

NetsmartCONNECT Solution Support Portal

Training for Netsmart
TheraOffice

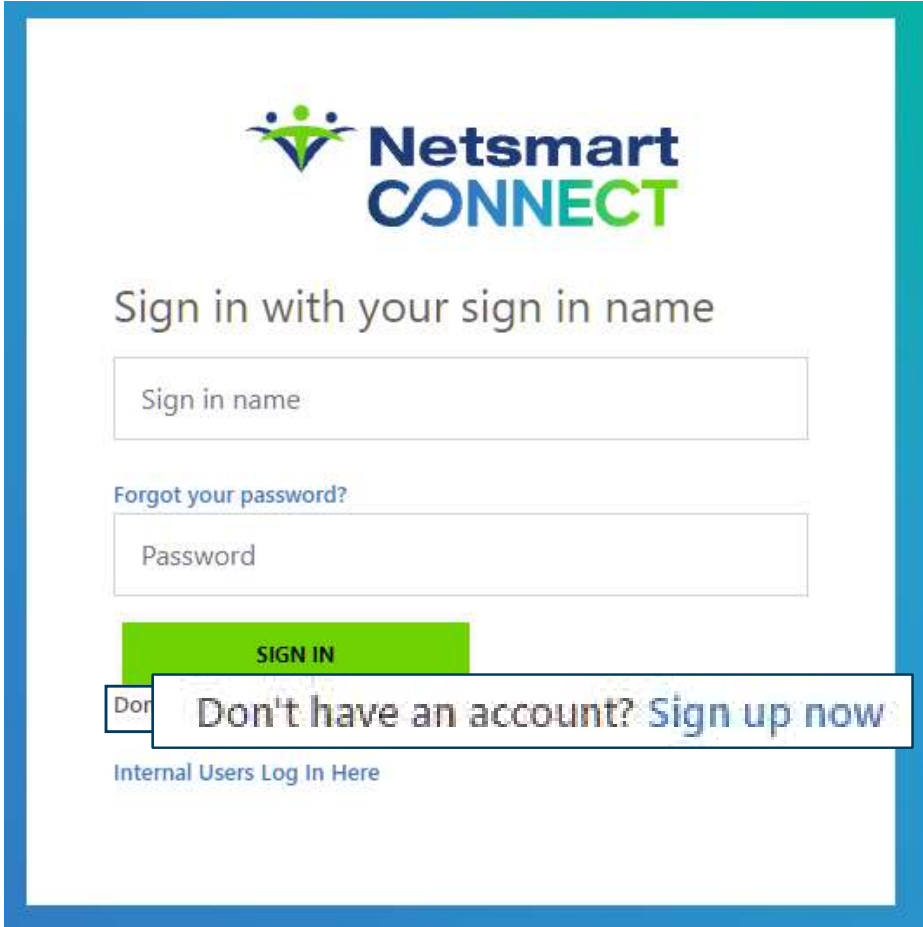
Register for NetsmartCONNECT


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>





Sign in with your sign in name

Sign in name

Forgot your password?

Password

SIGN IN

Don't have an account? [Sign up now](#)

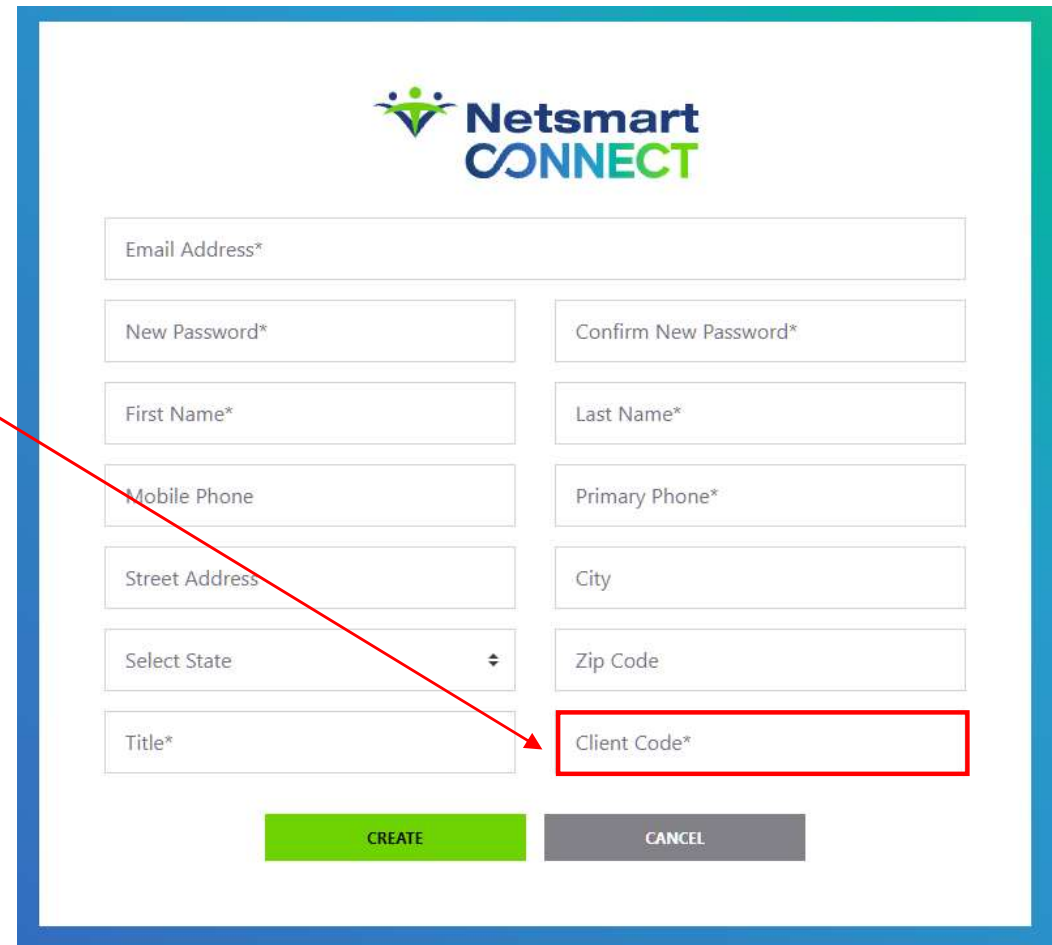
[Internal Users Log In Here](#)

Complete registration

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


Client Code*

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



The image shows a registration form for Netsmart CONNECT. The form is titled "Netsmart CONNECT" at the top. It contains several input fields: "Email Address*", "New Password*", "Confirm New Password*", "First Name*", "Last Name*", "Mobile Phone", "Primary Phone*", "Street Address", "City", "Select State" (with a dropdown arrow), "Zip Code", and "Title*". A red box highlights the "Client Code*" field, and a red arrow points from a box labeled "Client Code*" in the text to this field. At the bottom of the form, there are two buttons: "CREATE" (green) and "CANCEL" (grey).

Example Registration – Click Create



exampleuser@ntst.com

.....

.....

Example User


Mobile Phone (417) 111-2222

Street Address City

MO Zip Code

Example Title 4999999

CREATE CANCEL



exampleuser@ntst.com

.....

.....

Example

Mobile Phone (417) 111-2222

Street Address City

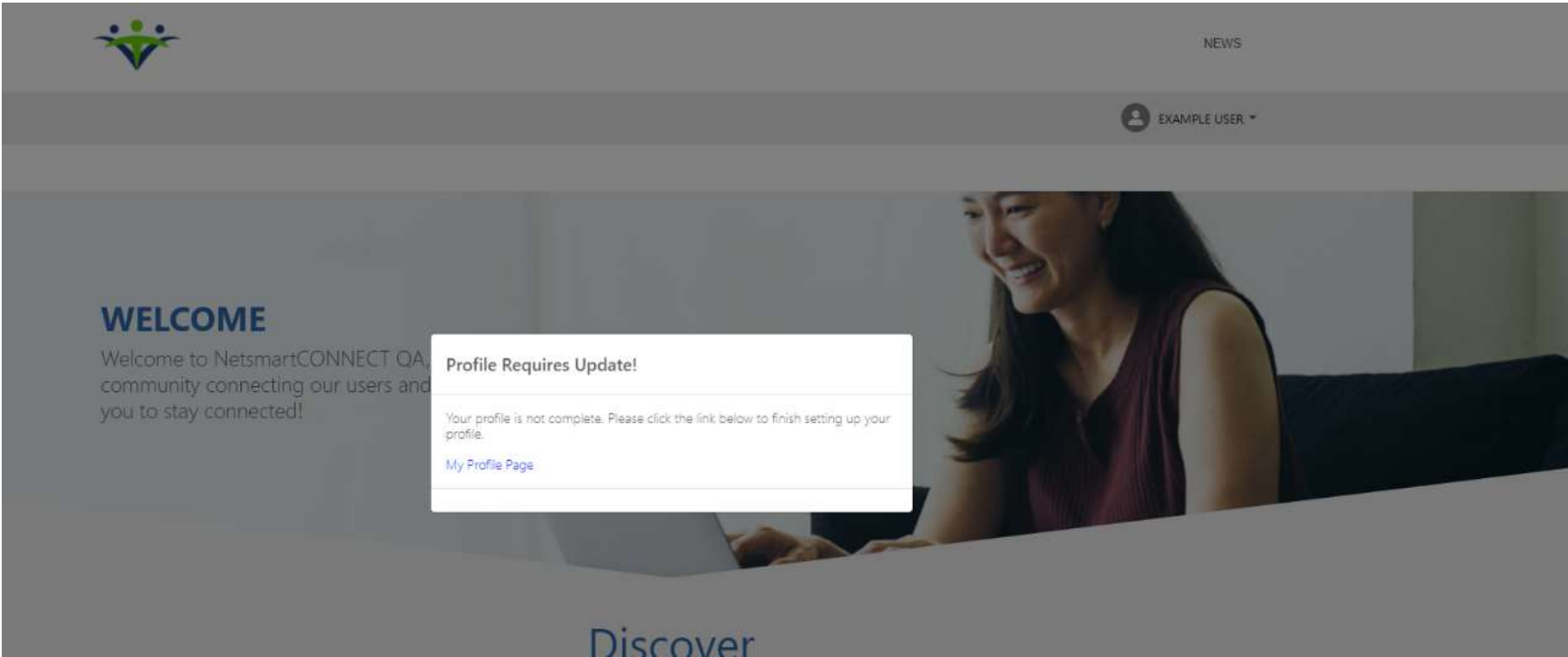
MO Zip Code

Example Title 1281629

CREATE CANCEL

Please wait while we process your information.

Profile Updates



My Profile – Set up

Public Display

- Choose which fields to turn on for public view

Public Display?

- 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

The screenshot shows the 'My Profile' setup form. It includes fields for First Name, Last Name, Title, Email, Primary Phone, Mobile Phone, Street Address, City, State, and Zip Code. Each field has a 'Public Display?' checkbox below it. A red box highlights the 'Public Display?' checkbox for the Title field, with a red arrow pointing from the 'Public Display?' checkbox in the instructions to it. Another red box highlights the 'Focus Areas', 'Regions', and 'Lines of Service' dropdown menus, with a red arrow pointing from the 'SAVE' button in the instructions to the 'SAVE' button at the bottom of the form.

