			All Read Changes
di di		User administrator			All
Reports	Date Us	Application phr-web	umen	t details	
*	07/11/2019 01:36:02 PM ad		irned	3 results.	
Configuration	07/11/2019 01:35:18 PM ad		irned	3 results.	
=	07/11/2019 01:35:16 PM ad	User: BillTest Status: active	irned	25 results.	
Unregistered Patients	07/11/2019 01:35:05 PM ad	DOE, BILL	irned	8 results.	
			in the second se	20	



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.

		Admin 🗸
HEALTH		
Users	Policy Documents Security Settings Default Settings	
History	Document Terms and Conditions Language	
	English US	
Reports	H1 H2 H3 P B I U III III C O E 2 4 Haitian Creole Spanish	
Configuration	Notice of Privacy Practices	
Unregistered Patients	This Notice Describes How Medical Information About You May Be Used And Disclosed And How You Can Get Access To This Information. Please Review It Carefully.	
() Measure	Uses and Disclosures of your protected health information	

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.

	aSoft			
				ASH
Florida HEALTH				Activation code
و Users	Policy Documents Security Settings Defau	ilt Settings		
H				
History	Password Validation	Rules Custom		
Reports		At least one upper-case letter 🕜		At least one number 🕑
to the second se		At least one lower-case letter 🗷		At least one special character 🔲
Configuration		Min length 6		Max length 20
💬 Broadcast	Display	The password must contain between 6 an	d 20 characters , and at least one each o	f upper-case letters, lower-case letters, numbe
	Account Expiry (days)	90	Password Expiry (days)	60
Patients	Password History Length	24	Password Expiry Reminder	10
Measure	Max Number Of Sessions	5	(days)	
Reports	Max Number Of Admin Sessions	10	Max Failed Login Attempts	3

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.



					ASHLEY 🗸
Florida HEALTH				Activation code	Q
2 Users	Policy Documents Security Settings Defau	It Settings			
History	Password Validation	Rules Custom			
Reports	Regex				
Configuration	Display				
ee Broadcast	Account Expiry (days)	90	Password Expiry (days)	60	
:=	Password History Length	24	Password Expiry Reminder (days)	10	
Unregistered Patients	Max Number Of Sessions	5	Max Failed Login Attempts	3	
Measure Reports	Max Number Of Admin Sessions	10	bbbbbb		
					Save

Updated: 7/12/19

Revision History					
7/12/19	Updated screenshots				