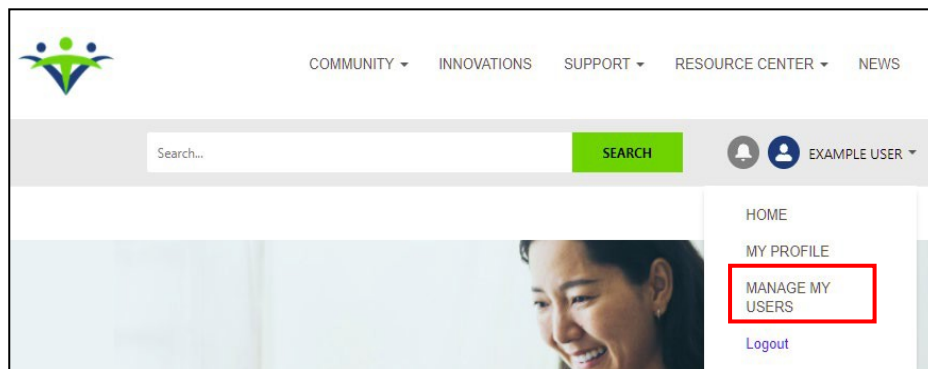


Client Admin Feature & Functionality

- 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.


Name	Role	Email	Status	Action
Homecare Biller	restricted	hcbiller@ntsthomecare.com	Active	DEACTIVATE
Sample Contact	restricted	samplecontact@example.com	Active	DEACTIVATE
Sample User	restricted	sampleuser@example.com	Active	DEACTIVATE
Information User	restricted	infouser@example.com	Active	DEACTIVATE
Example User	restricted basic support	jbanar-perstestsb03@avantia-inc.com	Active	DEACTIVATE
Test User	restricted	testuser@ntsthome.com	Active	DEACTIVATE
Example User	restricted client-admin	exampleuser@ntst.com	Active	DEACTIVATE
Test User 1295679	restricted	jbanar-1295679@avantia-inc.com	Active	DEACTIVATE

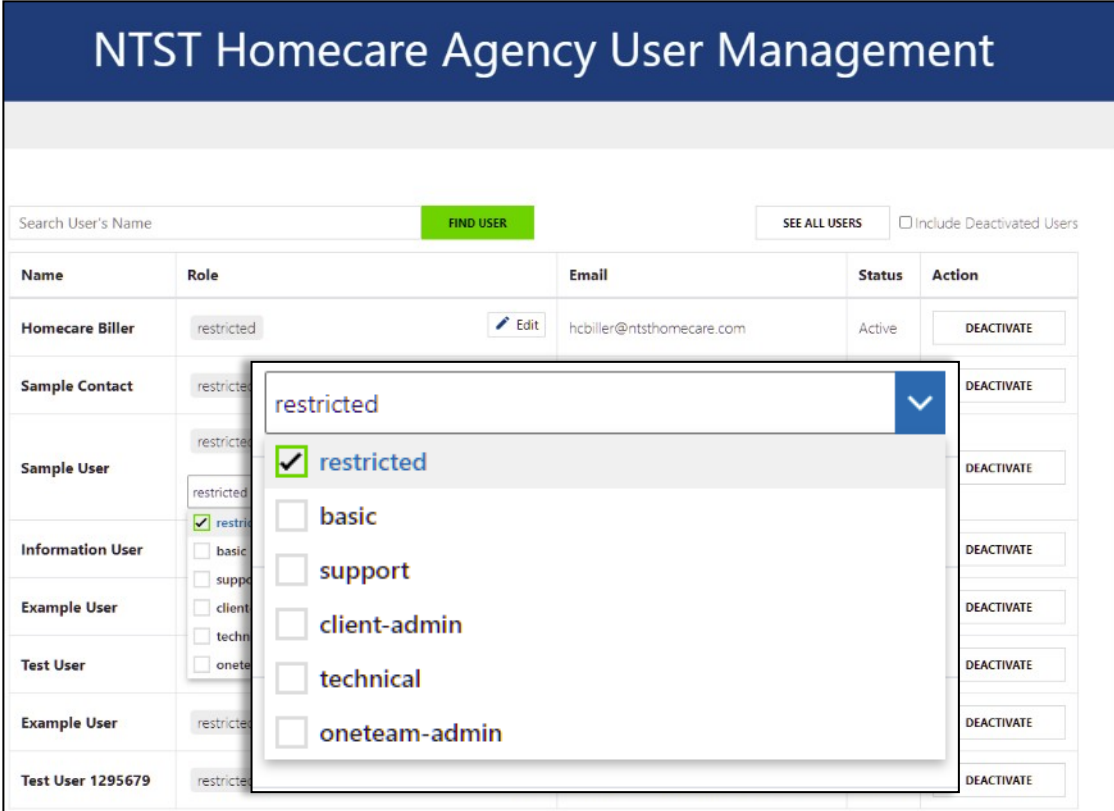
- Each individual user is assigned a specific role that controls access to various sections of the NetsmartCONNECT community portal
- Any new registrations have basic role by default