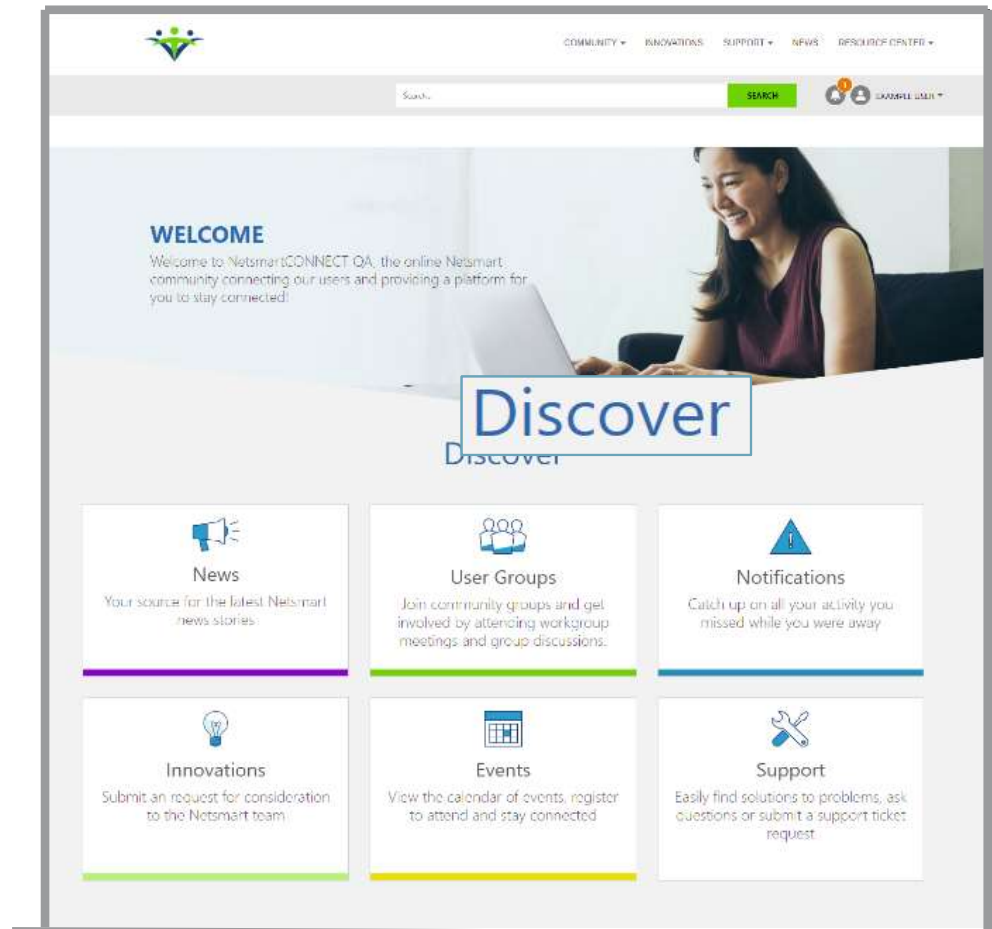
Adding additional team members

- ① Anyone from your organization can register
- ① Newly registered users will inform their Admin once they've completed registration
- ① 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



COMMUNITY ▾

INNOVATIONS

RES

RESOURCE CENTER

PRODUCT UPDATE PORTAL ↗

GUARDIAN ↗

EVENTS ↗

Search...

SEARCH



SUSY RYAN ▾

For user guides and release notes, please select a solution below

Specialty Practice CareRecord



TheraOffice®
A Netsmart Solution

Click Resource Center from menu to access TheraOffice

Netsmart Resource Center

The screenshot shows the TheraOffice resource center interface. At the top, there is a search bar with the text "How can we help you?". To the right of the search bar is a user profile icon labeled "Your name here". Below the search bar is a breadcrumb navigation path: "Home » CareRecord » Specialty Practices » TheraOffice". The main heading is "TheraOffice". Below the heading, it says "Last updated: Nov 15, 2022, 3:37 PM by Carol Hattrup" and "Page restriction: Semi-Public". There is a star icon on the right. The main content area is divided into four sections: "Onboarding and implementation" (with a monitor icon), "Help" (with a group of people icon), "System administration resources" (with a person at a laptop icon), and "Solution highlights" (with a network diagram icon). Below these sections is a large box for "TheraOffice release notes" (with a smartphone icon).

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

Netsmart Resource Center



Selected 'Solutions Highlights' from main page

How can we help you? Your name here

Home » CareRecord » Specialty Practices » TheraOffice » Help

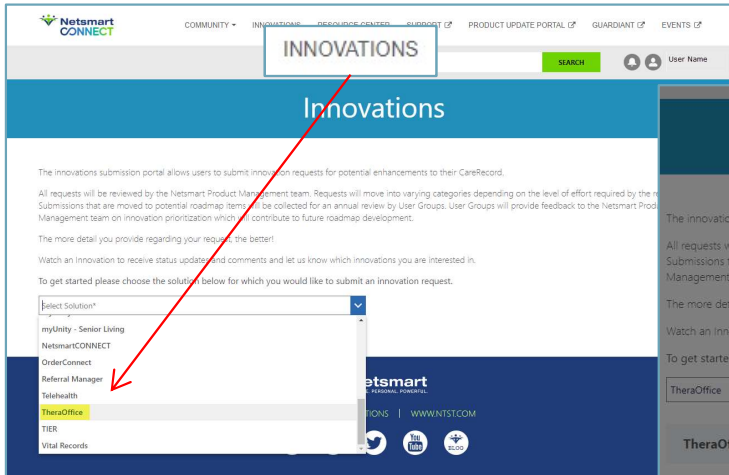
Solution highlights

Welcome to TheraOffice Highlights. This is a place where we can gather together and share the latest and greatest content. This section will change as we rotate available solution highlights.

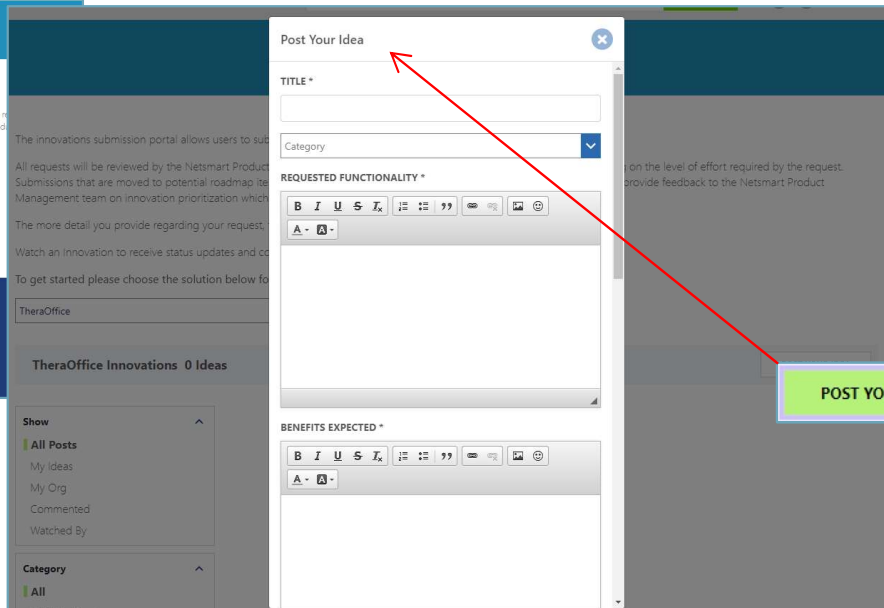
TheraOffice Training **Newest Features**

An icon of a person standing next to a whiteboard.A network icon with four colored nodes (green, orange, blue, black).

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

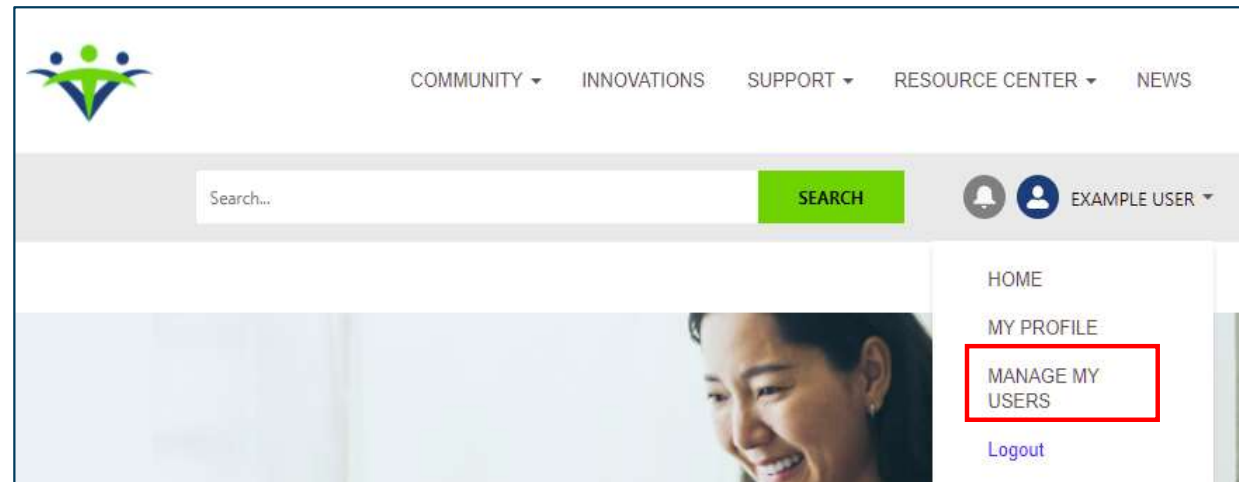
NetsmartCONNECT

Portal Admin Functionality

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

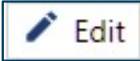
- Each user account is assigned roles
- Listed are all contacts at your agency
- New registrations have basic role by default
- Roles can be added or removed
- Click **Deactivate** to remove access

