NetsmartCONNECT Solution Support Portal

Training for Simple clients

Netsmart

Register for NetsmartCONNECT

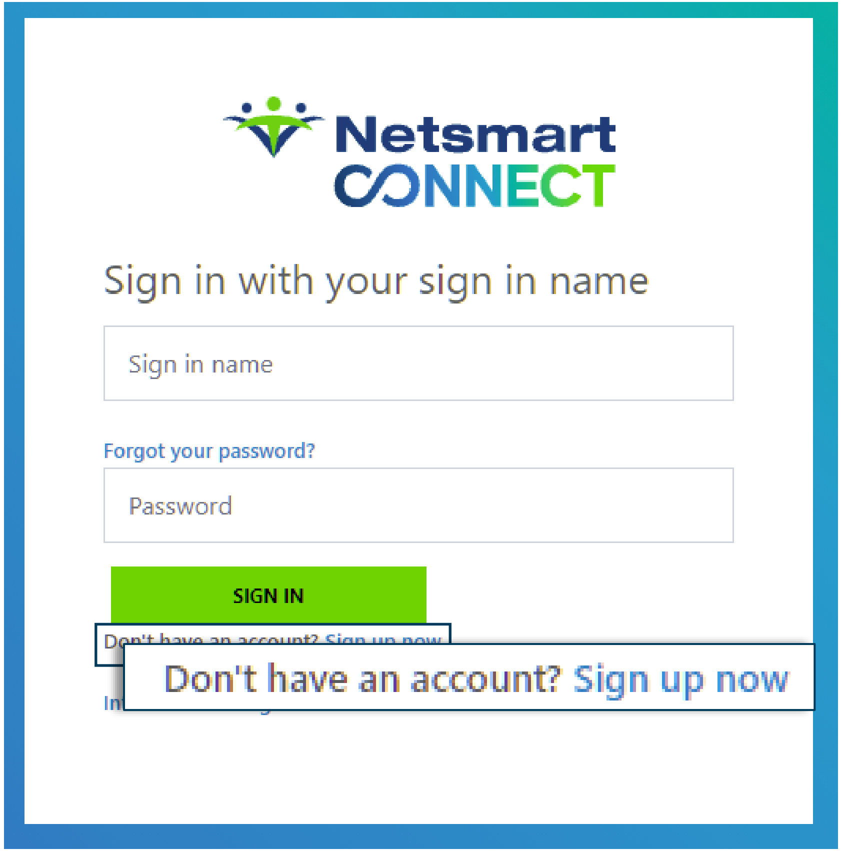
Netsmart

Register for NetsmartCONNECT

- "*Create your account for contacting Simple Support*" email sent on 12/14 from simple@ntst.com
  - Check Spam/Junk if missing
  - Call Support if you need assistance
- Begin with registration on NetsmartCONNECT home page

  Click Sign up now

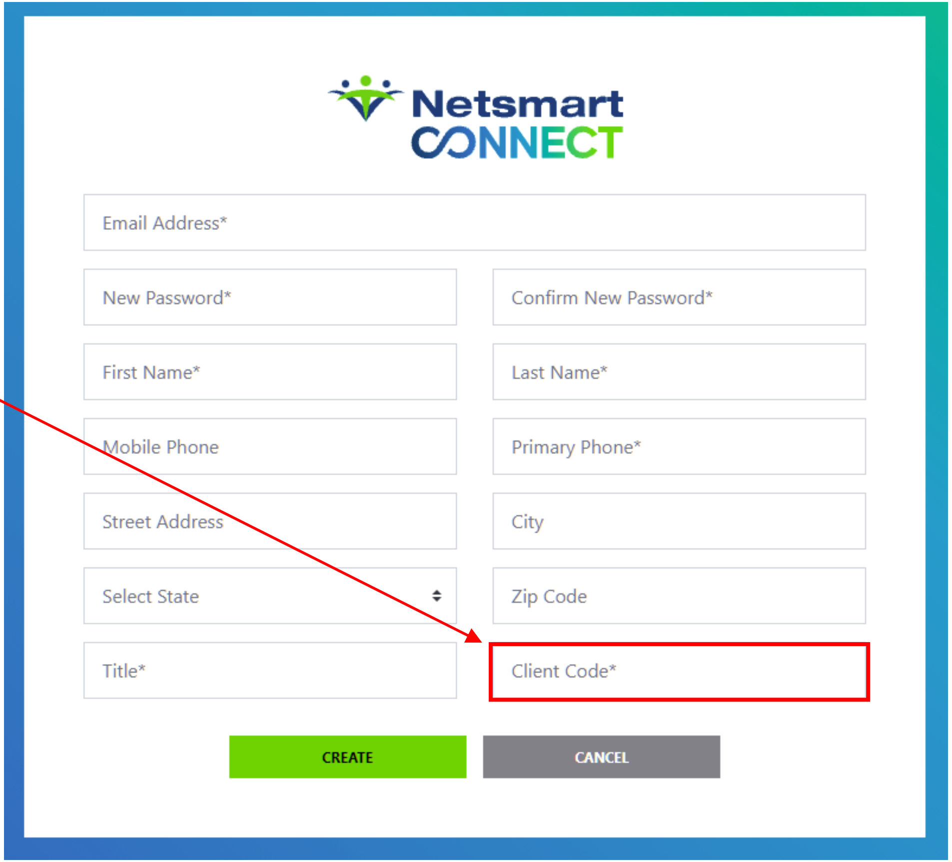
  https://netsmartconnect.com



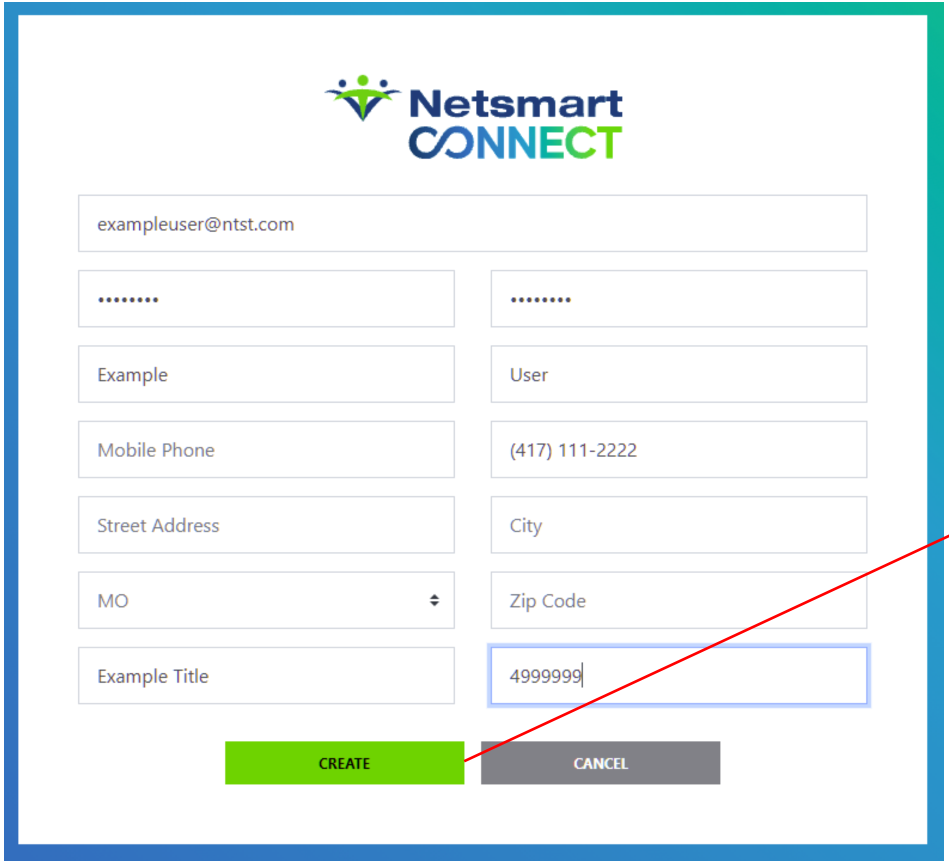
Complete registration

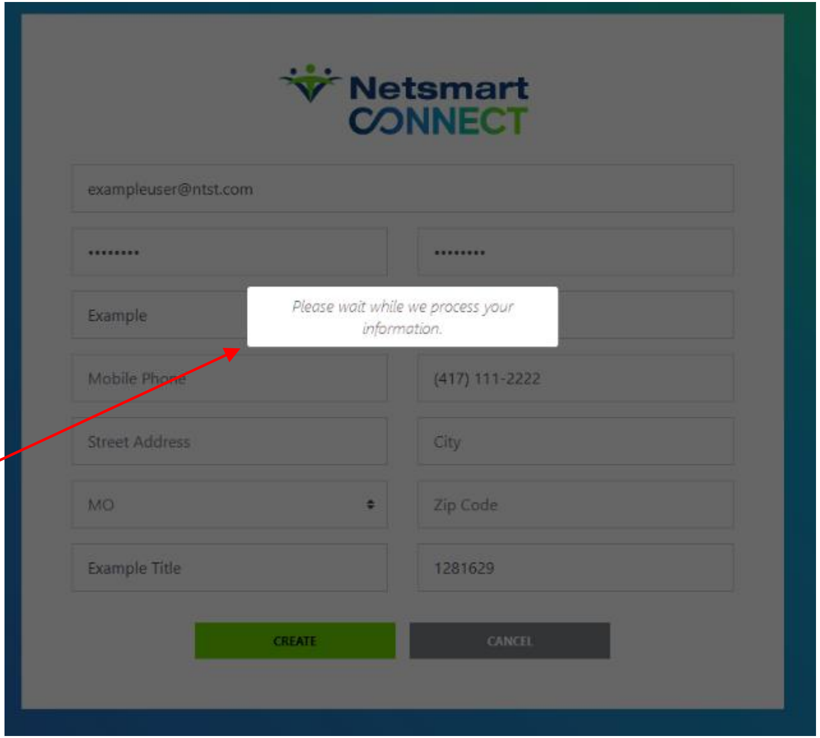
- Fill in required fields
  - Client code is your Netsmart account number

