NetsmartCONNECT Solution Support Portal

Training for Netsmart

TheraOffice

Netsmart

Register for NetsmartCONNECT

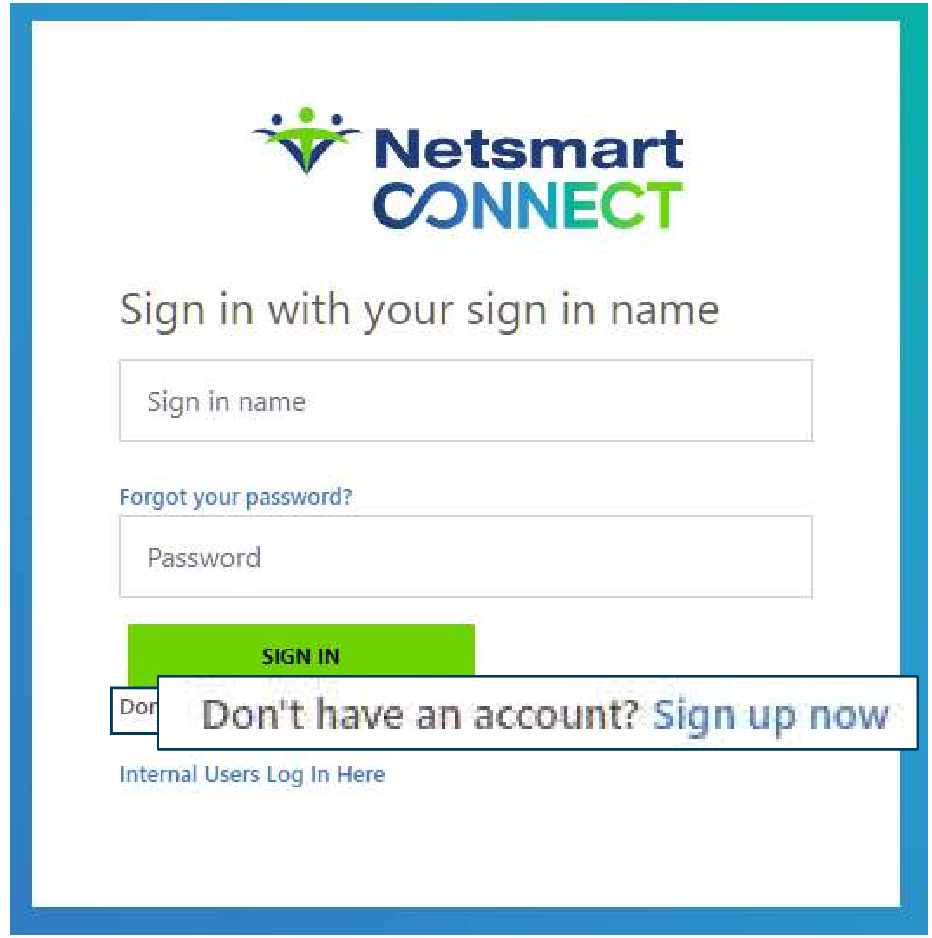
Netsmart

Register for NetsmartCONNECT

- Email were sent 3/23/23 from NetsmartCONNECT(clientexperience@ntst.com)
  - Check Spam/Junk if missing
  - Call Support if you need assistance
- Begin with registration on NetsmartCONNECT home page

  Click Sign up now

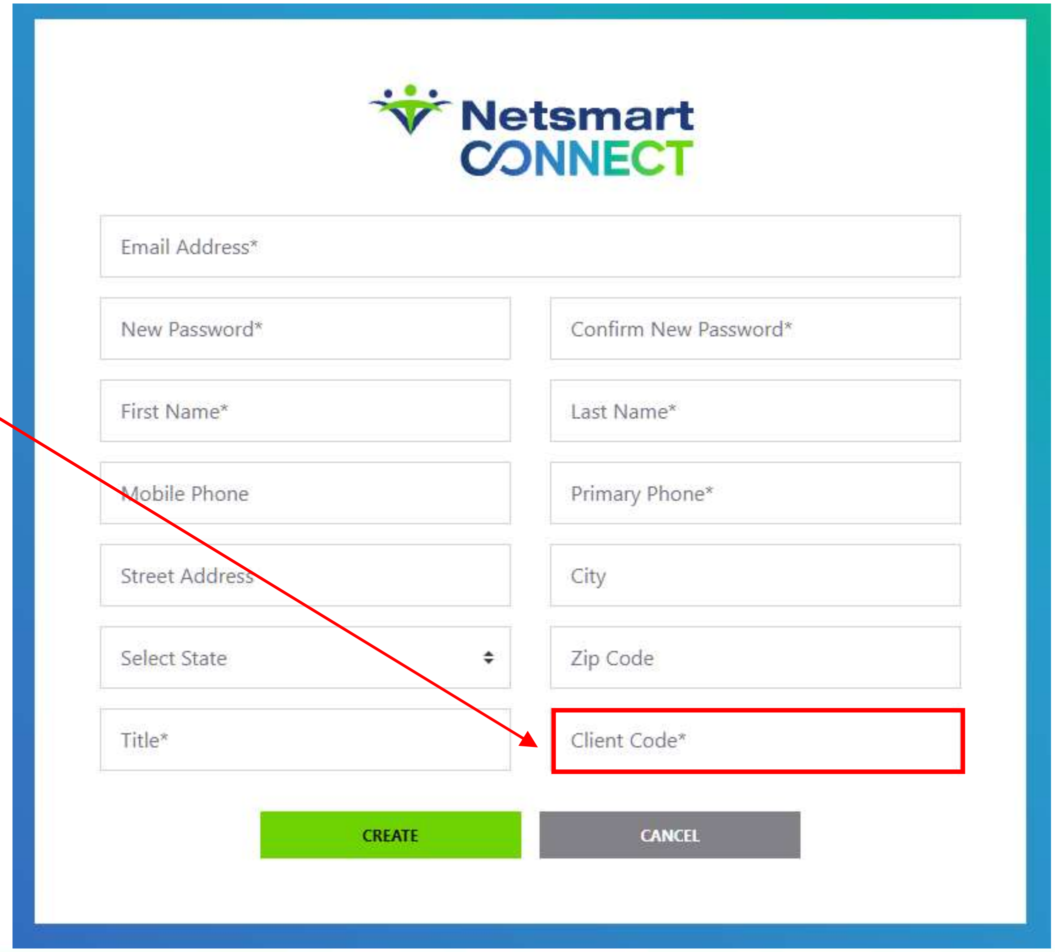
  https://netsmartconnect.com



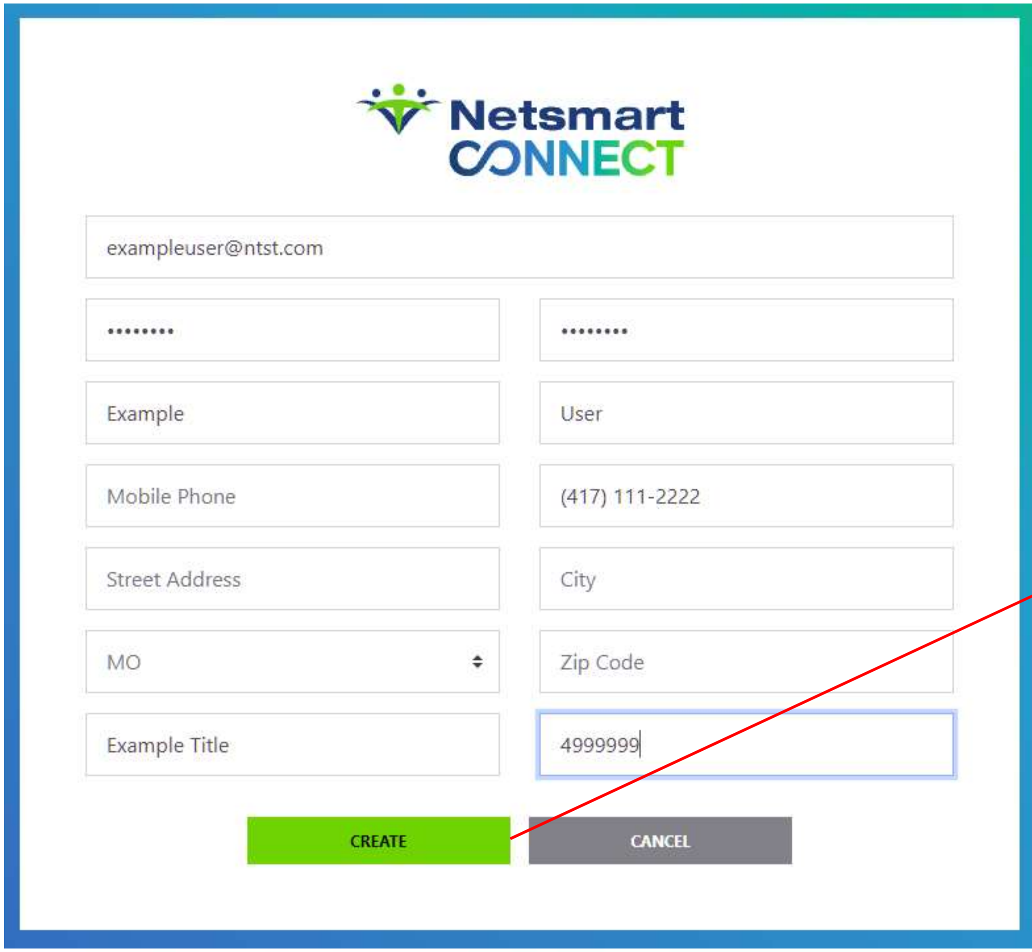
Complete registration

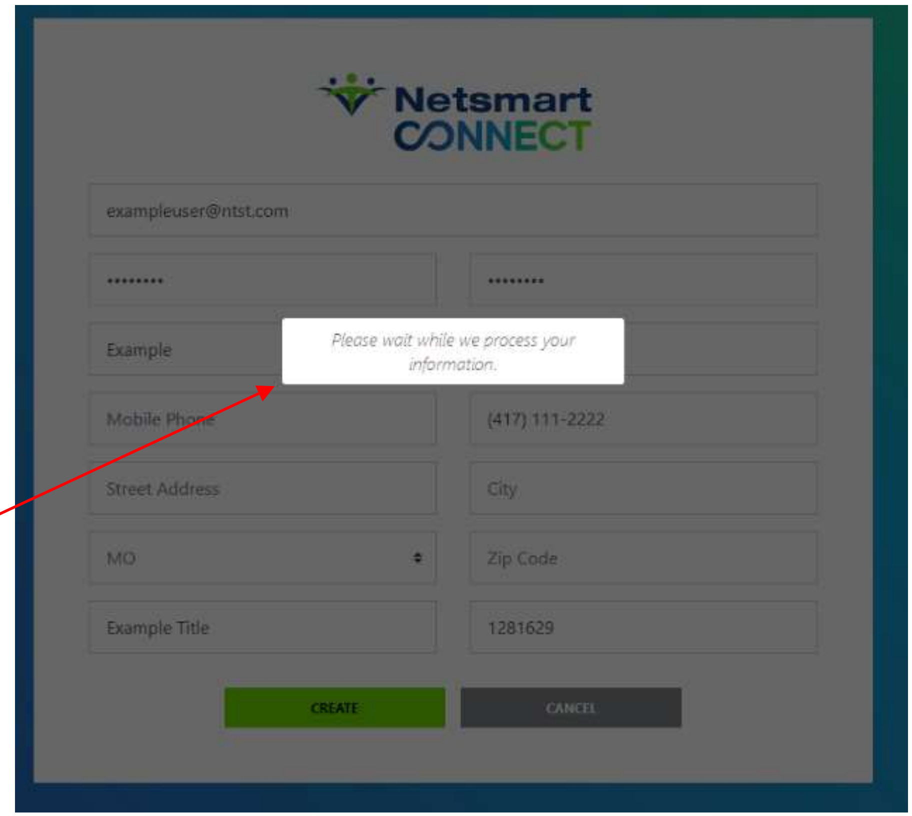
- Fill in required fields
  - Client code is your Netsmart account number

  - Email will include your unique client code
  - If unsure Contact Support

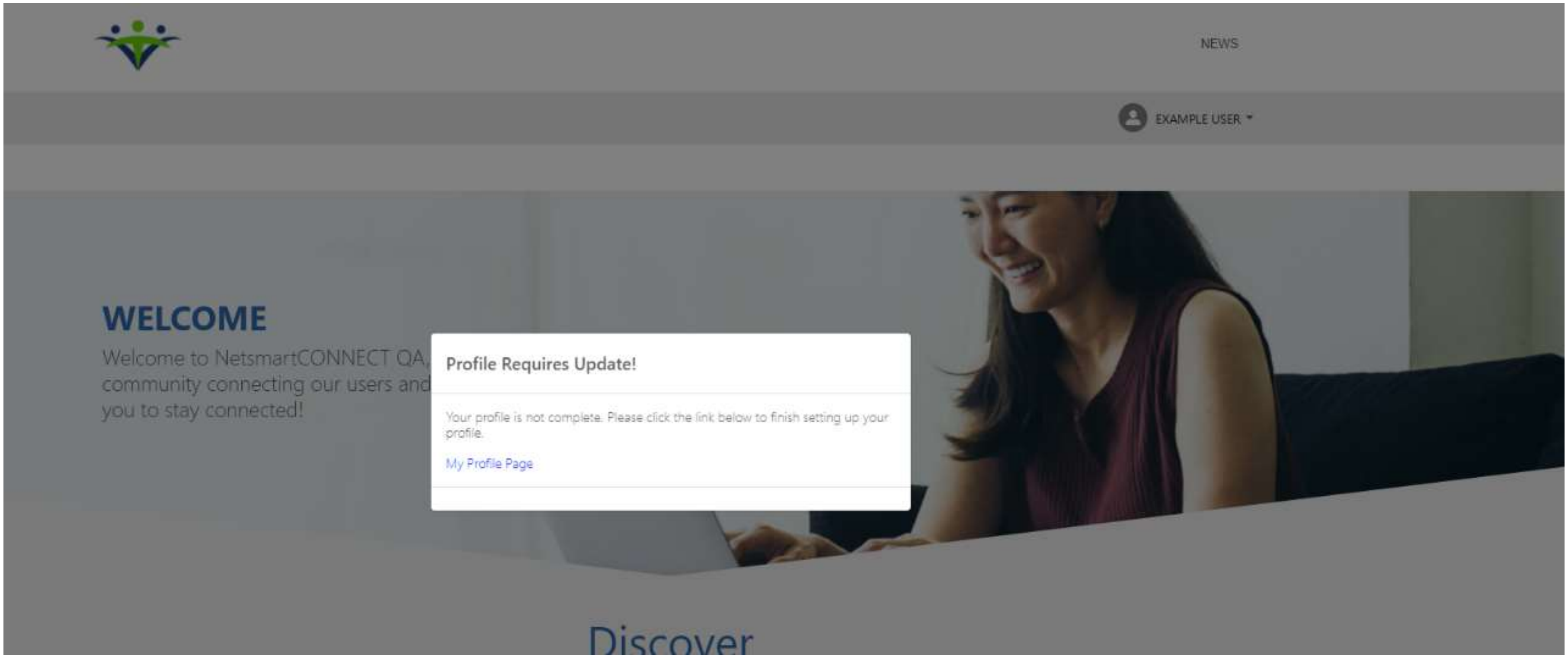


Example Registration – Click Create



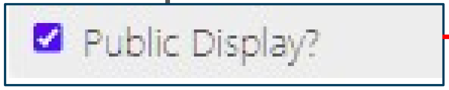


Profile Updates

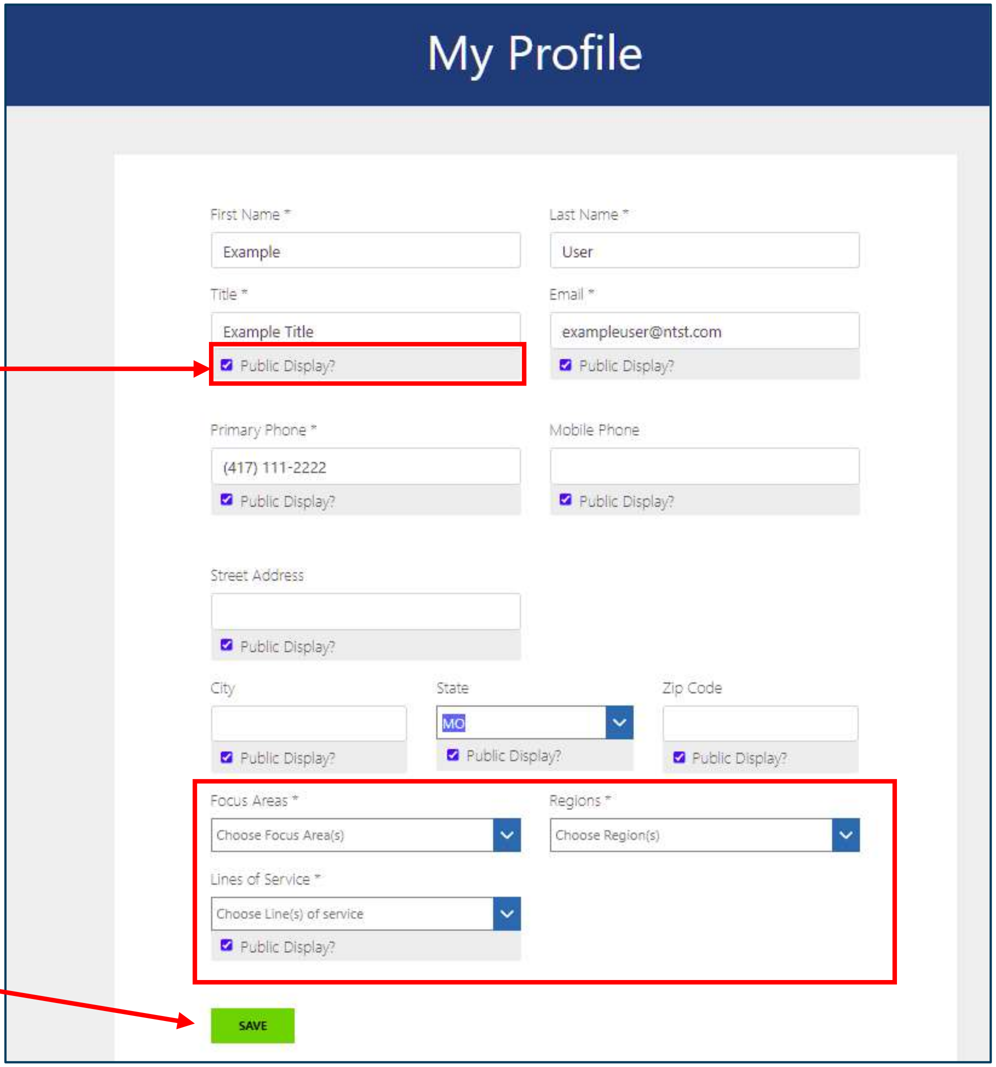


My Profile – Set up

- Public Display
  - Choose which fields to turn on for public view



  - Uncheck those fields you wish to hide
- Choose up to 3 Focus areas
- Choose your Region
- Choose Line(s) of Service
- Click SAVE once all fields are complete



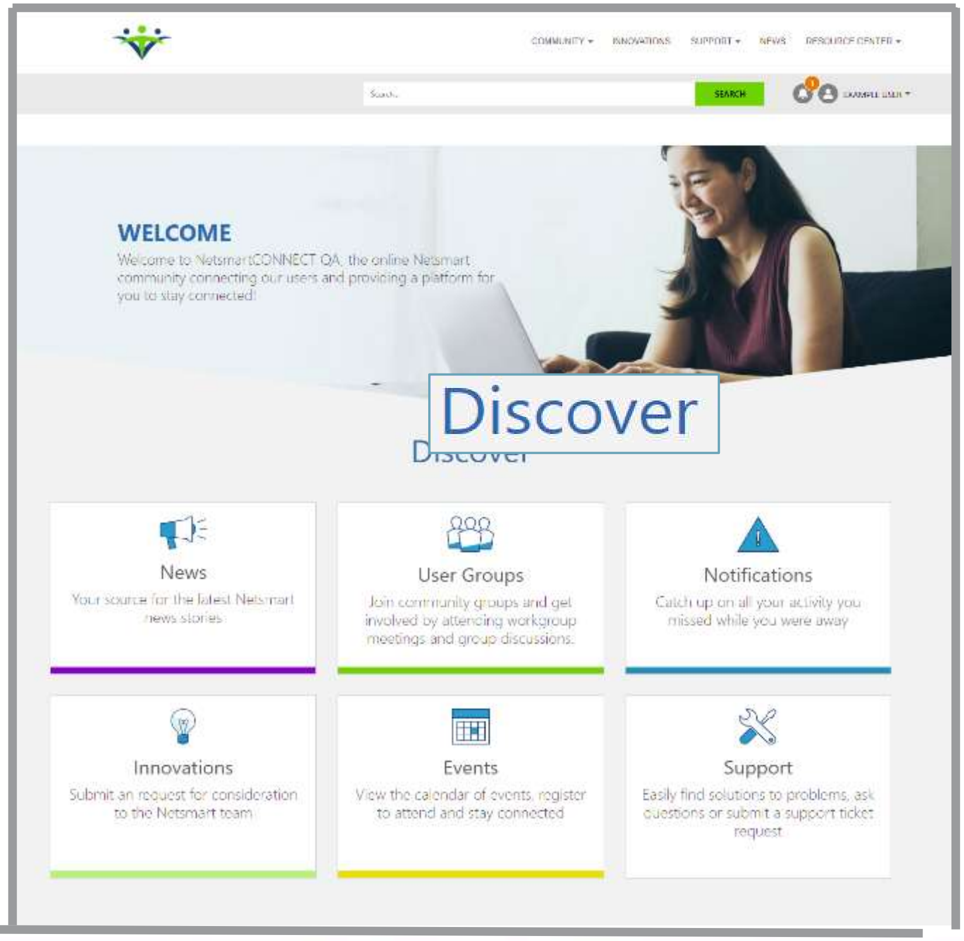
Adding additional team members

- Anyone from your organization can register
- Newly registered users will inform their Admin once they've completed registration
- Client's portal Admin will complete the set up by assigning user additional roles if desired