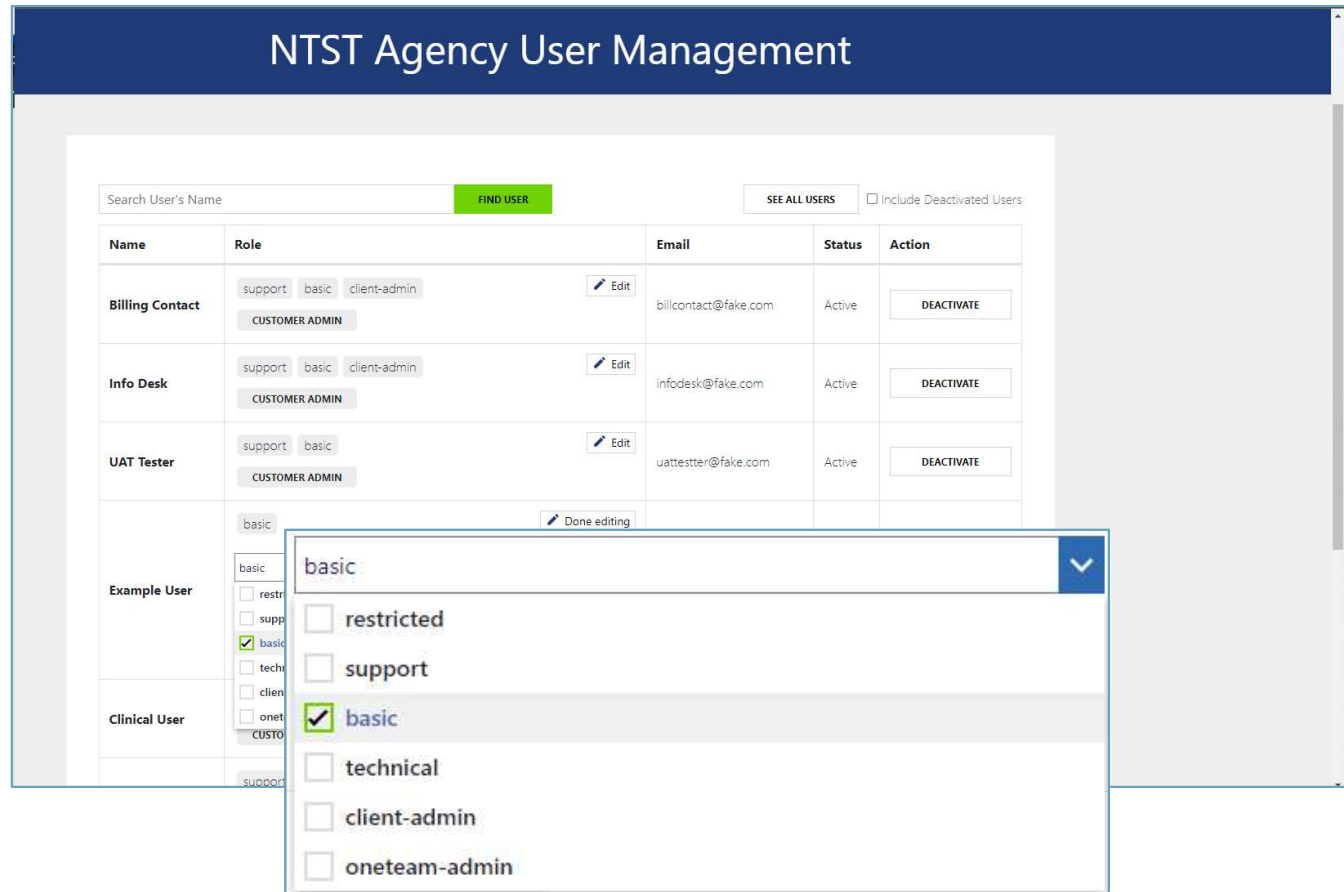
NTST Homecare Agency User Management

Search User's Name Include Deactivated Users

Name	Role		Email	Status	Action
Homecare Biller	restricted	<input type="button" value="Edit"/>	hcbiller@ntsthomecare.com	Active	<input type="button" value="DEACTIVATE"/>
Sample Contact	restricted	<input type="button" value="Edit"/>	samplecontact@example.com	Active	<input type="button" value="DEACTIVATE"/>
Sample User	restricted	<input type="button" value="Edit"/>	sampleuser@example.com	Active	<input type="button" value="DEACTIVATE"/>
Information User	restricted	<input type="button" value="Edit"/>	infouser@example.com	Active	<input type="button" value="DEACTIVATE"/>
Example User	restricted basic support	<input type="button" value="Edit"/>	jbanar+perstests03@avantia-inc.com	Active	<input type="button" value="DEACTIVATE"/>
Test User	restricted	<input type="button" value="Edit"/>	testuser@ntsthome.com	Active	<input type="button" value="DEACTIVATE"/>
Example User	restricted client-admin	<input type="button" value="Edit"/>	exampleuser@ntst.com	Active	<input type="button" value="DEACTIVATE"/>
Test User 1295679	restricted	<input type="button" value="Edit"/>	jbanar+1295679@avantia-inc.com	Active	<input type="button" value="DEACTIVATE"/>

Edit User Roles

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



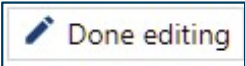
The screenshot displays the 'NTST Agency User Management' interface. At the top, there is a search bar for 'Search User's Name' with a 'FIND USER' button and a 'SEE ALL USERS' button. Below this is a table with columns for Name, Role, Email, Status, and Action. The table lists three users: 'Billing Contact', 'Info Desk', and 'UAT Tester', each with an 'Edit' button. A fourth user, 'Example User', is shown with a dropdown menu for role selection. The dropdown menu is open, showing a search bar with 'basic' entered and a list of roles: 'restricted', 'support', 'basic' (checked), 'technical', 'client-admin', and 'oneteam-admin'. The 'Example User' row also shows a 'Done editing' button.

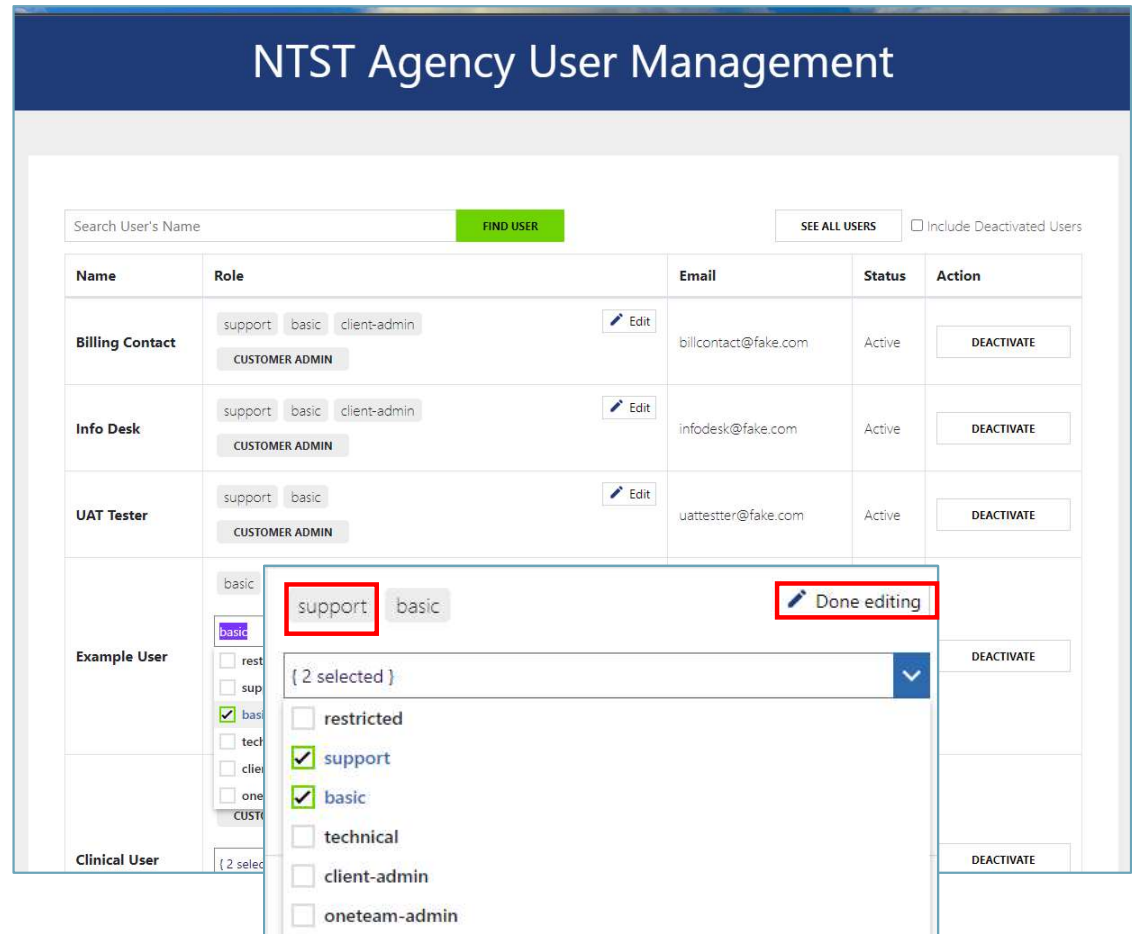
Name	Role	Email	Status	Action
Billing Contact	support basic client-admin CUSTOMER ADMIN	billcontact@fake.com	Active	DEACTIVATE
Info Desk	support basic client-admin CUSTOMER ADMIN	infodesk@fake.com	Active	DEACTIVATE
UAT Tester	support basic CUSTOMER ADMIN	uattester@fake.com	Active	DEACTIVATE
Example User	basic basic <input type="checkbox"/> restr <input type="checkbox"/> supp <input checked="" type="checkbox"/> basic <input type="checkbox"/> tech <input type="checkbox"/> clien <input type="checkbox"/> onet CUSTO			Done editing
Clinical User				

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  to complete changes
- User will want to log out and back in to see changes



The screenshot displays the 'NTST 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 the search bar is a table with columns: Name, Role, Email, Status, and Action. The table lists four users: 'Billing Contact', 'Info Desk', 'UAT Tester', and 'Example User'. Each user row has an 'Edit' button and a 'DEACTIVATE' button. The 'Example User' row is highlighted, and a modal window is open over it. The modal shows a list of roles: 'restricted', 'support', 'basic', 'technical', 'client-admin', and 'oneteam-admin'. The 'support' and 'basic' roles are selected, indicated by checkmarks. A 'Done editing' button is visible in the top right corner of the modal. The 'Example User' row in the table also has a 'Done editing' button highlighted with a red box.

Name	Role	Email	Status	Action
Billing Contact	support basic client-admin CUSTOMER ADMIN	billcontact@fake.com	Active	DEACTIVATE
Info Desk	support basic client-admin CUSTOMER ADMIN	infodesk@fake.com	Active	DEACTIVATE
UAT Tester	support basic CUSTOMER ADMIN	uatstester@fake.com	Active	DEACTIVATE
Example User	basic support basic			DEACTIVATE
Clinical User	{ 2 selected }			DEACTIVATE

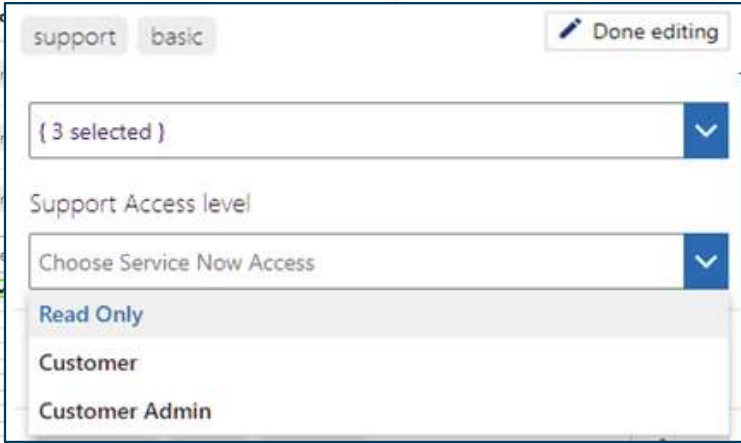
Support Access Level

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

NTST Homecare Agency User Management

Search User's Name Include Deactivated Users

Name	Role	Status	Action
Homecare Biller	support basic	Active	DEACTIVATE
Sample Contact	{ 3 selected }	Active	DEACTIVATE
Sample User	Support Access level	Active	DEACTIVATE
Information User	Choose Service Now Access	Active	DEACTIVATE
Example User	Read Only	Active	DEACTIVATE
Example User	Customer	Active	DEACTIVATE
Example User	Customer Admin	Active	DEACTIVATE
Test User	one-team-admin	Active	DEACTIVATE
Example User	restricted client-admin	Active	DEACTIVATE
Test User 1295679	restricted	Active	DEACTIVATE



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.

The screenshot displays a configuration interface for support access levels. At the top, there are two tabs: 'support' and 'basic'. To the right is a 'Done editing' button with a pencil icon. Below the tabs is a dropdown menu showing '{ 3 selected }'. Underneath is a label 'Support Access level' followed by another dropdown menu labeled 'Choose Service Now Access'. This dropdown menu is open, showing three options: 'Read Only' (highlighted in grey), 'Customer', and 'Customer Admin'.

Updated User Roles

Notice the updates display

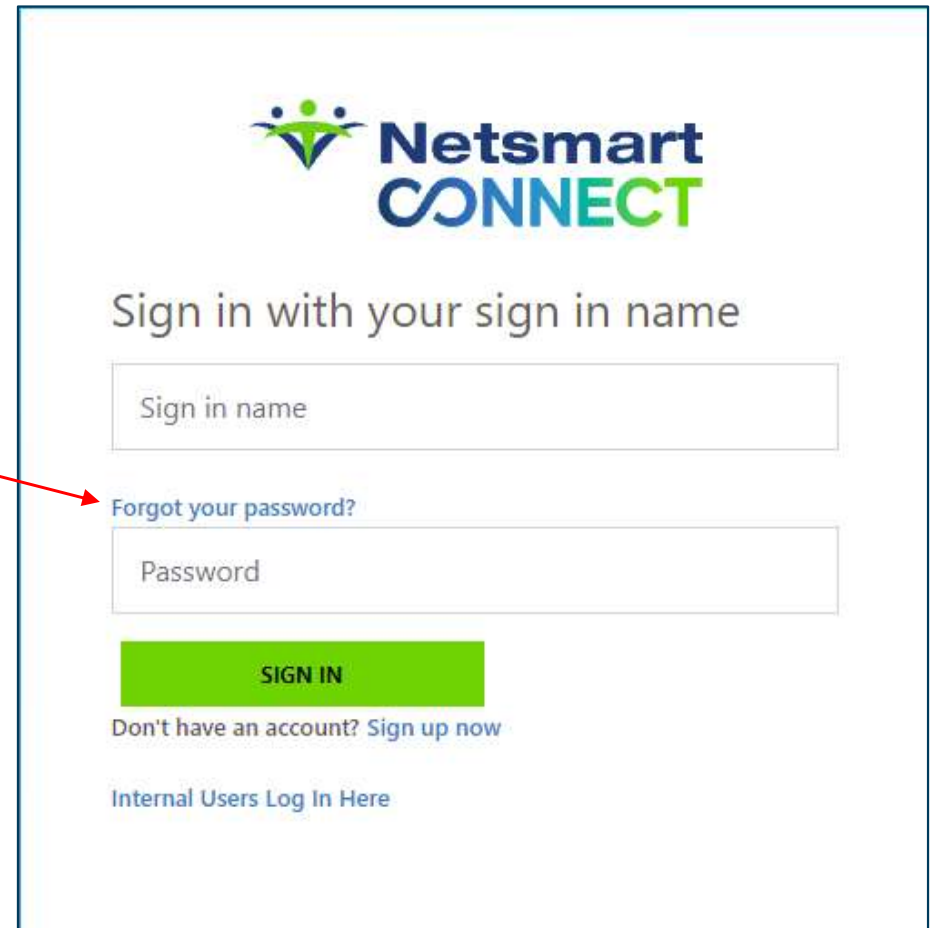
- ✓ User's new roles
- ✓ Support Portal level access