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

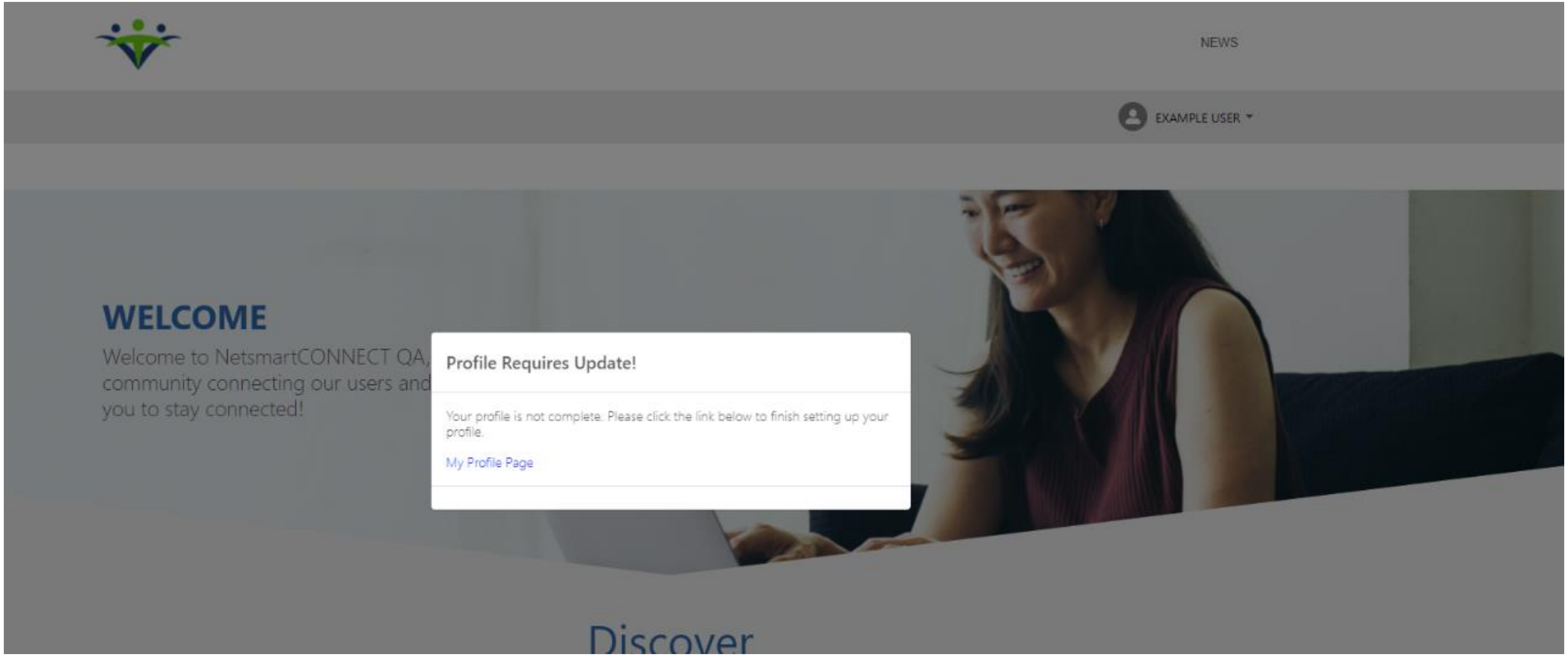


Example Registration – Click Create



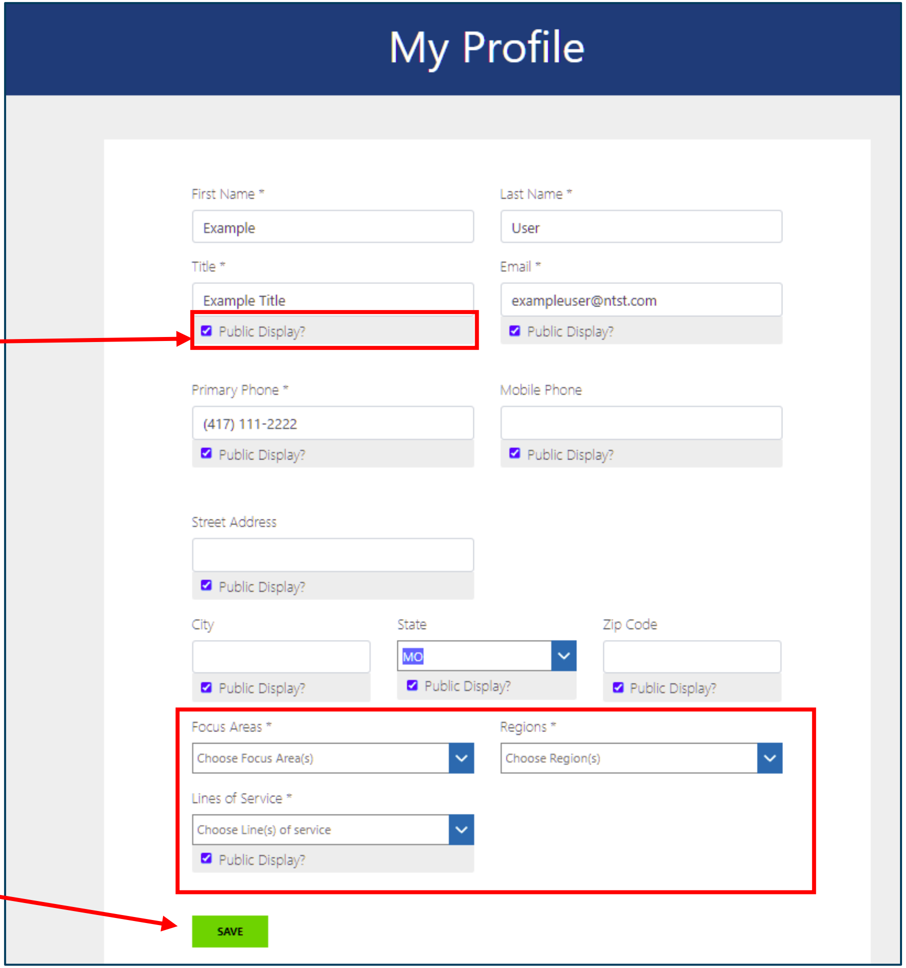


Profile Updates



My Profile – Set up

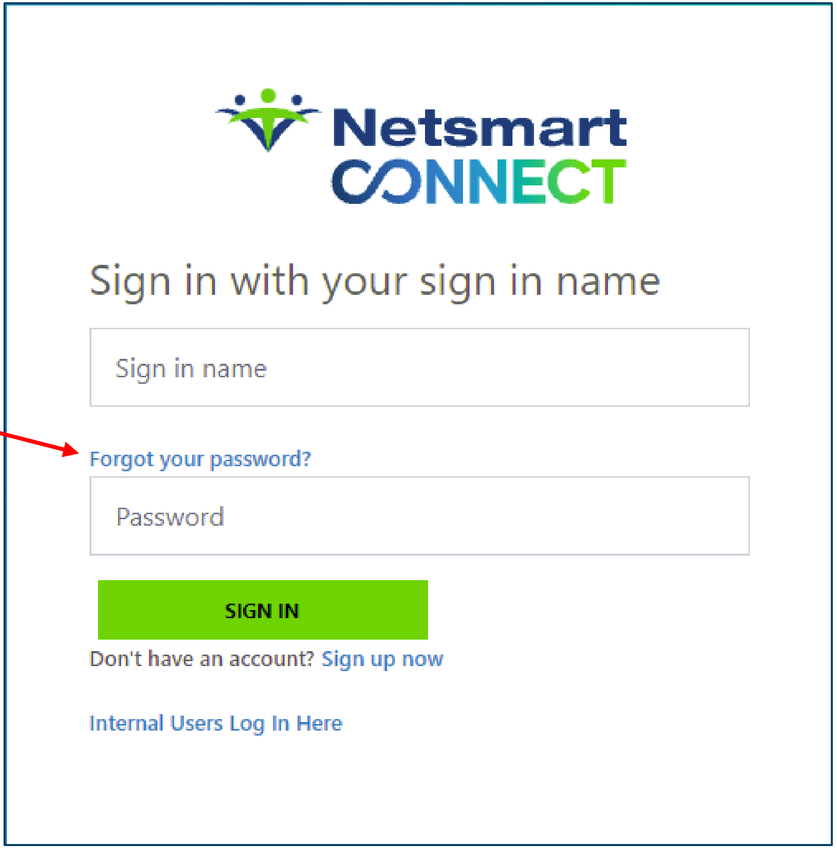
- Public Display
  - Choose which fields to turn on for public view
  - Public Display?
  - Uncheck those fields you wish to hide
- Choose up to 3 Focus areas
- Choose your Region
- Choose Line(s) of Service
- Click SAVE once all fields are complete



Reset Password

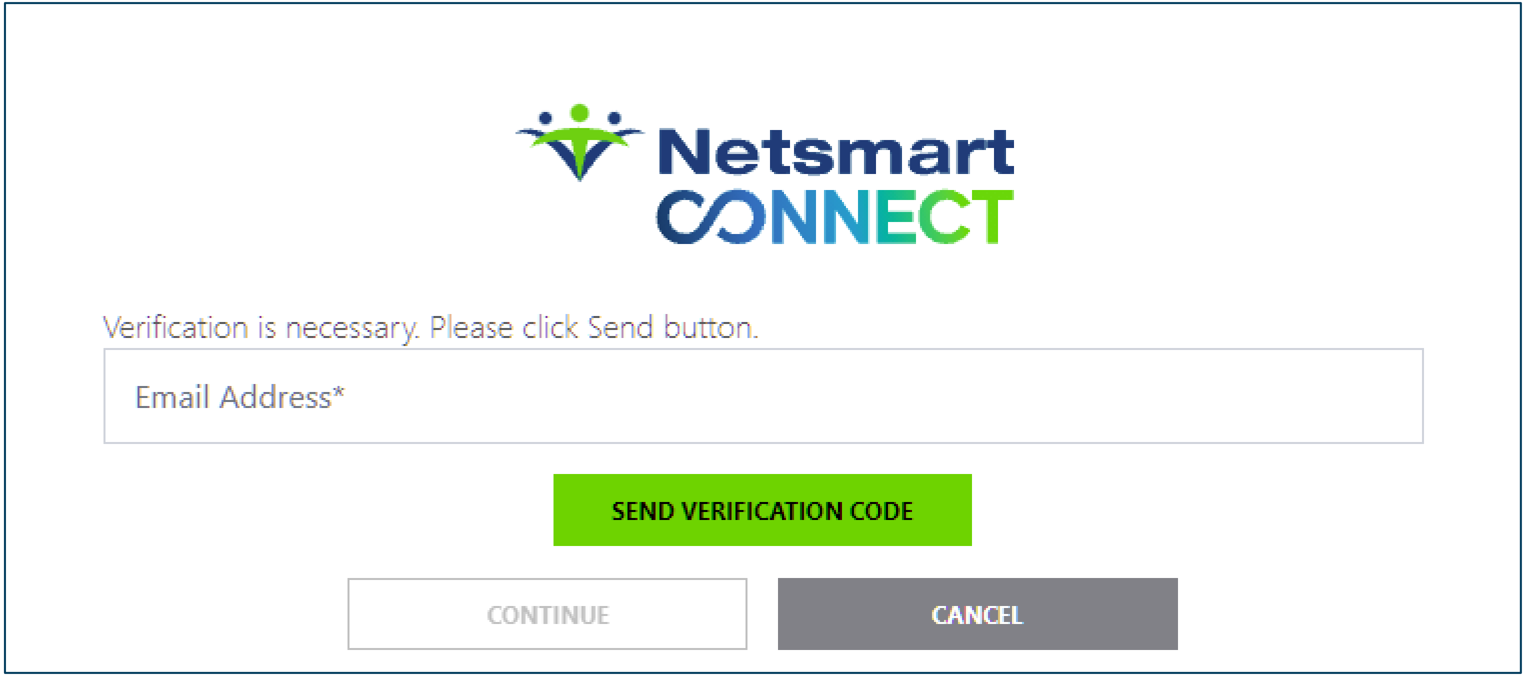
Resetting password

- 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

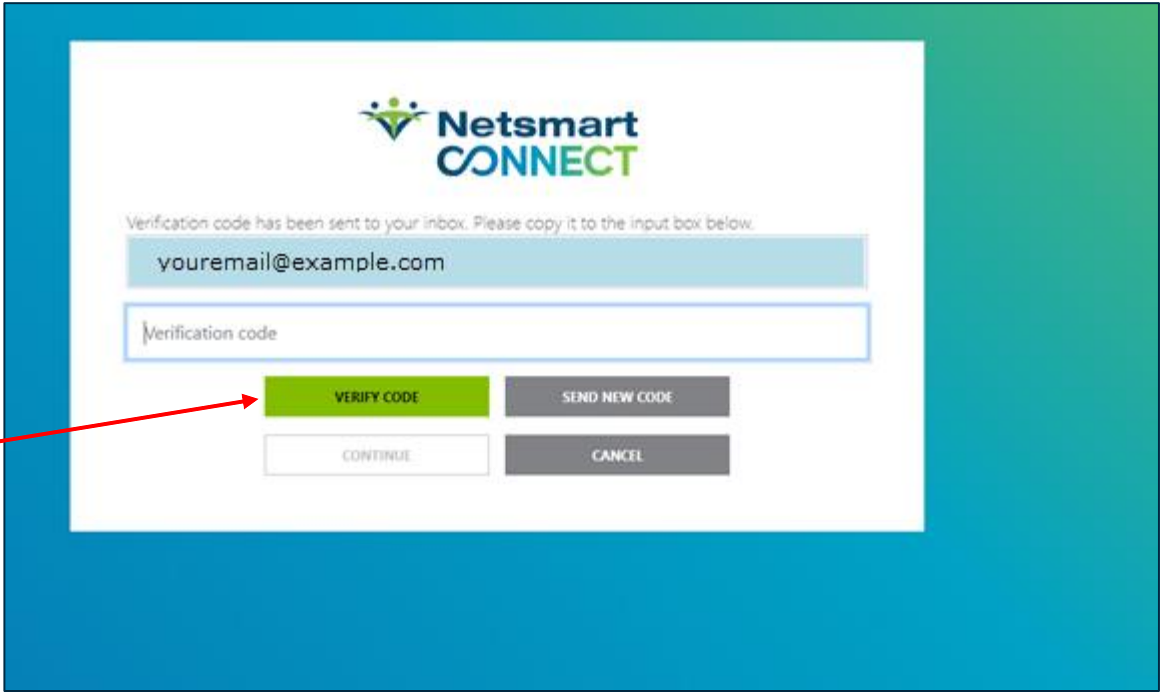
Verification code

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

  Your code is: ######

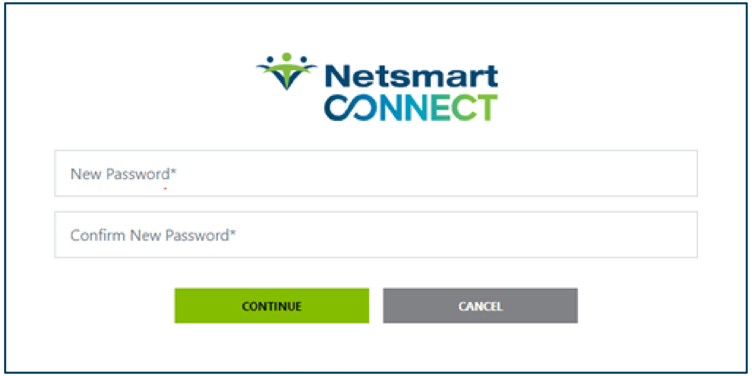
- Click Verify Code

  VERIFY CODE



Create new password

- Enter desired password to complete login process
  - 12 -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 to access the Home page

