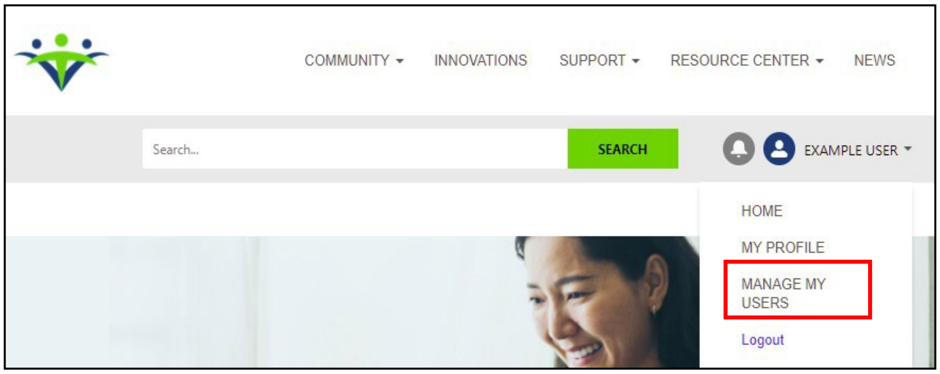
Client Admin Feature & Functionality

- All agencies should designate portal Admin(s) to manage user roles
- Send an email to DL_Community_Portal_Help@ntst.com to request an admin account
- Client Admins cannot create a new user, but can modify user roles as needed.
    - Any new user should follow the standard sign up/registration process
    - New users will need your client code (your 7-digit Netsmart Account number) to complete their registration.
    - If you do not know this you can call support or email DL_Community_Portal_Help@ntst.com

To manage users:

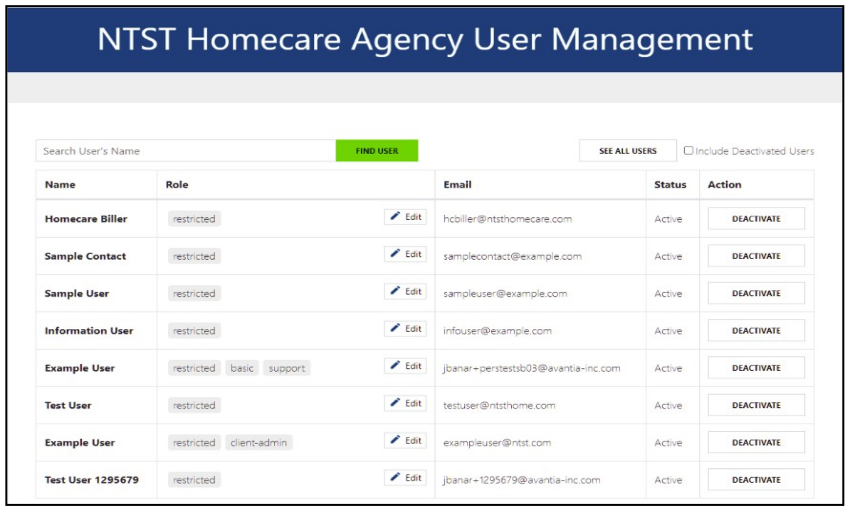
- All Client Admins will have a '*Manage My Users*' menu option under the profile option in the upper right-hand corner (click ▾ to display menu)



- Click 'Manage My Users' to open the Client Admin menu

User management page

- Your user management page will display a list of all contacts associated with your organization through the portal (Note: Contact will not display unless they have signed in to the portal).
    - If a contact is listed that is not a part of your agency or is no longer employed with your organization, you can remove them by selecting the “DEACTIVATE” button in the contact listing row.



