

HarmoniMD™ Training Tip

Managing Your Account in the User Profile & Resetting Your Password

Staff affected: All Users

BACKGROUND

The User Profile in the HarmoniMD™ Main Menu allows you to manage your HarmoniMD™ account:

From the first Tab, *Contact Info and User Data*, you can:

- Change your User Profile information (PIN, name, email address, start screen, etc.)
- Enter Identification information if so desired (or if your Facility requires it).
- Register a Phone Number – This allows you to retrieve your password should you forget it.
- Review and Change your Security Questions– If you did not like the options for Security Questions available when registering your account, you can create your own questions.

The Second Tab, *Password*, is just for changing your password.

Accessing the User Profile

Once logged in to HarmoniMD™, click on your name, the first choice in the Main Menu (RED rectangle):

The screenshot shows the HarmoniMD™ interface. On the left is a navigation menu with the following items: Scheduling, Lab Worklist, Imaging Worklist, Pharmacy Worklist, Med Soft Stop, Dietary Worklist, Therapist Worklist, System Reporting, Administration, and Logout. The 'Sample, Name' item is highlighted with a red rectangle. The main area displays a patient list table with the following data:

MRN	Acct Num	Name	DOB	Sex	Patient Vis
1003	AC0J-0023	Acosta, Jose Luis	10/15/1982	Male	06/15/2017
OP-1025	XXX	Apellido Materno, Juan Carlos Apellido Paterno	02/02/1972	Male	01/22/2018
OP-1028	123	Barrios, Herberth	01/26/1979	Male	01/26/2018
OP-1036	1010	Cervantes, Antonio Veraza	11/13/1959	Male	02/13/2018
OP-1000	SMID-3100	Dimitrov, Dan Smith	02/21/1946	Male	06/28/2017
1019		Escudero, Angela	02/02/1985	Female	12/12/2017
OP-1022	453645	Fernandez, Arturo	12/14/1962	Male	12/14/2017

This will open the first User Profile tab, *Contact Info and User Data*. (See next page for a screenshot.)

Active	Primary	Phone Number	Phone Type	Note
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Register	123-456-1789	Mobile Phone	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Registered	4084933439	Mobile Phone	

The *Contact Info and User Data* tab in the HarmoniMD™ User Profile

Changing your PIN or other User Profile Information

Click on **Edit User Profile Information** or on your email address (BLUE rectangles) to open the User Profile window:

The fields are as follows and all can be edited:

Personal PIN **Required** This is defined at registration and can be changed at any time. The PIN must be between 4 and 7 numbers. Choose a PIN that is very to remember but is difficult for someone else to replicate.

Skype ID Optional

NPI **National Provider Identification**, a number required for all Physicians in the US.

DEA **Drug Enforcement Administration**, a number required for all Physicians in the US.

Email Address You can change the email address where you receive communications. However, your user id will always remain as the one used when registering. If you want to change your user id, you must ask your IT department to create a new account for you and deactivate your current account since all user ids must be unique. You would then have to go through the registration process all over again.

Language	A dropdown list, select the language to display the software in.
Title	Enter an optional title
First Name	These three name fields can be edited.
Middle Name	"
Last Name	"
License No	Optional. If the user is a clinician and has a license number, it can be entered here.
Education Level	Optional
Medical Specialty 1	Optional. Medical Specialties can be selected from the dropdown lists.
Medical Specialty 2	"
Medical Specialty 3	"
Start Screen	Select the screen to appear when you first log on from the dropdown list. For most users, this will be the Patient List. But, if you work in a specific Department you many want to change this. For example, Lab staff can have their start screen be the Lab Worklist, or Pharmacy staff can use the Pharmacy Worklist, etc. TIP: Check with your IT department to make sure you have access to the Start Screen you select.

Entering Optional Identification Information

You may want to keep identification information in your User Profile. Or, your facility may require you to enter identification information. To do so, click on **+ Identification** (GREEN rectangle in first screenshot on page 2). This opens the add *Identification* window:

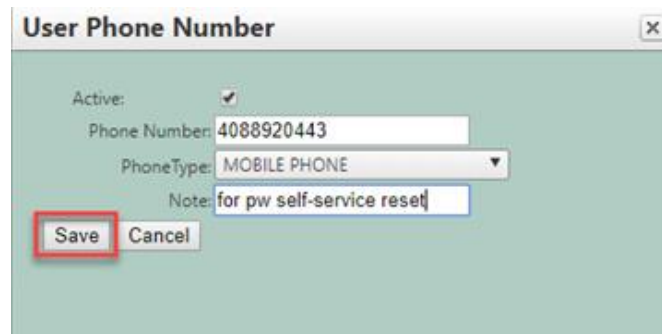
Type in the ID Number, select the ID Type from the dropdown list, then hit **Save**.