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

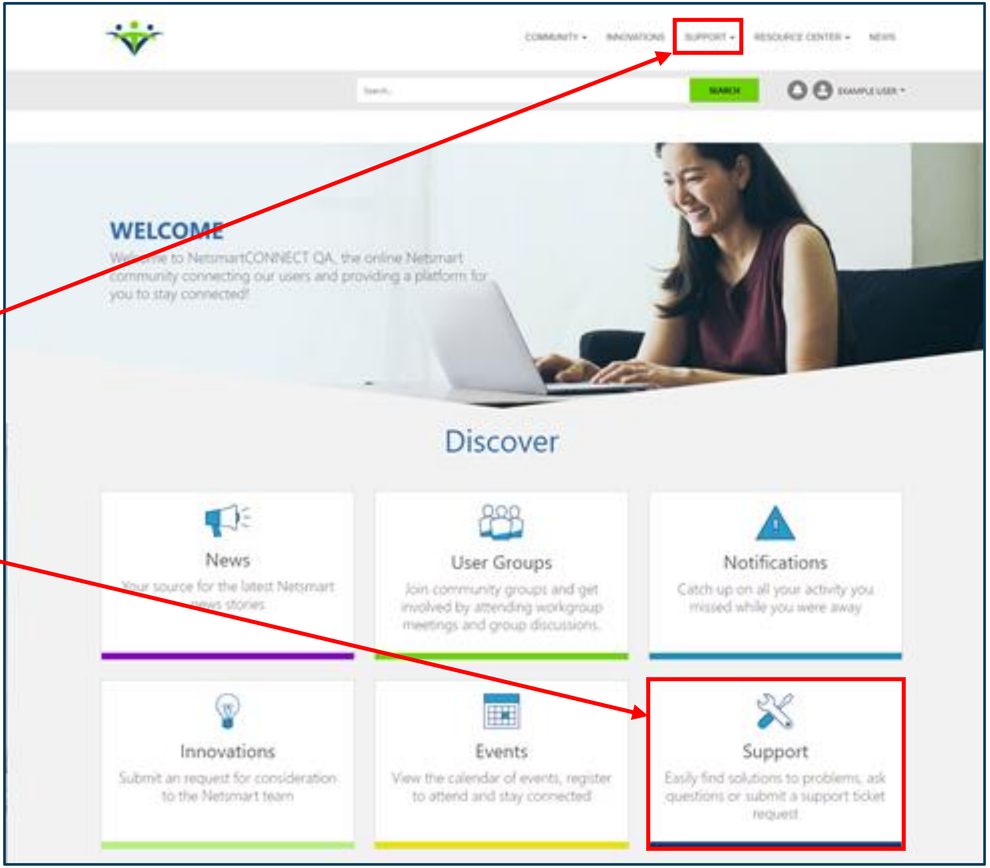
- Find answers to questions quickly (*coming soon*)

Known Issues

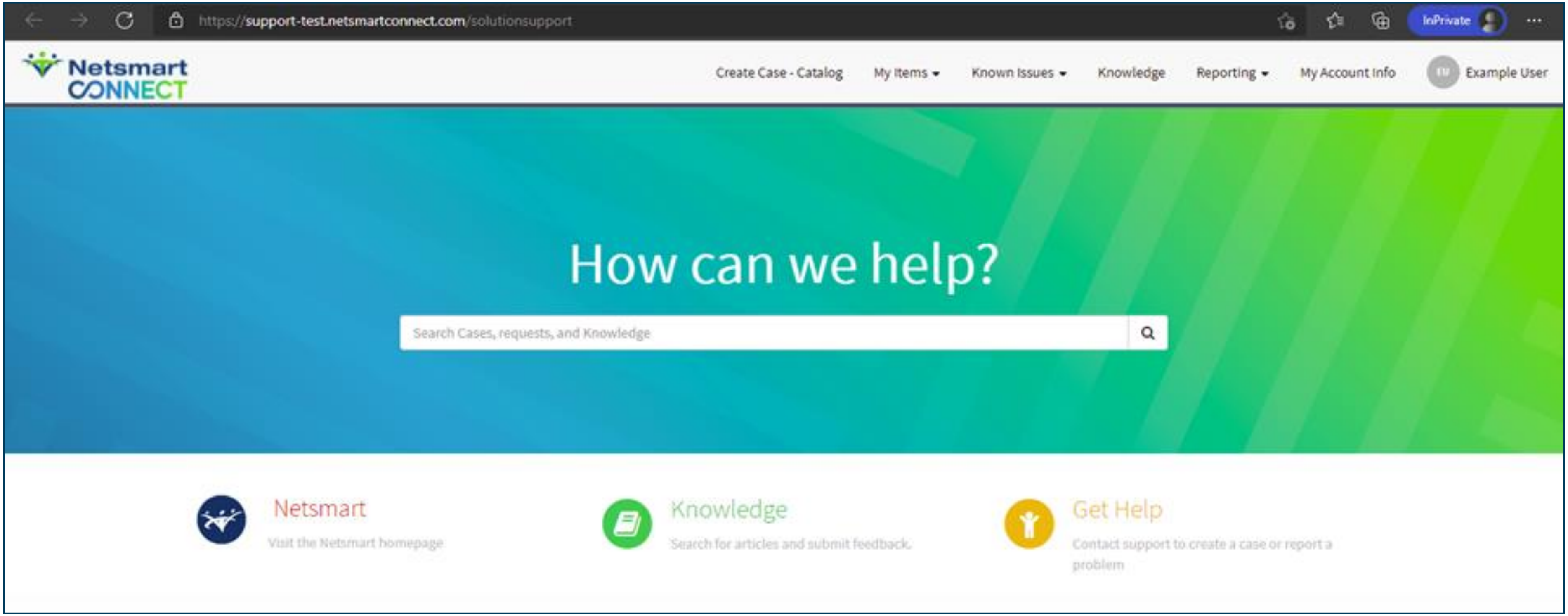
- Search and watch current Known Issues for update notifications

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

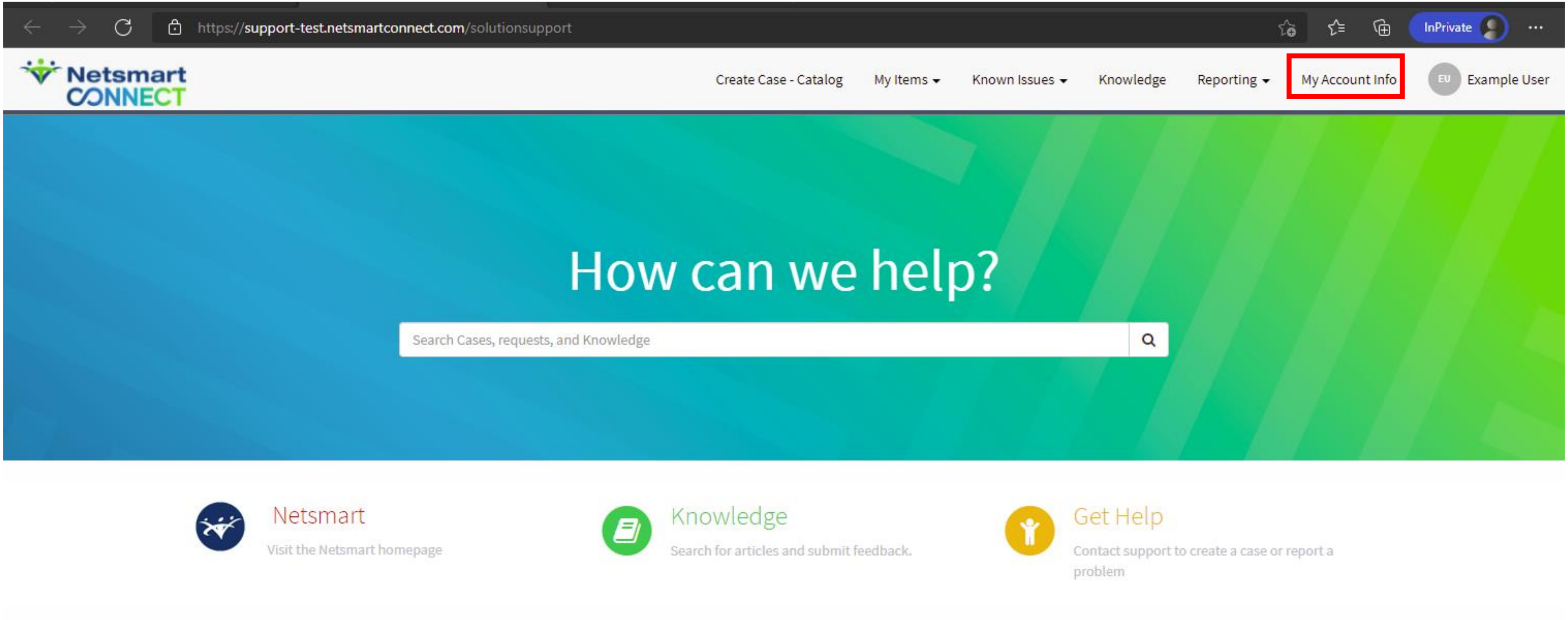


Solution Support Home Page

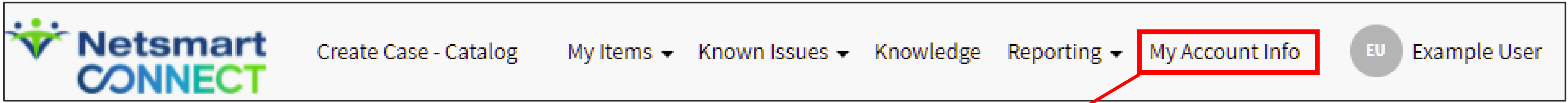


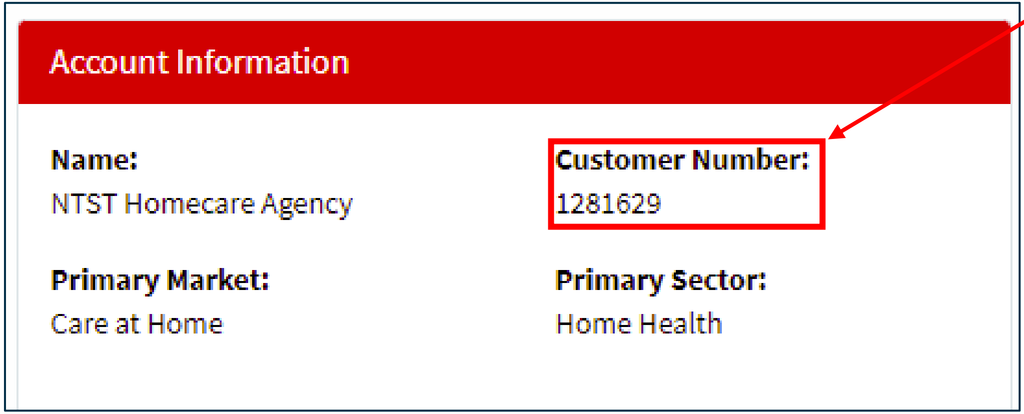
My Account Info

Important Information – Your Account Number



Important Information – Your Account Number



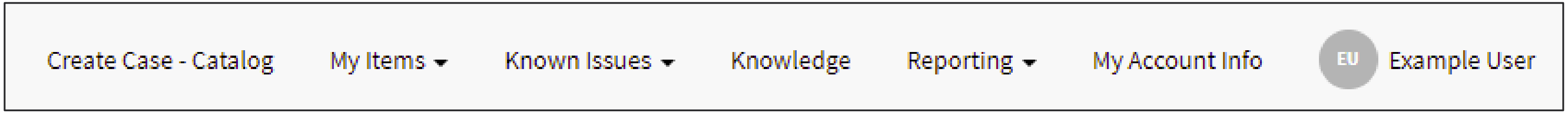


Providing your account number will simplify opening a case when calling Support

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

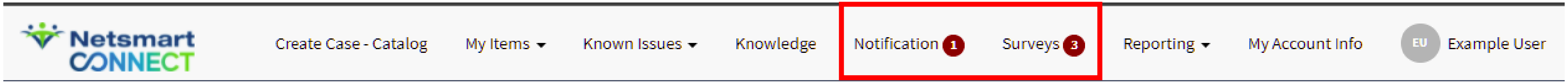
Navigating Solution Support Menu

Navigating Support Portal Menu



- Create Case – Catalog
  - Access new case
- 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 (coming soon)
- Reporting - Dashboards and reports

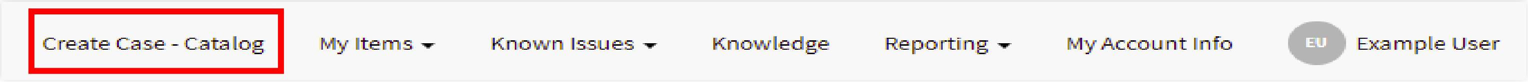
Navigating Support Portal Menu



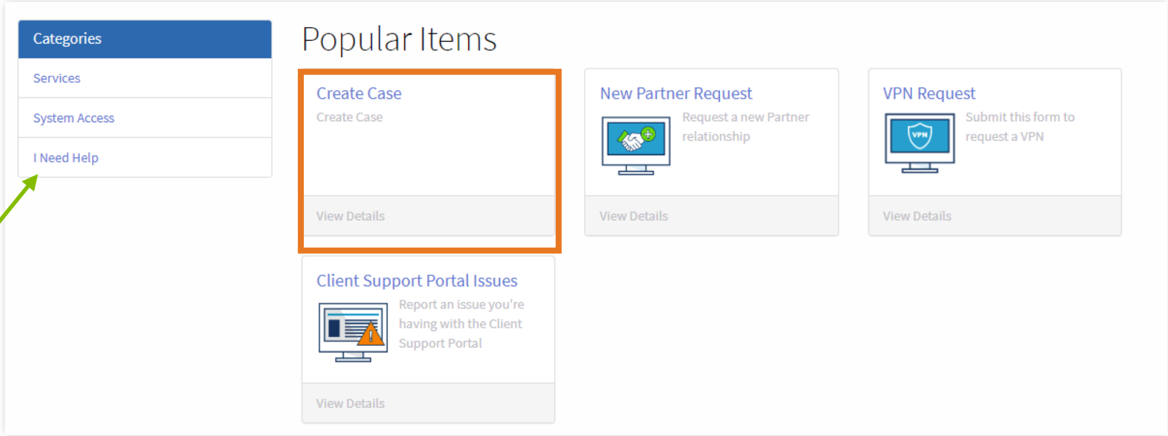
- Notifications
  - This menu item displays when either/both of these exist
    - Case set to Pending requesting information from contact
    - Case set to Resolution
- Surveys
  - Each close case triggers a short survey
  - Find all active surveys under this menu option