Example User	<p>support basic</p> <p>CUSTOMER ADMIN</p>	
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Reset Password

Resetting password

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





Sign in with your sign in name

Sign in name

[Forgot your password?](#)

Password

SIGN IN

Don't have an account? [Sign up now](#)

[Internal Users Log In Here](#)

Creating Verification Code

- Enter your email address then click SEND VERIFICATION CODE



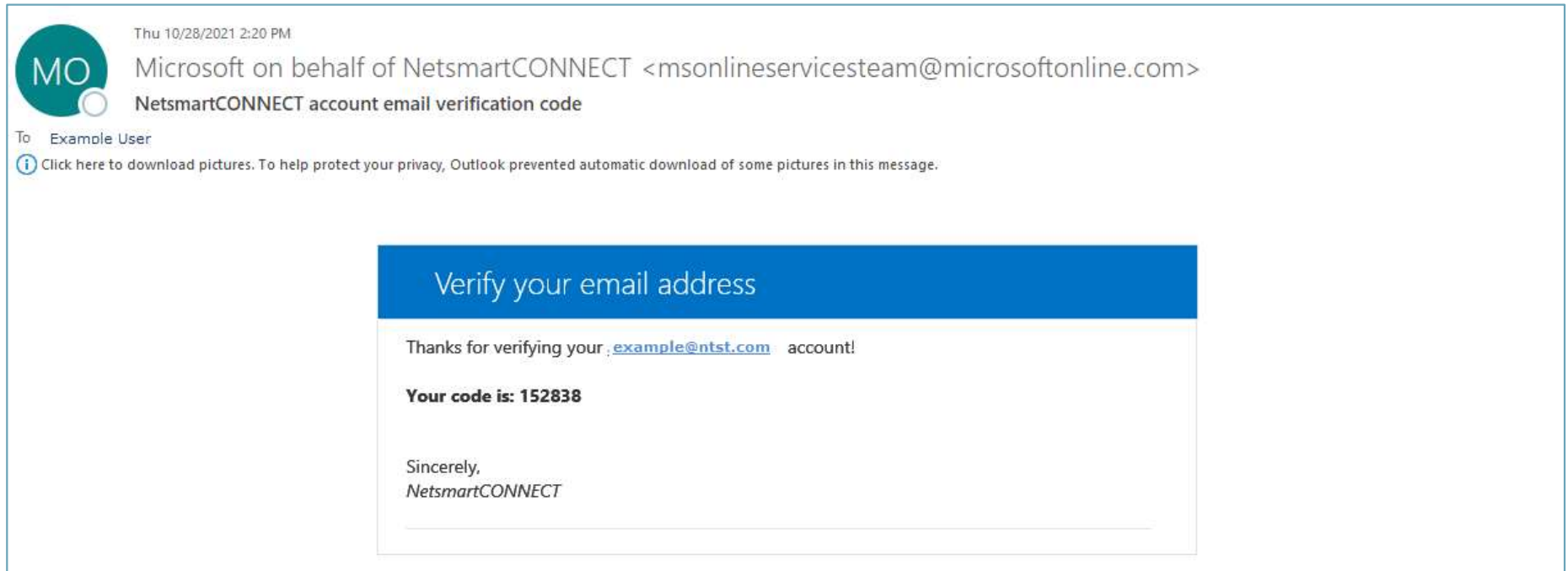
Verification is necessary. Please click Send button.

SEND VERIFICATION CODE

CONTINUE CANCEL

Completing registration

- An email is generated to provide a validation code



Verification code

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

Your code is: #####

- Click Verify Code

VERIFY CODE

Netsmart
CONNECT

Verification code has been sent to your inbox. Please copy it to the input box below.

youremail@example.com

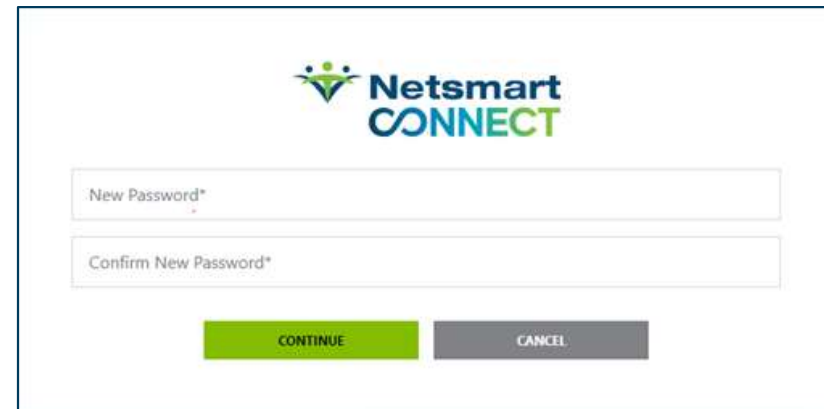
Verification code

VERIFY CODE SEND NEW CODE

CONTINUE CANCEL

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:
 - @ # \$ % ^ & * - _ + = [] { } | \ : ' , ? / ` ~ " () ; .



The screenshot shows the Netsmart CONNECT logo at the top. Below it are two input fields: "New Password*" and "Confirm New Password*". At the bottom, there are two buttons: a green "CONTINUE" button and a grey "CANCEL" button.

- 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

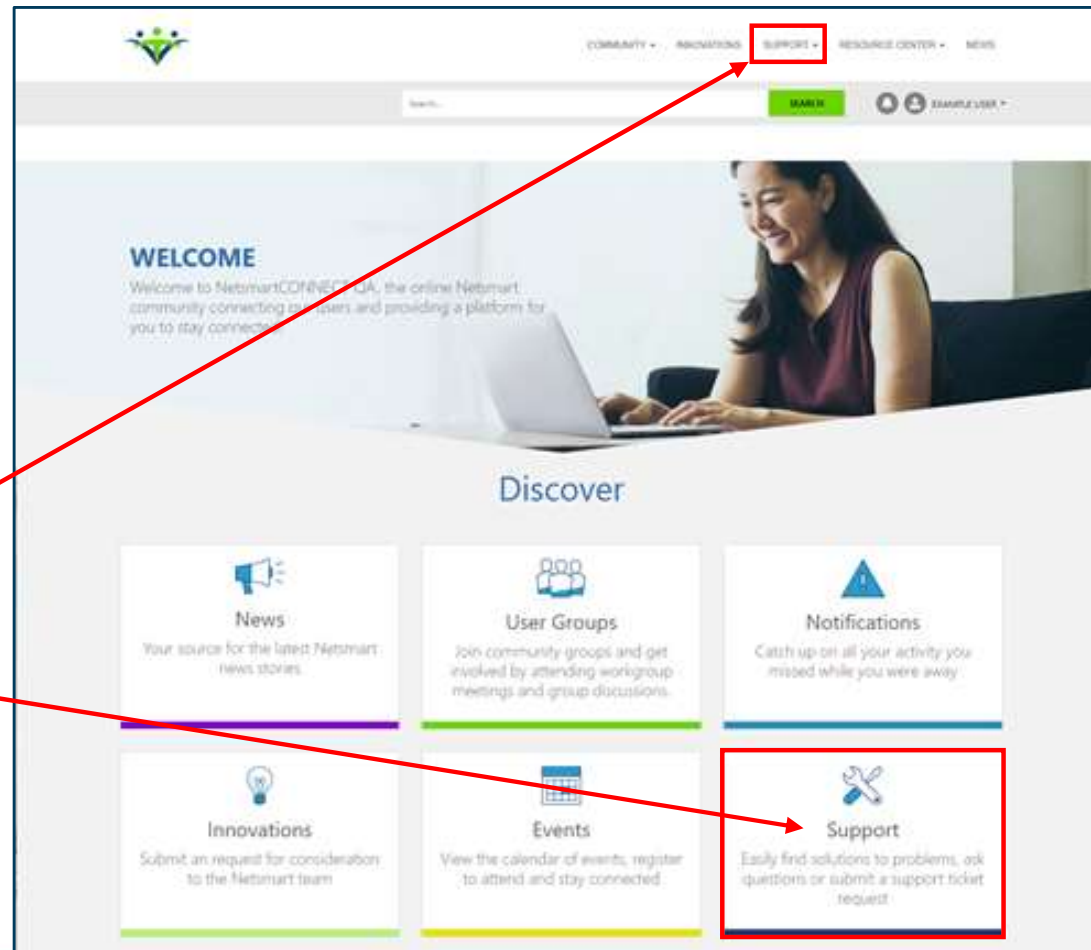
- Find answers to questions quickly (coming soon)

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

https://support-test.netsmartconnect.com/solutionsupport

Netsmart CONNECT

Create Case - Catalog | My Items | Known Issues | Knowledge | Reporting | My Account Info | Example User

How can we help?

Search Cases, requests, and Knowledge

- Netsmart**
Visit the Netsmart homepage
- Knowledge**
Search for articles and submit feedback.
- Get Help**
Contact support to create a case or report a problem

My Account Info

Important Information – Your Account Number

The screenshot shows a web browser window with the URL <https://support-test.netsmartconnect.com/solutionsupport>. The Netsmart CONNECT logo is in the top left. The navigation menu includes: Create Case - Catalog, My Items, Known Issues, Knowledge, Reporting, and My Account Info (highlighted with a red box). The user is logged in as 'Example User' with a profile icon labeled 'EU'. The main content area has a teal and green background with the text 'How can we help?' and a search bar containing the text 'Search Cases, requests, and Knowledge'. Below this are three service tiles: 'Netsmart' (Visit the Netsmart homepage), 'Knowledge' (Search for articles and submit feedback), and 'Get Help' (Contact support to create a case or report a problem). The footer contains the copyright notice 'Copyright © Netsmart. All rights reserved.' and the Netsmart logo.