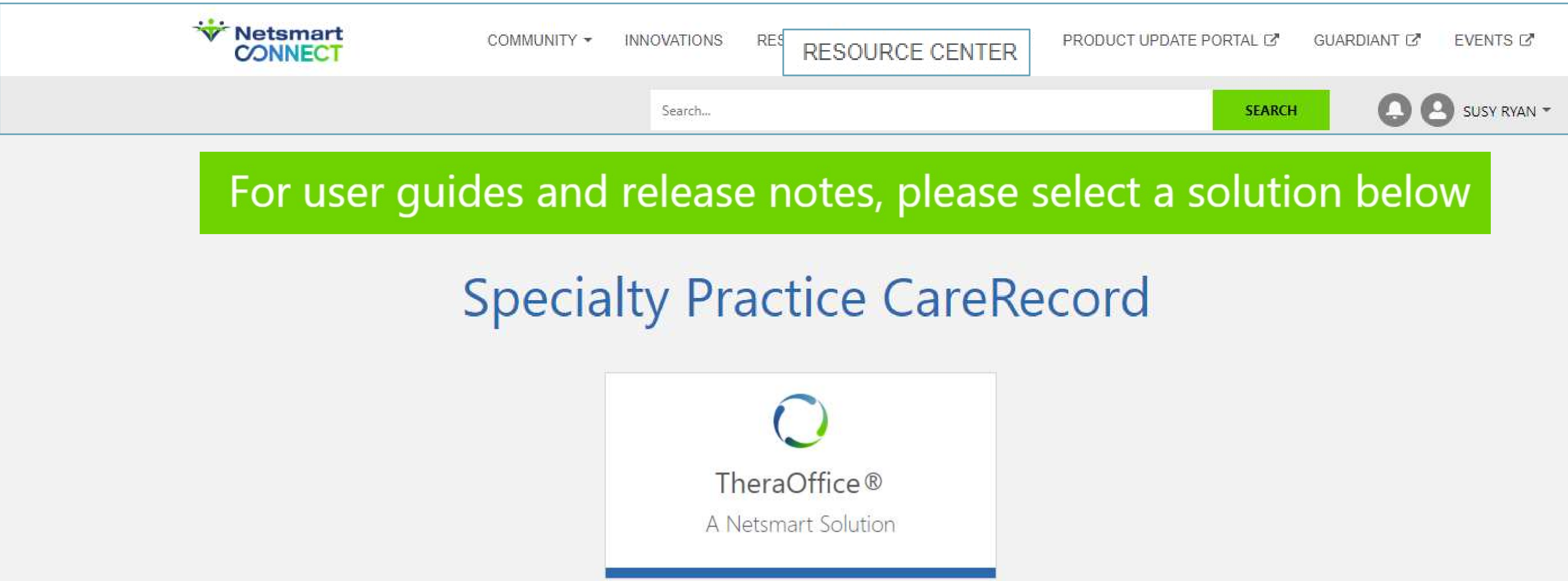
Discover – Quick links

- Role based menu/discover options
- User's access features with a single click

Access [Quick Guide Videos]

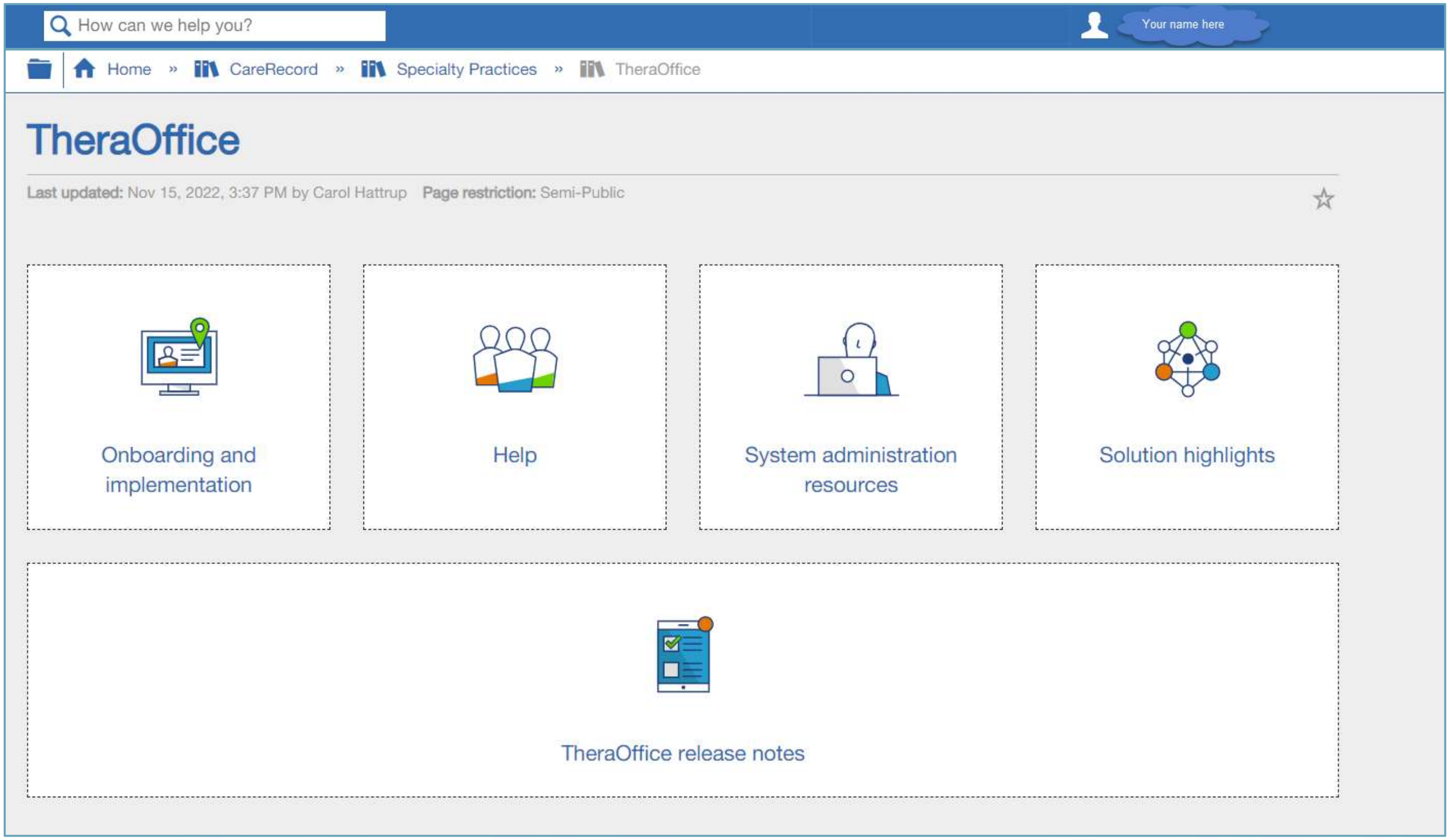


Netsmart Resource Center



Click Resource Center from menu to access TheraOffice

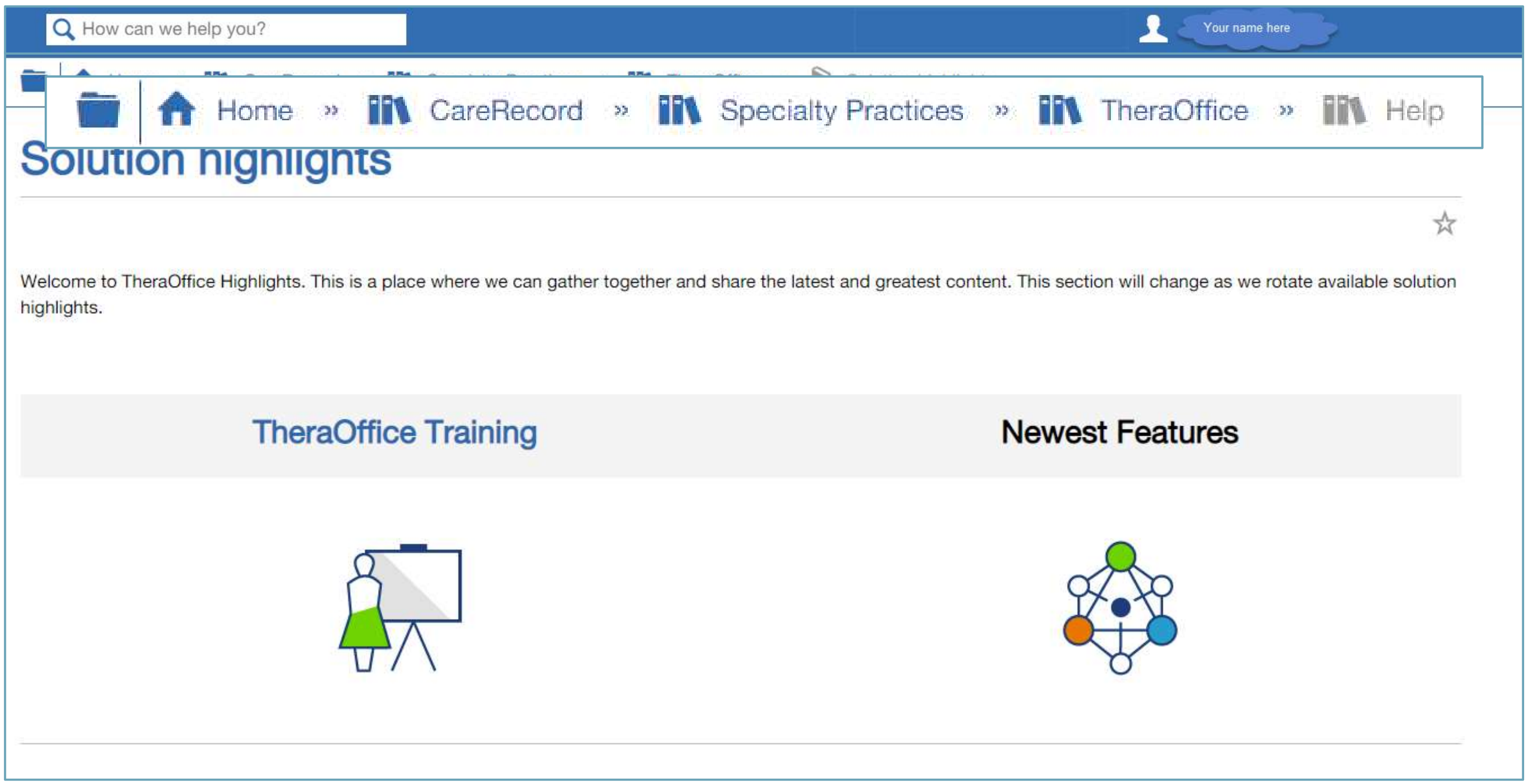
Netsmart Resource Center



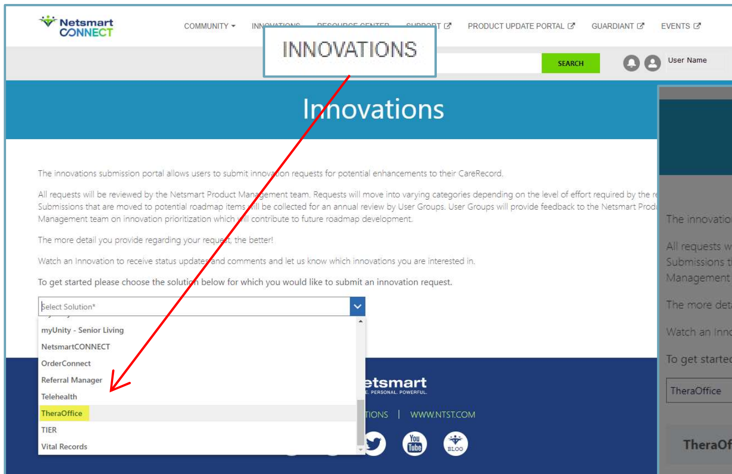
- Organized by subject
- Release notes under separate section
- Click the desired topic to view content

Netsmart Resource Center

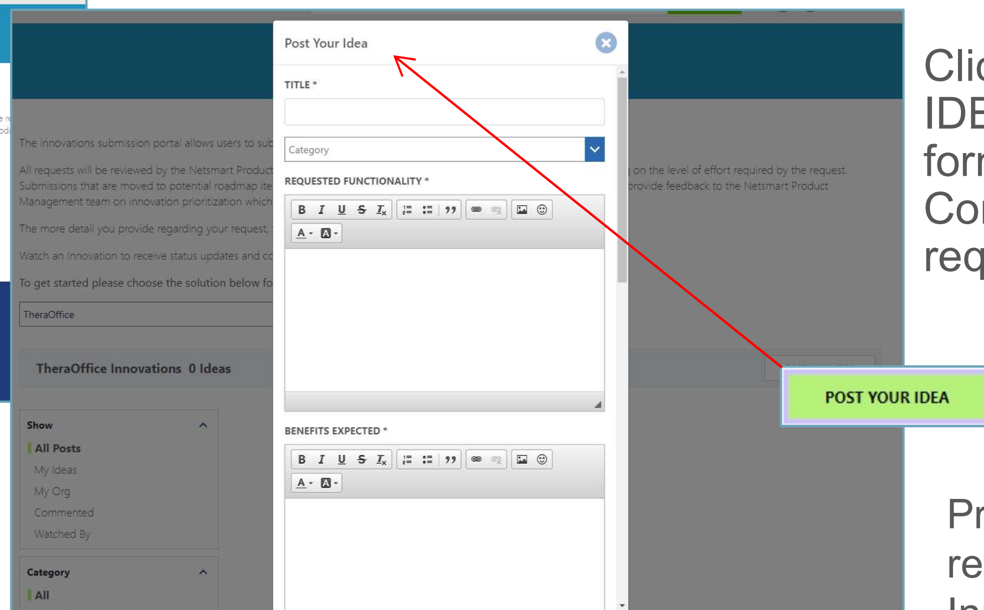
Selected ‘Solutions Highlights’ from main page



Innovations



Begin by clicking Innovations from the menu.
Scroll to choose your product from the drop down.



Click 'POST YOUR IDEA' to access the form.
Complete the required fields.

Product management reviews and tracks all Innovations

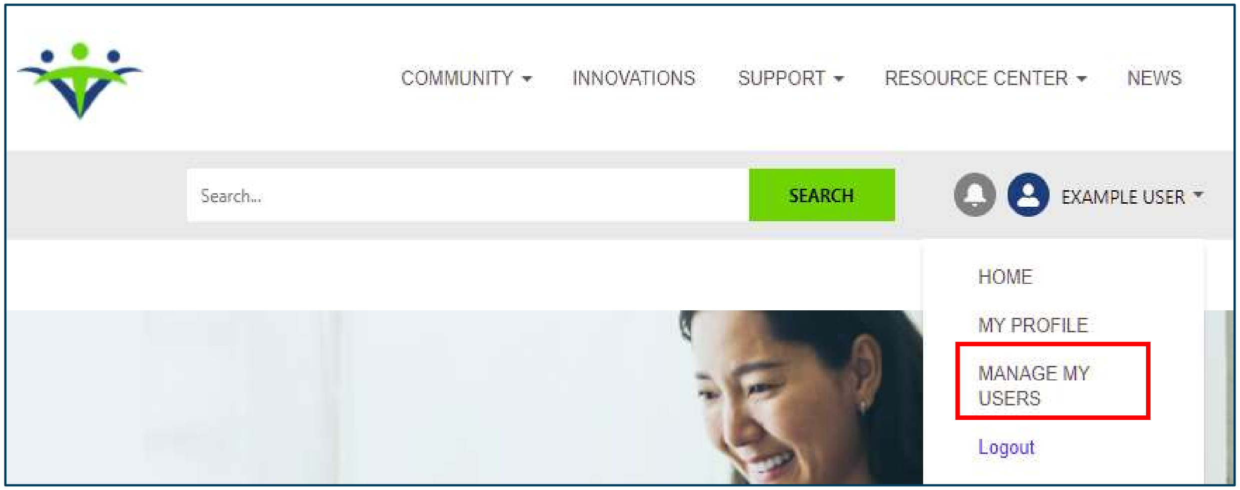
NetsmartCONNECT

Portal Admin Functionality

Netsmart

Admin Role

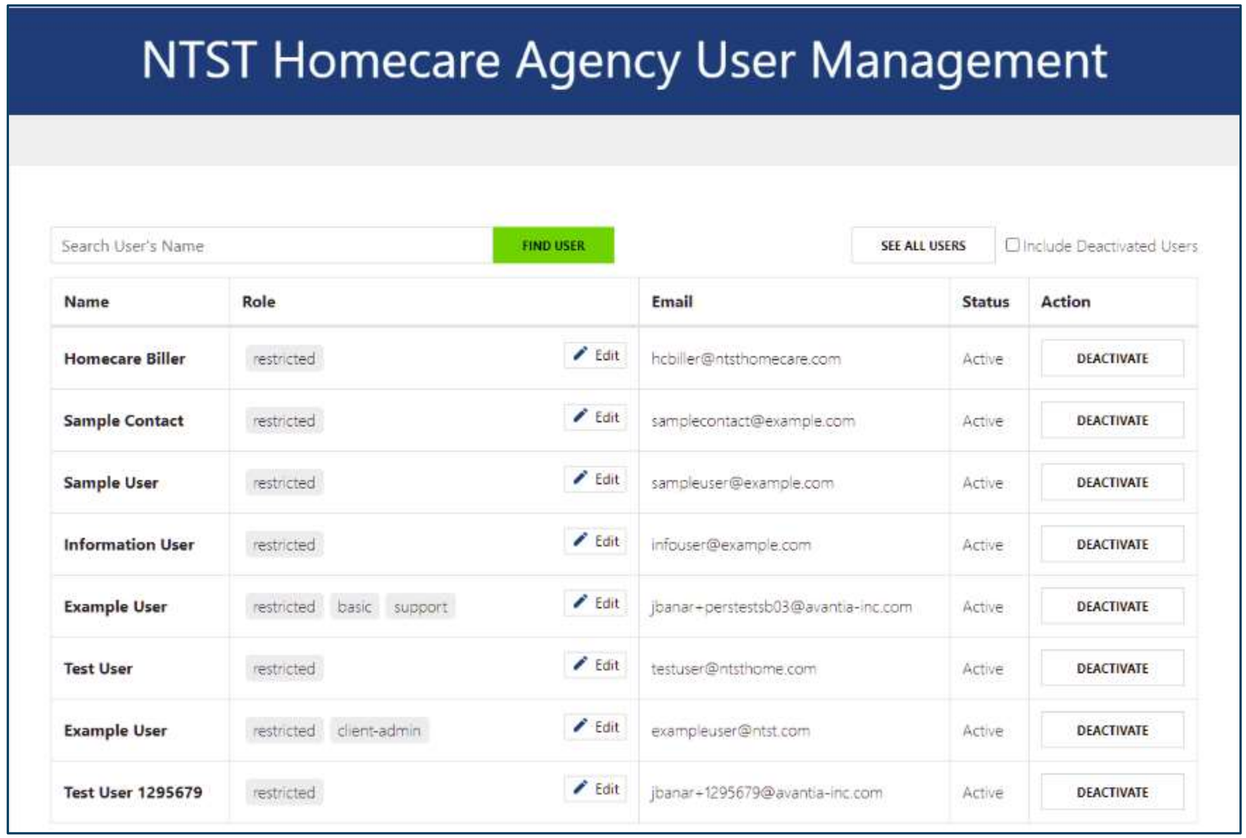
- All agencies should designate portal Admin(s) to manage user account
  - All TheraOffice product admins will be set up as Portal Admins



- Admins have '*Manage My Users*' menu option
- Click to open Admin menu

User Management

- Each user account is assigned roles
- Listed are all contacts at your agency
- New registrations have basic role by default
- Roles can be added or removed
- Click **Deactivate** to remove access



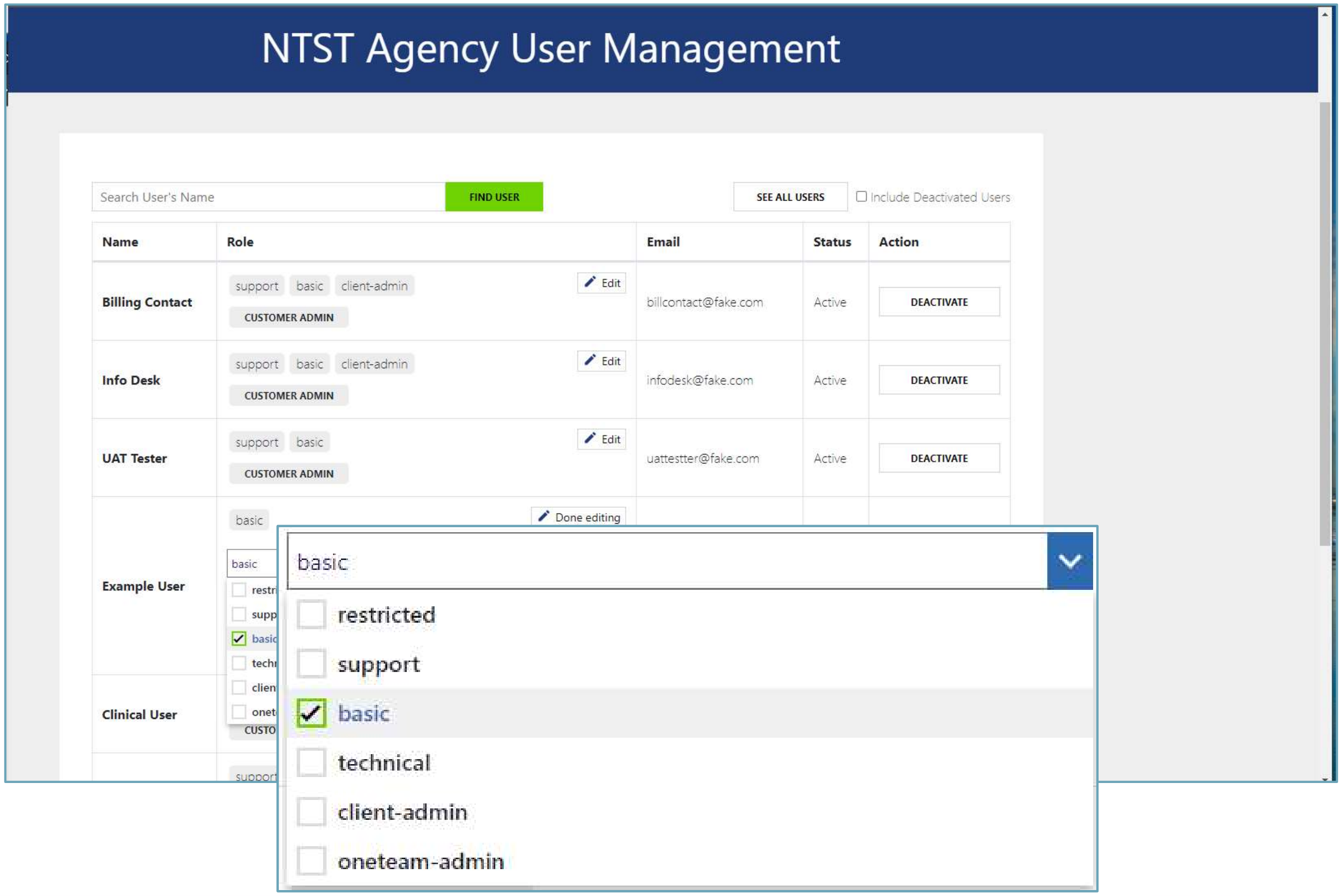
NTST Homecare Agency User Management

Search User's Name | FIND USER | SEE ALL USERS | Include Deactivated Users

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

Edit User Roles

- Click Edit to open roles menu
- Check or uncheck desired role(s)

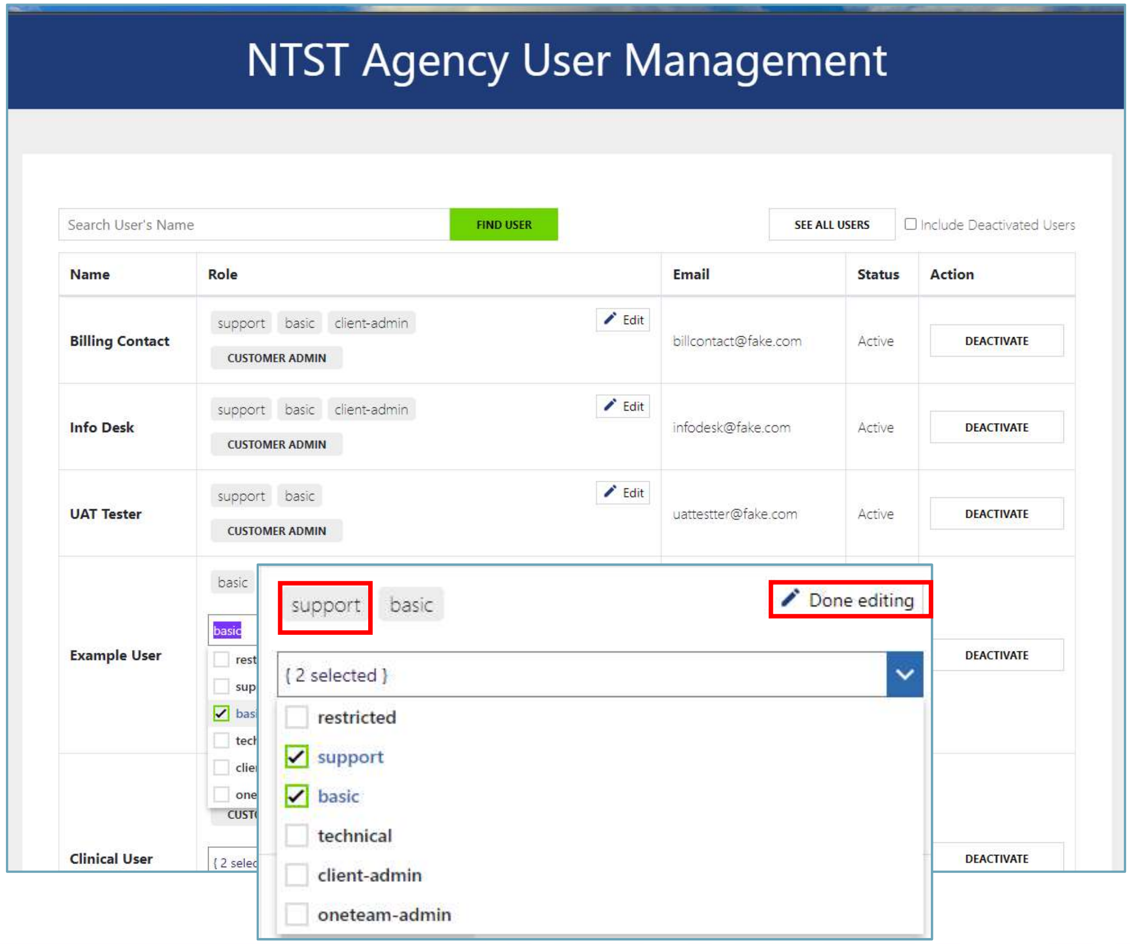


List roles and descriptions here

Role Type	Summary
Restricted	Limited user. Restricted to public content only.
Basic	Standard user. Access to Community, Innovations, Resource Centers, News and Events.
Technical	Same as Basic user adding access to Solution Download Portal.
Support	Same as Basic user adding access to Support Portal.