Create Support Case

Creating a new case

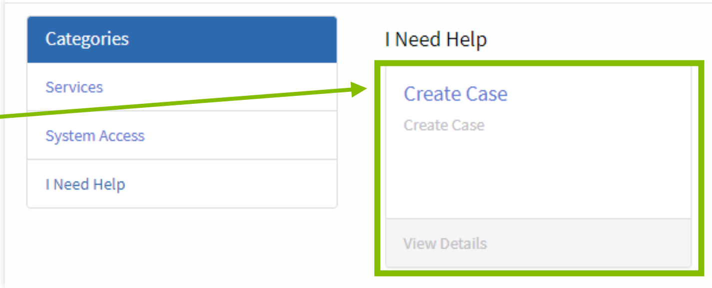


Option 1:
Click **Create Case** from the Popular Items page

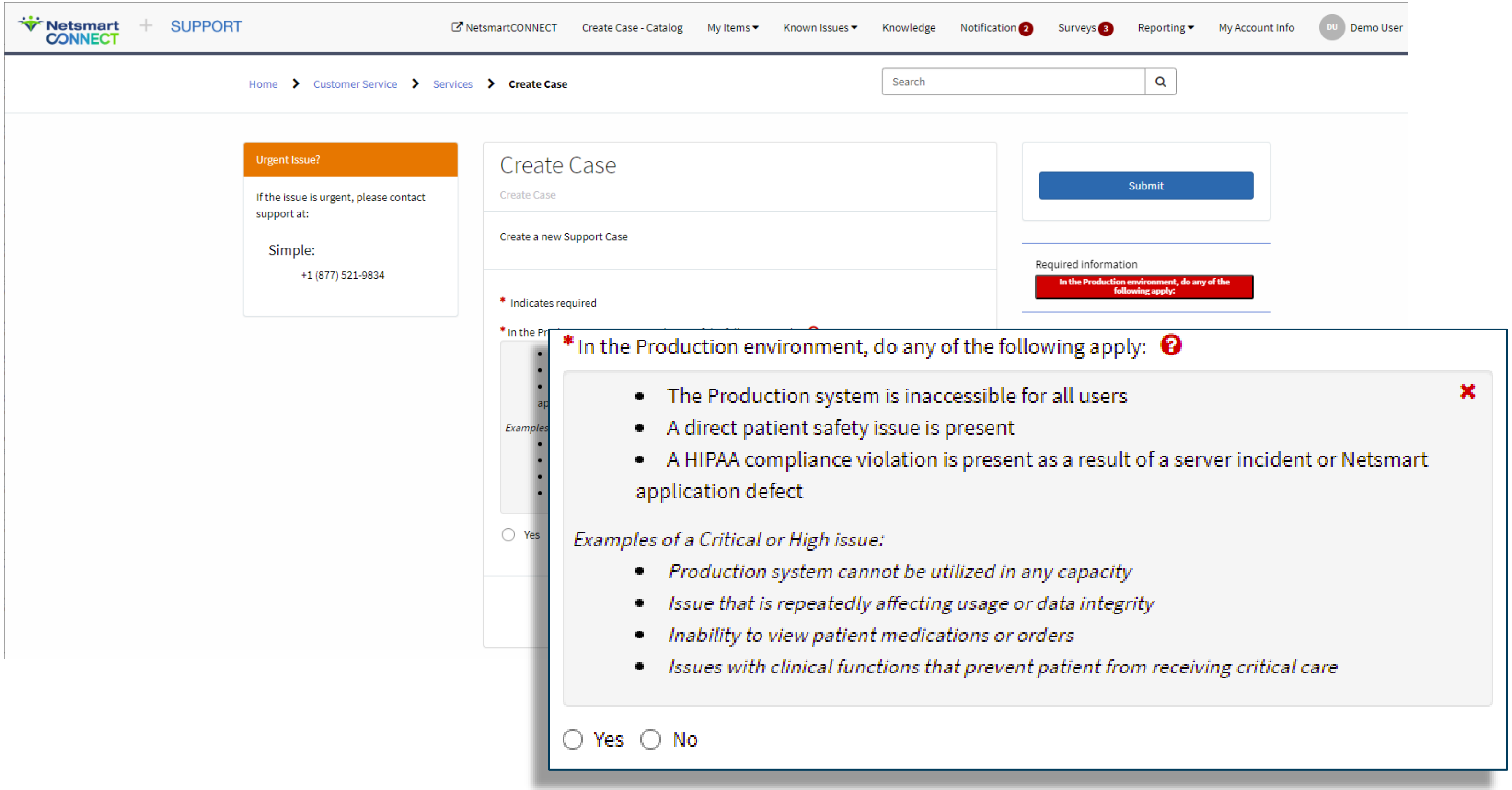


OR

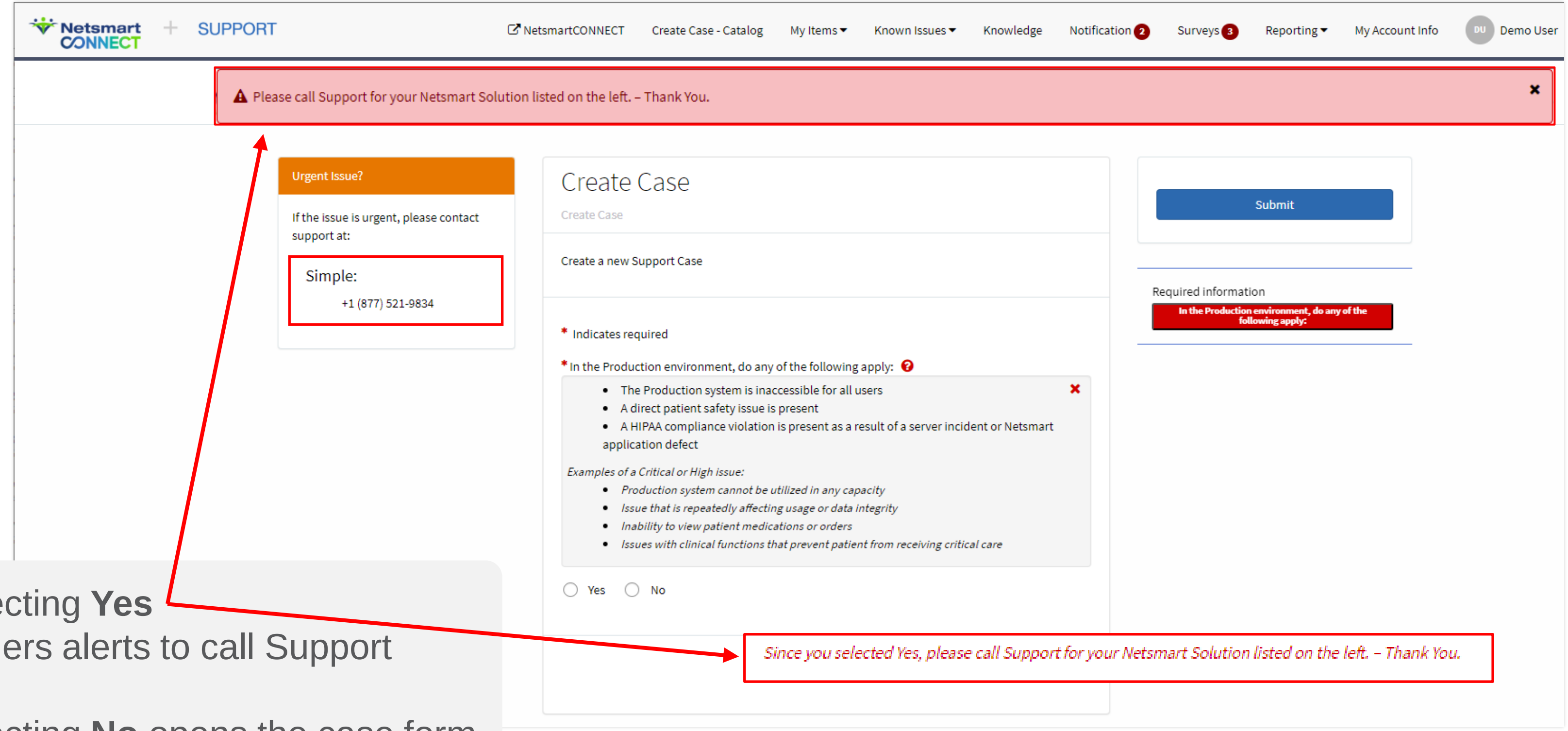
Option 2:
Click **I Need Help** category and then click **Create Case**