Important Information – Your Account Number



Account Information

Name: NTST Homecare Agency	Customer Number: 1281629
Primary Market: Care at Home	Primary Sector: Home Health

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



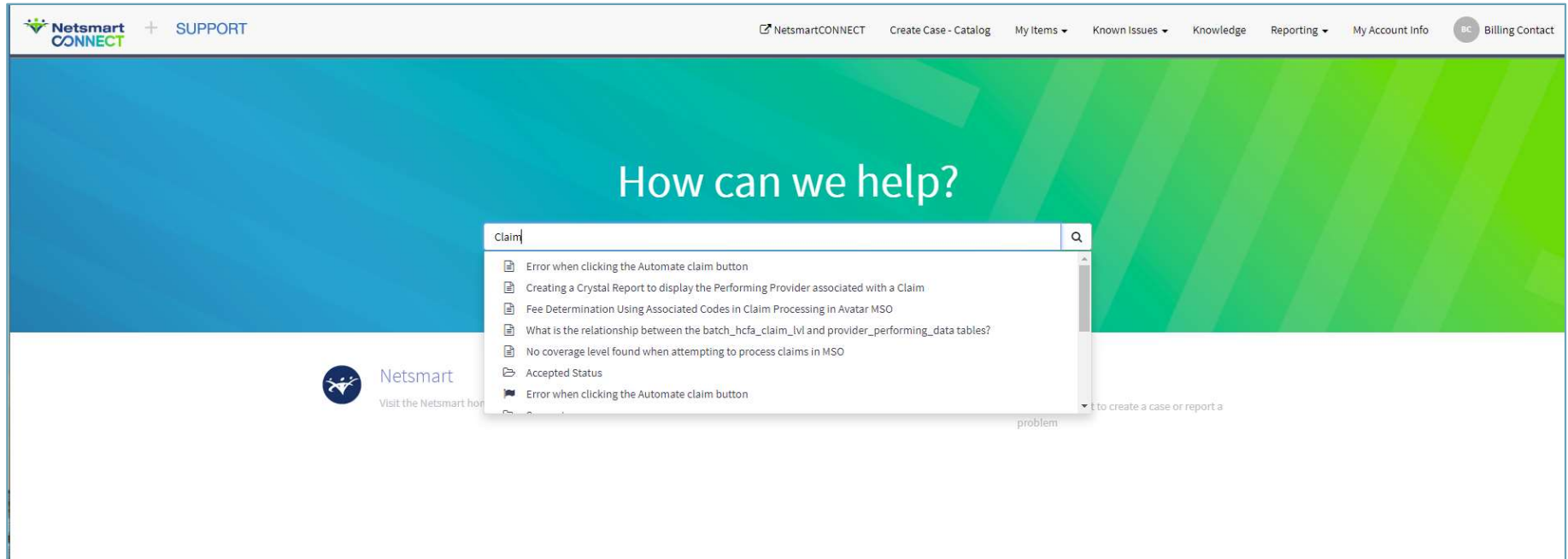
Clicking NetsmartConnect icon will return you to the Solution Support home page

Search Solution Support

Search to find answers faster

The screenshot displays a web browser window with the URL <https://support-test.netsmartconnect.com/solutionsupport>. The Netsmart CONNECT logo is in the top left, and navigation links for 'Create Case - Catalog', 'My Items', 'Known Issues', 'Knowledge', 'Reporting', and 'My Account Info' are in the top right. A user profile 'Example User' is visible. The main content area features a large green and blue banner with the text 'How can we help?' and a search bar containing the text 'Search Cases, requests, and Knowledge'. Below the banner, three service tiles are shown: 'Netsmart' (Visit the Netsmart homepage), 'Knowledge' (Search for articles and submit feedback), and 'Get Help' (Contact support to create a case or report a problem).



Enter Search Criteria

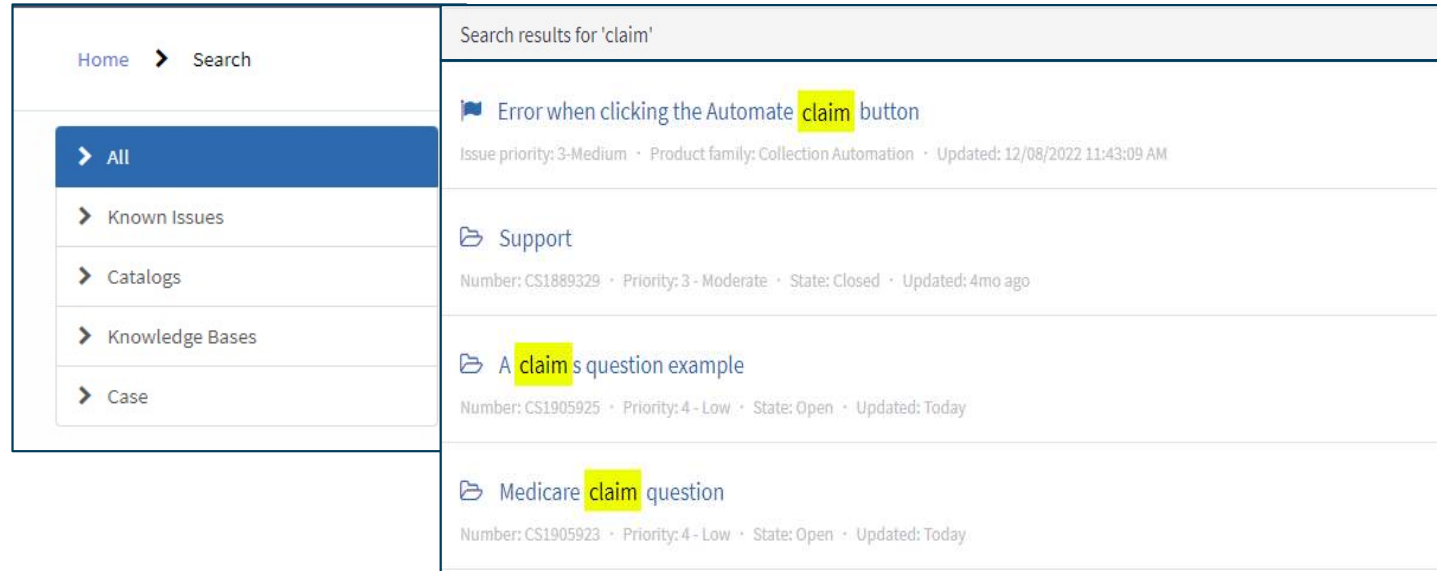


Select a case from the drop down or press enter to open Knowledge home page

Search Results

Various resources





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



Home > Search

- > All
- > Known Issues
- > Catalogs
- > Knowledge Bases
- > Case

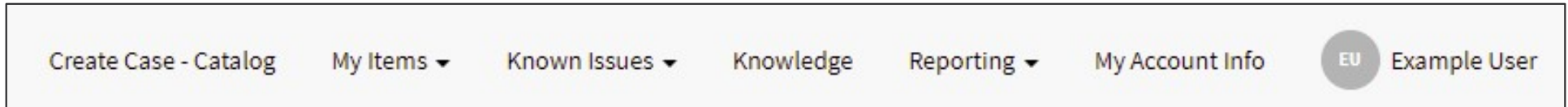
Search results for 'claim'

-  Error when clicking the Automate **claim** button
Issue priority: 3-Medium · Product family: Collection Automation · Updated: 12/08/2022 11:43:09 AM
-  Support
Number: CS1889329 · Priority: 3 - Moderate · State: Closed · Updated: 4mo ago
-  A **claim's** question example
Number: CS1905925 · Priority: 4 - Low · State: Open · Updated: Today
-  Medicare **claim** question
Number: CS1905923 · Priority: 4 - Low · State: Open · Updated: Today

Click on an article to view

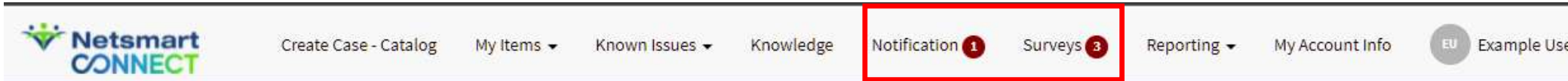
Navigating Solution Support Menu

Navigating Support Portal Menu



- ① Create Case – Catalog
 - Access new case and other case catalog forms
- ① My Items ▼
 - View cases by contact or all agency cases with appropriate role
- ① Known Issues ▼
 - View Known Issues by user or all known issues for agency
- ① Knowledge – Access to various knowledge bases
- ① Reporting ▼ - Dashboards and reports

Navigating Support Portal Menu



⦿ Notifications

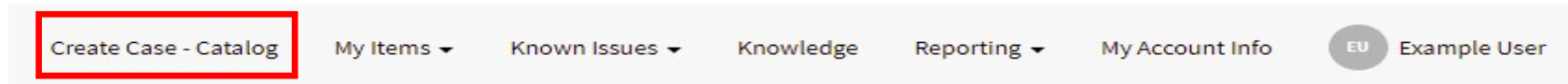
- This menu item displays when either/both of these exist
 - ▶ Case set to Pending requesting information from contact
 - ▶ Case set to Resolution

⦿ Surveys

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

Create Support Case

Creating a new case



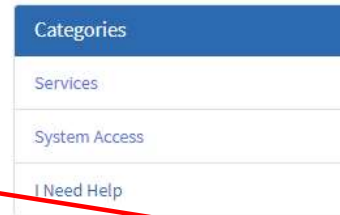
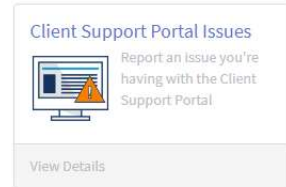
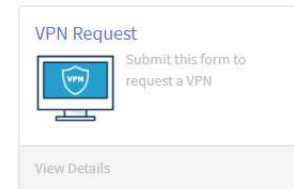
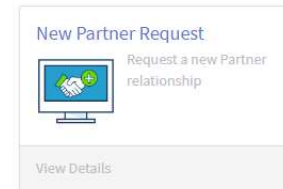
Click **Create Case** from the Popular Items page

OR

Click **I Need Help** category and access Create Case



Popular Items



I Need Help



Main Case Form

Urgent Issue?
If the issue is urgent, please contact support at:
TheraOffice:
+1 (866) 562-8413

Create Case

Create a new Support Case

* Indicates required

* In the Production environment, do any of the following apply: ?

In the Production environment, do any of the following apply:

- The Production system is inaccessible for all users
- A direct patient safety issue is present
- A HIPAA compliance violation is present as a result of a server incident or Netsmart application defect

Examples of a Critical or High issue:

- Production system cannot be utilized in any capacity
- Issue that is repeatedly affecting usage or data integrity
- Inability to view patient medications or orders
- Issues with clinical functions that prevent patient from receiving critical care

Yes No

All high and critical issues must be called into Support

Main Case Form

Urgent Issue?
If the issue is urgent, please contact support at:

TheraOffice:
+1 (866) 562-8413

Create Case

Create Case

Create a new Support Case

* Indicates required

* In the Production environment, do any of the following apply:

- The Production system is inaccessible for all users
- A direct patient safety issue is present
- A HIPAA compliance violation is present as a result of a server incident or Netsmart application defect

Examples of a Critical or High Issue:

- Production system cannot be utilized in any capacity
- Issue that is repeatedly affecting usage or data integrity
- Inability to view patient medications or orders
- Issues with clinical functions that prevent patient from receiving critical care.

Yes No

Submit

In the Production environment, do any of the following apply:

Please call Support for your Netsmart Solution listed on the left. - Thank You.

Since you selected No, please call Support for your Netsmart Solution listed on the left. - Thank You.

Selecting **Yes** triggers alerts to call Support

Selecting **No** opens the case form

Case Priority

- ① 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
- ② High (P2)
 - Defects in live production environment that have significant negative impact, but do not cause a “System Down”
- ③ Medium (P3)
 - An issue that allows the continuation of function, including issues in which a reasonable workaround is available
- ④ 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

The screenshot displays the 'Create Case' form in the NetsmartCONNECT system. The form is titled 'Create Case' and includes a search bar at the top right. The main content area is divided into several sections. On the left, there is a 'Urgent Issue?' section with a contact number for TheraOffice. The main form area contains the following fields:

- Account:** A dropdown menu with 'NTST Agency' selected.
- Contact:** A dropdown menu with 'Demo User' selected.
- Contact number:** A text input field containing '(417) 556-5454'.
- Preferred time of call:** A text input field with a note: 'Communication will be provided via portal. If you prefer a phone call, please check here.'
- Alternate contact:** A dropdown menu.
- Short description:** A text input field.

Two dropdown menus are highlighted with red asterisks, indicating they are required fields:

- Product family:** A dropdown menu with 'NetsmartConnect' and 'TheraOffice' as options.
- Product:** A dropdown menu with options: 'TheraOffice On-Site', 'TheraOffice On-Site HL7 Interface', 'TheraOffice Patient Portal', 'TheraOffice PE Mobile Check In', 'TheraOffice PE Online Scheduling', 'TheraOffice PE Surveys', and 'TheraOffice PE TeleHealth'.

A 'Submit' button is located at the top right of the form.

