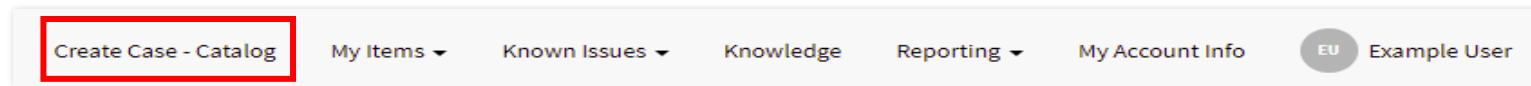


NetsmartCONNECT Solution Support Portal

Training for Simple clients

Create Support Case

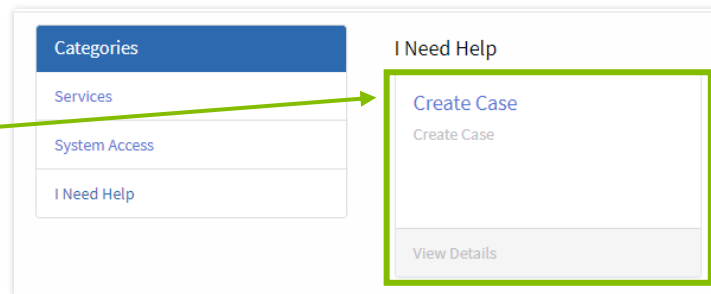
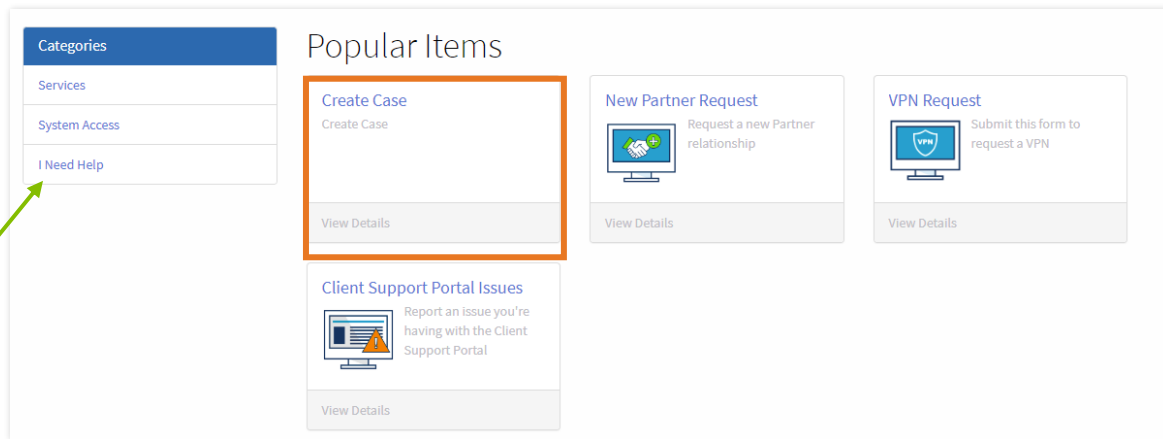
Creating a new case



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

Urgent Issue?

If the issue is urgent, please contact support at:

Simple:
+1 (877) 521-9834

Create Case

Create Case

Create a new Support Case

Submit

Required information

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

* Indicates required

* In the Pr

* 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

Main Case Form

Urgent Issue?

If the issue is urgent, please contact support at:

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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
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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

Required Information

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

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

Since you selected Yes, please call Support for your Netsmart Solution listed on the left. - Thank You.

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

The screenshot shows the 'Create Case' form in the Netsmart CONNECT system. The form includes a search bar, a 'Urgent Issue?' section with contact information, and a 'Case Form Data' section with various fields. Two dropdown menus are open, showing options for 'Product family' and 'Product'. The 'Product family' dropdown lists 'NetsmartConnect' and 'Simple'. The 'Product' dropdown lists 'SimpleAnalyzer', 'SimpleAnalyzer State Add On', 'SimpleCFS', 'SimpleClaims', 'SimpleConnect', 'SimpleHomeHealth', and 'SimplePBJ'. Red asterisks indicate required fields.

Urgent Issue?
If the issue is urgent, please contact support at:
Simple:
+1 (877) 521-9834

Create Case
Create a new Support Case

Case Form Data

- * Account: NTST Agency
- * Contact: Demo User
- * Contact number: (417) 555-1212
- * Product family: Simple
- * Product: SimpleAnalyzer

* Indicates required

* 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 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

* 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

▼

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


* Short description

* Description/Re-creation steps

PHI

Important 

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

 Add attachments

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

The screenshot shows a web form with several fields and a warning message. A callout box highlights the 'PHI' field with the text 'ALL PHI IS POPULATED IN THIS FIELD'. Another callout box highlights the 'Add attachments' button with the text 'Add attachments'.

* Short description

Claim file

PHI

* Description

Details a

PHI

Important ?