Main Case Form



Main Case Form



Selecting **Yes** triggers alerts to call Support

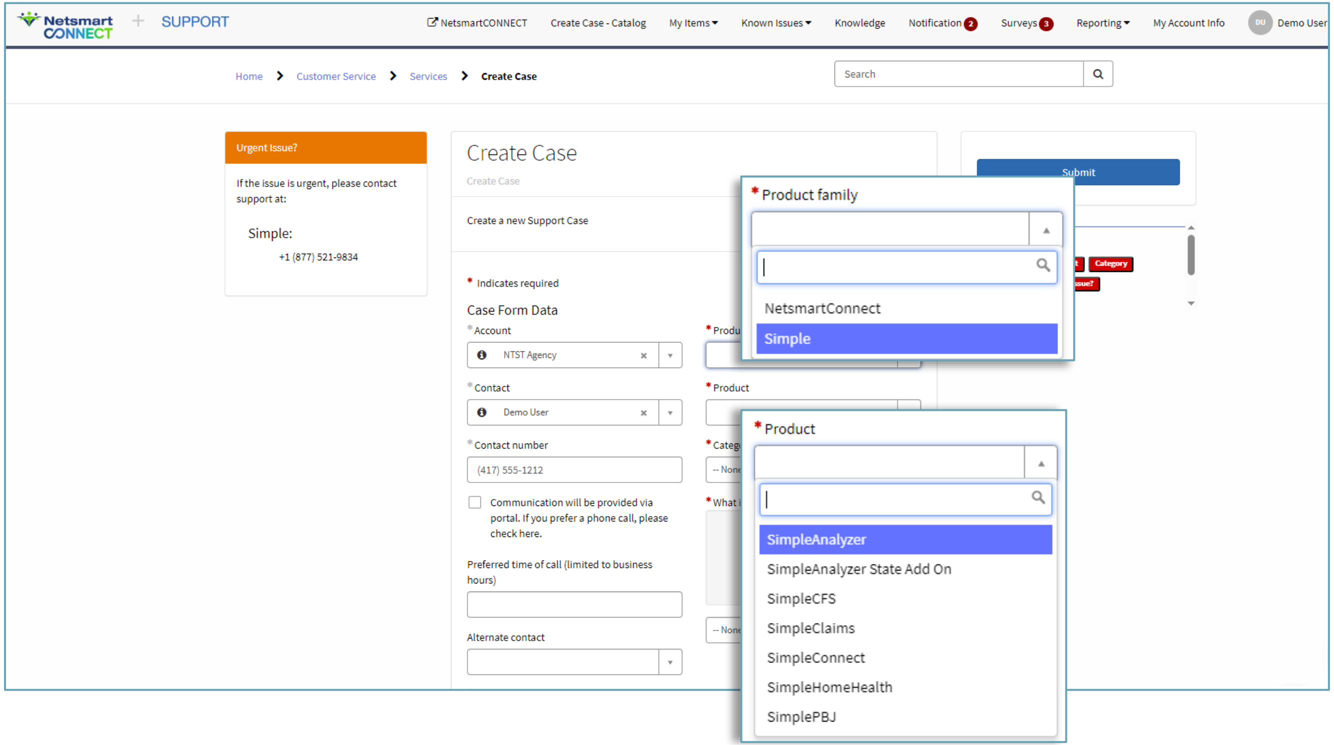
Selecting **No** opens the case form

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

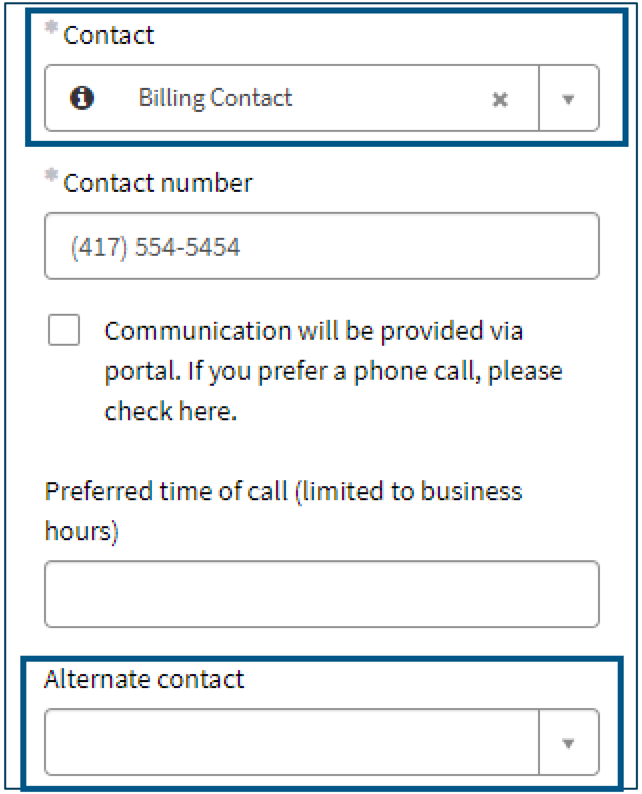
Create Case form

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



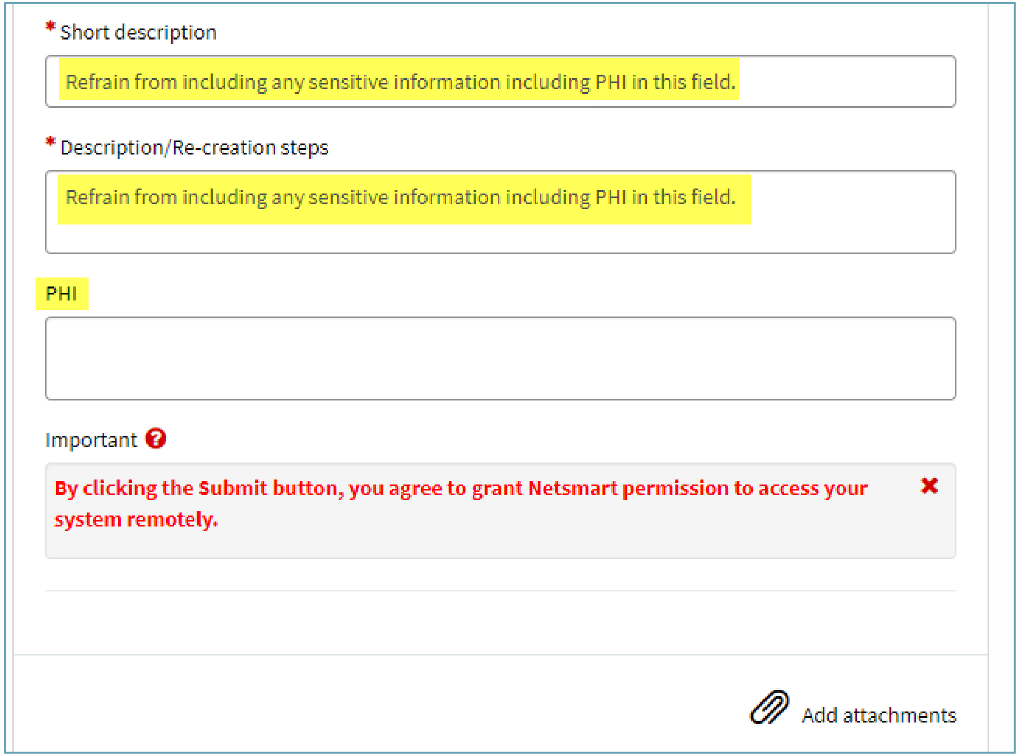
Adding case contacts

- Contact
  - Works with Support in resolving the case
  - Verify number is correct
- Alternate Contact
  - Contact Back up
  - Has interest in following case
- All contacts receive email updates



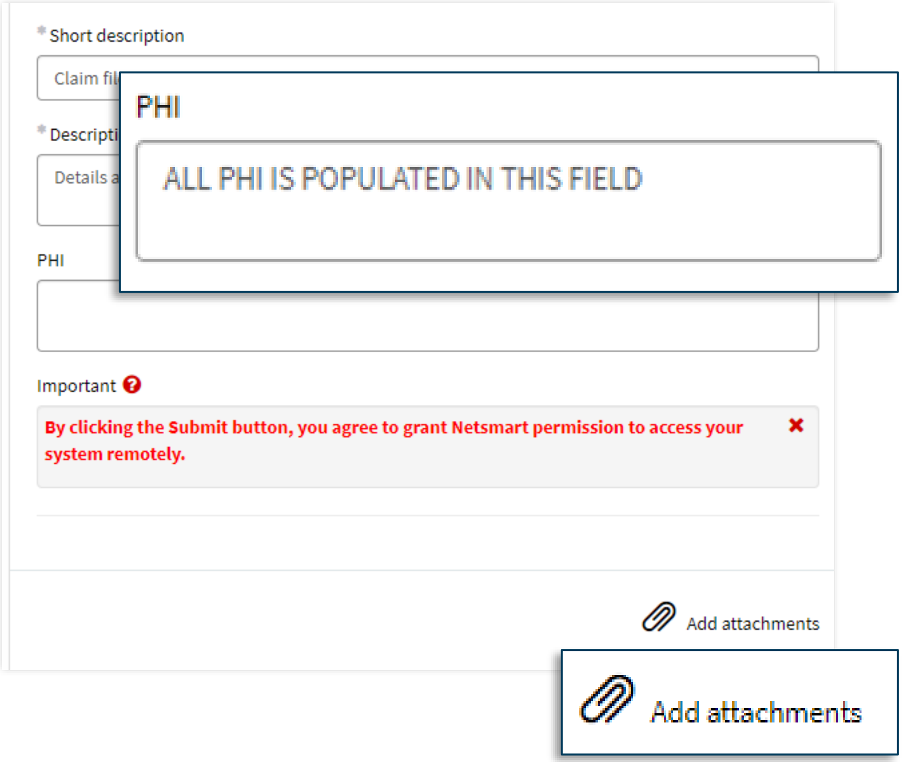
Input fields

- Short description
  - Similar to email Subject line
- Description
  - Similar to the body of an email
  - Share details around issue (i.e. Steps leading up to error)
- PHI
  - **ALL** sensitive patient data
  - Add attachments by clicking the Add attachments icon



Adding PHI

- All PHI MUST be populated in the secure PHI field
  - Creates Secure Data Records
  - Records saved on secure server
- System Audits all views
  - Audit files can be created
- Attachments saved on secure server



Create Case form

Create Case

Create Case

Create a new Support Case

Case Form Data

* Account

NTST Agency

* Contact

Demo User

* Contact number

(417) 555-1212

☐ 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

* Product family

Simple

* Product

SimpleClaims

* Function

Claim Files

* Category

Question

* 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

* Short description

Claim file question

* Description/Re-creation steps

Details around the question or steps taken to get to the issue.

PHI

Some Patient MR 5406540 Claim file 50654

Important

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

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

Add attachments

Submit

Case email notifications

Each new case triggers an email to the contact with the case ID and link.

Click the case link to be directed to the case.

Additional emails are sent for case updates and resolutions.

Case CS2368376 opened - SimpleLTC facility set up

NS Netsmart Support <support@ntst.com>
11-16-2023 03:12:29 PM

To: Demo User

Case Description: SimpleLTC facility set up
Click here to view: CS2368376
Please Note: If you are not currently logged into NetsmartConnect (in your default browser), you will first be prompted to login before it will take you to the linked record.

Hello Demo,
Thank you for submitting your support request to the Netsmart Solution Support team. It is being tracked by case CS2368376 . You may add to this case at any time by replying to this email, or adding a comment to the case directly using the above link.

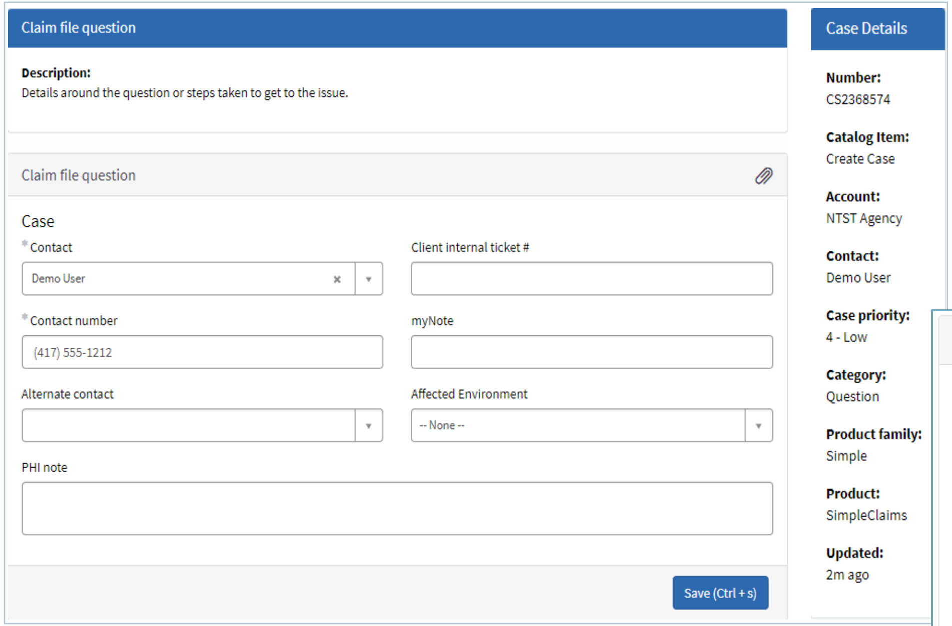
Reference this case number in all associated communications with support. If this is an urgent issue, please contact us by phone.

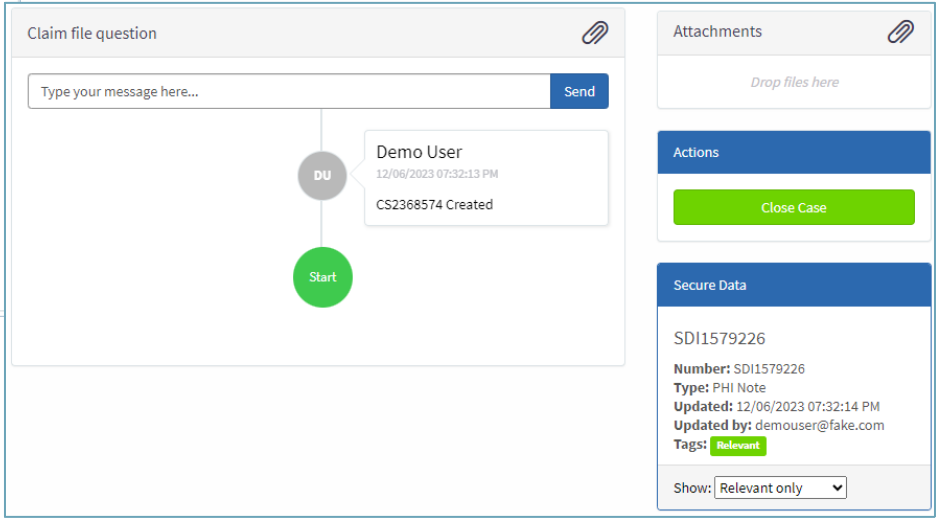
Please use the link above to view the updates in the portal. If it's your first time logging in or you need to reset your password, you can use the Reset Password link directly below the username and password fields. Put in your company email, then follow the prompts when the reset password email is sent to you.

In an effort to minimize the risk of Netsmart clients or associates from accidently including PHI within case emails, Netsmart has taken a proactive approach to eliminate the body of the message in email communications from Care Record Support Cases. Please note this decision did not come lightly, as we understand this could slow down the communication path and the information support needs to help resolve reported issues. The protection of our clients PHI is of paramount importance; we appreciate you understanding our decision on this more protective approach.

Netsmart Solution Support
+1 (877) 521-9834
At Netsmart, We Believe EveryDayMatters®