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

* Contact

 Billing Contact  


* Contact number

(417) 554-5454

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

Preferred time of call (limited to business hours)

Alternate contact




Adding PHI

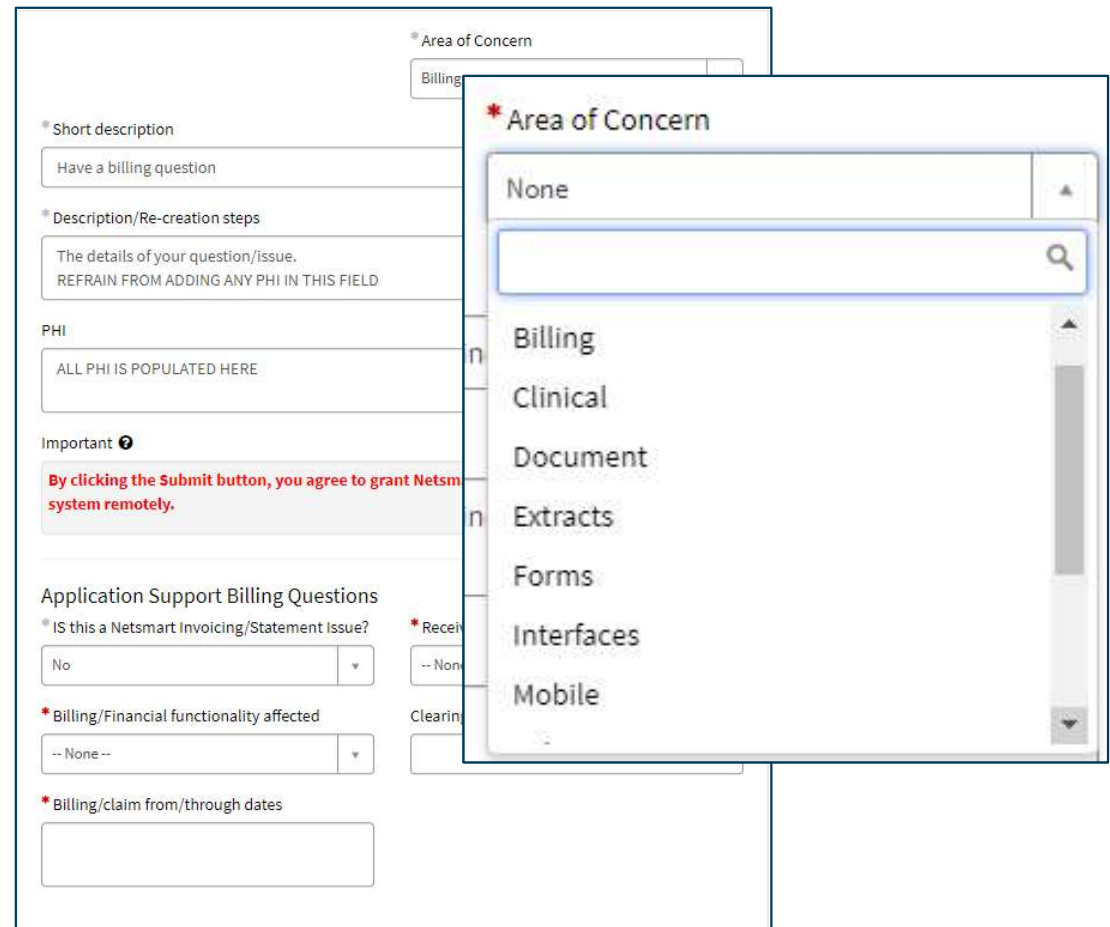
- All PHI MUST be populated in the secure PHI field
- Ensures the PHI is saved in our secure server
- System Audits all views
- Attachments will be saved in secure server

The image shows a screenshot of a web form titled "Application Support Billing Questions". The form contains several fields and sections:

- Short description:** A text box containing "Have a billing question".
- Description/Re-creation steps:** A text box containing "The details of your question/issue. REFRAIN FROM ADDING ANY PHI TO THIS FIELD".
- PHI:** A text box containing "ALL PHI IS POPULATED IN THIS FIELD". This field is highlighted with a red border and a callout box.
- Important:** A section with a red warning icon and text: "By clicking the Submit button, you are submitting your information to our secure server remotely."
- Application Support Billing Questions:** A section with several sub-sections:
 - Billing/Financial functionality affected:** A dropdown menu with "Claims Mgmt Payer Error" selected.
 - Billing/claim from/through dates:** A text box containing "Dec 6 - Dec 9".
 - Claim/Invoice/Billing number:** A text box containing "Claims/Invoices/Payments" with a red "X" icon.
 - Payer(s)/Guarantor/Submitter:** A text box containing "Medicare".
 - Billing company:** An empty text box.
 - Receiving error?:** A dropdown menu with "Yes" selected.
 - Error text or number:** A text box containing "Invalid address".
- Attachments:** A button with a paperclip icon and the text "Add attachments". This button is highlighted with a red border and a callout box.

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



The image shows a screenshot of a support form with a dropdown menu open. The form contains several input fields and sections:

- Area of Concern:** A dropdown menu is open, showing options: None, Billing, Clinical, Document, Extracts, Forms, Interfaces, and Mobile. A search icon is visible in the top right of the dropdown.
- Short description:** A text input field containing "Have a billing question".
- Description/Re-creation steps:** A text input field containing "The details of your question/issue. REFRAIN FROM ADDING ANY PHI IN THIS FIELD".
- PHI:** A text input field containing "ALL PHI IS POPULATED HERE".
- Important:** A red warning message: "By clicking the Submit button, you agree to grant Netsmart system remotely."
- Application Support Billing Questions:**
 - IS this a Netsmart Invoicing/Statement Issue?:** A dropdown menu with "No" selected.
 - Billing/Financial functionality affected:** A dropdown menu with "-- None --" selected.
 - Billing/claim from/through dates:** An empty text input field.

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
<input type="checkbox"/> Communication will be provided via portal. If you prefer a phone call, please check here.	* What is the impact of this issue? <ul style="list-style-type: none">Question/Documentation = Low ImpactMinimal Impact = With minimal daily operational impactProduction only: Moderate Impact = Defect with no major impact
Preferred time of call (limited to business hours)	Question/Documentation
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

Have a billing question

Description:
The details of your question/issue.
REFRAIN FROM ADDING ANY PHI IN THIS FIELD

Have a billing question

Case

Contact

Contact number

Alternate contact

PHI note

[Save \(Ctrl + s\)](#)

Case Details

Number:
CS1914681

Stage:
New

Catalog Item:
Create Case

Account:
NTST Agency

Contact:
Demo User

Case priority:
4 - Low

Category:
Malfunction / Unexpected Behavior

Product family:
TheraOffice

Product:
TheraOffice On-Site

Updated:
just now

Have a billing question

Type your message here... [Send](#)

DU

Demo User
03/20/2023 10:07:38 PM
CS1914681 Created

Start

Attachments

Drop files here

Actions

[Close Case](#)

Secure Data

SD11200475
Number: SD11200475
Type: PHI Note
Updated: 03/20/2023 10:07:38 PM
Updated by: demouser@fake.com
Tags: [Relevant](#)

SD11200476
Number: SD11200476
Type: PHI Note
Updated: 03/20/2023 10:09:02 PM
Updated by: demouser@fake.com
Tags: [Relevant](#)

TheraOffice Icon.jpg
Number: SD11200477
Type: Attachment
Updated: 03/20/2023 10:09:32 PM
Updated by: system
Tags: [Relevant](#)

Show: [Relevant only](#)

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

Case Details

Number:
CS1914631

Stage:
Open: Level 1 Working

Account:
NTST Agency

Contact:
Demo User

Case priority:
4 - Low

Product family:
TheraOffice

Product:
TheraOffice Patient Portal

Assigned to:
Susy Ryan

Updated:
14m ago

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

The screenshot displays a web form titled "Have a billing question". At the top, there is a blue header with the text "Have a billing question". Below this is a "Description" section with the text: "Description: The details of your question/issue. REFRAIN FROM ADDING ANY PHI IN THIS FIELD".

Below the description is another header "Have a billing question" with a paperclip icon on the right. Underneath is a "Case" section containing several input fields:

- "* Contact": A dropdown menu showing "Demo User" with a close (x) and dropdown (v) button.
- "Client internal ticket #": An empty text input field.
- "* Contact number": A text input field containing "(417) 556-5454".
- "myNote": An empty text input field.
- "Alternate contact": A dropdown menu.

At the bottom of the case section is a "PHI note" field, which is a large text input area highlighted with a red border. At the very bottom right of the form is a blue button labeled "Save (Ctrl + s)".

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

The screenshot displays a web interface for a case conversation. At the top, there is a header "Have a billing question" with a paperclip icon. Below the header is a text input field with the placeholder "Type your message here..." and a blue "Send" button. The conversation timeline consists of three messages:


- Susy Ryan** (03/20/2023 10:35:28 PM): "Hi Demo, After reviewing the details you shared I do have a couple follow up questions. See below..... Thanks for your help."
- Demo User** (03/20/2023 10:32:35 PM): "Hi Susy - Here's the information your requested..... Let me know if you have any quesitons."
- Susy Ryan** (03/20/2023 10:30:47 PM): "Hi Demo User - I reviewed and have a few questions. Left you a voice message, plase call me or update this case with the details I requested. Thanks."

At the bottom of the timeline is a green "Start" button.

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

PHI note

Attachments 

Drop files here

Actions

Close Case


Secure Data

SDI1199459

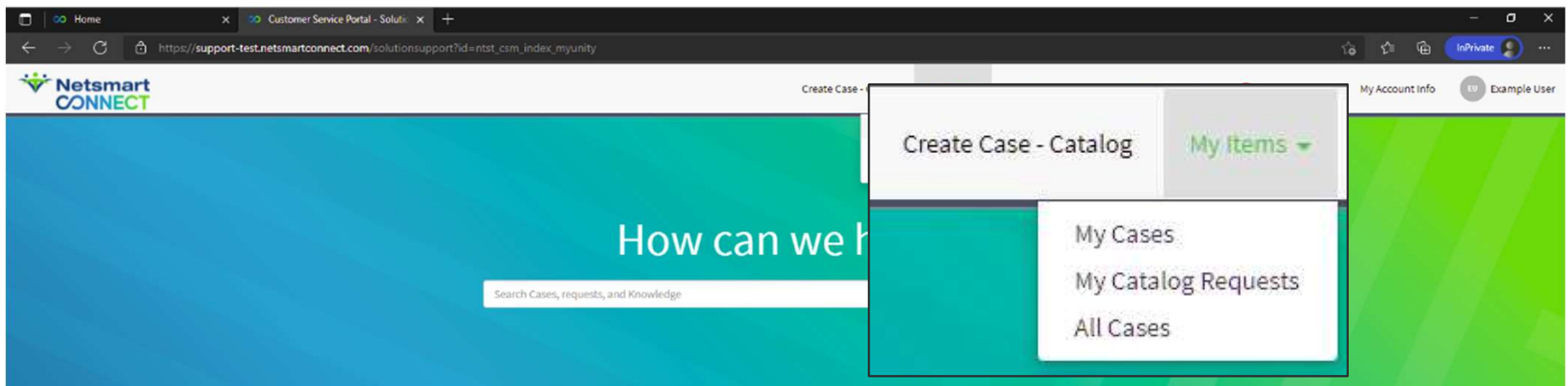
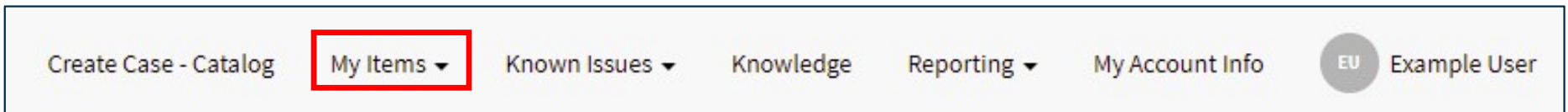
Number: SDI1199459
Type: PHI Note
Updated: 12/12/2022 01:09:57 PM
Updated by: billcontact@fake.com
Tags: **Relevant**

Client support portal view.jpg

Number: SDI1199460
Type: Attachment
Updated: 12/12/2022 01:10:00 PM
Updated by: system
Tags: **Relevant**