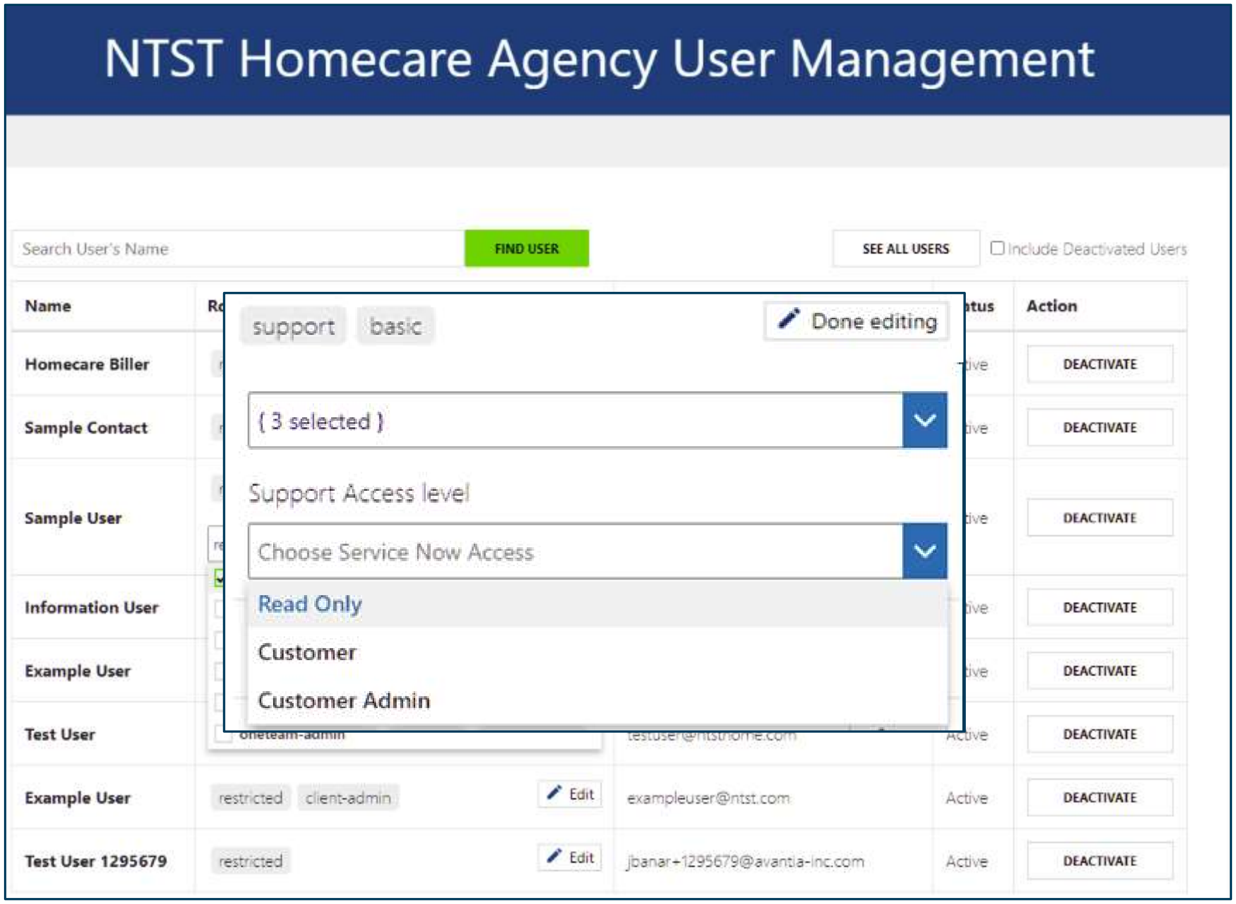
Edit User Roles

- Notice roles display once checked
- Click Done editing to complete changes
- User will want to log out and back in to see changes



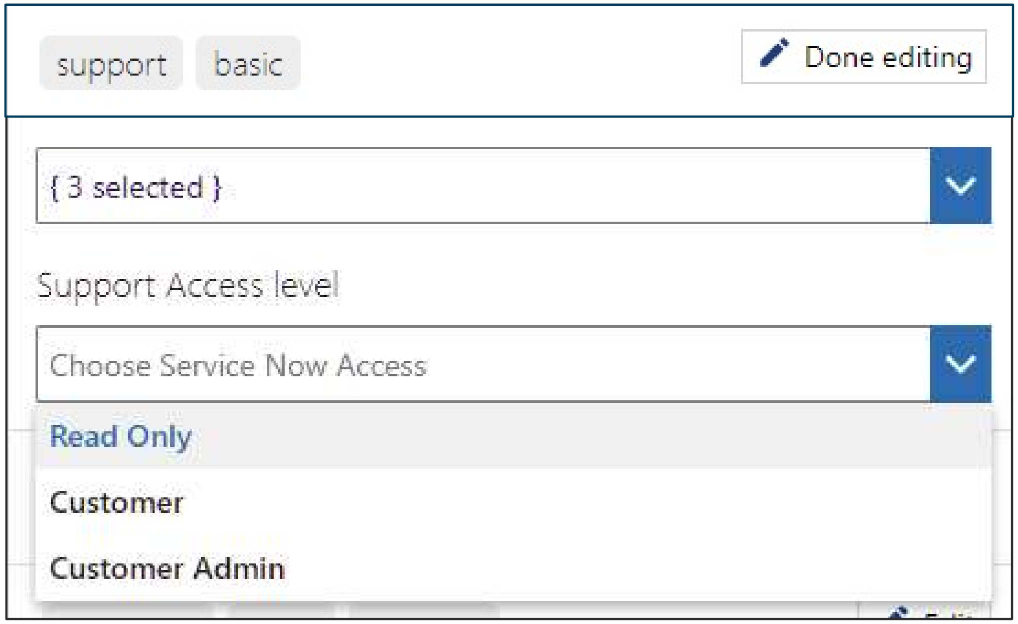
Support Access Level

- Notice Support Access levels
  - Ready only
  - Customer
  - Customer Admin
- Choose the access to complete the updates



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 organization.

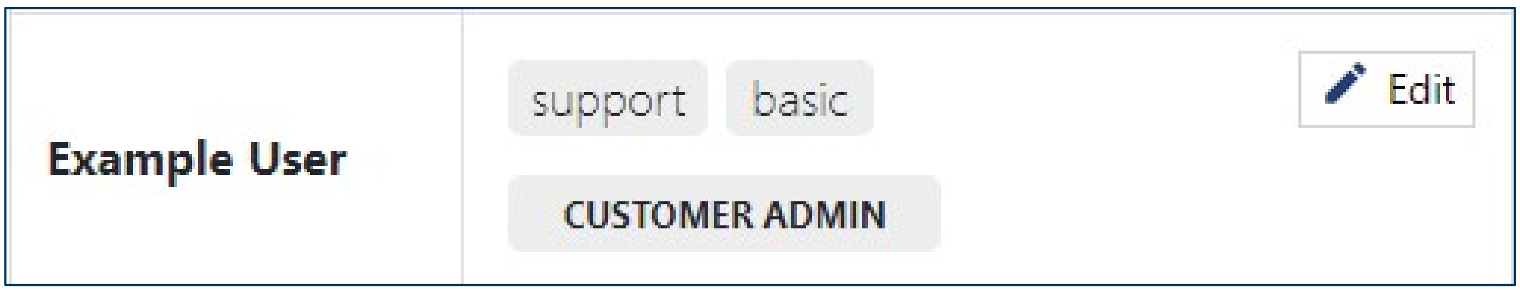


Updated User Roles

Notice the updates display

✓ User's new roles

✓ Support Portal level access

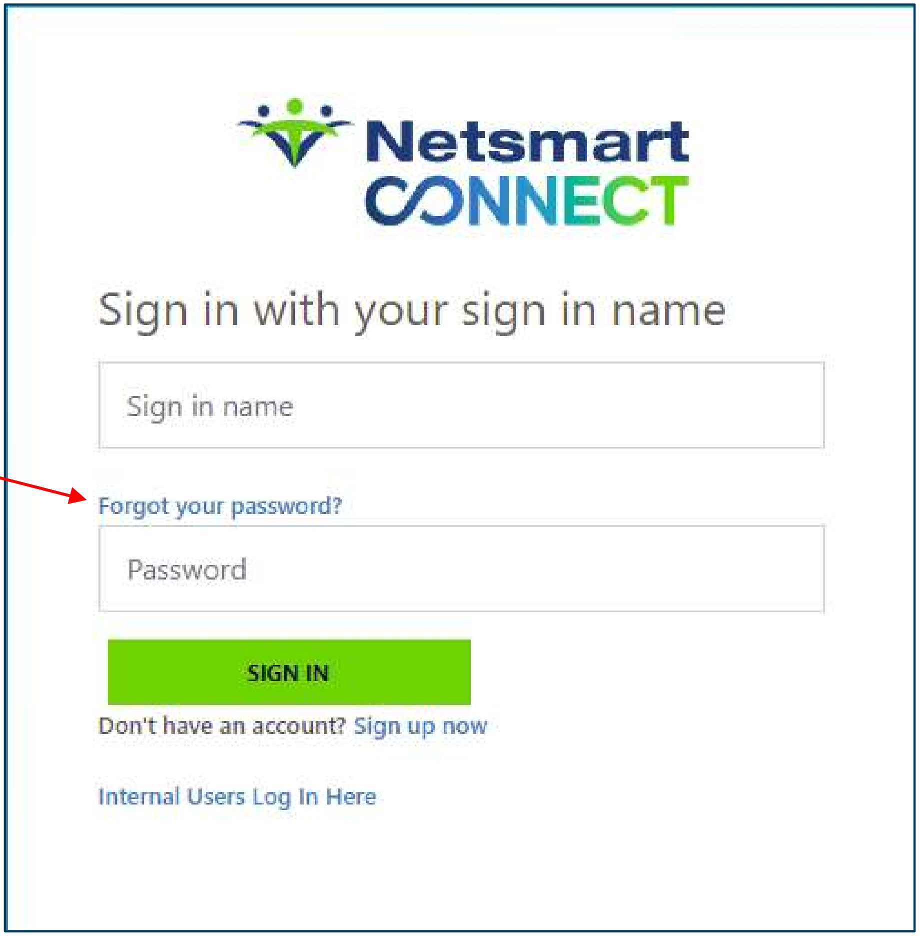


Reset Password

Netsmart

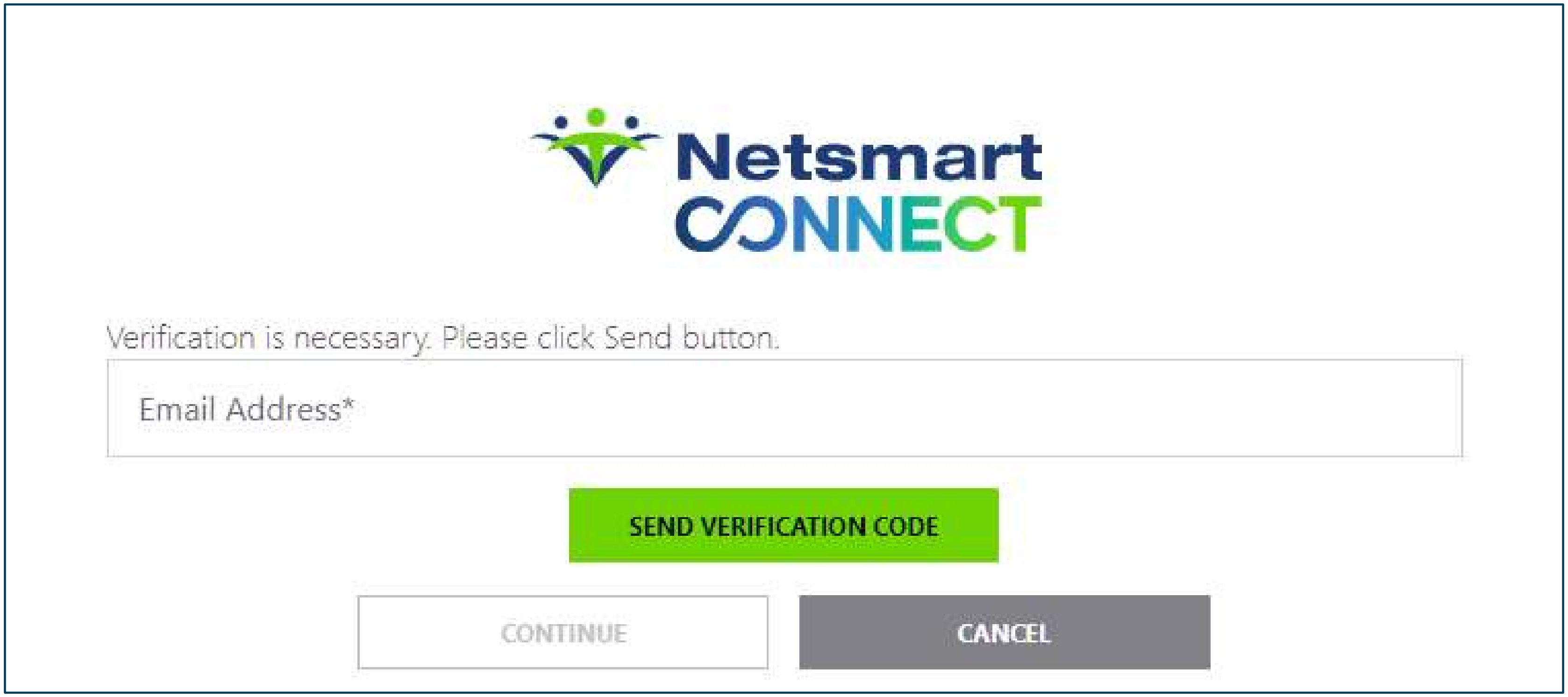
Resetting password

- Enter your email address (user ID)
- Click ‘Forgot Password’



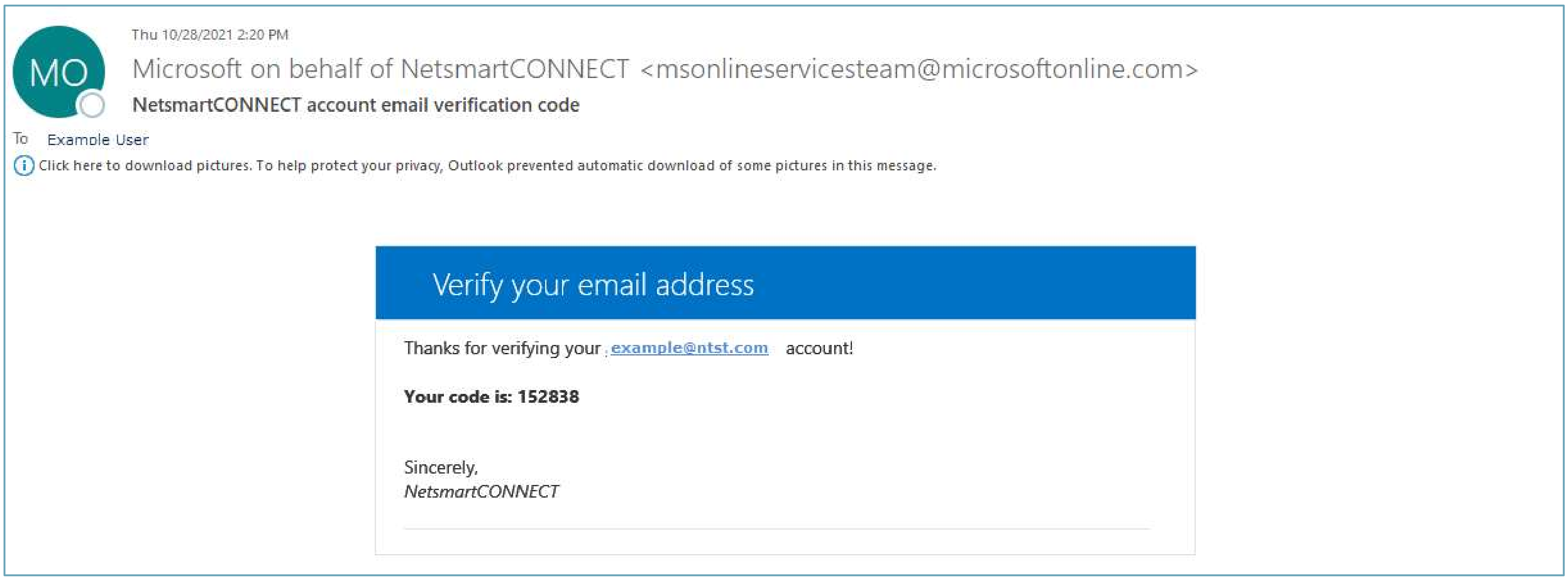
Creating Verification Code

- Enter your email address then click SEND VERIFICATION CODE



Completing registration

- An email is generated to provide a validation code



Thu 10/28/2021 2:20 PM

MO

Microsoft on behalf of NetsmartCONNECT <msonlineservicesteam@microsoftonline.com>

NetsmartCONNECT account email verification code

To Example User

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Verify your email address

Thanks for verifying your example@ntst.com account!

Your code is: 152838

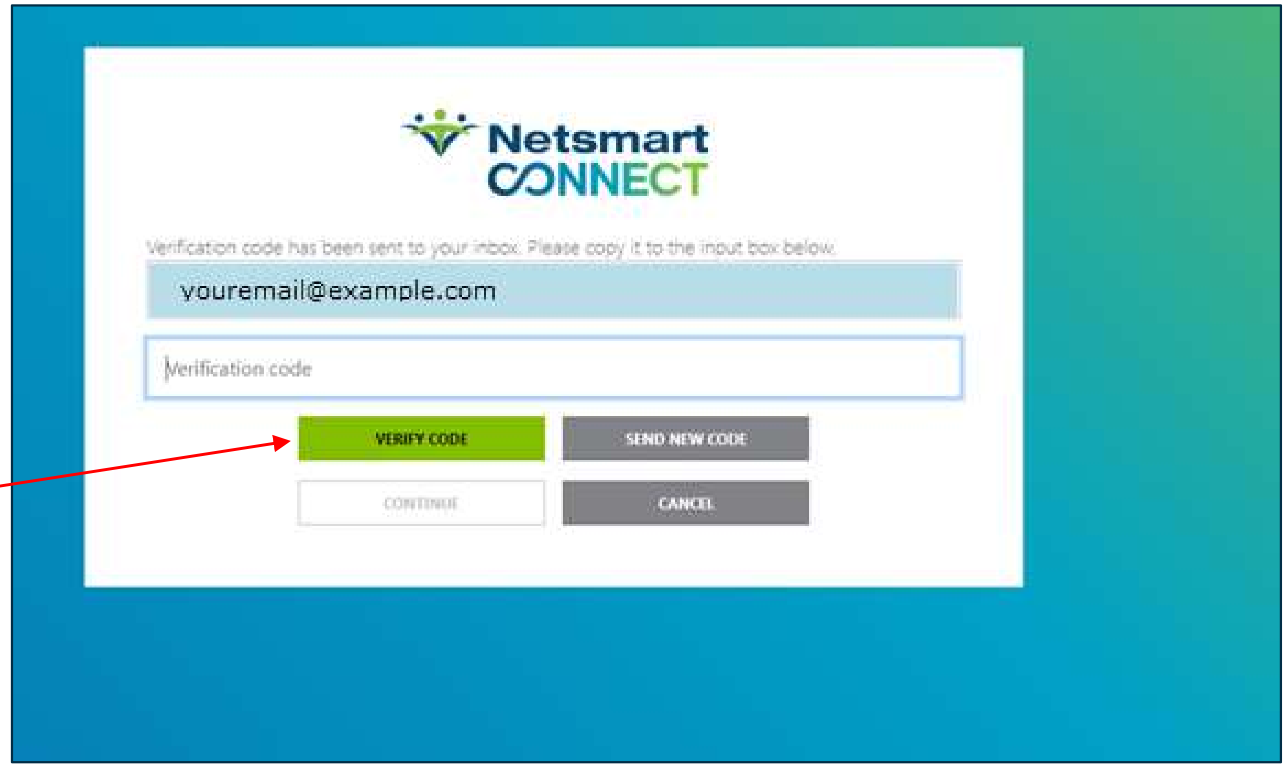
Sincerely,
NetsmartCONNECT

Verification code

- Copy the code from the email
- Paste code into box

Your code is: ######

- Click Verify Code



Create new password

- Enter desired password to complete login process
  - 8-16 characters
  - Contains 3 out of 4 of the following:
    - Lowercase characters
    - Uppercase characters
    - Digits (0-9)
    - One or more of the following symbols:
      - @ # $ % ^ & * - _ + = [ ] { } | \ : ' , ? / ` ~ " ( ) ; .