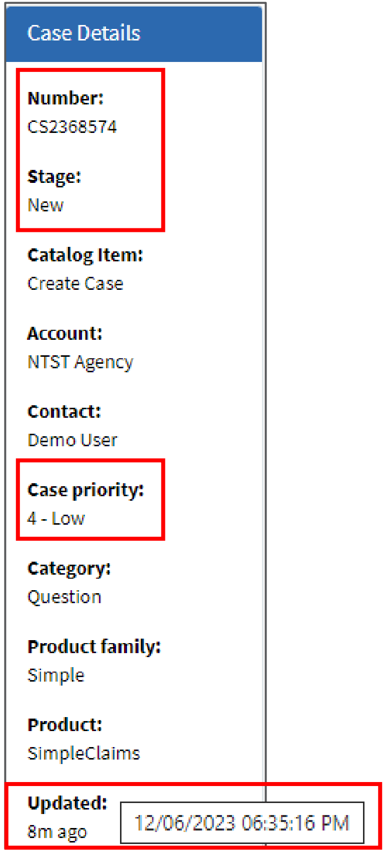
Completed Case View





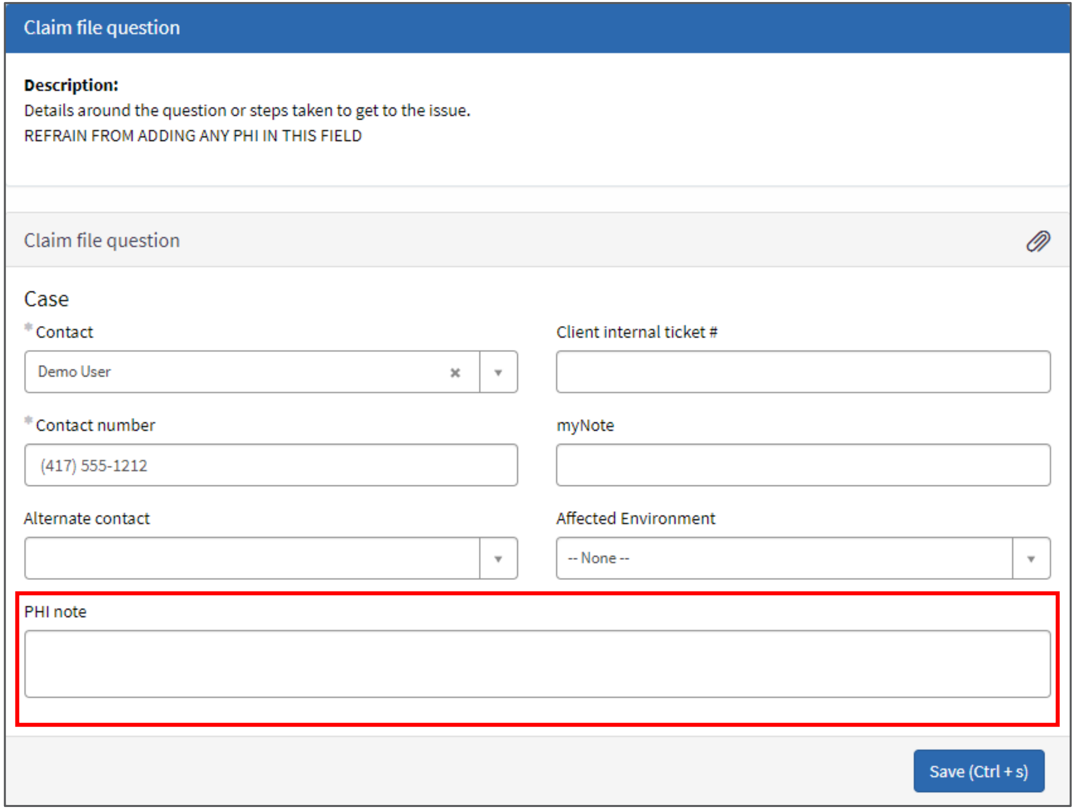
Case Information Screen – Case Details

- 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



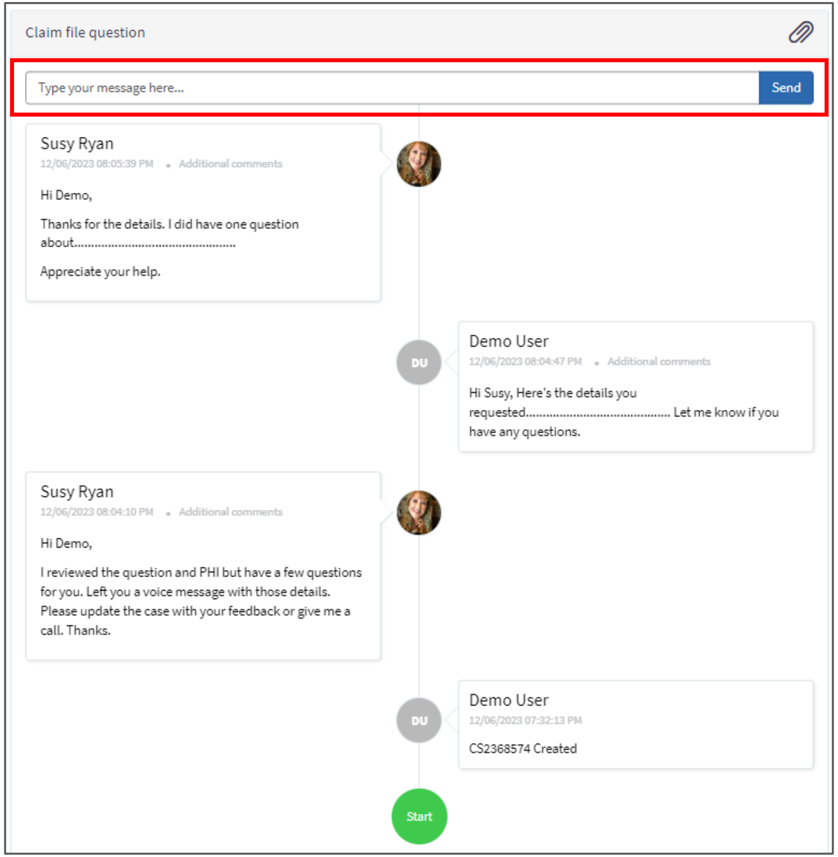
Case Information Screen – Case Details

- Case Description with additional details
- Contact details
- Internal ticket # tracking field
- PHI Note field
  - **ALL PHI** MUST be entered into this field



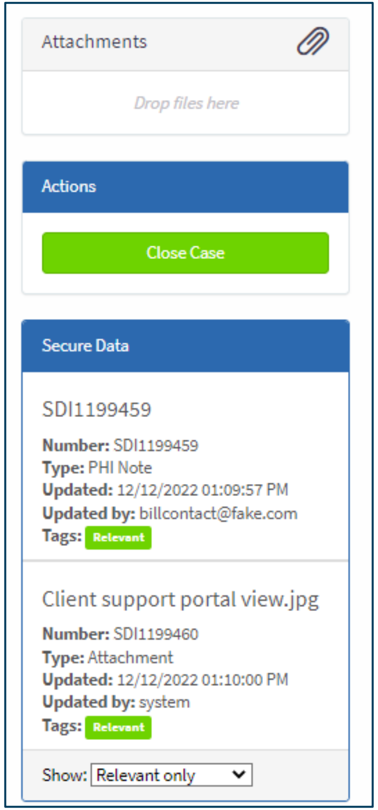
Case Information Screen – Case Details

- 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

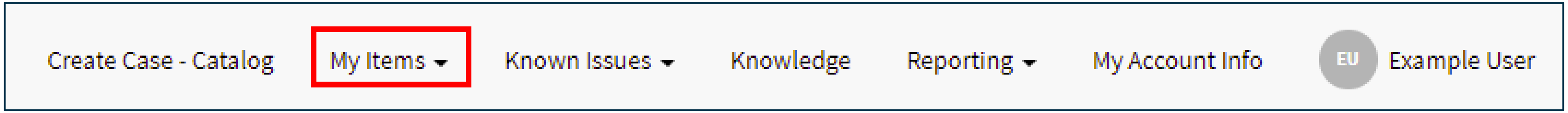


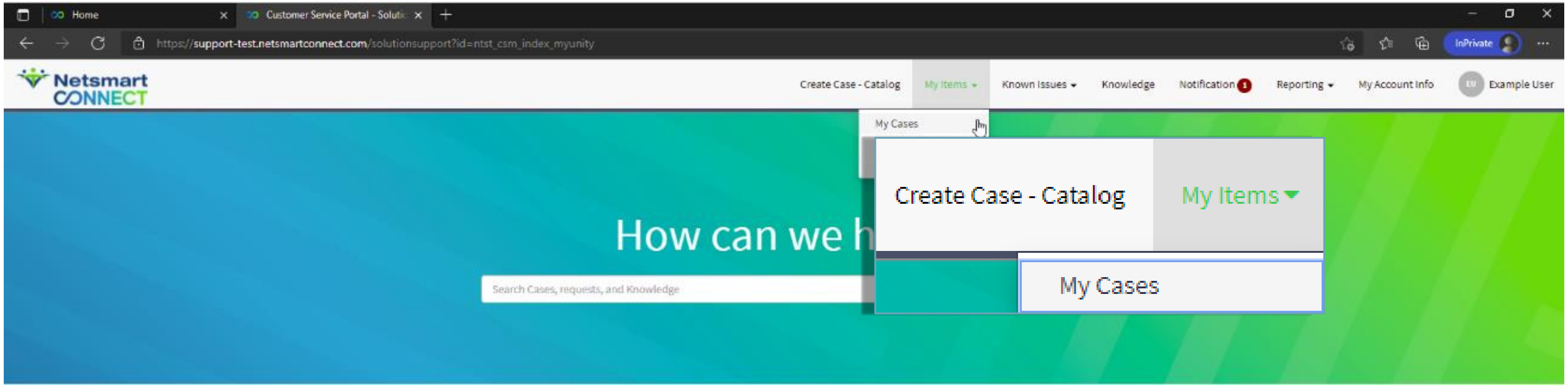
Case Information Screen – Case Details

- 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 level access

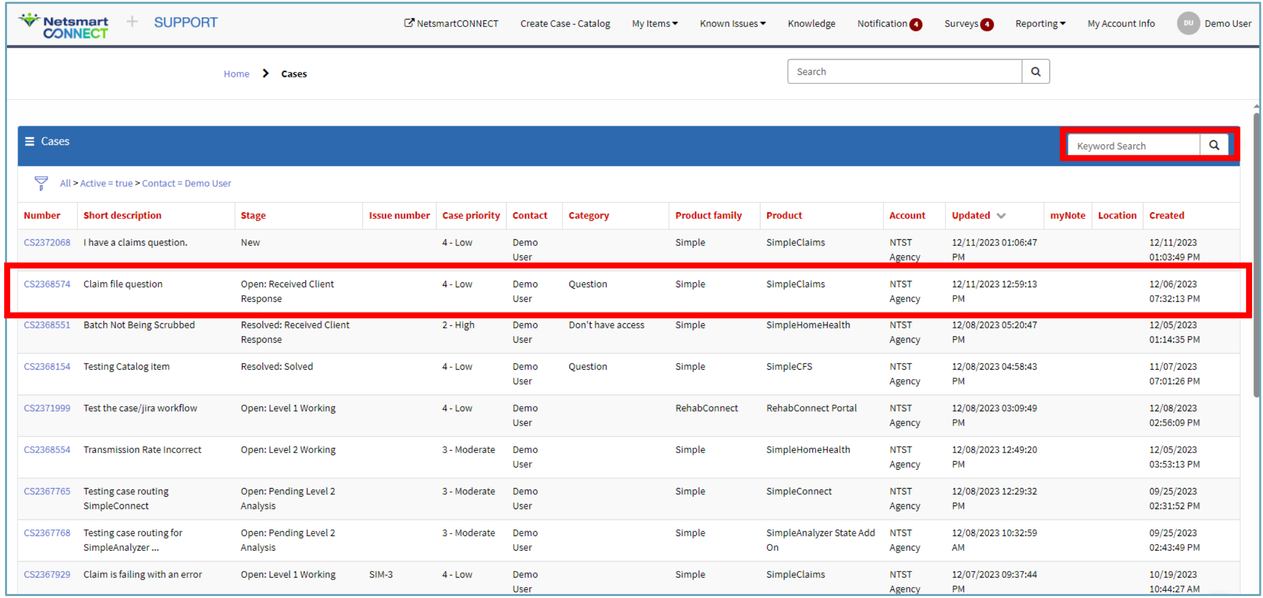
Case List Information Screen

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



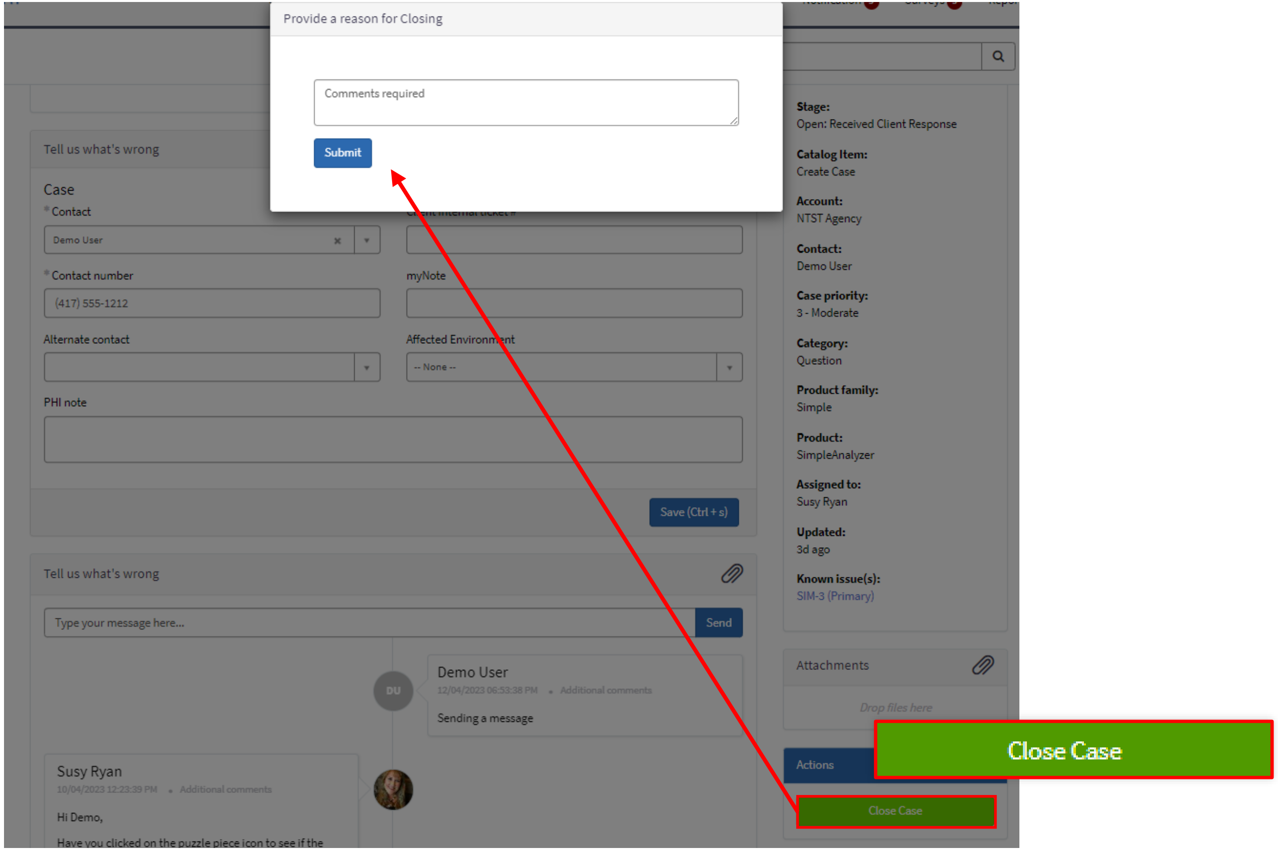
Number	Short description	Stage	Issue number	Case priority	Contact	Category	Product family	Product	Account	Updated	myNote	Location	Created
CS2372068	I have a claims question.	New		4 - Low	Demo User		Simple	SimpleClaims	NTST Agency	12/11/2023 01:06:47 PM			12/11/2023 01:03:49 PM
CS2368574	Claim file question	Open: Received Client Response		4 - Low	Demo User	Question	Simple	SimpleClaims	NTST Agency	12/11/2023 12:59:13 PM			12/06/2023 07:32:13 PM
CS2368551	Batch Not Being Scrubbed	Resolved: Received Client Response		2 - High	Demo User	Don't have access	Simple	SimpleHomeHealth	NTST Agency	12/08/2023 05:20:47 PM			12/05/2023 01:14:35 PM
CS2368154	Testing Catalog item	Resolved: Solved		4 - Low	Demo User	Question	Simple	SimpleCFS	NTST Agency	12/08/2023 04:58:43 PM			11/07/2023 07:01:26 PM
CS2371999	Test the case/jira workflow	Open: Level 1 Working		4 - Low	Demo User		RehabConnect	RehabConnect Portal	NTST Agency	12/08/2023 03:09:49 PM			12/08/2023 02:56:09 PM
CS2368554	Transmission Rate Incorrect	Open: Level 2 Working		3 - Moderate	Demo User		Simple	SimpleHomeHealth	NTST Agency	12/08/2023 12:49:20 PM			12/05/2023 03:53:13 PM
CS2367765	Testing case routing SimpleConnect	Open: Pending Level 2 Analysis		3 - Moderate	Demo User		Simple	SimpleConnect	NTST Agency	12/08/2023 12:29:32 PM			09/25/2023 02:31:52 PM
CS2367768	Testing case routing for SimpleAnalyzer ...	Open: Pending Level 2 Analysis		3 - Moderate	Demo User		Simple	SimpleAnalyzer State Add On	NTST Agency	12/08/2023 10:32:59 AM			09/25/2023 02:43:49 PM
CS2367929	Claim is failing with an error	Open: Level 1 Working	SIM-3	4 - Low	Demo User		Simple	SimpleClaims	NTST Agency	12/07/2023 09:37:44 PM			10/19/2023 10:44:27 AM