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

Add attachments

Add attachments

Create Case form

Create Case

Create Case

Create a new Support Case

Case Form Data

* Account <input type="text" value="NTST Agency"/>	* Product family <input type="text" value="Simple"/>
* Contact <input type="text" value="Demo User"/>	* Product <input type="text" value="SimpleClaims"/>
* Contact number <input type="text" value="(417) 555-1212"/>	* Function <input type="text" value="Claim Files"/>
<input type="checkbox"/> Communication will be provided via portal. If you prefer a phone call, please check here.	* Category <input type="text" value="Question"/>
Preferred time of call (limited to business hours) <input type="text"/>	* What is the impact of this issue? <ul style="list-style-type: none">• Question/Documentation = Low Impact• Minimal Impact = With minimal daily operational impact• Production only: Moderate Impact = Defect with no major impact
Alternate contact <input type="text"/>	<input type="text" value="Question/Documentation"/>

*** Short description**

*** Description/Re-creation steps**

PHI

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

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 accidentally 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

Claim file question

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

Case Details

Number:
CS2368574

Catalog Item:
Create Case

Account:
NTST Agency

Contact:
Demo User

Case priority:
4 - Low

Category:
Question

Product family:
Simple

Product:
SimpleClaims

Updated:
2m ago

Claim file question

Case

Contact Client internal ticket #

Demo User x Client internal ticket #

Contact number myNote

(417) 555-1212 myNote

Alternate contact Affected Environment

-- None -- Affected Environment

PHI note

Save (Ctrl + s)

Claim file question

Type your message here... Send

DU

Demo User
12/06/2023 07:32:13 PM
CS2368574 Created

Start

Attachments

Drop files here

Actions

Close Case

Secure Data

SDI1579226

Number: SDI1579226
Type: PHI Note
Updated: 12/06/2023 07:32:14 PM
Updated by: demouser@fake.com
Tags: Relevant

Show: Relevant only

Case Information Screen – Case Details

- ① Number – Use this when calling Support
- ① Stage
 - New – Case waiting to be assigned to agent
 - Open – Agent working case
 - Pending – Client gathering information for Support
 - Resolved – Troubleshooting/Answer complete
- ① Case Priority - Determined by the Impact and Urgency of the issue
- ① Updated – Denotes the last update.
 - Hover over the value and the exact date/time of update displays


Case Details	
Number:	CS2368574
Stage:	New
Catalog Item:	Create Case
Account:	NTST Agency
Contact:	Demo User
Case priority:	4 - Low
Category:	Question
Product family:	Simple
Product:	SimpleClaims
Updated:	8m ago
	12/06/2023 06:35:16 PM

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

Claim file question

Description:
Details around the question or steps taken to get to the issue.
REFRAIN FROM ADDING ANY PHI IN THIS FIELD

Claim file question 

Case

* Contact	Client internal ticket #
<input type="text" value="Demo User"/>	<input type="text"/>
* Contact number	myNote
<input type="text" value="(417) 555-1212"/>	<input type="text"/>
Alternate contact	Affected Environment
<input type="text"/>	<input type="text" value="-- None --"/>

PHI note

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

Claim file question

Type your message here... Send

Susy Ryan
12/06/2023 08:05:39 PM • Additional comments
Hi Demo,
Thanks for the details. I did have one question about.....
Appreciate your help.

Demo User
12/06/2023 08:04:47 PM • Additional comments
Hi Susy, Here's the details you requested..... Let me know if you have any questions.

Susy Ryan
12/06/2023 08:04:10 PM • Additional comments
Hi Demo,
I reviewed the question and PHI but have a few questions for you. Left you a voice message with those details. Please update the case with your feedback or give me a call. Thanks.


Demo User
12/06/2023 07:32:13 PM
CS2368574 Created

Start

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

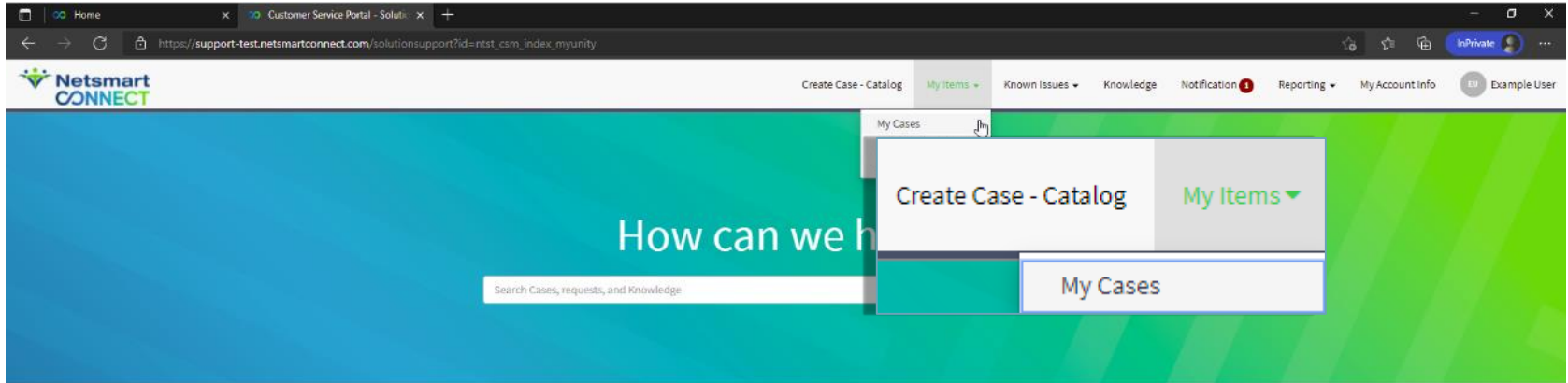
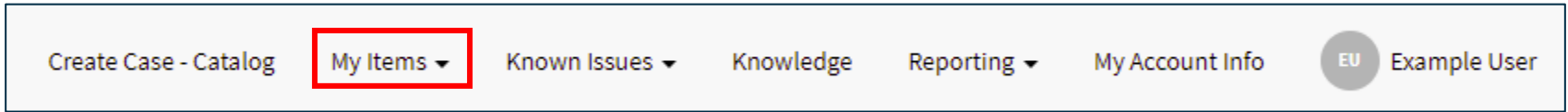
Number: SDI1199459
Type: PHI Note
Updated: 12/12/2022 01:09:57 PM
Updated by: billcontact@fake.com
Tags: Relevant

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 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 12:29:52 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