Show: Relevant only 

Netsmart Support Portal – Access Case Lists



Navigation options for viewing active cases

- May vary depending on Support role defined by agency admin

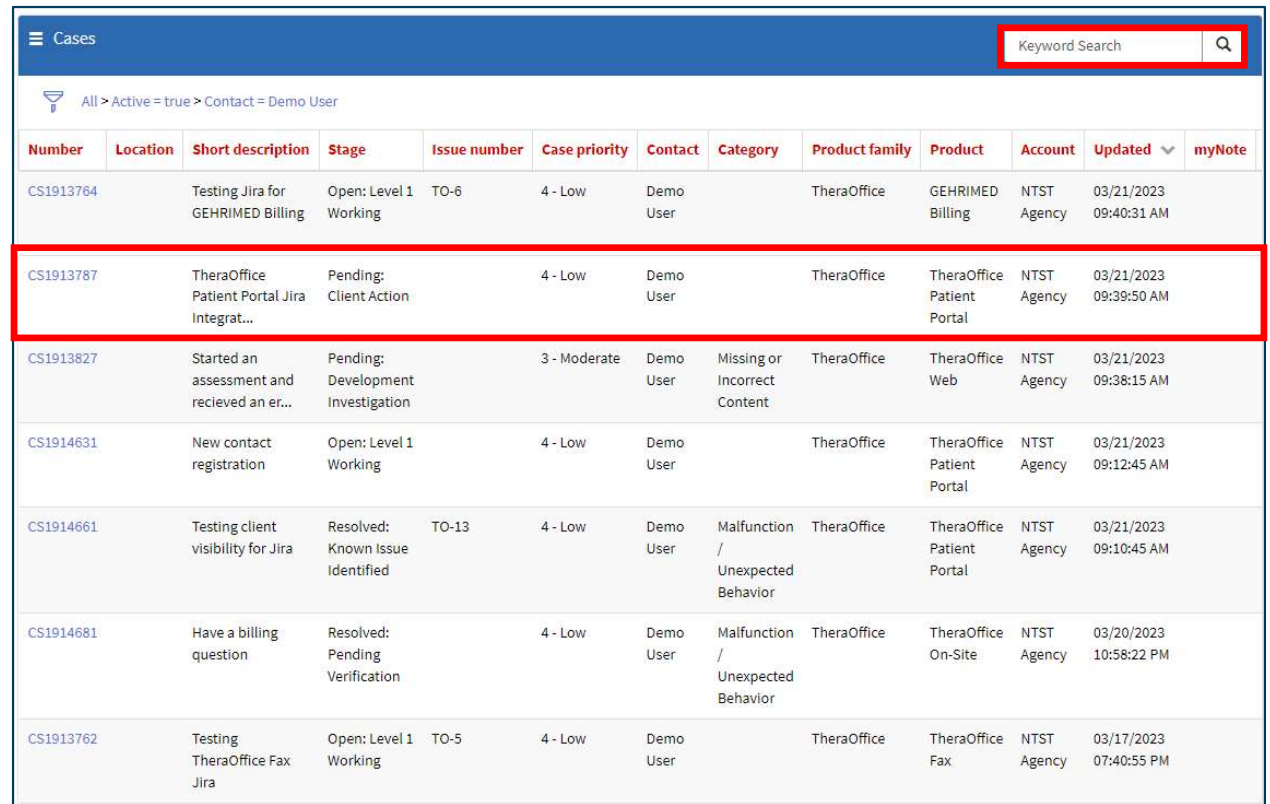
Case Information Screen - Description

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



The screenshot shows a web interface for viewing cases. At the top, there is a navigation bar with a hamburger menu icon and the text 'Cases'. To the right of the navigation bar is a search bar labeled 'Keyword Search' with a magnifying glass icon. Below the navigation bar, there is a filter bar showing 'All > Active = true > Contact = Demo User'. The main content is a table with the following columns: Number, Location, Short description, Stage, Issue number, Case priority, Contact, Category, Product family, Product, Account, Updated, and myNote. The table contains several rows of case data. The second row, corresponding to case number CS1913787, is highlighted with a red border. The search bar is also highlighted with a red border.

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

The screenshot displays a web application interface for case management. A modal dialog box titled "Provide a reason for Closing" is centered on the screen. It contains a text input field with the placeholder text "Comments required" and a blue "Submit" button below it. A red arrow points from the "Close Case" button in the "Actions" section of the main interface to the "Submit" button in the dialog. The background interface shows a case record for "Demo User" with contact number "(417) 556-5454". The right sidebar lists case details: "Open: Level 1 Working", "Catalog Item: Create Case", "Account: NTST Agency", "Contact: Demo User", "Case priority: 4 - Low", "Category: Malfunction / Unexpected Behavior", "Product family: TheraOffice", "Product: TheraOffice On-Site", "Assigned to: Susy Ryan", and "Updated: just now". At the bottom right, an "Actions" menu is visible with a "Close Case" button highlighted in green.

Resuming Cases – Resolved 2-day Workflow

Resume Case

The screenshot shows a web interface for managing cases. A green button labeled "Resume Case" is highlighted with a red border and a red arrow pointing to the "Description" field of a case. The case details include a "Description" field with a warning to refrain from adding PHI, "Resolution notes", and a "Have a billing question" button. Below this, there are fields for "Contact" (Demo User), "Contact number" ((417) 556-5454), "Alternate contact", "Client internal ticket #", "myNote", and "PHI note". A modal dialog box is overlaid on the right, containing the text: "If the resolution provided has not resolved the reported issue, provide additional details so we may continue investigating. If this is a new or unrelated issue, please click Cancel and create a new case." Below the text is a "Comments required" text area and "Submit" and "Cancel" buttons.

Enter why the resolution has stopped working and then submit

Resuming Cases – Resolved 6-day Workflow

The screenshot displays a user interface for managing a case. The main content area is divided into several sections:

- Have a billing question** (Header)
- Description:** The details of your question/issue. REFRAIN FROM ADDING ANY PHI IN THIS FIELD
- Resolution notes:** Shared resources and confirmed the information provided the answer needed to move forward. (This section is highlighted with a red box in the original image)
- Case plan:** Gained an understanding of the question, now searching for resources. Will follow up by Thursday.

On the right side, there is an **Actions** panel with two buttons: **Accept Solution** (highlighted with a red box) and **Resume Case**. A red arrow points from the **Accept Solution** button to a central grey callout box.

The central grey callout box contains the text: "Allows client additional time to validate solution prior to closure. Client can accept solution anytime in 6-day window."

Below the main content area, there is a form for **Case** details:

- Case**
- Contact:** Demo User
- Contact number:** (417) 556-5454
- Alternate contact:** (dropdown menu)
- PHI note:** (text area)

On the far right, there is a **Case Details** panel with the following information:

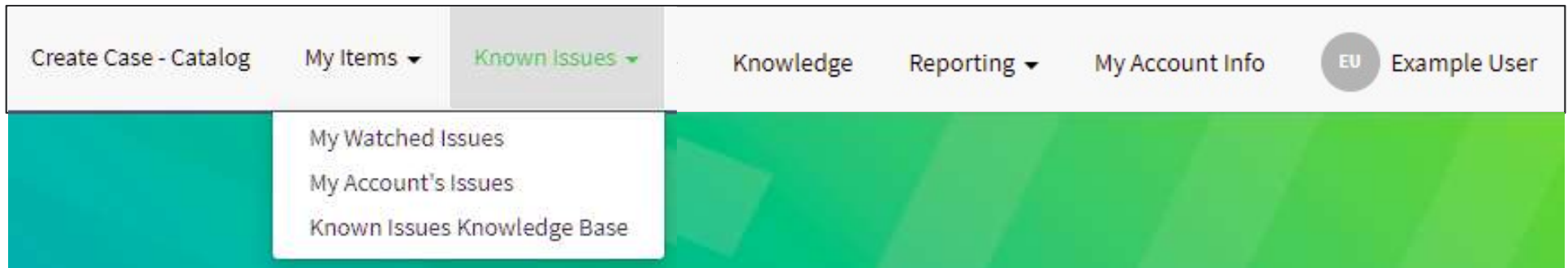
- Number:** CS1914681
- Stage:** Resolved: Pending Verification
- Catalog Item:** Create Case
- Account:** NTST Agency
- Contact:** Demo User
- Case priority:** 4 - Low
- Category:** Malfunction / Unexpected Behavior
- Product family:** TheraOffice

Known Issues

Known Issue Tracking

- ① 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
- ① Email Notifications
 - Notified of status change
 - Notified of solution

Navigating Support Portal Menu



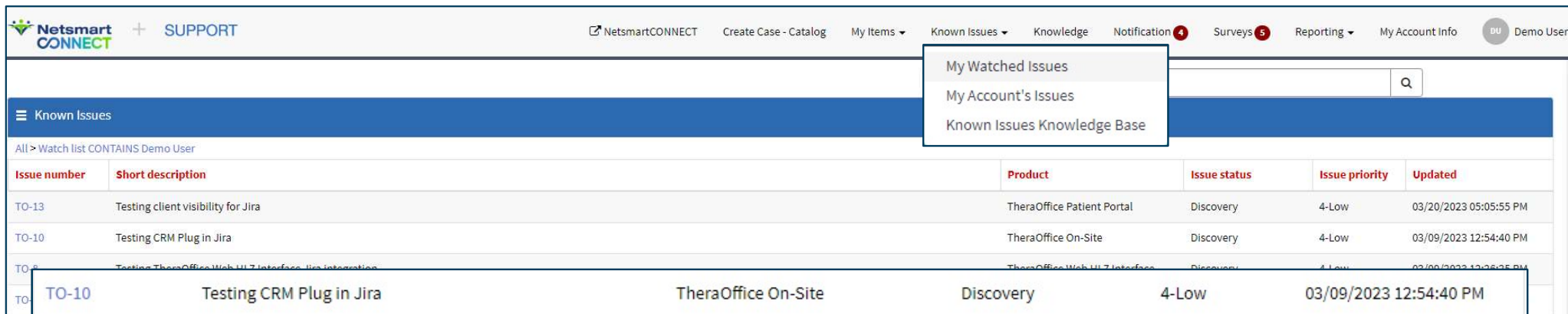
Known Issues

- 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



Issue number	Short description	Product	Issue status	Issue priority	Updated
TO-13	Testing client visibility for Jira	TheraOffice Patient Portal	Discovery	4-Low	03/20/2023 05:05:55 PM
TO-10	Testing CRM Plug in Jira	TheraOffice On-Site	Discovery	4-Low	03/09/2023 12:54:40 PM
TO-9	Testing TheraOffice Web HL7 Interface Jira integration	TheraOffice Web HL7 Interface	Discovery	4-Low	03/09/2023 12:56:05 PM
TO-10	Testing CRM Plug in Jira	TheraOffice On-Site	Discovery	4-Low	03/09/2023 12:54:40 PM

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

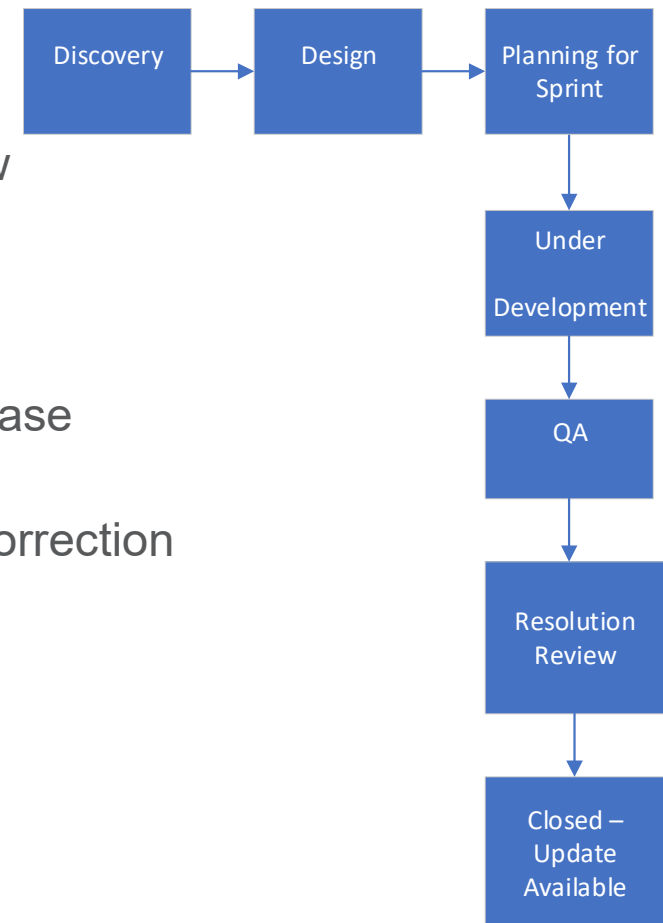
Solution Support Portal – Known Issue Details

Issue Information		Actions
Issue number: TO-13	Short description: Testing client visibility for Jira	Unwatch Issue Share Issue
Product family: TheraOffice	Product: TheraOffice Patient Portal	
Issue status: Discovery	Issue type: Defect	
Reproduction steps: Lots of details sharing how to recreate this issue.		
Details		
Description: Testing		
Workaround: No workaround available.		
Related Cases		
CS1914661		

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

Issue Information

Issue number: TO-13	Short description: Testing client visibility for Jira
Product family: TheraOffice	Product: TheraOffice Patient Portal
Issue status: Discovery	Issue type: Defect
Reproduction steps: Lots of details sharing how to recreate this issue.	