- Click Continue

Solution Support Portal

Solution Support Portal - Features

Case tracking system

- Simplified case form for creating and documenting issues
- Track open cases, review past cases
- Emphasis on Client interaction to move cases to resolution
- 24x7 access for ease of submission

Provides easy workflow to communicate

- Easy to read case comments
- System generated emails to keep you informed

Knowledge base

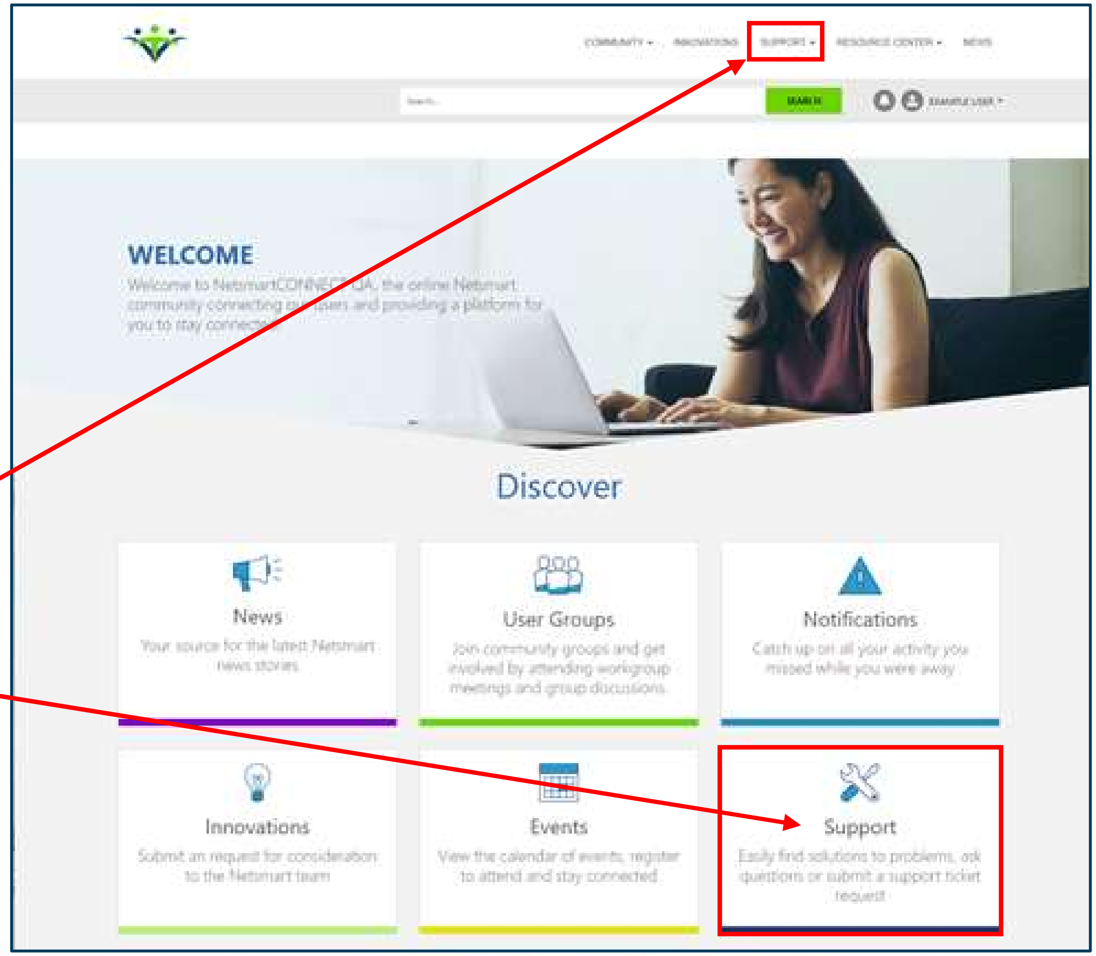
- Find answers to questions quickly (coming soon)

Known Issues

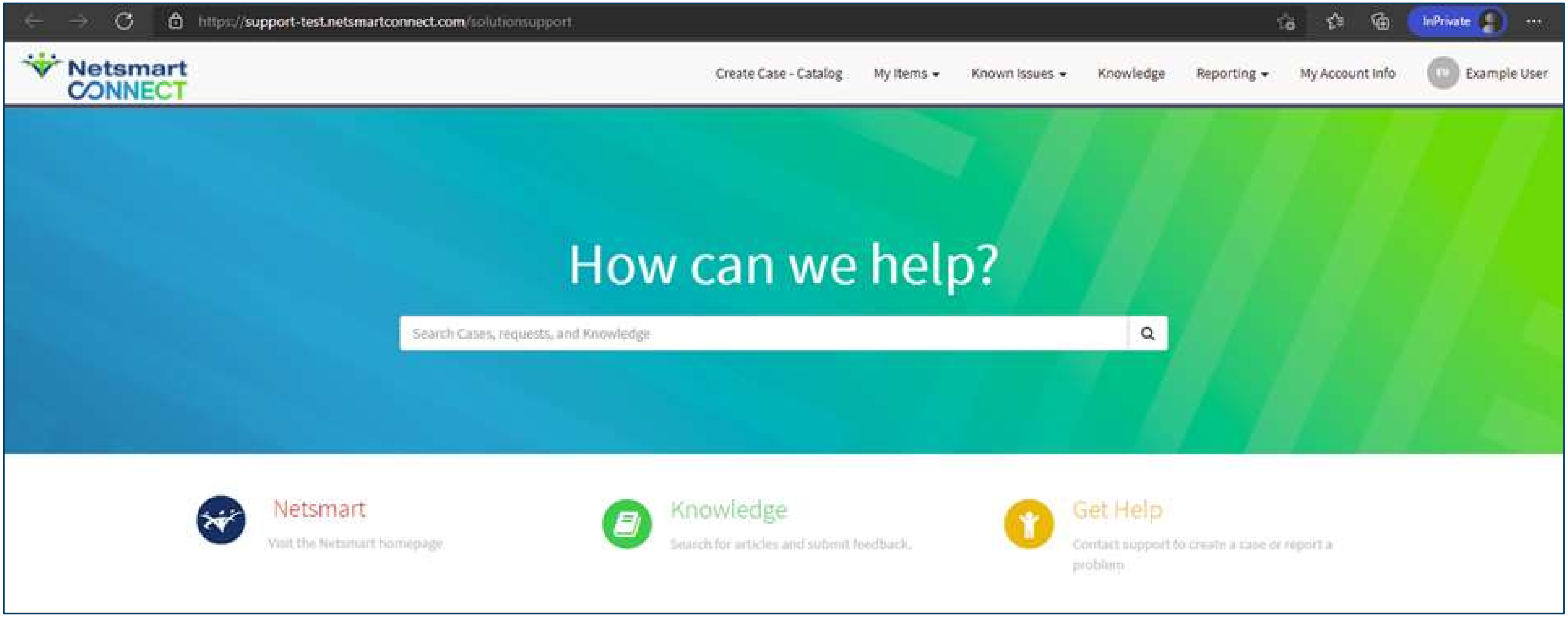
- Search and watch current Known Issues for update notifications

NetsmartCONNECT Home Page

- Features are dependent on logged in user's role
  - Must have Support role to access menu/tile
- Access Support Portal
  - Click Support menu
  - **OR**
  - Click Support tile



Solution Support Home Page

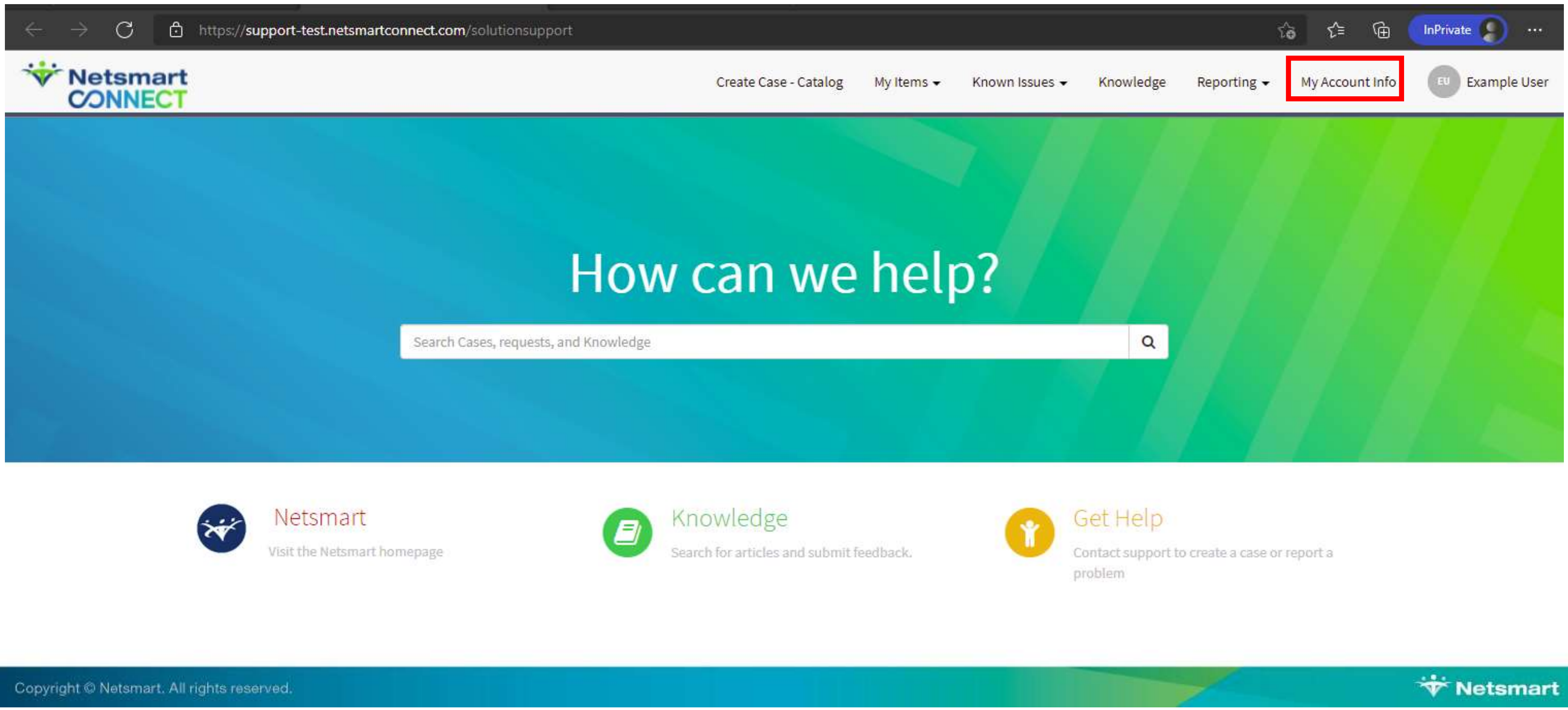


Netsmart

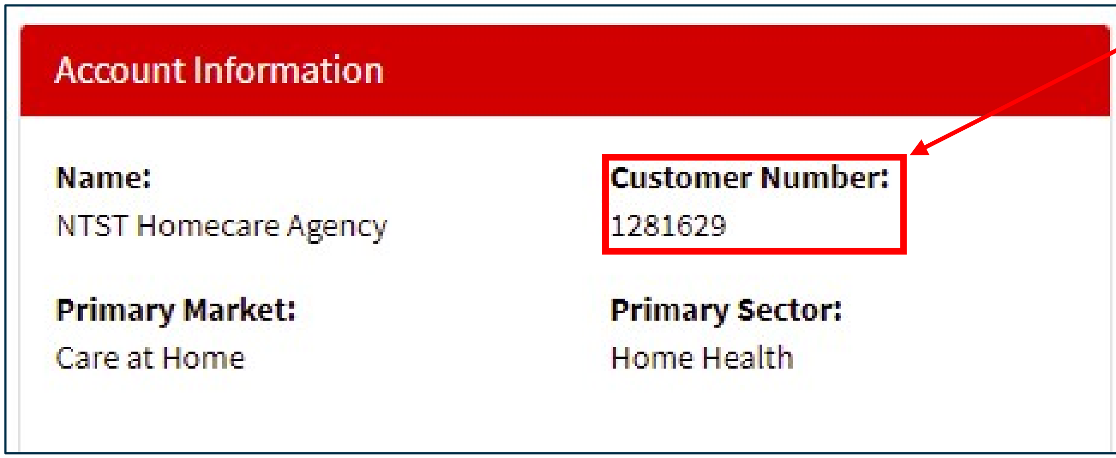
My Account Info

Netsmart

Important Information – Your Account Number



Important Information – Your Account Number

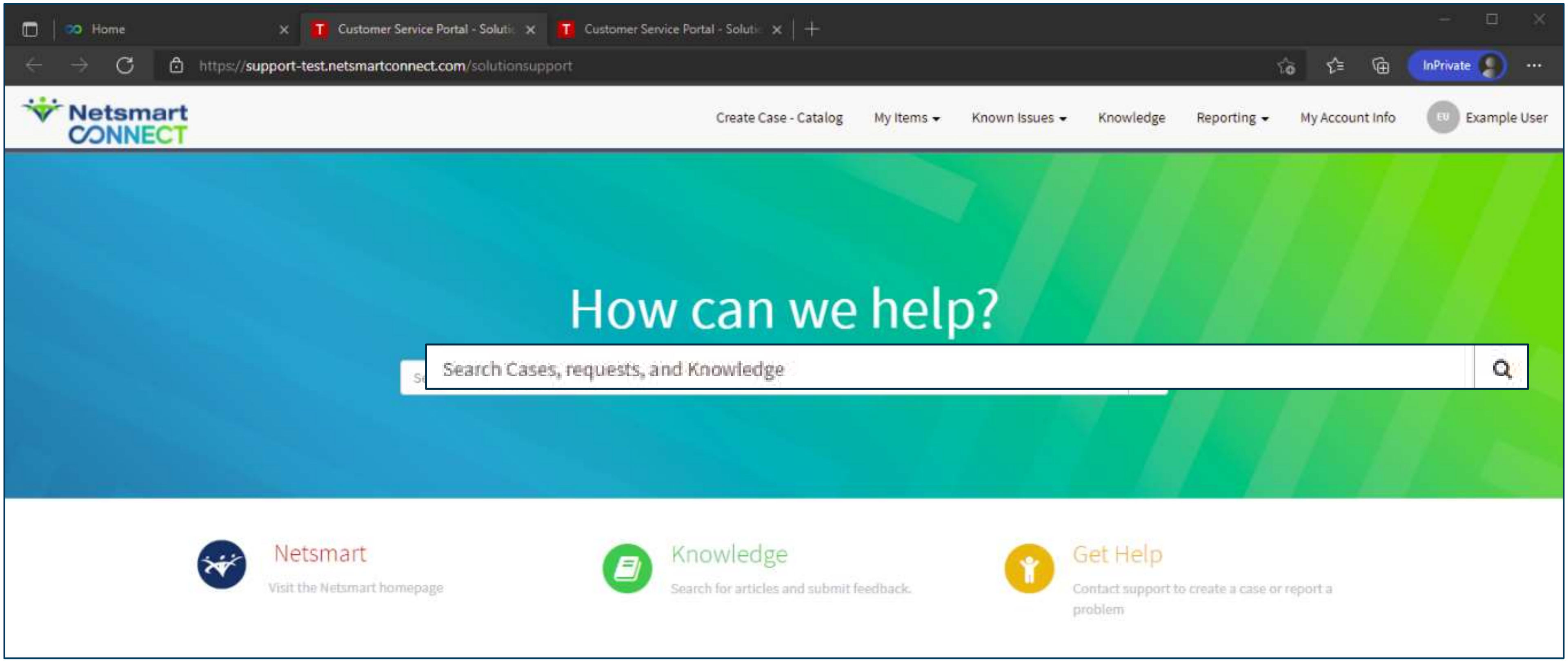


Providing your account number will simplify opening a case when calling Support

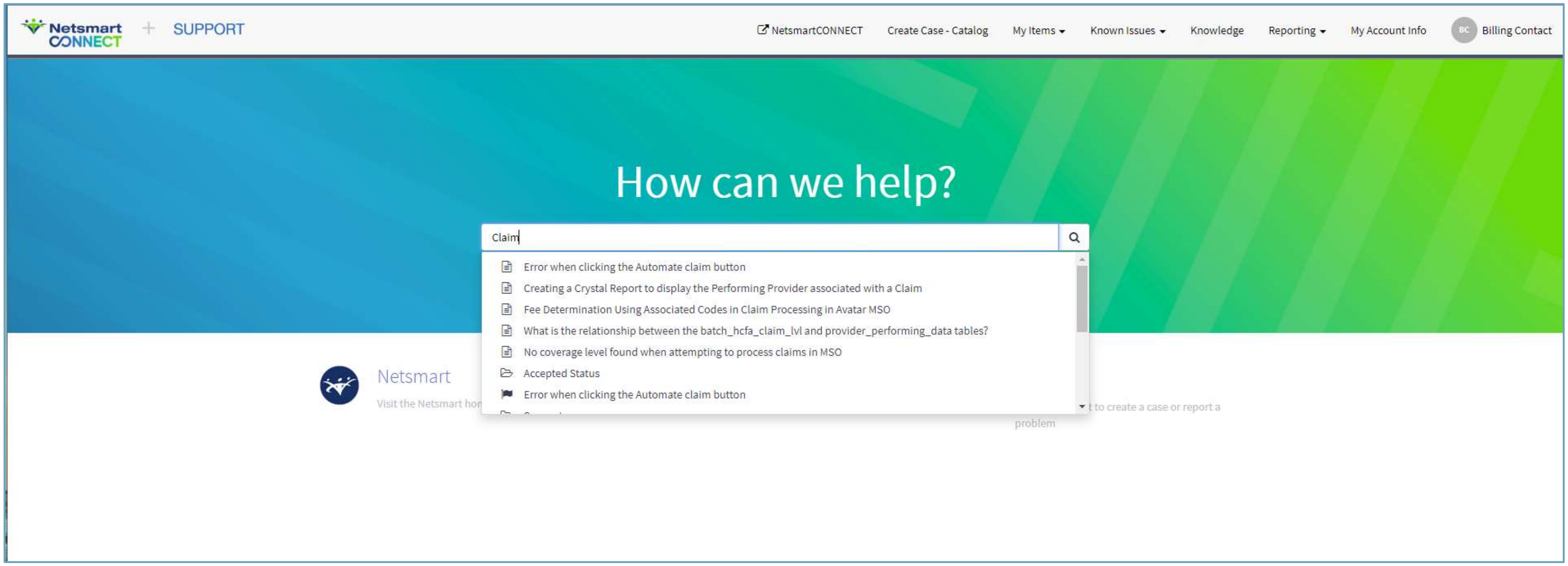
Clicking NetsmartConnect icon will return you to the Solution Support home page

Search Solution Support

Search to find answers faster



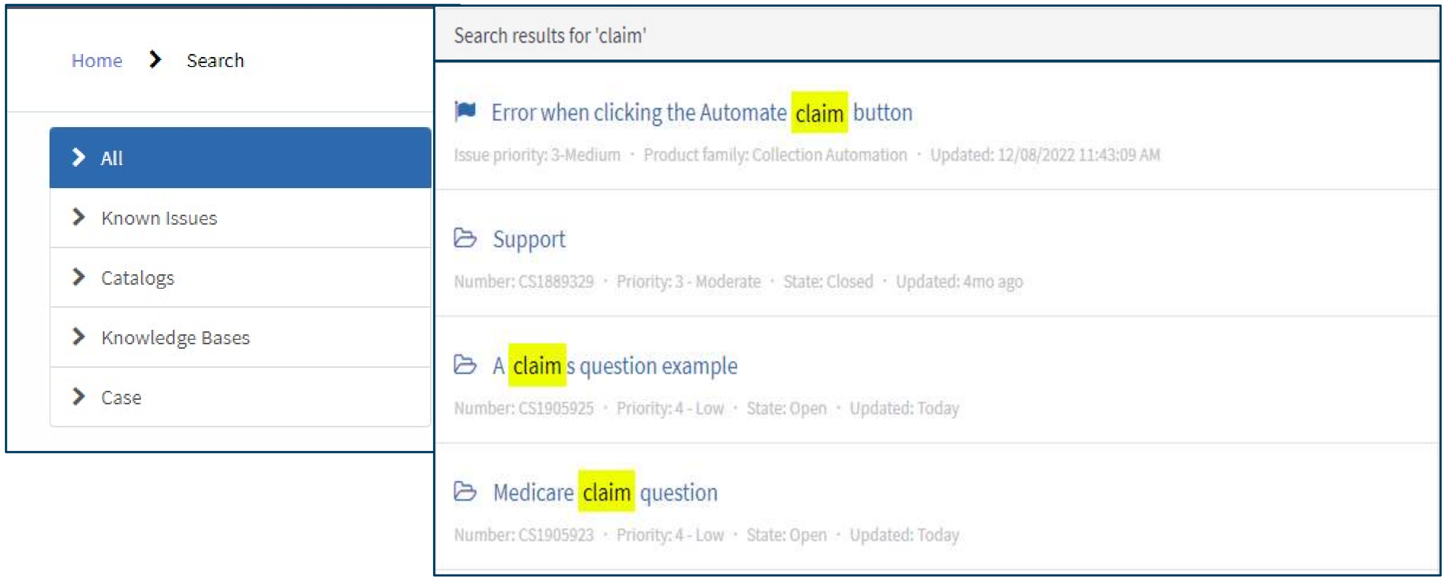
Enter Search Criteria



Select a case from the drop down or press enter to open Knowledge home page

Search Results

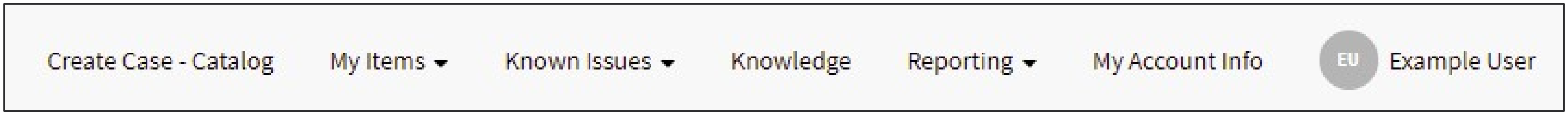
- Various resources
  - Account Cases
    - Any State
      - Open
      - Pending
      - Resolved
      - Closed
  - Known Issue
  - Knowledge Base articles



Click on an article to view

Navigating Solution Support Menu

Navigating Support Portal Menu



- Create Case – Catalog
  - Access new case and other case catalog forms
- My Items
  - View cases by contact or all agency cases with appropriate role
- Known Issues
  - View Known Issues by user or all known issues for agency
- Knowledge – Access to various knowledge bases
- Reporting - Dashboards and reports

Navigating Support Portal Menu

Notifications

- This menu item displays when either/both of these exist
  - Case set to Pending requesting information from contact
  - Case set to Resolution