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.

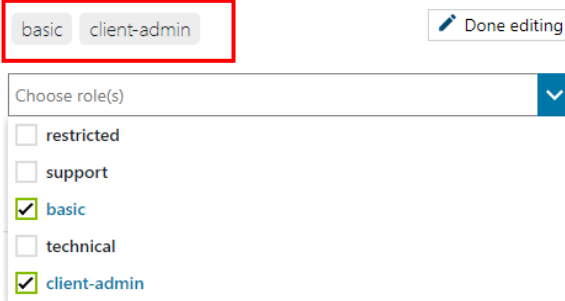
To edit/update a user role:

1. Click  to open roles menu




The screenshot displays the 'NTST Homecare Agency User Management' interface. At the top, there is a search bar for 'Search User's Name' with a 'FIND USER' button and a 'SEE ALL USERS' button. A checkbox for 'Include Deactivated Users' is also present. Below this is a table with columns: Name, Role, Email, Status, and Action. The table lists several users, including 'Homecare Biller', 'Sample Contact', 'Sample User', 'Information User', 'Example User', 'Test User', and 'Test User 1295679'. A dropdown menu is open over the 'Role' column, showing a list of roles: 'restricted' (selected), 'basic', 'support', 'client-admin', 'technical', and 'oneteam-admin'. Each role has a checkbox next to it.

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



This screenshot shows a close-up of the role selection interface. At the top, there are two role buttons: 'basic' and 'client-admin', both of which are highlighted with a red box. To the right of these buttons is a 'Done editing' button. Below the buttons is a dropdown menu titled 'Choose role(s)' with a list of roles: 'restricted', 'support', 'basic' (checked), 'technical', and 'client-admin' (checked).

2. Click  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

The screenshot displays the 'NTST Homecare Agency User Management' interface. It features a search bar with a 'FIND USER' button and a 'SEE ALL USERS' button. Below the search bar is a table with columns for Name, Role, Email, Status, and Action. The table lists several users, including 'Homecare Biller', 'Sample Contact', 'Sample User', 'Information User', 'Example User', 'Test User', and 'Test User 1295679'. A modal window is open over the 'Information User' row, showing a list of roles: 'restricted', 'support', and 'technical'. The 'restricted' role is selected. Below the role list, there is a dropdown menu with the text '{ 3 selected }'. The modal also shows a 'Done editing' button. A red box highlights the 'Support Access level' section, which includes a dropdown menu with the text 'Choose Service Now Access' and a list of options: 'Read Only', 'Customer', and 'Customer Admin'.

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



The screenshot shows the NetsmartCONNECT login interface. At the top is the logo. The main heading is "Sign in with your sign in name". Below this is a text input field labeled "Sign in name". Underneath is a "Forgot your password?" link, which is highlighted with a red box. Below that is a "Password" input field. A green "SIGN IN" button is positioned below the password field. At the bottom of the form area, there is a link "Don't have an account? Sign up now" with a red box around it, and a smaller link "Internal Users Log In Here" below it.

Available Resources to help navigate NetsmartCONNECT:

- [NetsmartCONNECT Features List](#)
- [NetsmartCONNECT Quick Guide Videos](#)
- [NetsmartCONNECT Office Hours](#)