Actions

- Unwatch Issue
- Share Issue

Details

Description:
Testing

Workaround:
No workaround available.

Related Cases

CS1914661

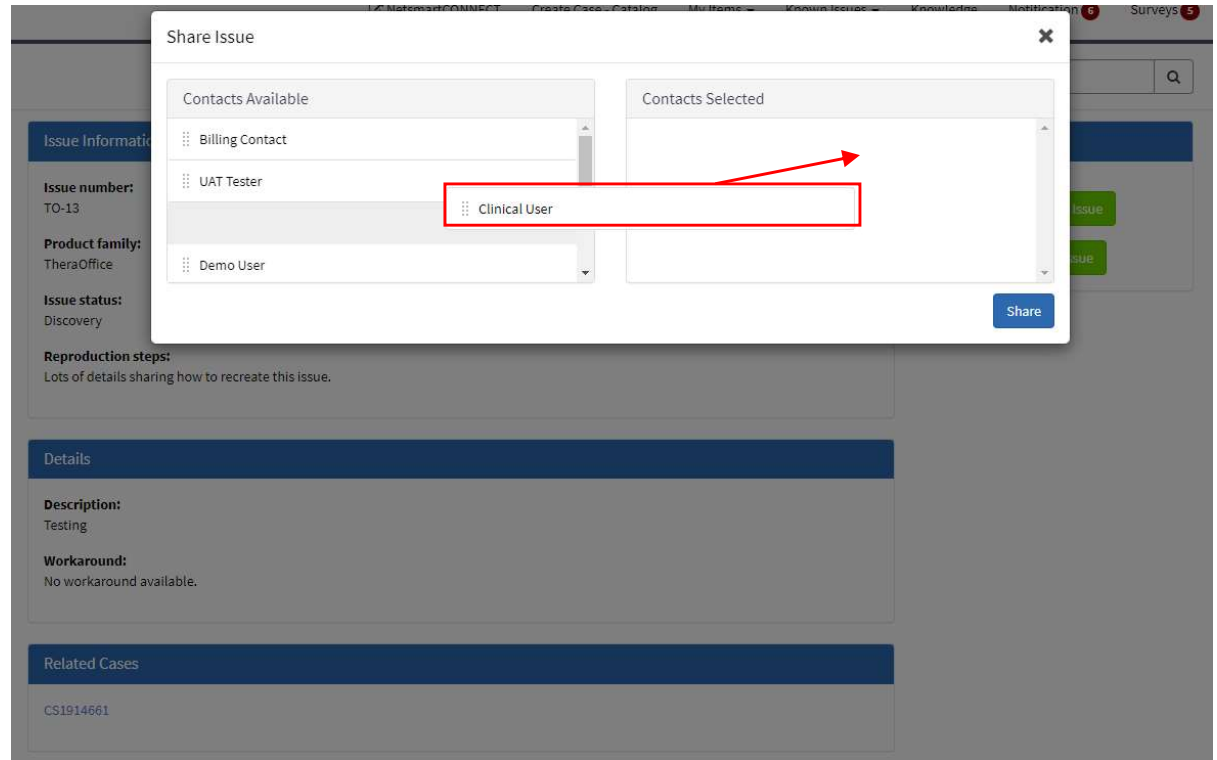
Netsmart Support Portal – Known

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

Testing client visibility for Jira

Description:
Details about this issue noted and how the issue is reproduced

Resolution notes:
This issue has been identified as Known Issue TO-13 - Testing client visibility for Jira.

The Support case has been resolved and the issue can now be followed for updates by accessing www.netsmartconnect.com. Once logged in click the Support tile then click Known Issue from the main menu and then My Watched Issues. The Known Issue can also be accessed from your resolved Support case.

Case plan:
The current state of the case, next steps and communication expectations.

Actions

Resume Case

Case Details

Number:
CS1914661

Stage:
Resolved: Known Issue Identified

Account:
NTST Agency

Contact:
Demo User

Case priority:
4 - Low

Category:
Malfunction / Unexpected Behavior

Product family:
TheraOffice

Product:
TheraOffice Patient Portal

Assigned to:
Susy Ryan

Updated:
about an hour ago

Known issue(s):
TO-13 (Primary)

Testing client visibility for Jira

Case

* Contact: Demo User

Client internal ticket #

* Contact number: (417) 556-5454

myNote

Alternate contact

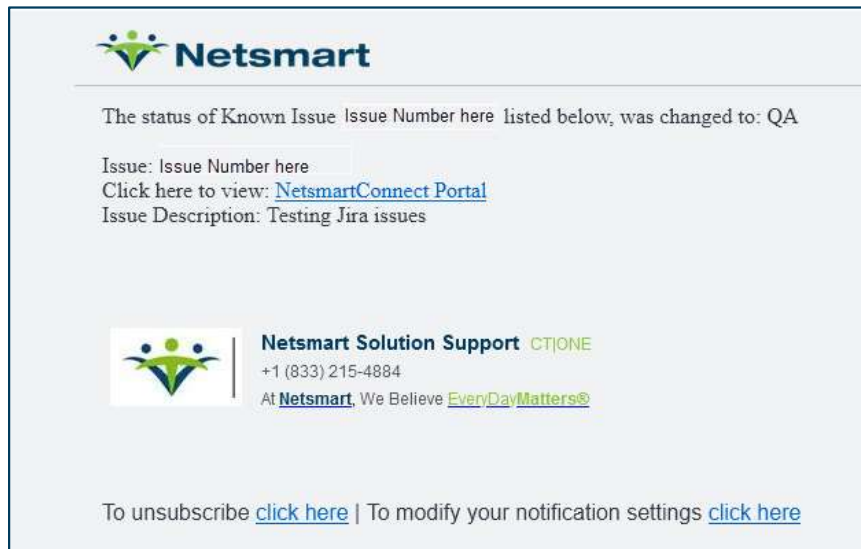
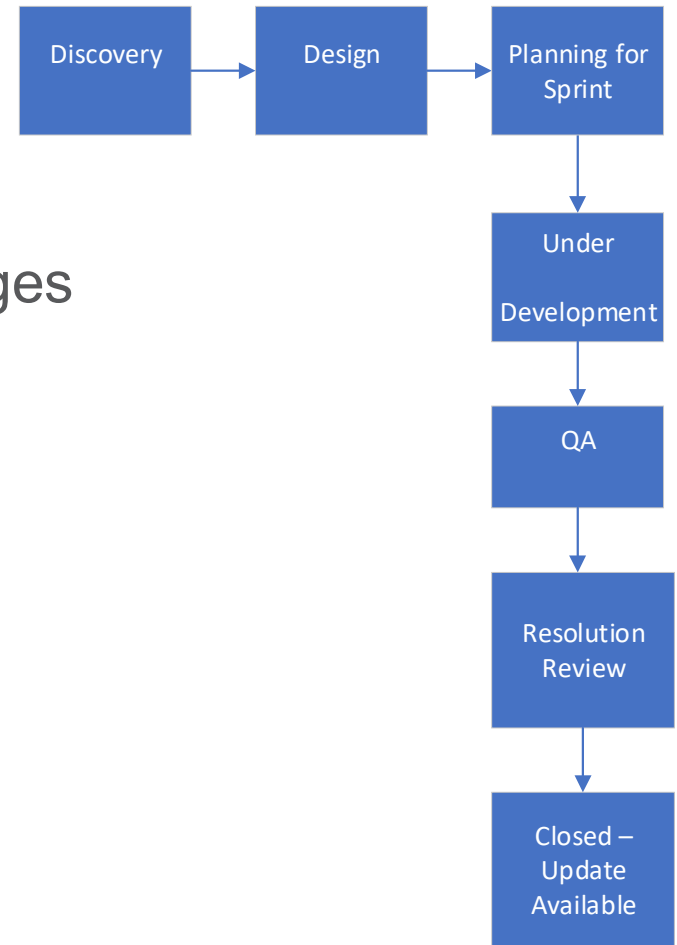
PHI note

Case Stage set to Resolved: Case Forwarded

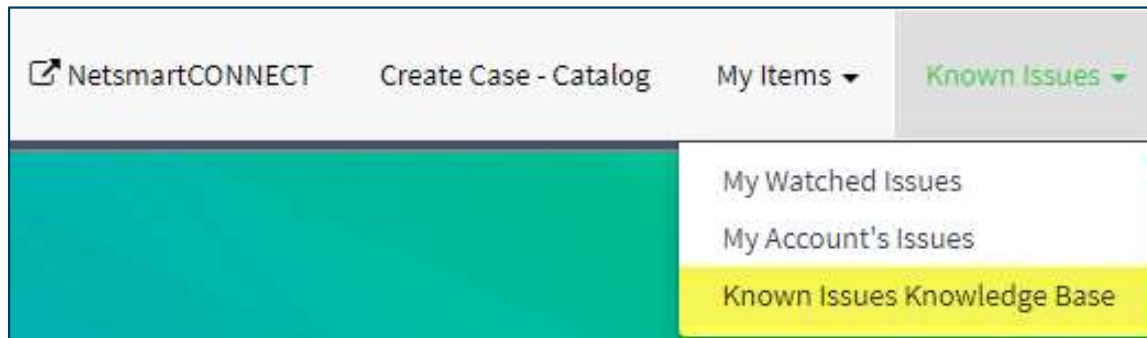
Link to Known issue added to case

Known Issue Notifications

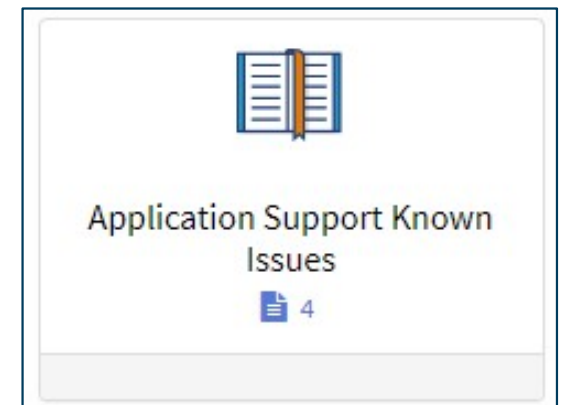
- Case contacts added to watch list
- Email triggered when the issue status changes



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

Reporting

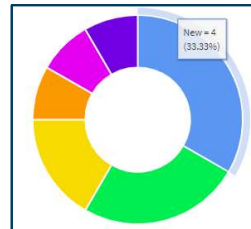
The screenshot displays the NetsmartCONNECT user interface. At the top left is the logo for Netsmart CONNECT and the word SUPPORT. The main navigation bar includes links for NetsmartCONNECT, Create Case - Catalog, My Items, Known Issues, Knowledge, Notification (with a red indicator), Reporting (highlighted), My Account Info, and Billing Contact. A dropdown menu for Reporting is open, showing options for Dashboard, Open Cases, and Closed/Resolved Cases. The main content area features a large teal banner with the text 'How can we help?' and a search bar below it containing the text 'Search Cases, Requests, and Knowledge'.

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	
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!!