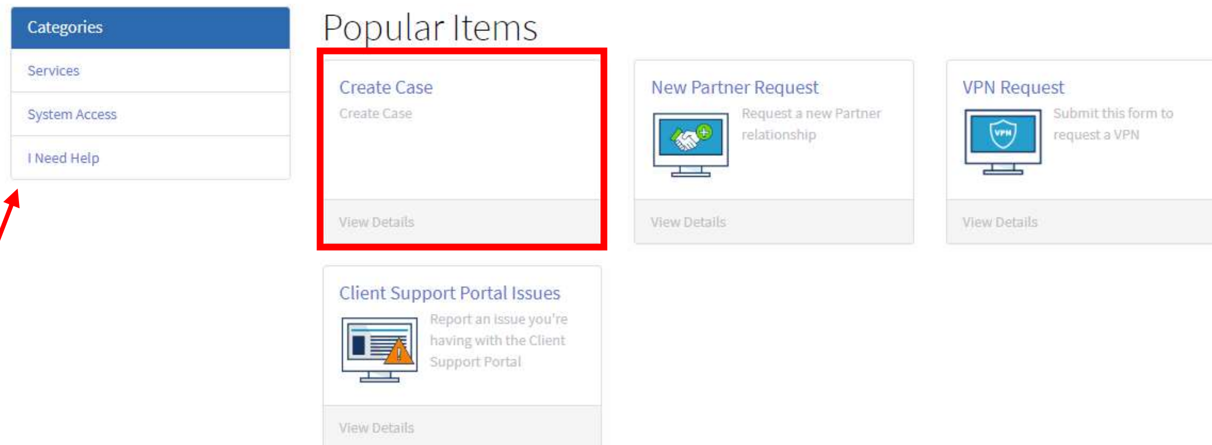
Surveys

- Each close case triggers a short survey
- Find all active surveys under this menu option

Create Support Case

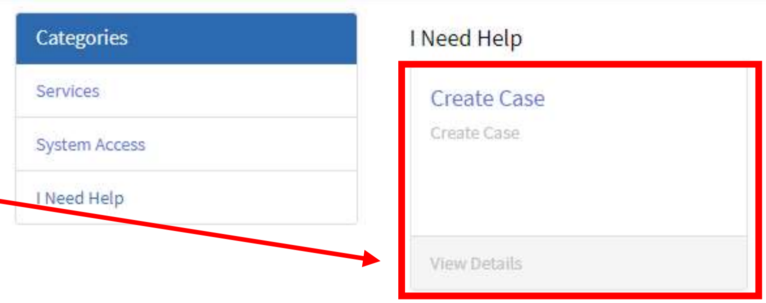
Creating a new case

Click Create Case from the Popular Items page

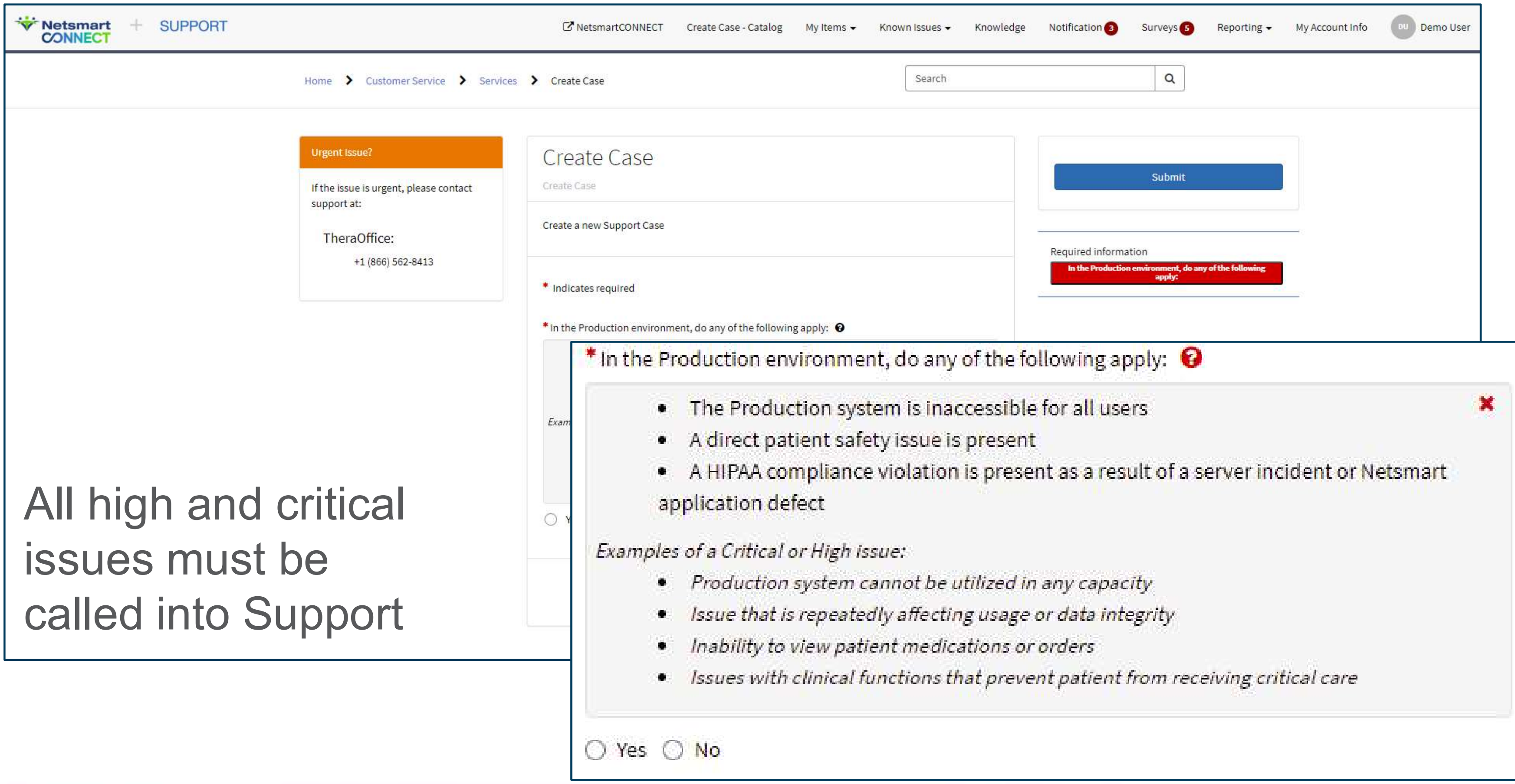


OR

Click I Need Help category and access Create Case

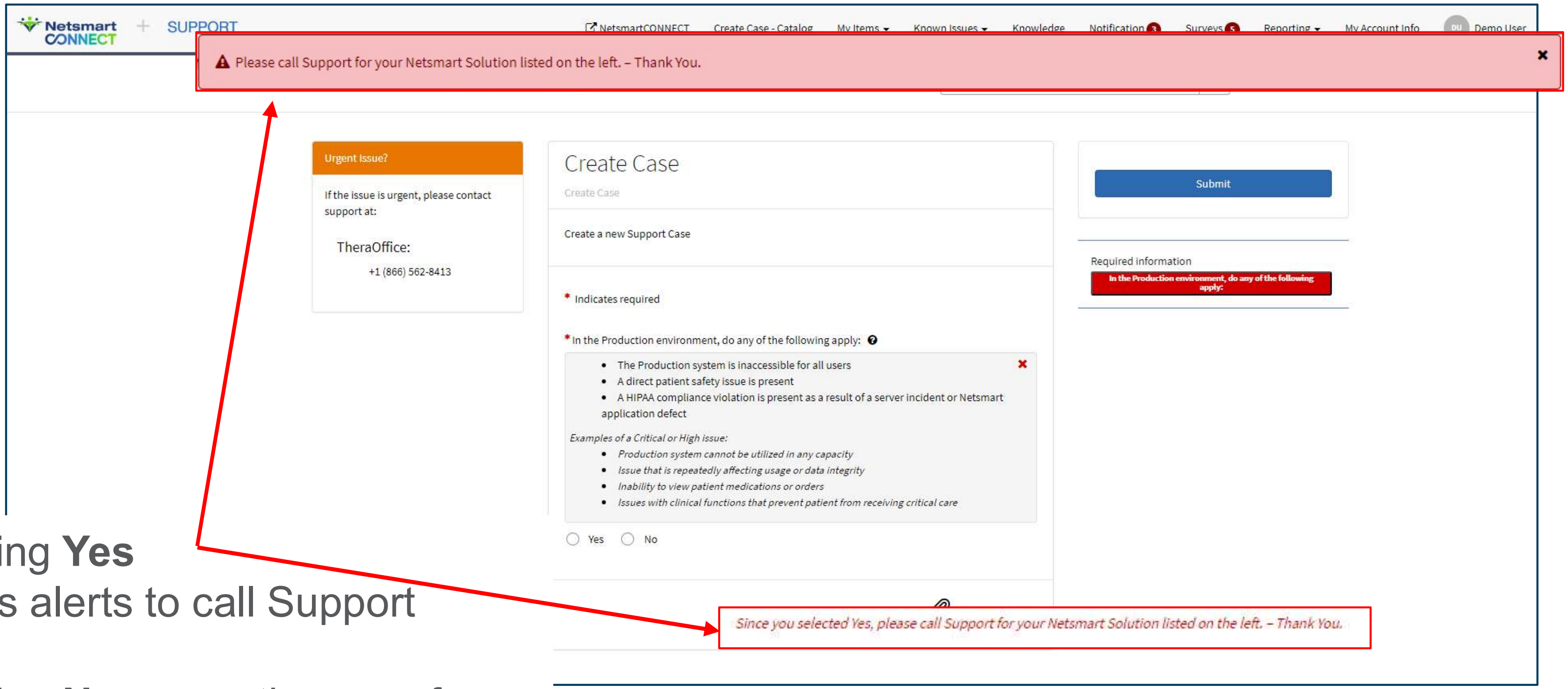


Main Case Form



All high and critical issues must be called into Support

Main Case Form



Selecting **Yes**
triggers alerts to call Support

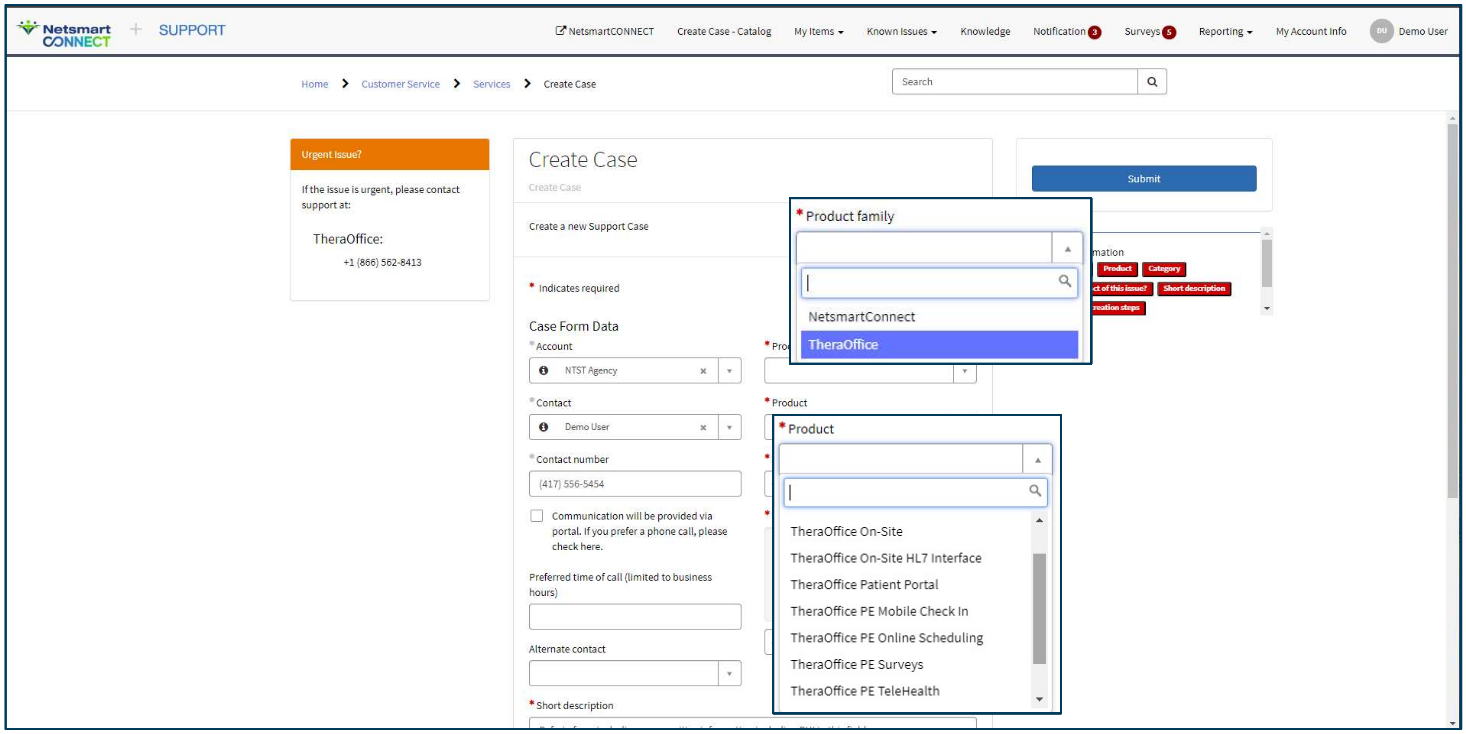
Selecting **No** opens the case form

Case Priority

- Critical (P1)
  - Production system cannot be utilized in any capacity, a direct patient safety issue is present, or a HIPAA compliance violation as a result of an incident or Netsmart application defect
- High (P2)
  - Defects in live production environment that have significant negative impact, but do not cause a “System Down”
- Medium (P3)
  - An issue that allows the continuation of function, including issues in which a reasonable workaround is available
- Low (P4)
  - Non-defect related request on cosmetic defect that does not affect system usability

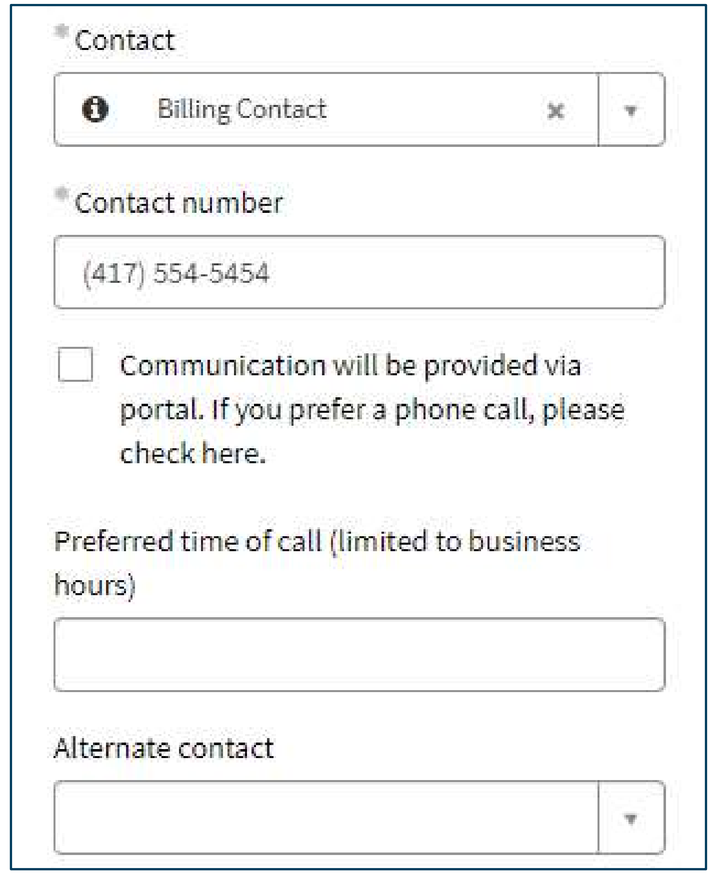
Create Case form – NEW SS

- Click drop down arrows to choose values for each field
  - Product Family
  - Product
- * Red Asterisk indicates required field



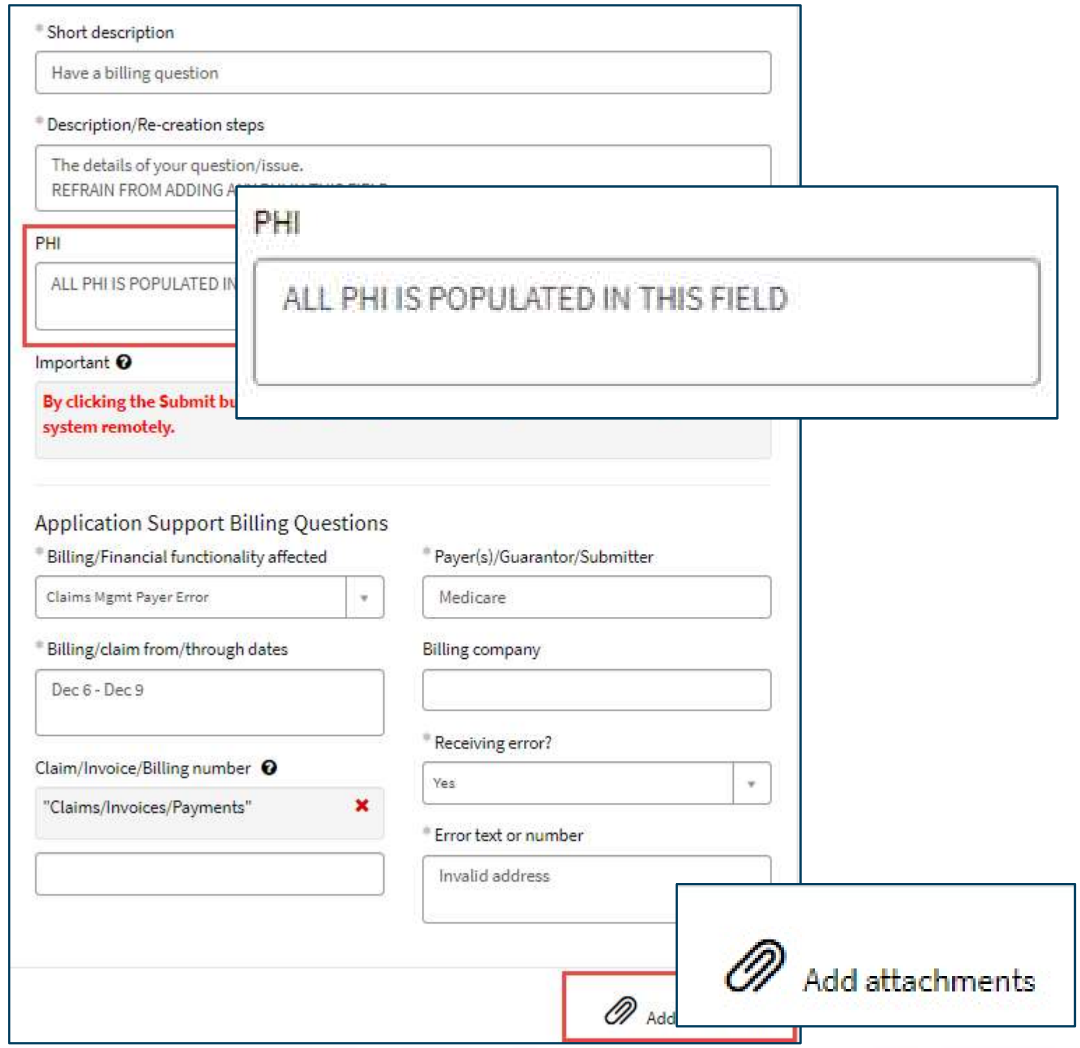
Adding case contacts

- Contact
  - Works with Support in resolving the case
  - Verify number is correct
  - Request call back (if needed)
    - Check box
    - Enter preferred time
- Alternate Contact
  - Contact Back up
  - Has interest in following case
- All contacts receive email updates



Adding PHI

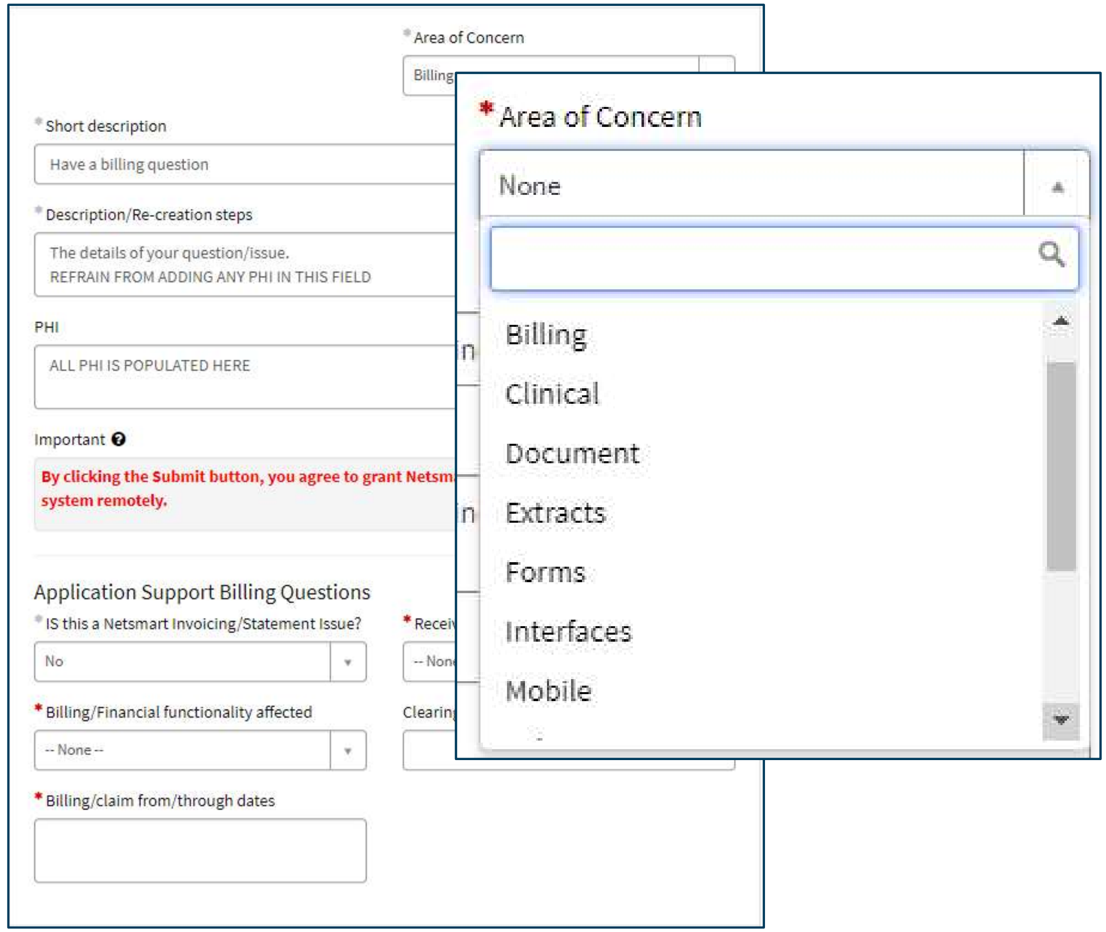
- All PHI MUST be populated in the secure PHI field
- Ensures the PHI is saved in our secure server
- System Audits all views
- Attachments will be saved in secure server



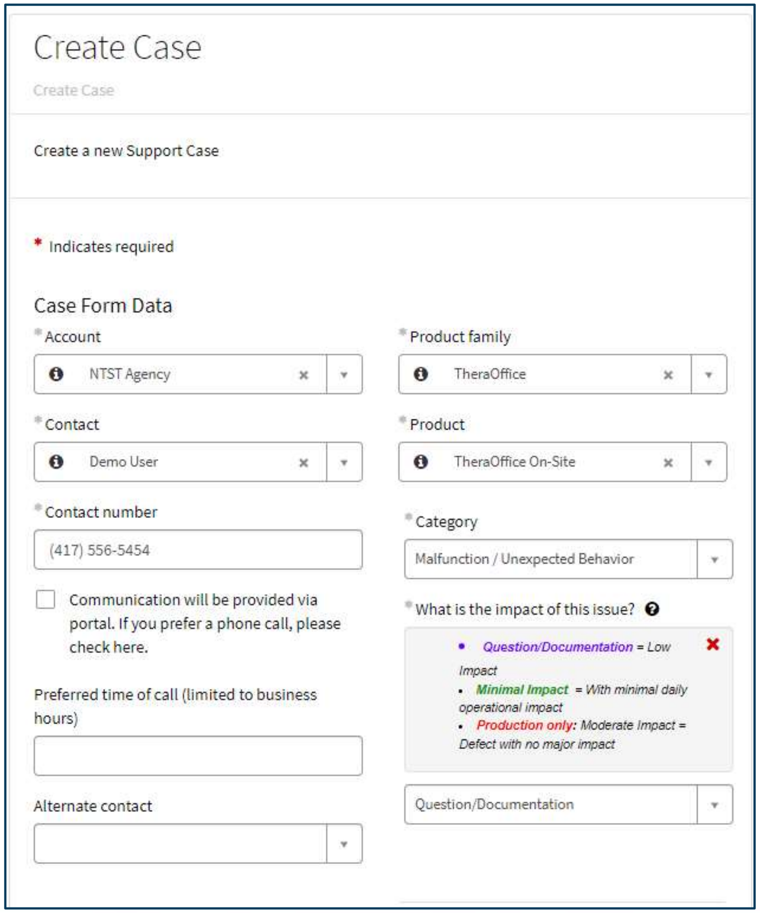
Netsmart

Input fields

- Area of Concern
  - Topics drive questions
- Fields with drop down arrow are multiple choice
- Some fields trigger additional information
- Provides Support valuable troubleshooting data



Create Case form



Create Case

Create Case

Create a new Support Case

* Indicates required

Case Form Data

* Account: NTST Agency

* Product family: TheraOffice

* Contact: Demo User

* Product: TheraOffice On-Site

* Contact number: (417) 556-5454

* Category: Malfunction / Unexpected Behavior

Communication will be provided via portal. If you prefer a phone call, please check here.