NOTE: If you need another ID Type added, contact your IT Department.

Register a Phone Number Within Your HarmoniMD™ Profile

Use this to enable the self-service password reset function within HarmoniMD™. The phone number registered must be able to receive text messages and must be set as your primary phone number. If you do not register a phone number and forget your password, you must contact your IT Department to reset your password for you.

Click on **+ Phone Numbers** (ORANGE rectangle in first screenshot on page 2). This opens the add *User Phone Number* window:



User Phone Number

Active:

Phone Number: 4088920443

Phone Type: MOBILE PHONE

Note: for pw self-service reset

Save Cancel

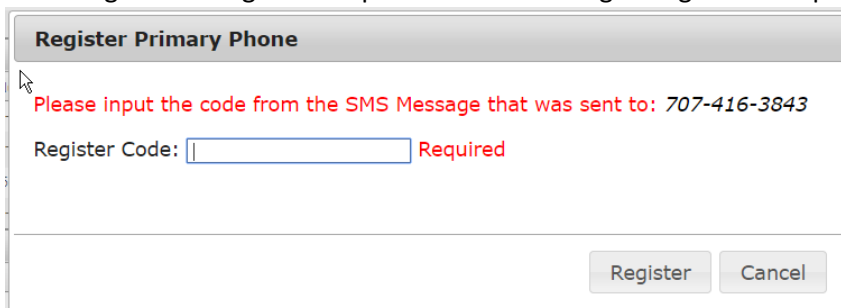
Follow these steps:

1. Keep the *Active* box checked
2. Enter the Phone Number
IMPORTANT: The phone number you enter must be able to accept text messages.
3. Choose a Phone Type from the dropdown list.
4. Enter any optional Note desired
5. Click **Save**.
6. Back in the User Profile window, select this phone number as the Primary phone number. (If it is the only phone number listed, it should default to the primary phone.) The phone number must be set to be your primary phone number in order to receive text messages, which are used to reset your password:



Active	Primary	Phone Number	Phone Type
<input checked="" type="checkbox"/>	<input type="checkbox"/>	707-416-384333	Mobile Phone
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	707-416-3843	Home Phone
<input checked="" type="checkbox"/>	<input type="checkbox"/>	cel1234567	Mobile Phone
<input checked="" type="checkbox"/>	<input type="checkbox"/>	707-416-1111	Home Phone

Click 'Register' to register the phone. The following dialog box will open:



Register Primary Phone

Please input the code from the SMS Message that was sent to: 707-416-3843

Register Code: Required

Register Cancel

As noted, a code will be sent to that phone. After you enter the valid verification code your phone will be registered.

+ Phone Numbers			
Active	Primary	Phone Number	PhoneType
<input checked="" type="checkbox"/>	<input type="checkbox"/>	123-456-1789	Mobile Phone
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4084933439	Mobile Phone

Note: If a phone number becomes obsolete, simply open the record and uncheck the *Active* box to deactivate it.

See last section below for how to use the reset password feature.

Reviewing & Updating Your Security Questions

The current Security Questions you selected and answers you provided are listed in the Additional Security Questions section. You need to know the answers to these questions to log in from new computers or reset your password on the login screen.

+ Additional Security Questions					
Question 1	Answer1	Question 2	Answer2	Question 3	Answer3
In what city did you meet your spouse/significant other?		What school did you attend for sixth grade?		In what city does your nearest sibling live?	

To change the questions or answers, click on **+ Additional Security Questions** (shown above and PURPLE rectangle in first screenshot on page 2). This will open the add *Security Questions* window:

The screenshot shows a window titled "Security Questions" with a close button (X) in the top right corner. Inside the window, there are three rows, each representing a security question and its answer field. The questions are: "Question 1: In what city did you meet your spouse/significant other?", "Question 2: What school did you attend for sixth grade?", and "Question 3: In what city does your nearest sibling live?". Each question has a corresponding answer field. At the bottom of the window, there are two buttons: "Update" and "Cancel". The "Update" button is highlighted with a red rectangle.