- Each individual user is assigned a specific role that controls access to various sections of the NetsmartCONNECT community portal

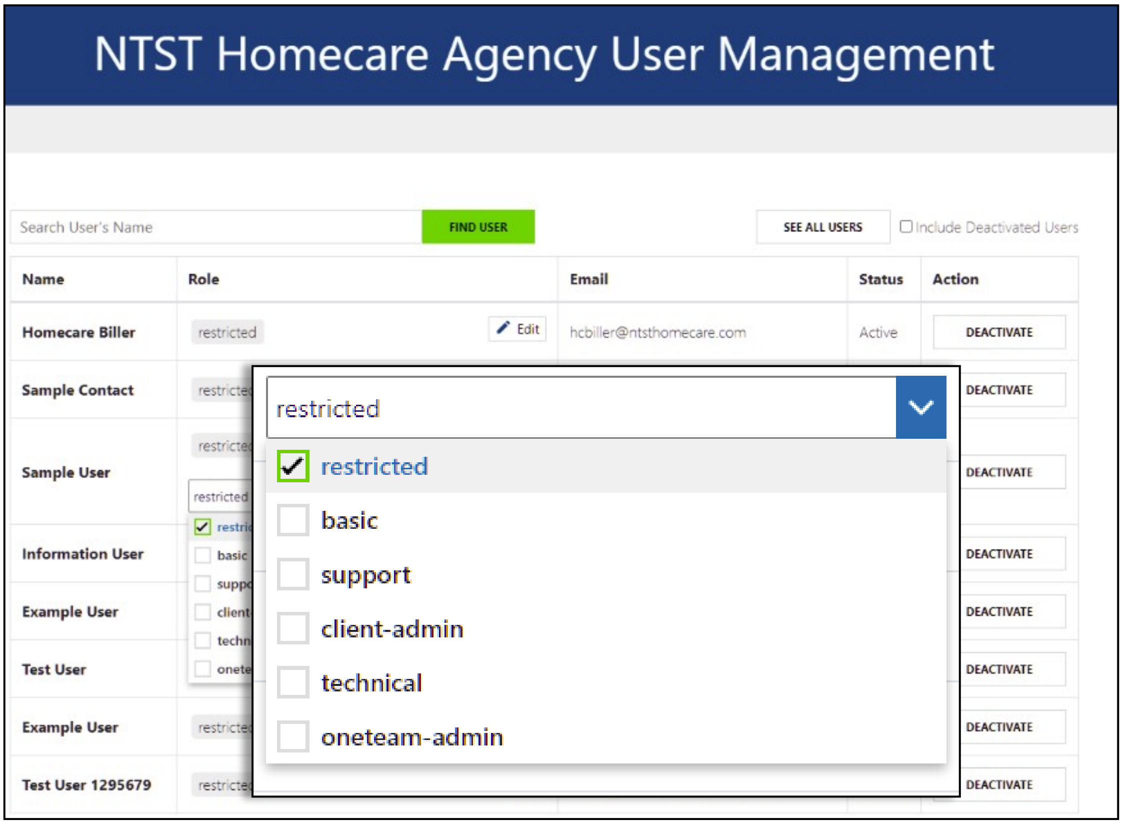
- Any new registrations have basic role by default

Role Outline:

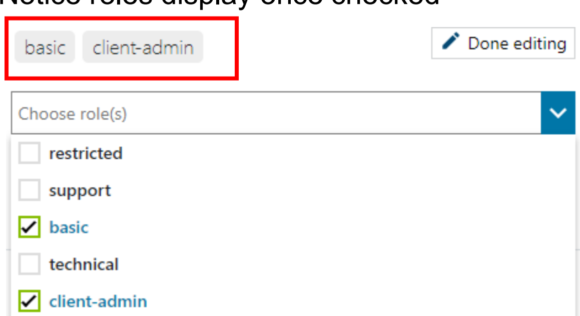
Role Type	Summary
Restricted	Limited user. Restricted to public content only. Must be accepted/confirmed by Client Admin in order to be moved to Basic profile.
Basic	Standard user. Access to Community, Innovations, Resource Centers, News and Events. Does not have access to Support or Solution Downloads.
Technical	Same as Basic user but added access to Solution Download Portal.
Support	Same as Basic user but added access to Support Portal.