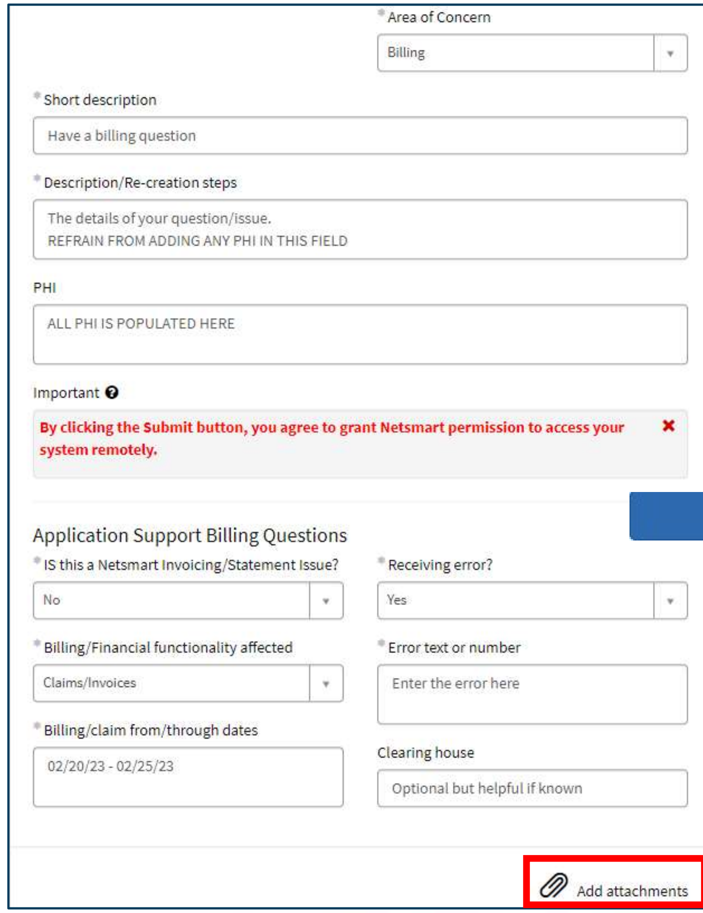
* What is the impact of this issue?

- *Question/Documentation* = *Low Impact*
- *Minimal Impact* = *With minimal daily operational impact*
- *Production only: Moderate Impact = Defect with no major impact*

Question/Documentation

Preferred time of call (limited to business hours)

Alternate contact



* Area of Concern: Billing

* Short description: Have a billing question

* Description/Re-creation steps: The details of your question/issue. REFRAIN FROM ADDING ANY PHI IN THIS FIELD

PHI: ALL PHI IS POPULATED HERE

Important

By clicking the Submit button, you agree to grant Netsmart permission to access your system remotely.

Submit

Application Support Billing Questions

* IS this a Netsmart Invoicing/Statement Issue?: No

* Receiving error?: Yes

* Billing/Financial functionality affected: Claims/Invoices

* Error text or number: Enter the error here

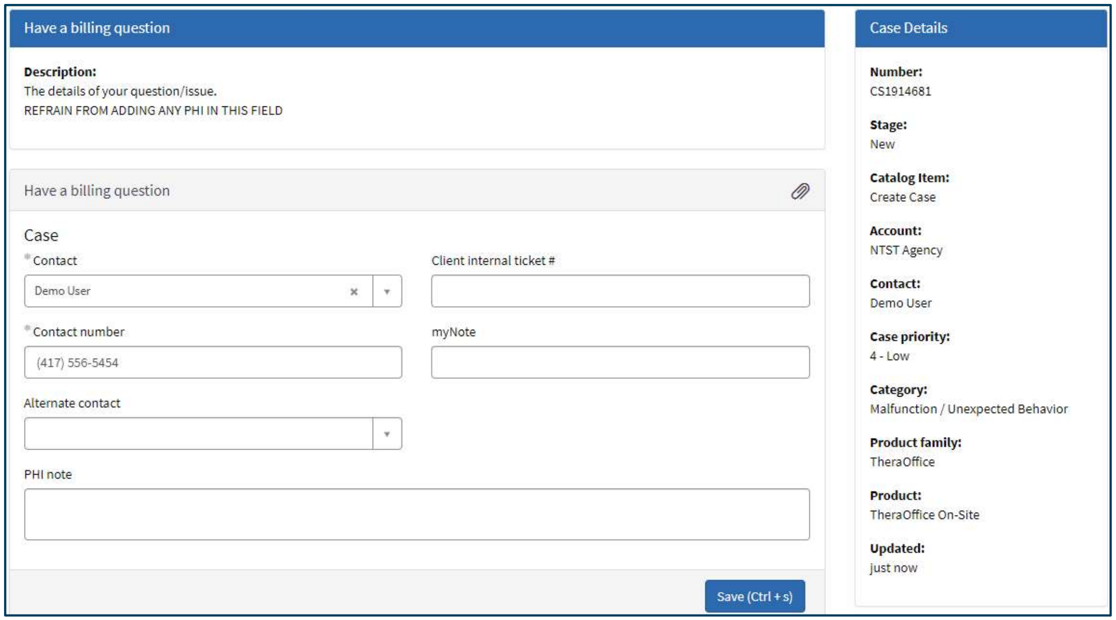
* Billing/claim from/through dates: 02/20/23 - 02/25/23

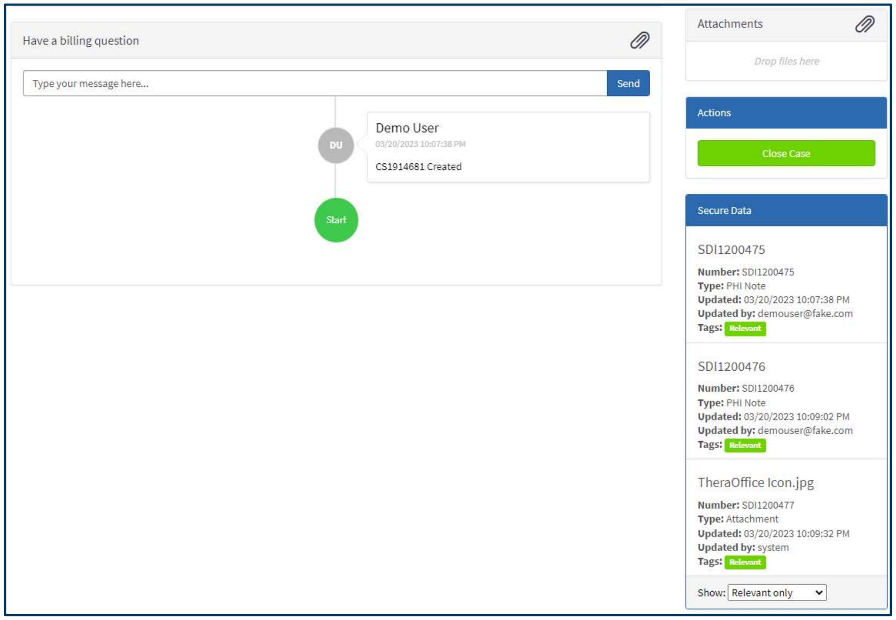
Clearing house: Optional but helpful if known

Add attachments

Can add files *before* or *after* Submitting case

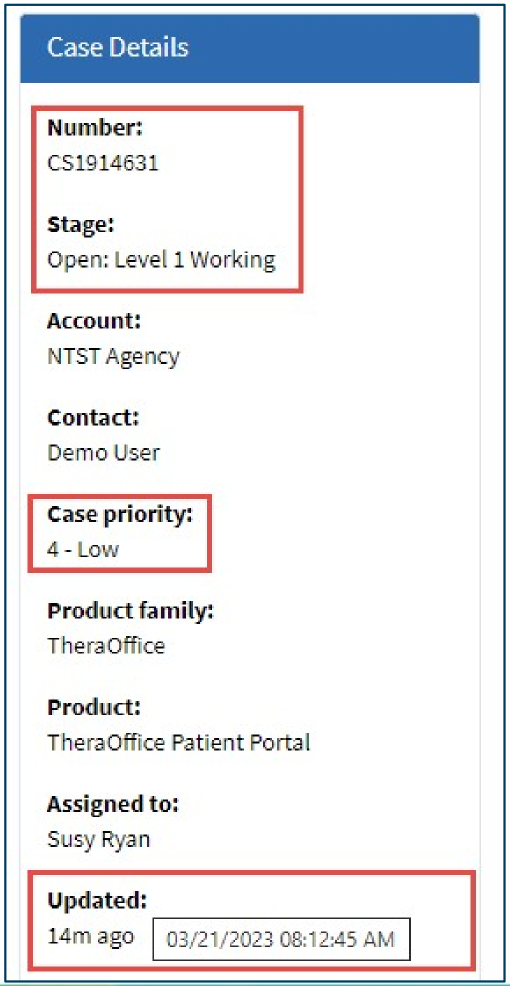
Completed Case View





Case Information Screen – Case Details

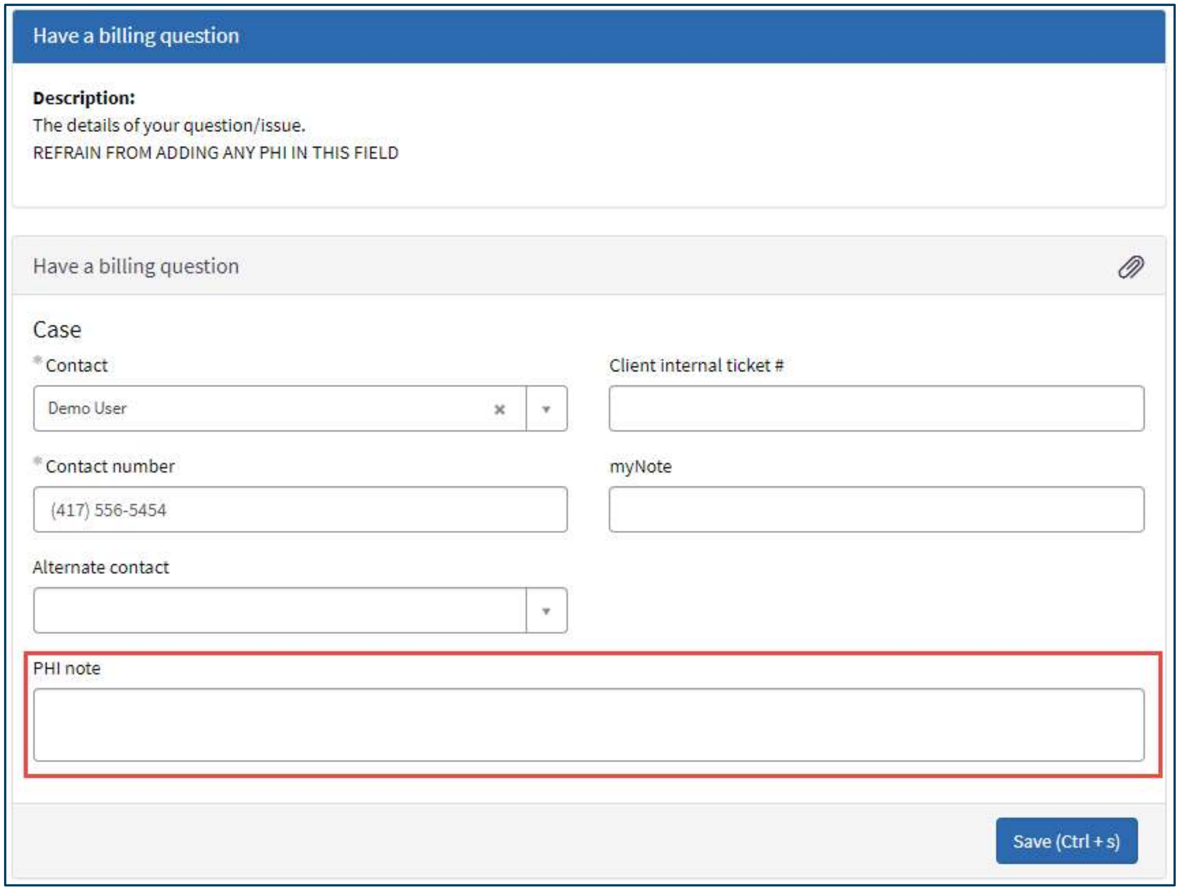
- Number – Use this when calling Support
- Stage
  - New – Case waiting to be assigned to agent
  - Open – Agent working case
  - Pending – Client gathering information for Support
  - Resolved – Troubleshooting/Answer complete
- Case Priority - Determined by the Impact and Urgency of the issue
- Updated – Denotes the last update.
  - Hover over the value and the exact date/time of update displays



Netsmart

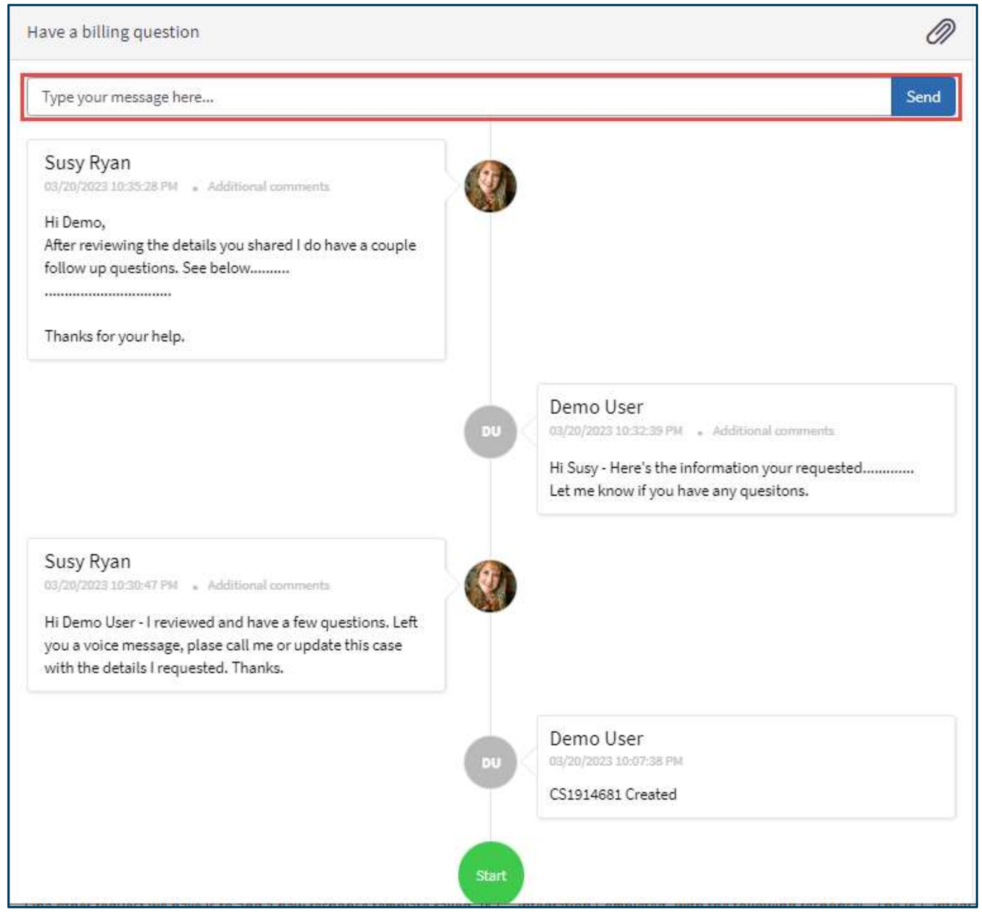
Case Information Screen – Case Details

- Case Description with additional details
- Contact and agency case tracking field
- PHI Note field
  - **ALL PHI** MUST be entered into this field



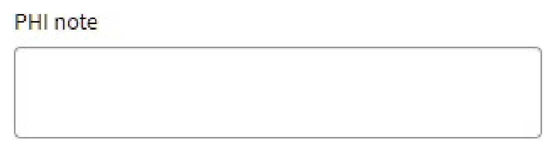
Case Information Screen – Case Details

- Case conversation
  - “*Type your message here….*” field used to send Support a message
  - The system displays a conversation timeline
  - Most recent will display at the top of the timeline
- REFRAIN from entering any PHI in this field

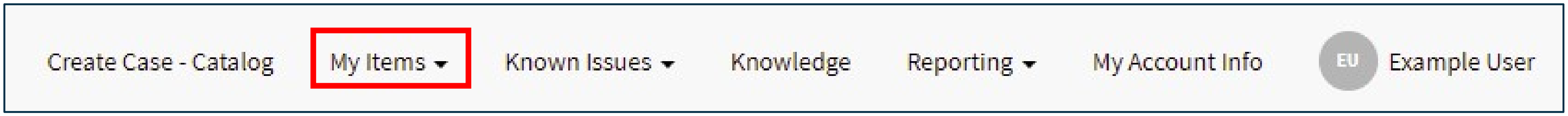


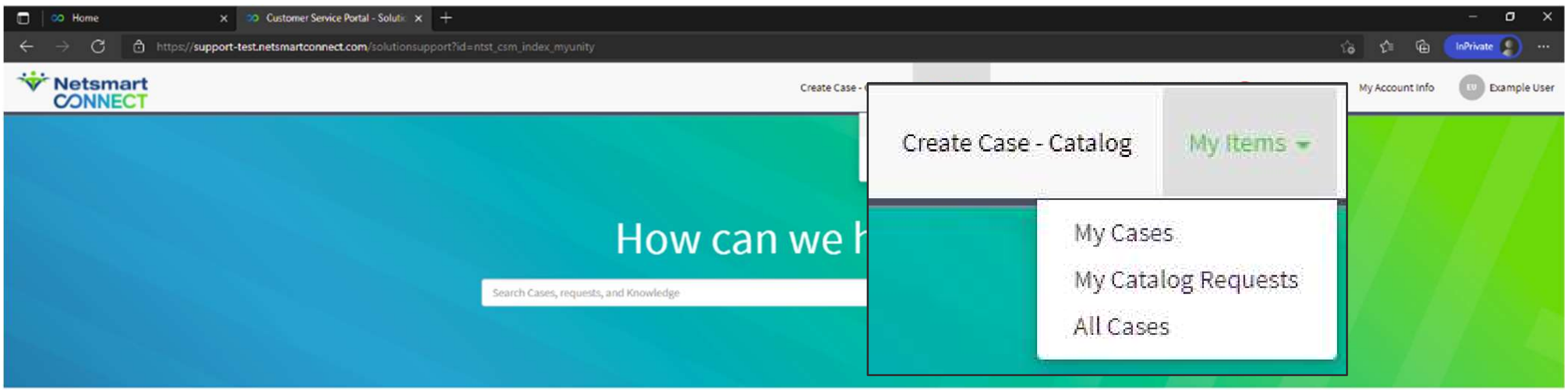
Case Information Screen – Case Details

- Populate patient data in PHI note field
- Creates Secure Data record
  - Robust PHI Auditing
    - **ALL PHI views** are recorded
  - Add Attachments
    - Drag file from your computer to “*Drop files here*”
    - Click the Paper clip to open window for searching files.
  - All PHI Secured
- Actions - Close Case
  - Client determines the issue/question has been resolved



Netsmart Support Portal – Access Case Lists





Navigation options for viewing active cases

➢ May vary depending on Support role defined by agency admin

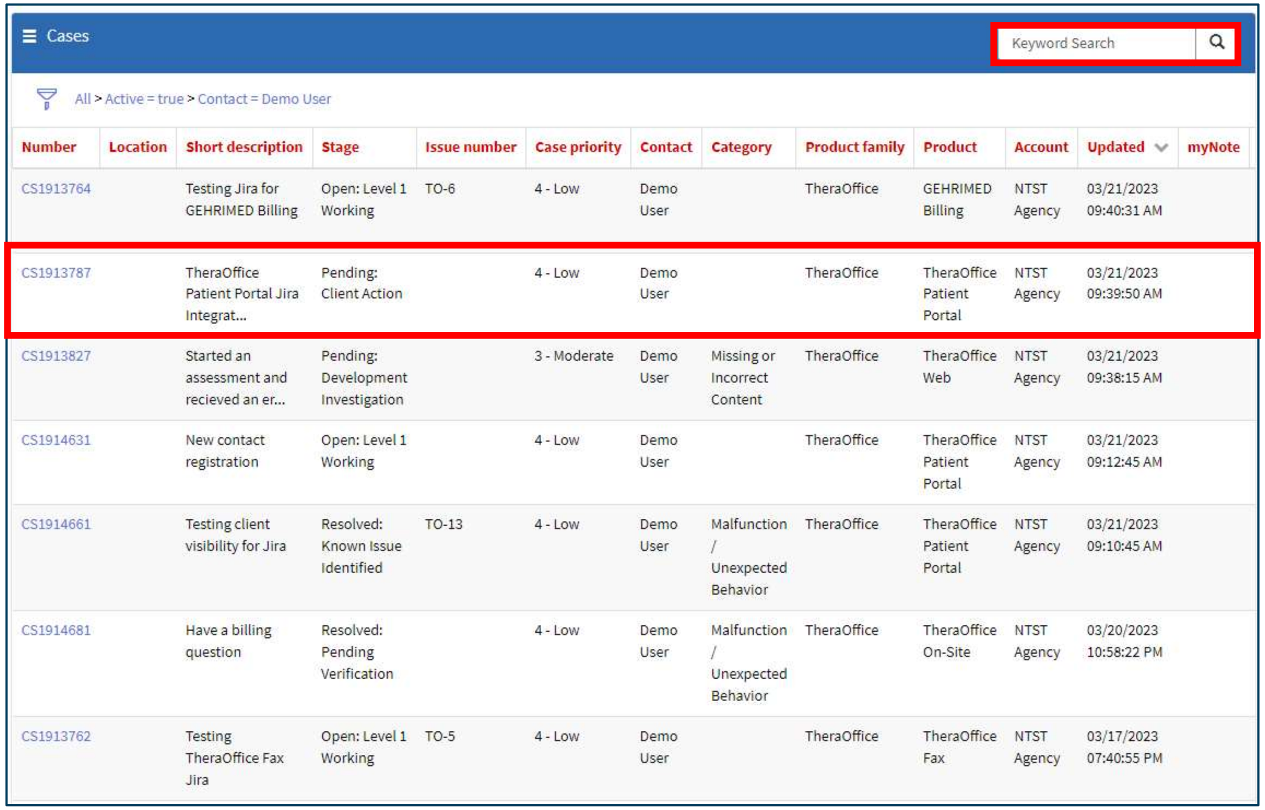
Case Information Screen - Description

Click anywhere on case detail row to open record

Click any Column header to sort list

Keyword Search

- Search for specific case number
- Narrow the list by searching for desired value