Note that unlike at registration, there is not a list of questions to choose from. You can create whatever questions you want, tailored specifically for you. Choose questions whose answers are very easy for you to remember. If you forget the answers to your security questions, you must go through the process of registration again.

Changing Your Password

To change your password, click on on the *Change Password* tab in User Profile (RED rectangle below). Enter your current password, your new password twice, and then select **Change Password**.

The screenshot shows the HarmoniMD user profile interface. On the left is a navigation menu with items like "Sample, Name", "Patient List", "Scheduling", "Lab Worklist", "Imaging Worklist", "Pharmacy Worklist", "Med Soft Stop", "Dietary Worklist", "Therapist Worklist", "System Reporting", "Administration", and "Logout". The main content area is titled "Change Your Password" and contains three input fields: "Password:", "New Password:", and "Confirm New Password:". A "Change Password" button is located below these fields. The "Change Password" tab in the top navigation bar is highlighted with a red rectangle.

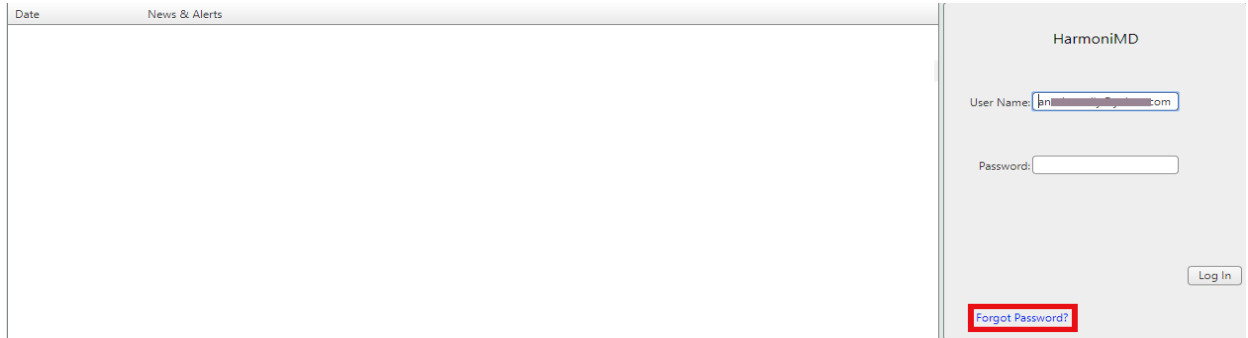
The *Change Password* tab in the HarmoniMD™ User Profile

Your password is updated! Once your password has been changed you will be required to login again using the new password.

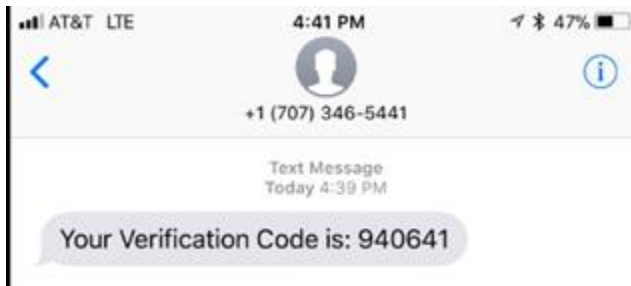
Resetting Your Password if You've Forgotten It

Once you've registered a phone number (see page 4), if you ever forget your password, you can reset your password yourself. To do so:

1. On the HarmoniMD™ login screen, enter your User Name in the user name field, then click on the [Forgot Password?](#) link at the bottom of the screen (RED rectangle):



2. Go to your phone and look for a text message with a verification code:

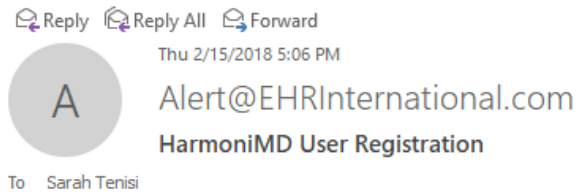


3. You will be asked to enter the answer to one of your Security Questions along with this code:



4. Click **Reset Password**.

5. You will receive a temporary password in your email:



6. Use this temporary password to login.
7. For security reasons, go to the *Change Password* tab in the User Profile to change your password. (See page 5 above.)

Please report any issues to your IT Department as soon as they are recognized as it is much easier to resolve them when the information is current.

Thank you, *The HarmoniMD™ Team*