To edit/update a user role:

1. Click [Edit] to open roles menu



- Check or uncheck desired role(s)
- Notice roles display once checked

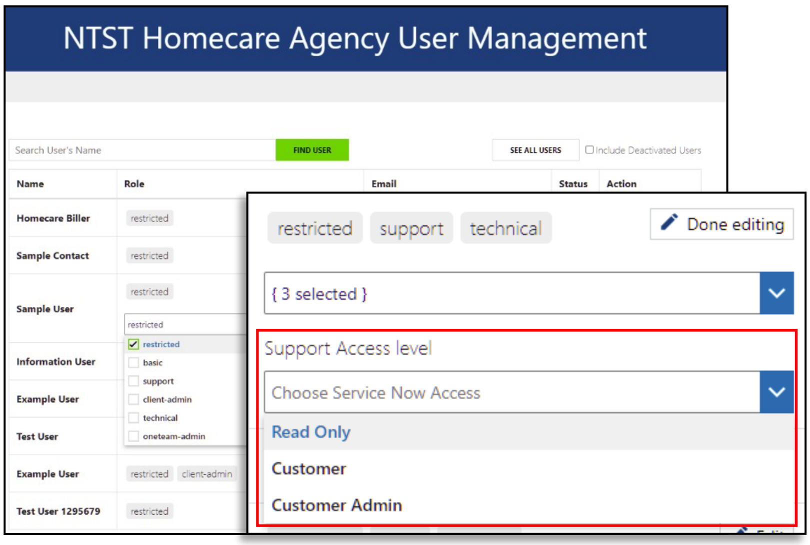


2. Click [Done editing] to complete changes
   - A user will need to log out and back in to see changes

Support Access Level

- Notice Support Access levels
    - Read Only – View only access to agency cases
    - Customer - Open/manage cases and access to cases created by contact.
    - Full Customer Admin - Open/manage cases and access to all cases for their account.

- Choose the access to complete the updates for a selected user



3. Click [Done editing] to complete changes
    - A user will need to log out and back in to see changes

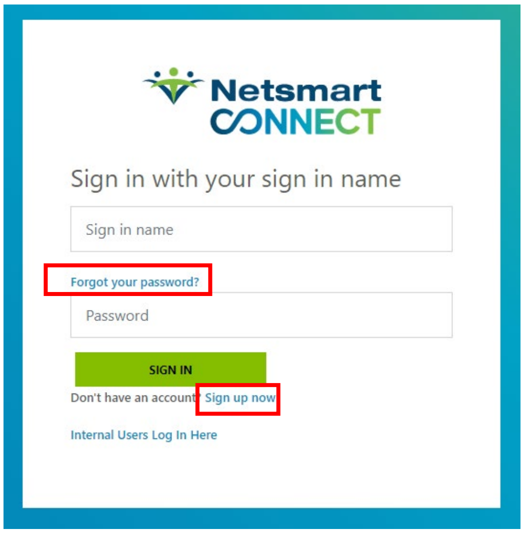
How do users sign up?

NetsmartCares Users: If a user previously had a NetsmartCares account, their information has been migrated to NetsmartCONNECT. They will simply need to create a new password by following the steps below:

1. Click the link in the registration email or visit www.NetsmartCONNECT.com and select "Forgot your password"
2. Input your email address in the box provided and press send verification code.
3. Verify your email by inputting the code emailed to you
4. Create a new password
5. Start connecting!

New Users: New users can create a new account by clicking "Sign up now". To create a new account, users will need their Client Code. A user's client code is a the 7-digit Client Account Number that can be located the following ways:

- Contact your agency's Client Admin(s)
- Email DL_Community_Portal_Help@ntst.com
- Call Support



Available Resources to help navigate NetsmartCONNECT:

- NetsmartCONNECT Features List
- NetsmartCONNECT Quick Guide Videos
- NesmartCONNECT Office Hours