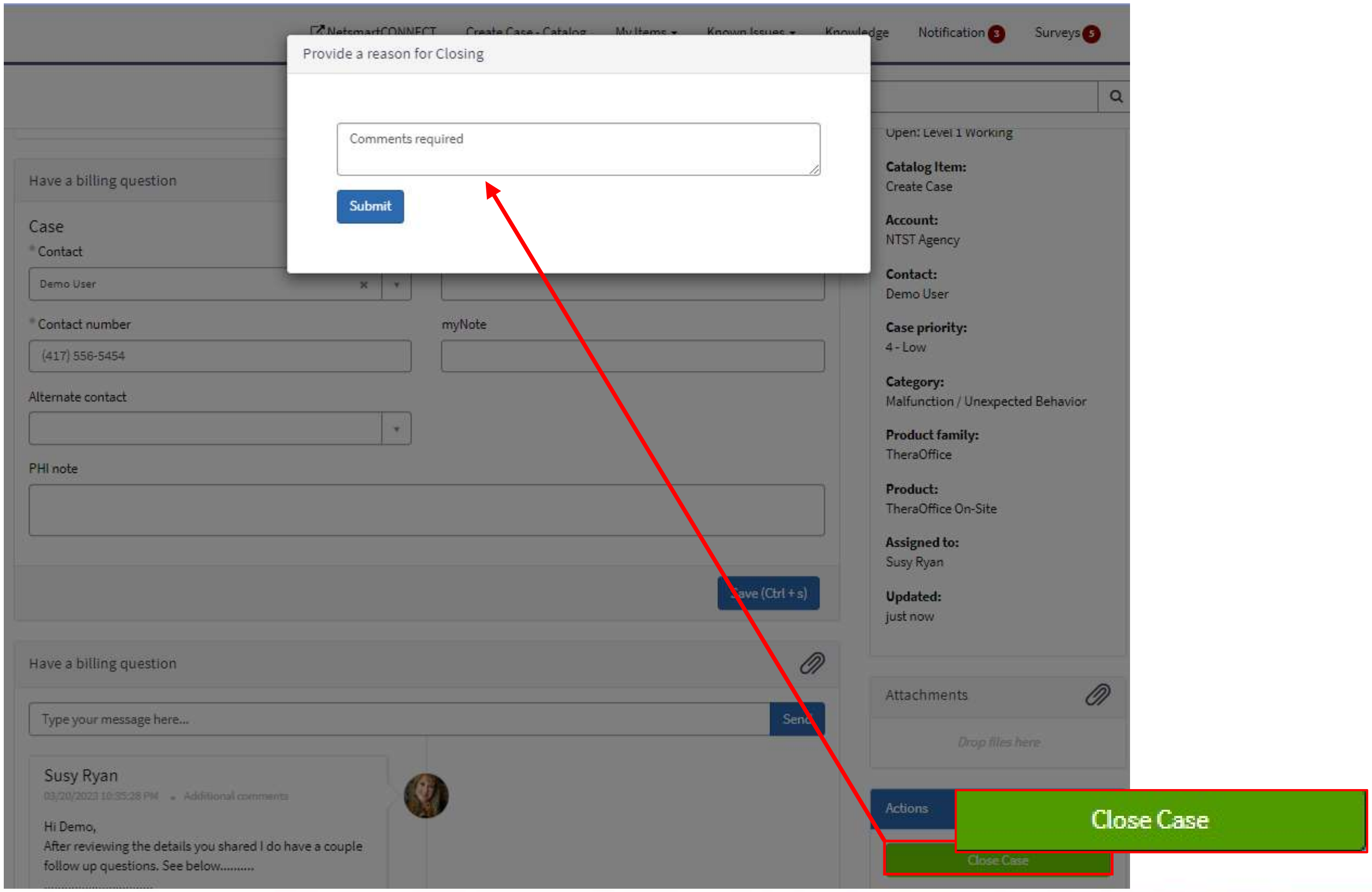
Number	Location	Short description	Stage	Issue number	Case priority	Contact	Category	Product family	Product	Account	Updated	myNote
CS1913764		Testing Jira for GEHRIMED Billing	Open: Level 1 Working	TO-6	4 - Low	Demo User		TheraOffice	GEHRIMED Billing	NTST Agency	03/21/2023 09:40:31 AM	
CS1913787		TheraOffice Patient Portal Jira Integrat...	Pending: Client Action		4 - Low	Demo User		TheraOffice	TheraOffice Patient Portal	NTST Agency	03/21/2023 09:39:50 AM	
CS1913827		Started an assessment and recieved an er...	Pending: Development Investigation		3 - Moderate	Demo User	Missing or Incorrect Content	TheraOffice	TheraOffice Web	NTST Agency	03/21/2023 09:38:15 AM	
CS1914631		New contact registration	Open: Level 1 Working		4 - Low	Demo User		TheraOffice	TheraOffice Patient Portal	NTST Agency	03/21/2023 09:12:45 AM	
CS1914661		Testing client visibility for Jira	Resolved: Known Issue Identified	TO-13	4 - Low	Demo User	Malfunction / Unexpected Behavior	TheraOffice	TheraOffice Patient Portal	NTST Agency	03/21/2023 09:10:45 AM	
CS1914681		Have a billing question	Resolved: Pending Verification		4 - Low	Demo User	Malfunction / Unexpected Behavior	TheraOffice	TheraOffice On-Site	NTST Agency	03/20/2023 10:58:22 PM	
CS1913762		Testing TheraOffice Fax Jira	Open: Level 1 Working	TO-5	4 - Low	Demo User		TheraOffice	TheraOffice Fax	NTST Agency	03/17/2023 07:40:55 PM	

Closing & Resuming Cases

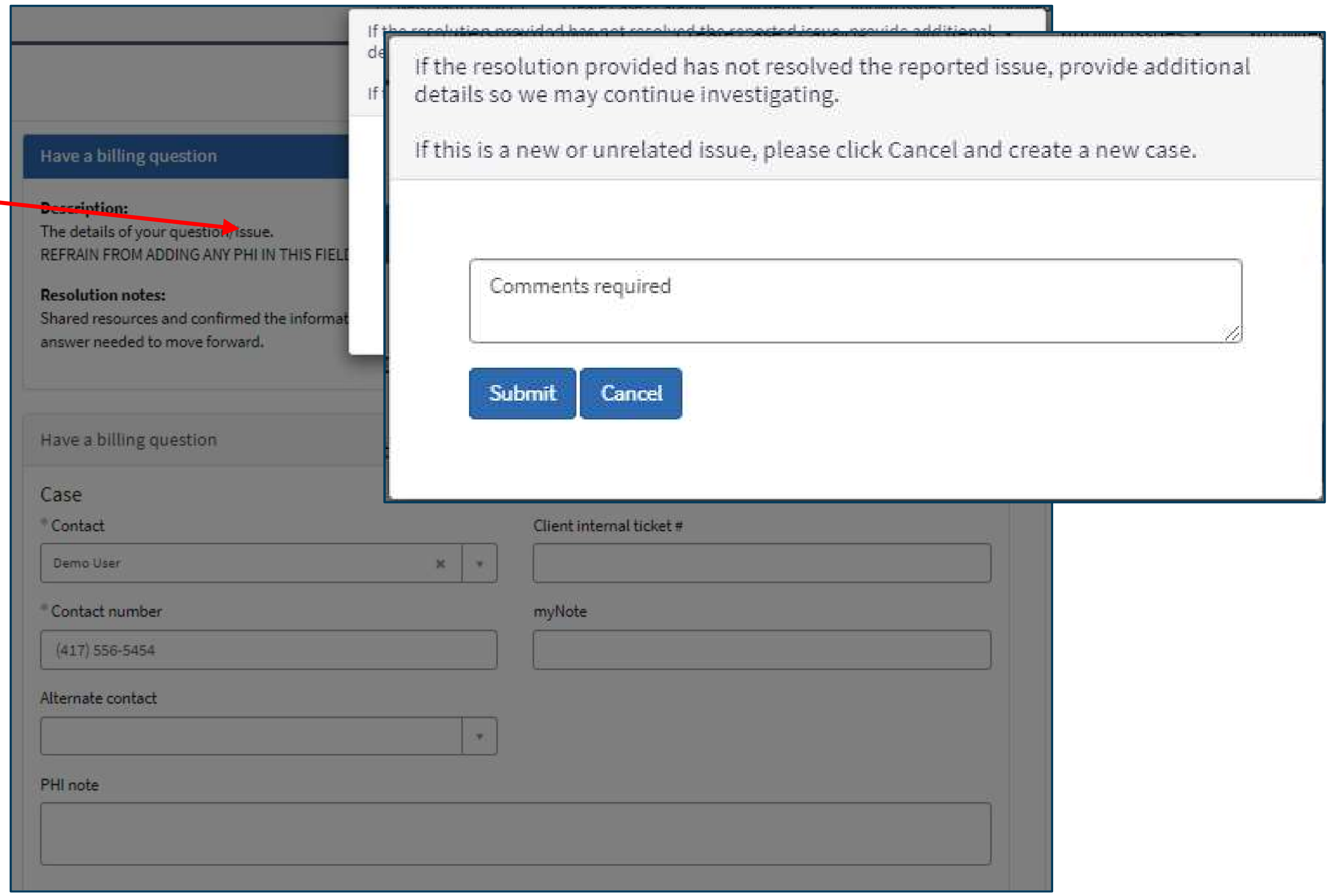
Resolved vs Closed Cases

- Netsmart Support marks cases as Resolved
- The Client or the automated workflow sets cases to Closed
- Resolved: Solved or Resolved: Case Forwarded
  - Initiates a 2- business day system workflow for closure
- Resolved: Pending Verification
  - Initiates a 6- business day system workflow for closure
- Closed
  - Client approved the resolution or took no action on Resolved status

Closing Cases – Client Initiated

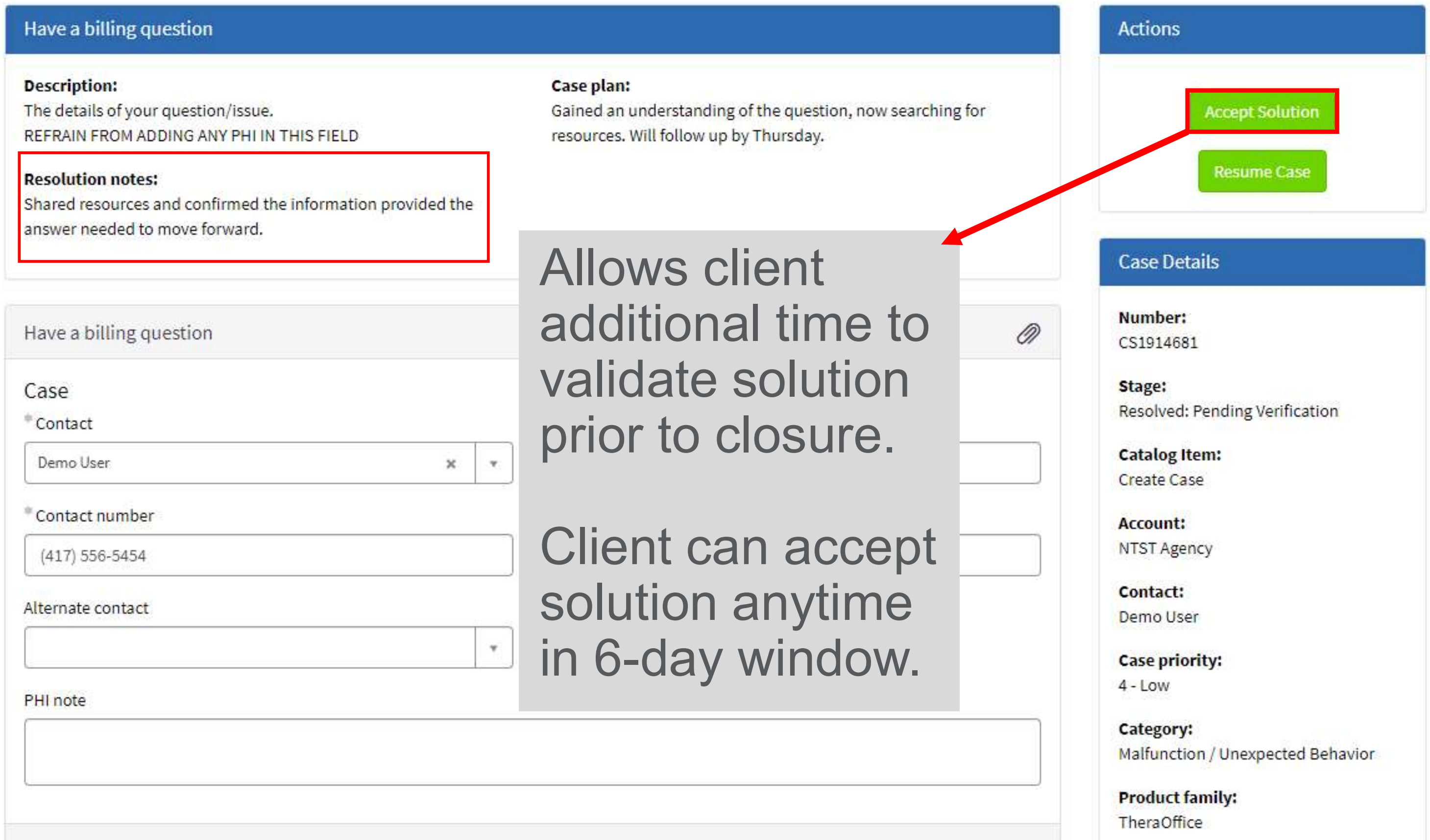


Resuming Cases – Resolved 2-day Workflow



Enter why the resolution has stopped working and then submit

Resuming Cases – Resolved 6-day Workflow



Allows client additional time to validate solution prior to closure.

Client can accept solution anytime in 6-day window.

Known Issues

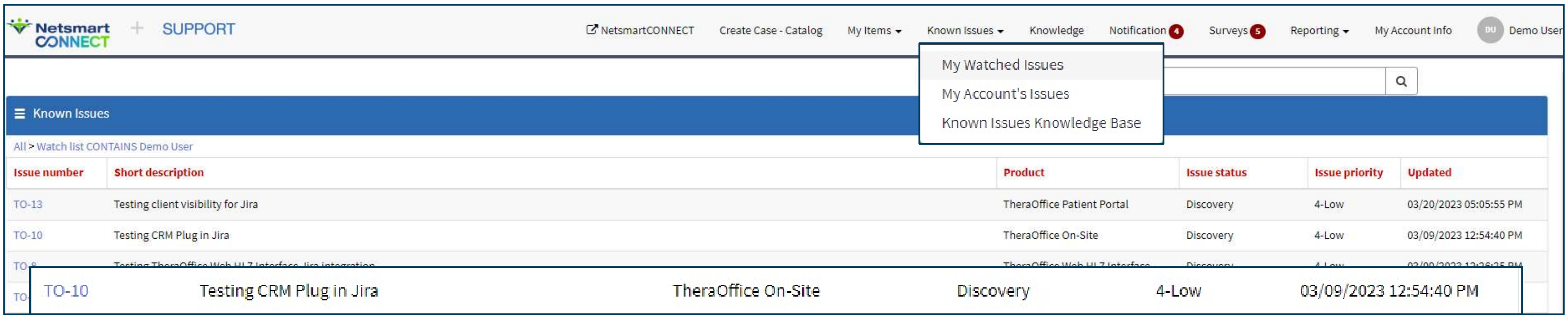
Known Issue Tracking

- Directly be able to view Known Issue
  - Viewable on the Client Support Portal for tracking your issues
  - Track Known Issues associated to yourself
  - Track Known Issues associated to the entire account
  - Share Known Issues with colleagues
- Email Notifications
  - Notified of status change
  - Notified of solution

Navigating Support Portal Menu

- Known Issues
  - View Known Issues by user or all known issues for agency
  - Issues reported in a case tied to a Development Known Issue
- Drop down menu
  - My Watched Issues
  - My Account’s Issues
  - Known Issues Knowledge Base (Coming Soon!)

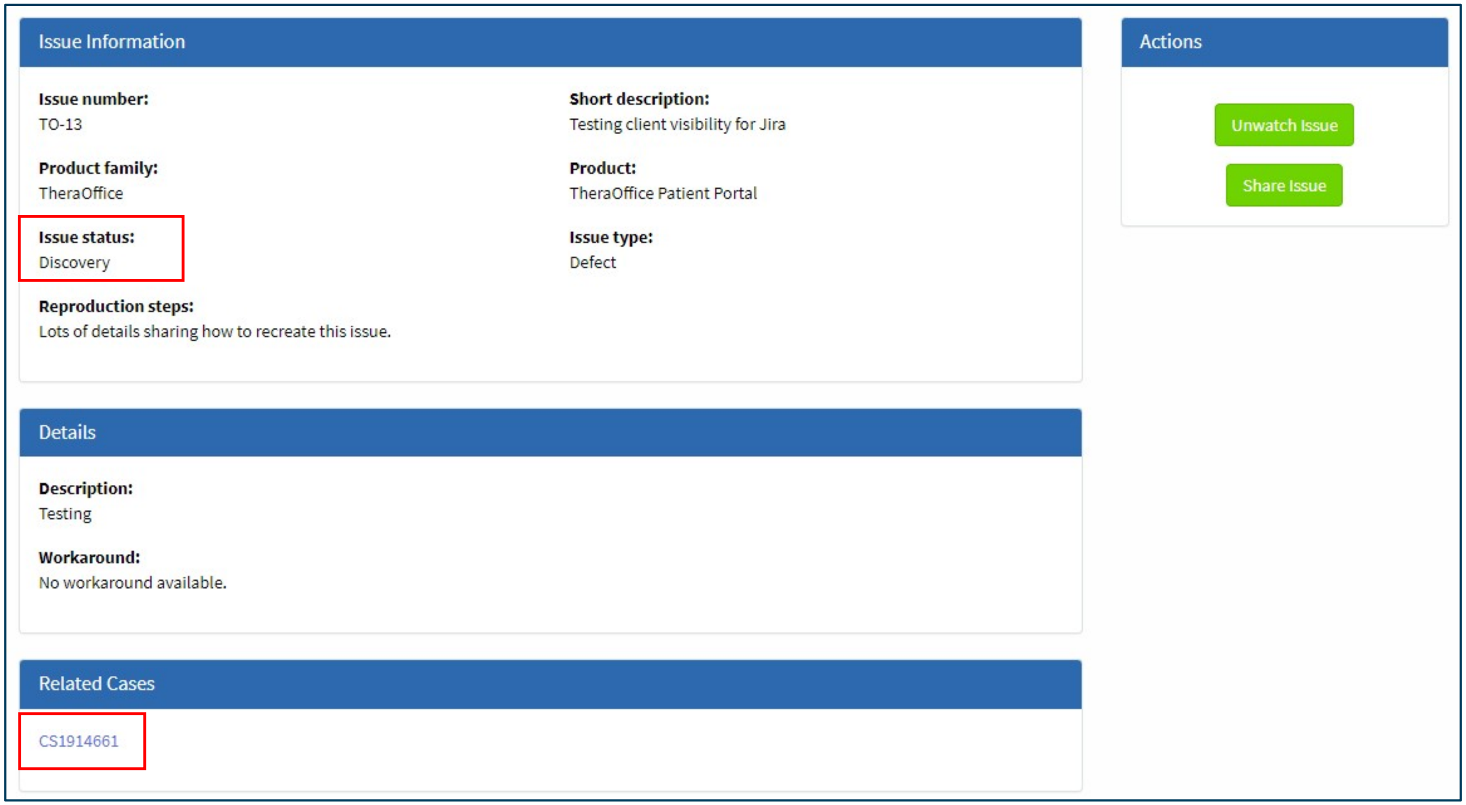
Solution Support Portal – Known Issues



Displayed are Knowns Issue from case associated to the logged in user

Click anywhere on the Issue number row to open details for the Known Issue

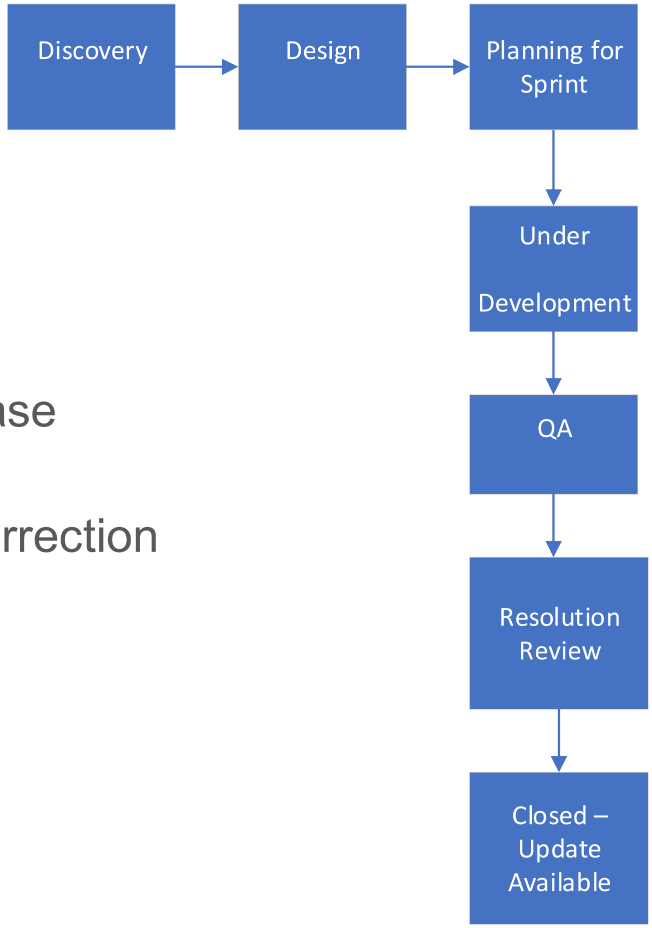
Solution Support Portal – Known Issue Details