Closing & Resuming Cases

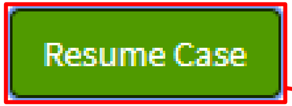
Resolved vs Closed Cases

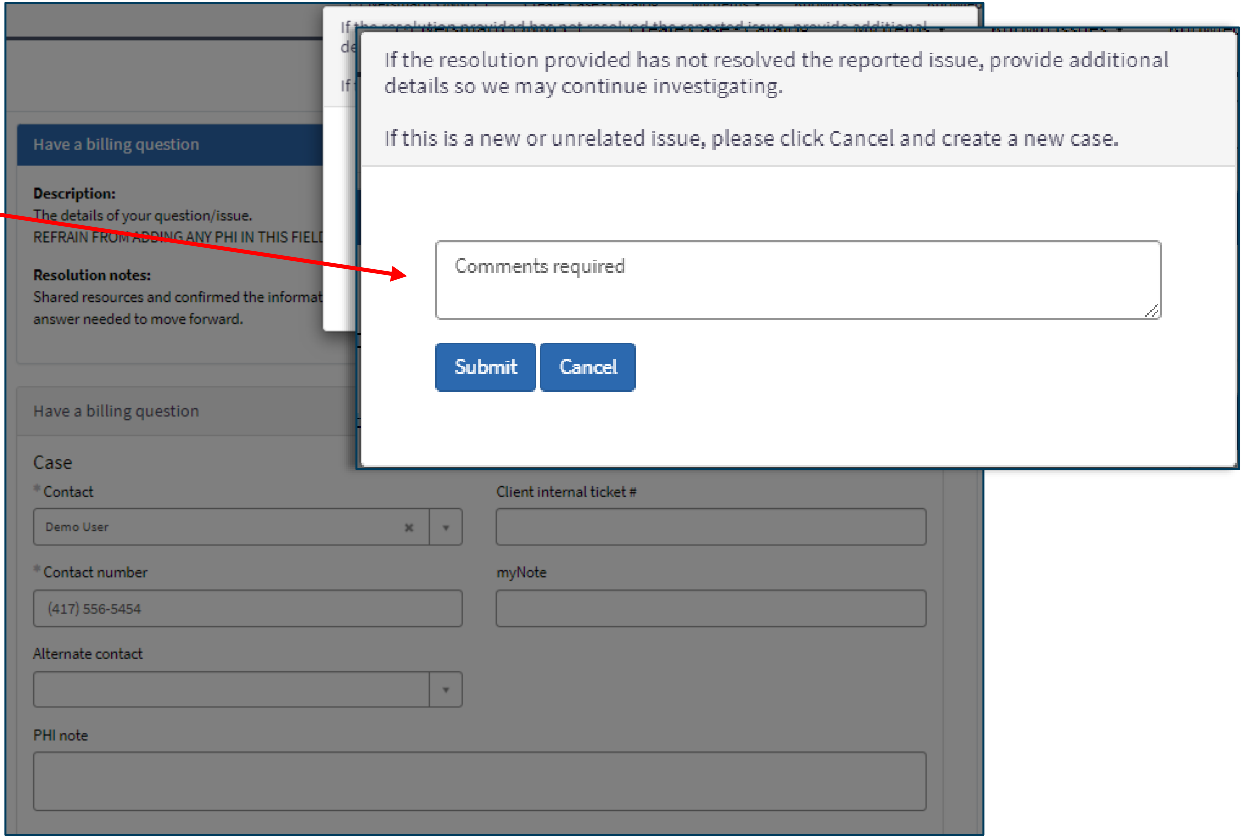
- Netsmart Support marks cases as Resolved
- The Client or the automated workflow sets cases to Closed
- Resolved: Solved or Resolved: Known Issue Identified
  - Initiates a 2- business day system workflow for closure
- Resolved: Pending Verification
  - Initiates a 6- business day system workflow for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

Closing Cases – Client Initiated



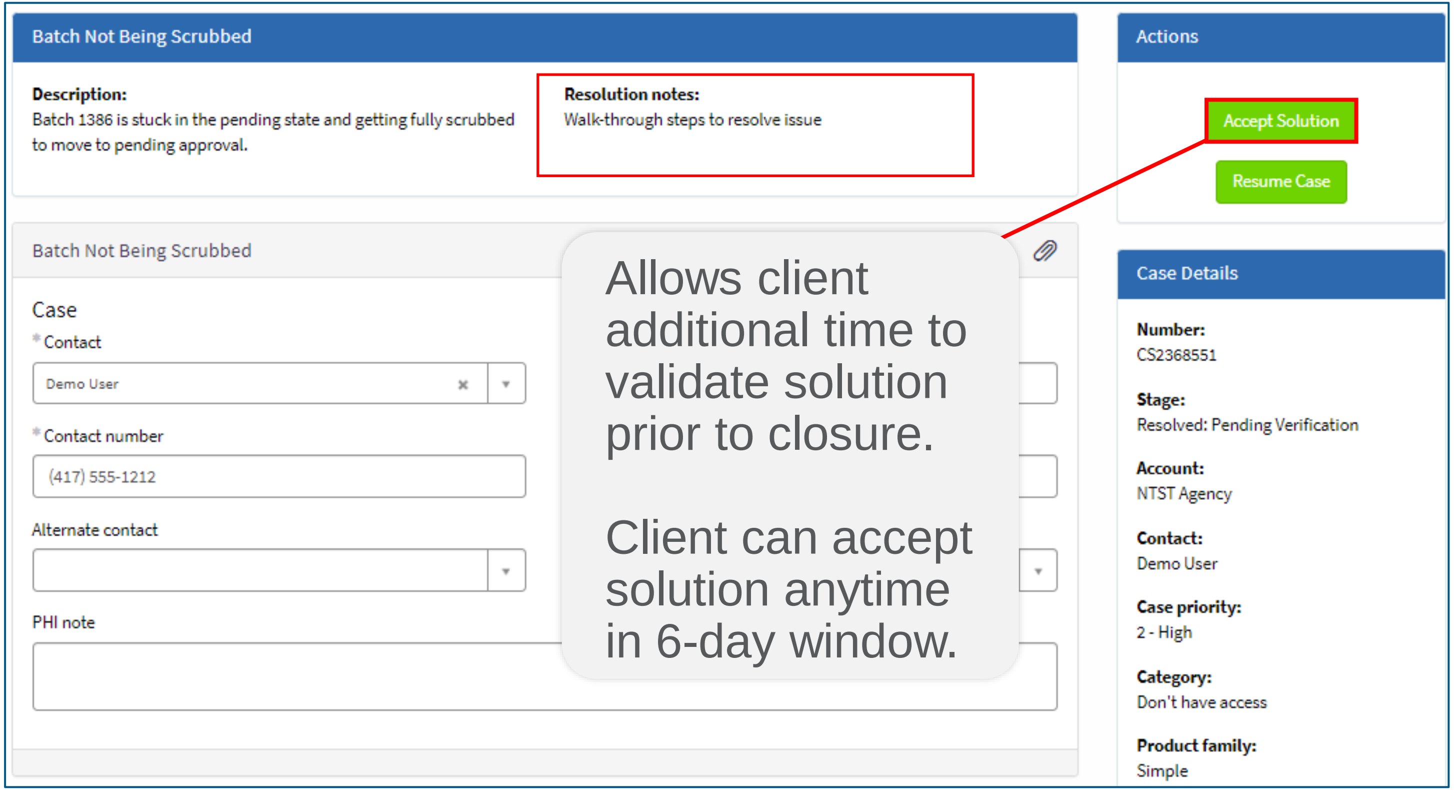
Resuming Cases – Resolved 2-day Workflow





Enter why the resolution has stopped working - then click **Submit**

Resuming Cases – Resolved 6-day Workflow



Allows client additional time to validate solution prior to closure.

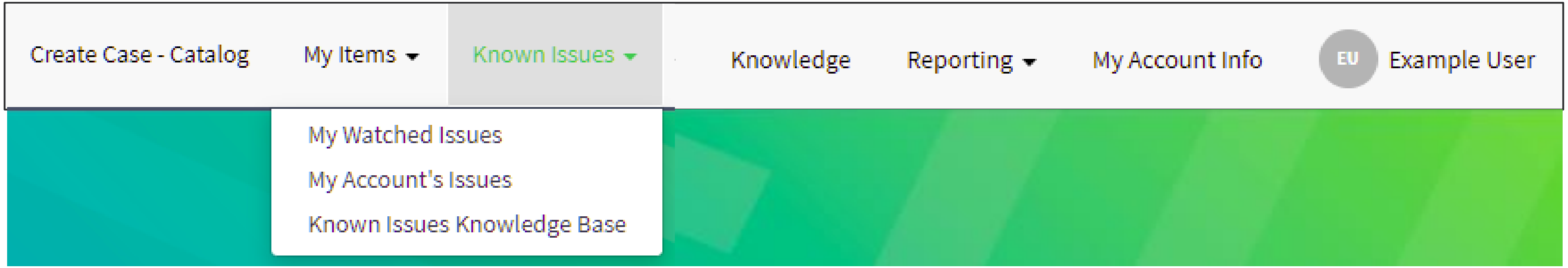
Client can accept solution anytime in 6-day window.

Known Issues

Known Issue Tracking

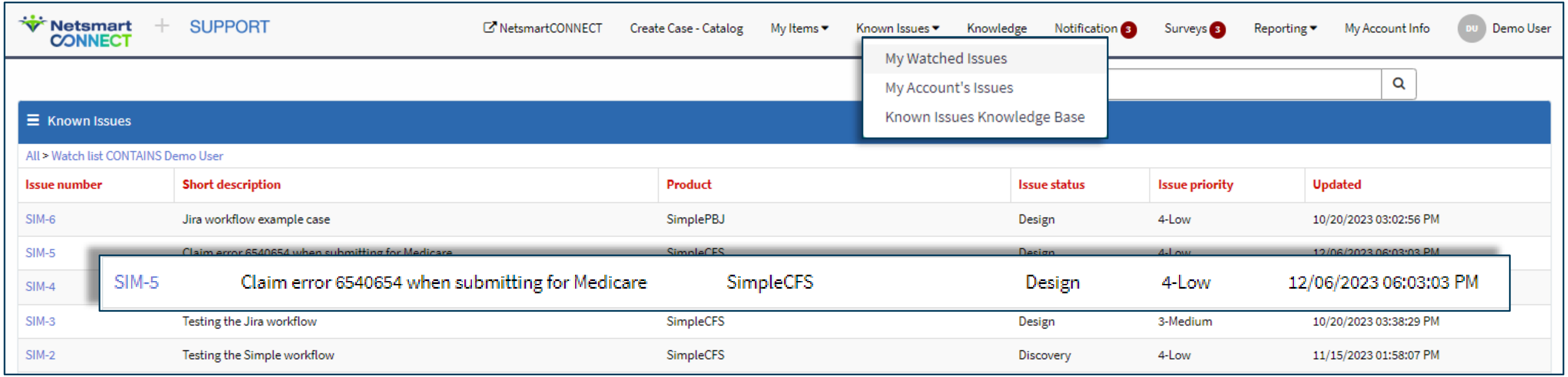
- Directly be able to view Known Issue
  - Viewable on the Client Support Portal for tracking your issues
  - Track Known Issues associated to yourself
  - Track Known Issues associated to the entire account
  - Share Known Issues with colleagues
- Email Notifications
  - Notified of status change
 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