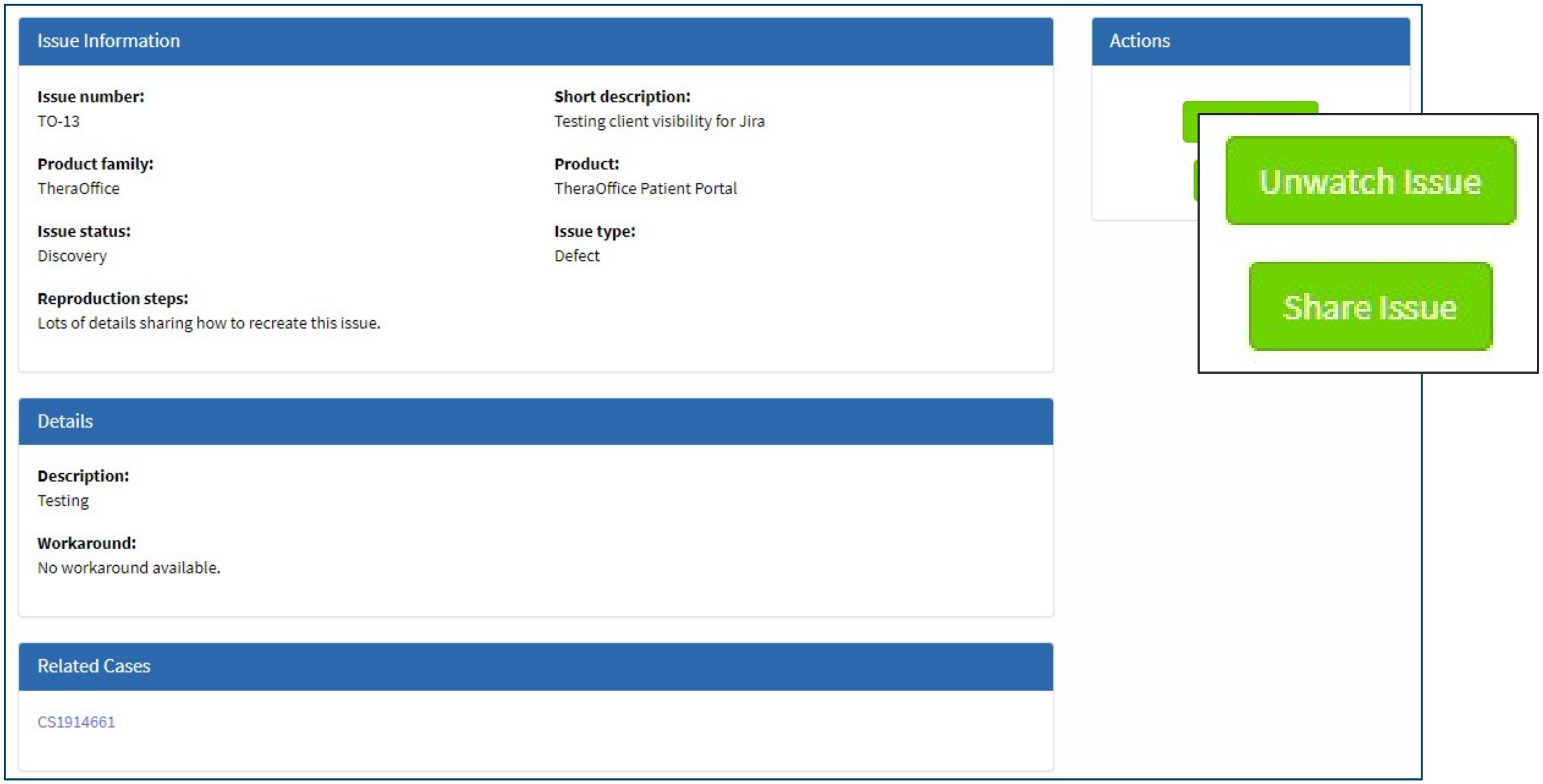
Updates to these details will populate as the issue moves through Development

Development Issue Status

- Discovery
  - Identified and sent to Development for initial review
- Design
  - Reviewing for potential design work
- Planned for Sprint
  - Initial assignment for inclusion in an upcoming release
- Under Development
  - Design work progressing and actively coding the correction
- QA
  - Code complete – in testing
- Resolution review
  - Passed QA awaiting packaging for release
- Closed – Update Available
  - Code correction is complete and available



Netsmart Support Portal – Known Issues



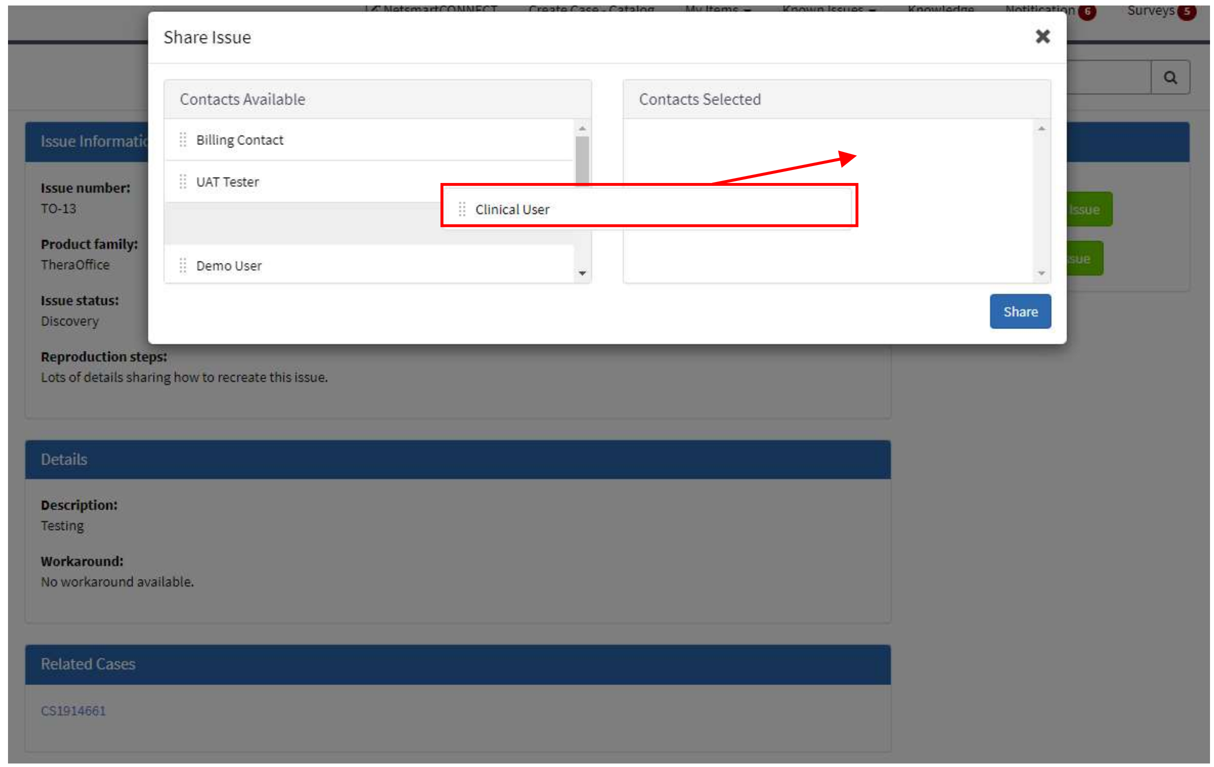
Netsmart Support Portal – Known

Click and hold the tile, then drag the desired contact to Contacts Selected

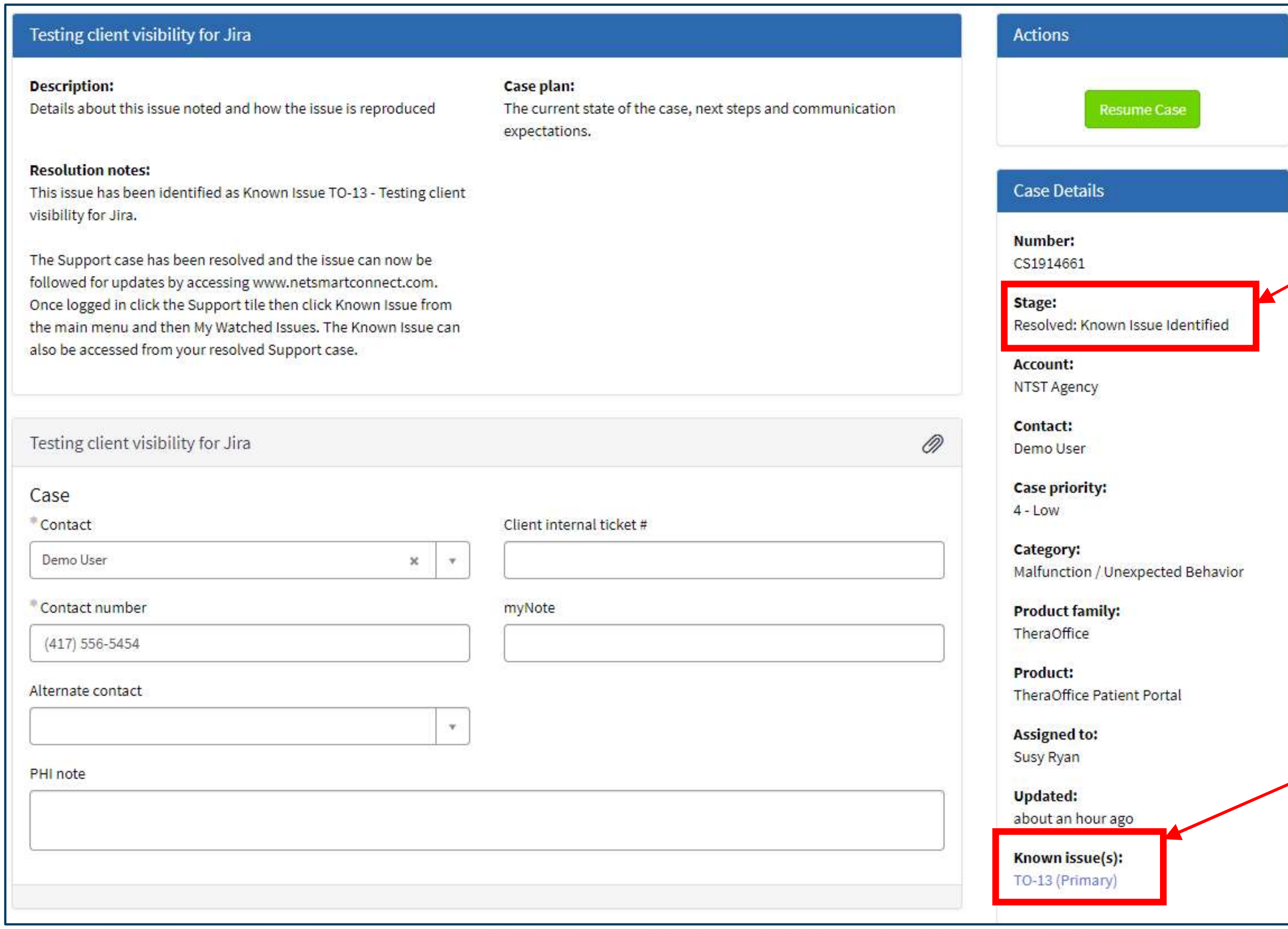
Continue until all desired Contacts are added

Click Share

- ✓ Newly added contacts receive notification



Netsmart Support Portal – Known Issues

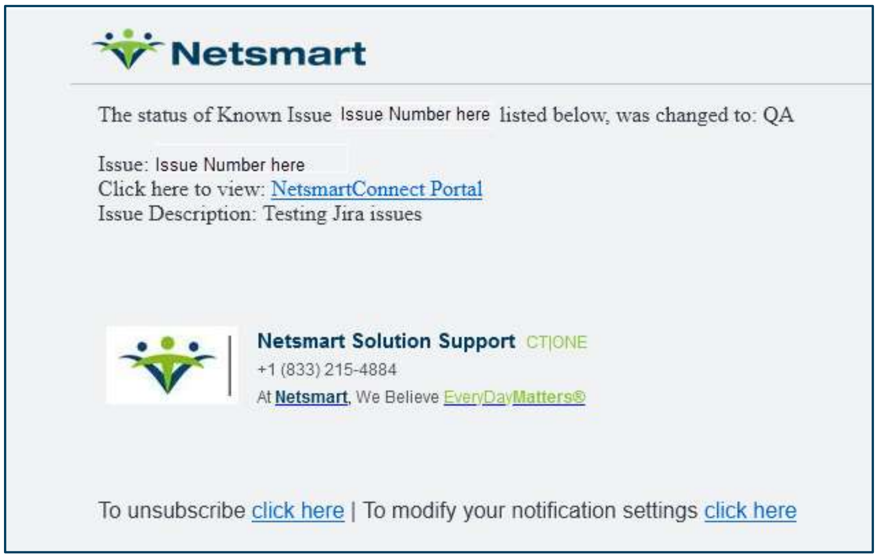


Case Stage set to Resolved: Case Forwarded

Link to Known issue added to case

Known Issue Notifications

- Case contacts added to watch list
- Email triggered when the issue status changes


Netsmart

The status of Known Issue Issue Number here listed below, was changed to: QA

Issue: Issue Number here
Click here to view: NetsmartConnect Portal
Issue Description: Testing Jira issues

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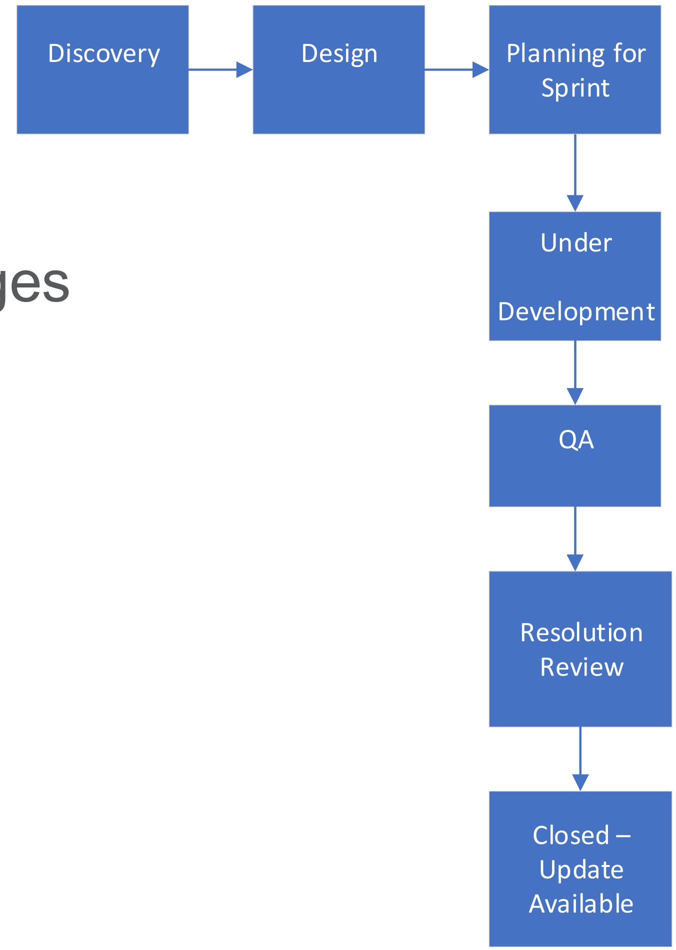
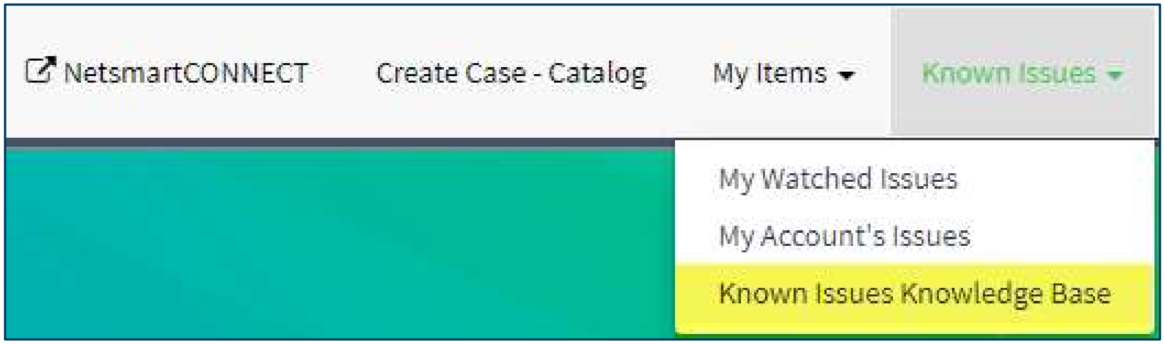
To unsubscribe click here | To modify your notification settings click here



Known Issue Knowledge Base

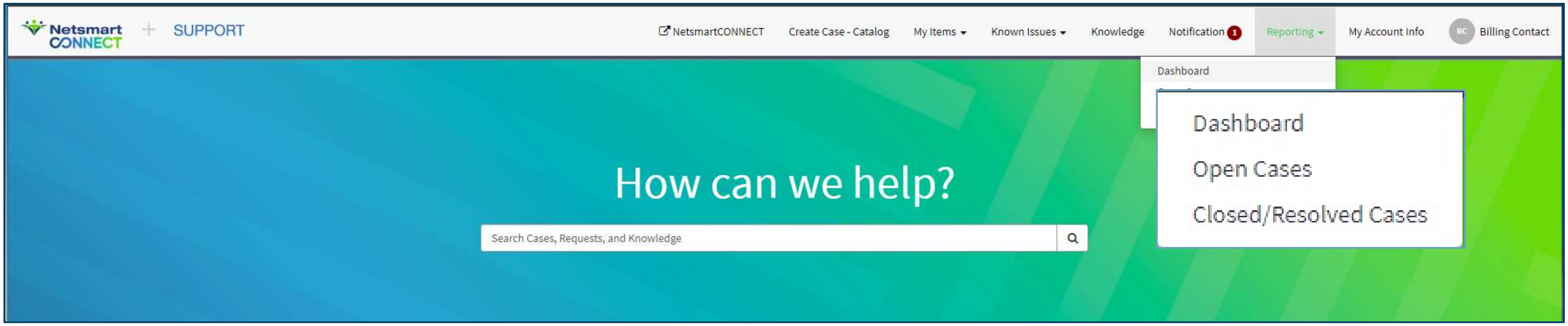


- Team is working to migrate their Known Issues to Application Support Known Issues knowledge base
- Look for updates in the coming months

Dashboard & Reporting

Netsmart

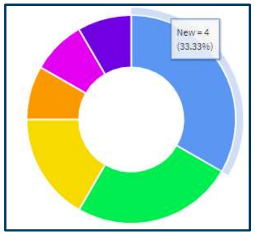
Reporting

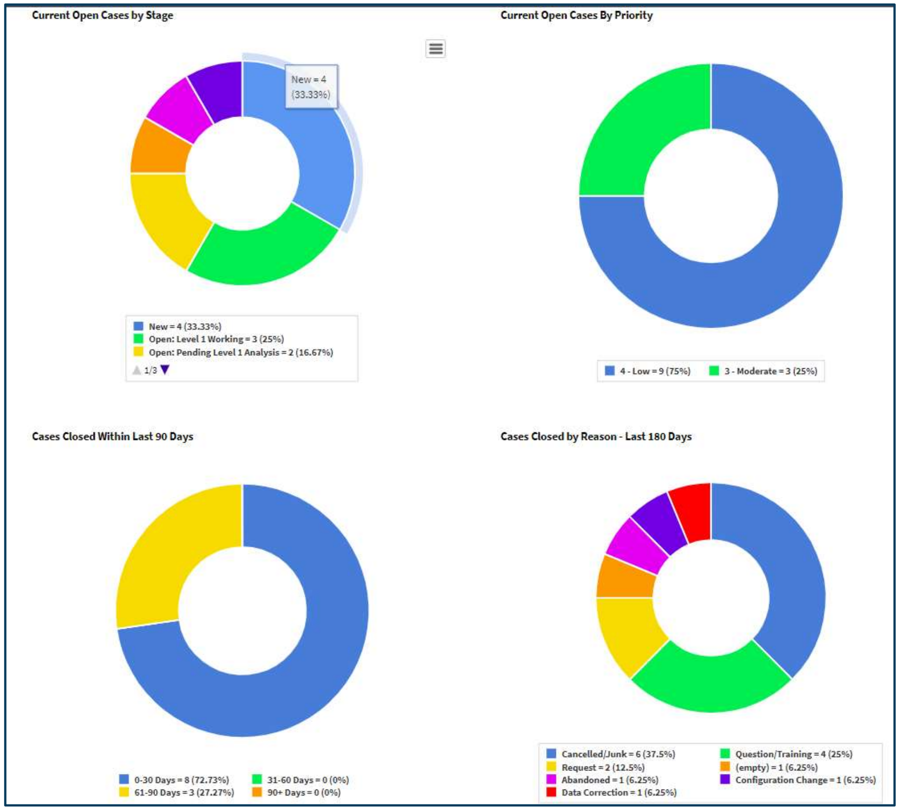


Netsmart

Dashboard

- Graphs for Current Open and Closed Cases
  - Open cases by Stage
  - Open cases by Priority
  - Closed within Last 90 Days
  - Closed within Last 180 Days
- Click any ‘Section’ of the chart to open a filtered list





Reporting

- Open Cases

Cases

Keyword Search

All > State in (New, Open, Pending)

Number	Client internal ticket #	Case priority	Created	Contact	Short description	Stage	Issue number	Category	Case plan	Product
CS1913787		4 - Low	03/09/2023 12:30:10 PM	Demo User	TheraOffice Patient Portal Jira Integrat...	Pending: Client Action			Researched the integration issue and will connect to patient portal for additional troubleshooting. Will check in with progress on Friday	TheraOffice Patient Portal
CS1913827		3 - Moderate	03/09/2023 02:34:34 PM	Demo User	Started an assessment and recieved an er...	Pending: Development Investigation		Missing or Incorrect Content	In my research I found I need another example. Once I have that information I can continue troubleshooting.	TheraOffice Web
CS1913957		4 - Low	03/10/2023 05:29:46 PM	Info Desk	Michael Scheer - PE Survey Question - 9	Open: Level 2 Working				TheraOffice PE Surveys
CS1913947		2 - High	03/10/2023 05:14:58 PM	Case User	Michael Scheer - Doc Design - 4	Open: Level 2 Working				TheraOffice On-Site
CS1914502		4 - Low	03/17/2023 02:53:57 PM	Info Desk	test	Open: Pending Level 1 Analysis				TheraOffice Web
CS1913700		4 - Low	03/08/2023 02:59:18 PM	Info Desk	Michael Scheer - Can't Login - 1	Open: Level 2 Working			Have reached out to client. They are getting to get login credentials from admin. They will call me to continue to see if error message continues.	TheraOffice Web

- Closed/Resolved

Netsmart CONNECT + SUPPORT

NetsmartCONNECT Create Case - Catalog My Items Known Issues Knowledge Notification 7 Surveys 5 Reporting My Account Info DU Demo User

All > State in (Resolved, Closed) > Resolved > 03/21/2022 10:25:44 AM .or. Closed > 03/21/2022 10:25:44 AM

Number	myNote	Client internal ticket #	Case priority	Closed	Contact	Short description	Resolution notes	Issue number	Update / Cust Pack #	Fix version	Product
CS1914661			4 - Low		Demo User	Testing client visibility for Jira	This issue has been identified as Known ...	TO-13			TheraOffice Patient Portal
CS1914681			4 - Low		Demo User	Have a billing question	Shared resources and confirmed the infor...				TheraOffice On-Site

Next steps

- Look for a registration email
- Open cases have been migrated to new system
- The following emails will be redirected to our new system
  - TheraOffice_Support@ntst.com
  - support@theraoffice.com

Thanks!!

Netsmart