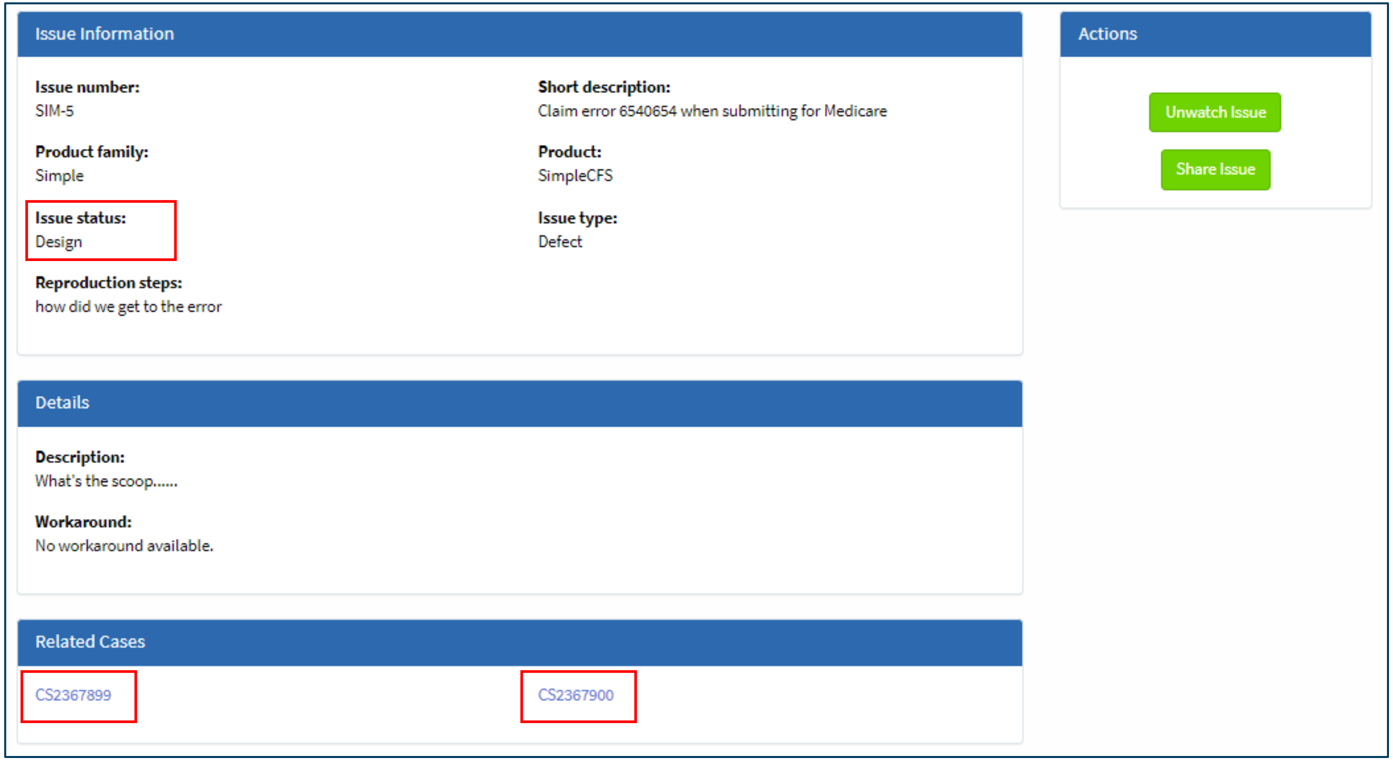
Solution Support Portal – Known Issues



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

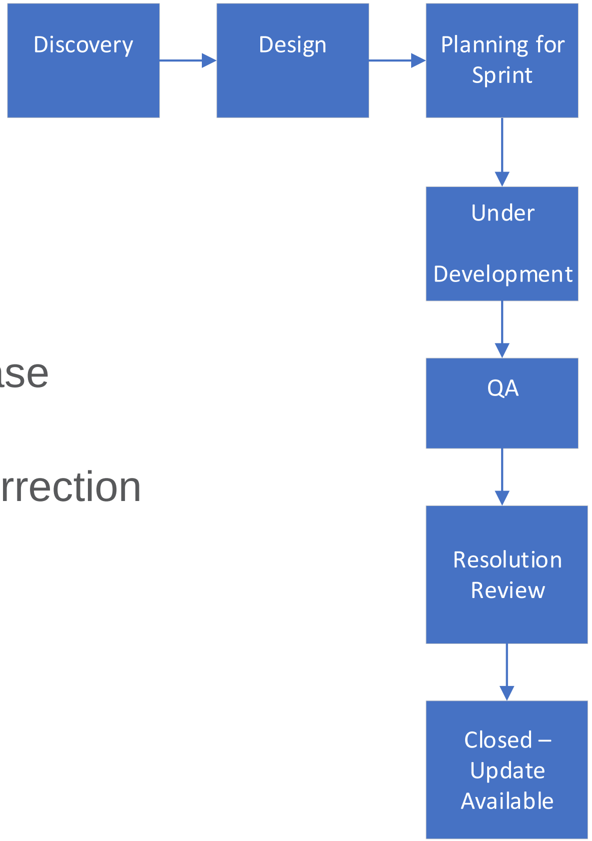


Engineering progress will update the issue details along with associated case hyperlinks

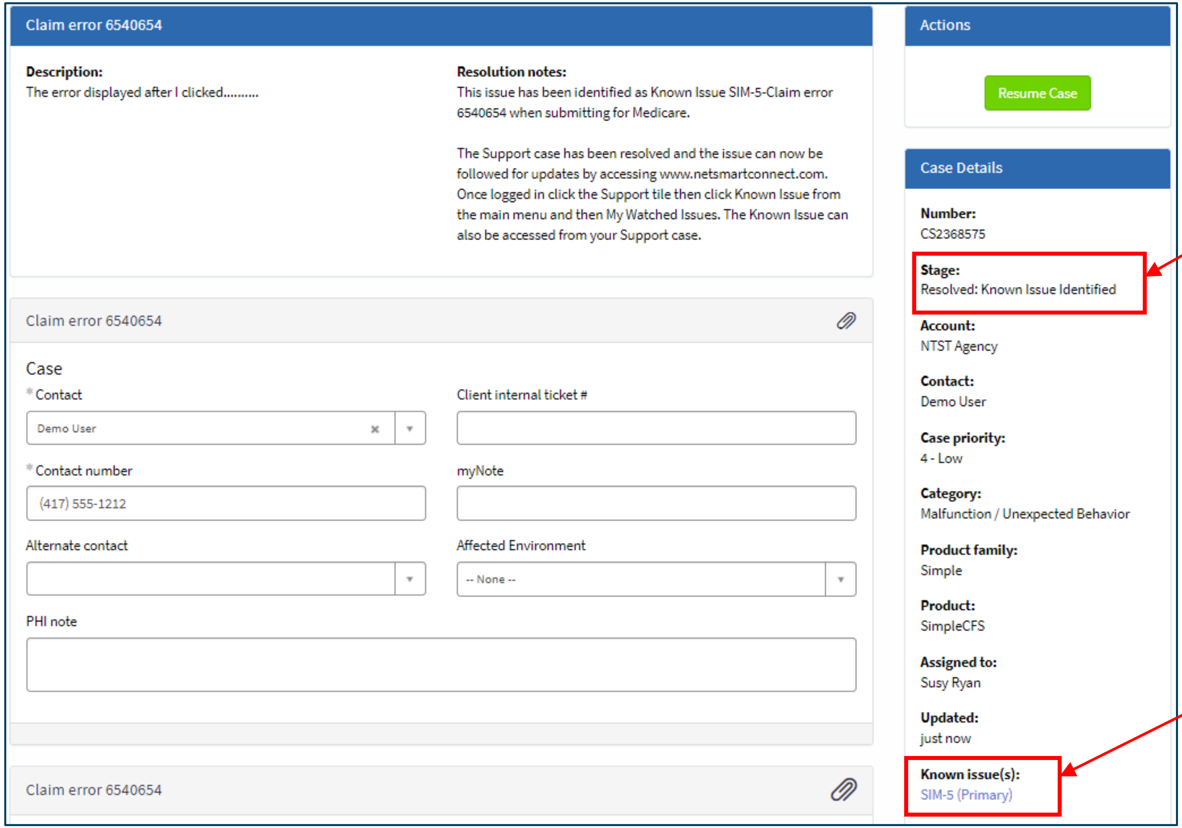
Netsmart

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

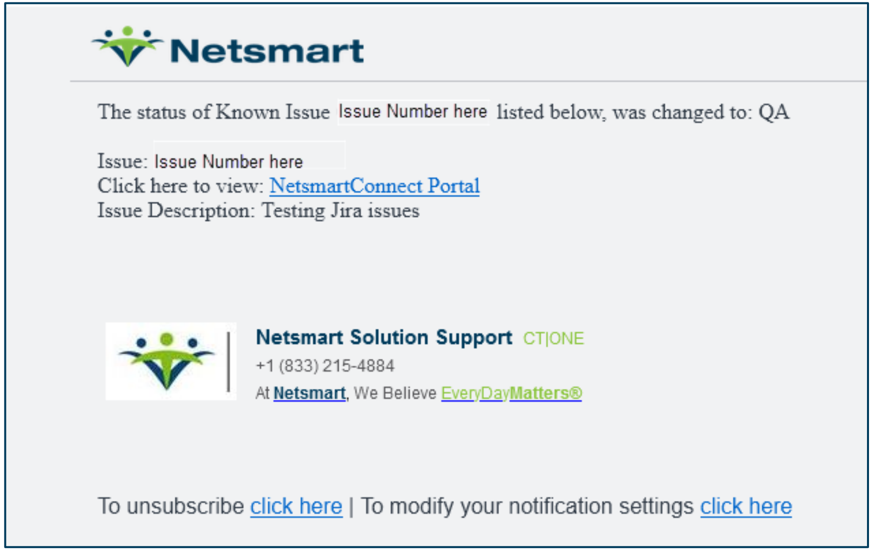


Case Stage set to Resolved: Known Issue Identified

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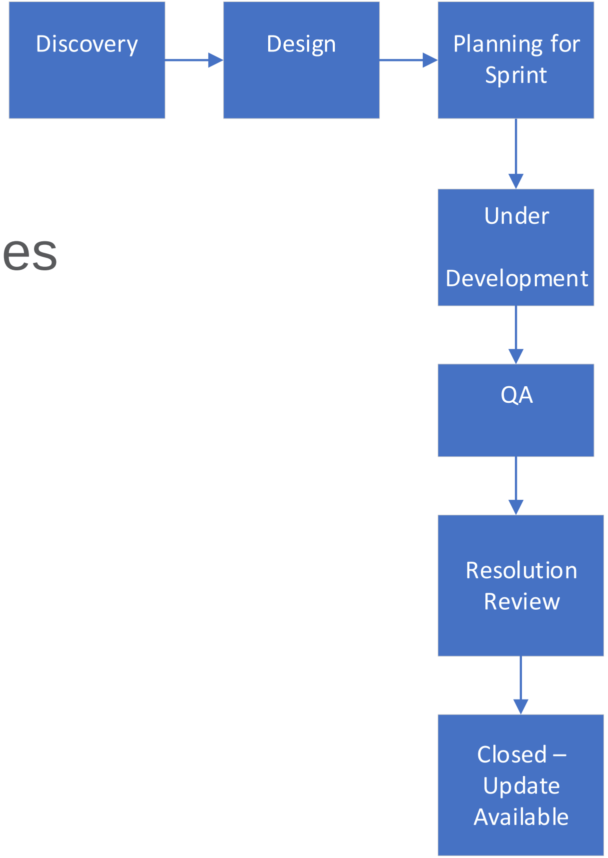
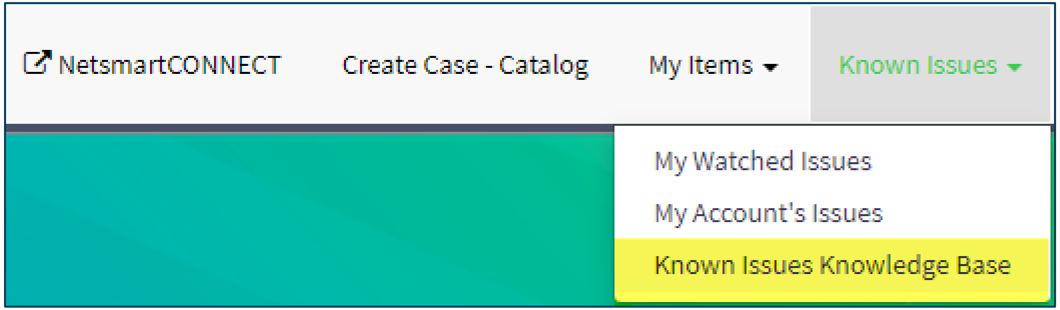
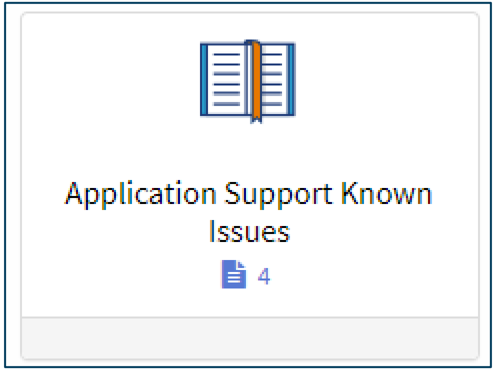
To unsubscribe click here | To modify your notification settings click here



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



Next steps

- Registration emails were sent 12/14
- Open cases were migrated to new system on 12/14
- Planning to discontinue the following emails to no longer generate a Support case as of 12/31/23.
  - **support@simpleltc.com**
  - **support@simplepbj.com**
  - **newsetup@simpleltc.com**
- Webinar Resources
  - Webinar recording and how-to guides available here
  - NetsmartCONNECT
  - Contact your Support team

Thanks!!