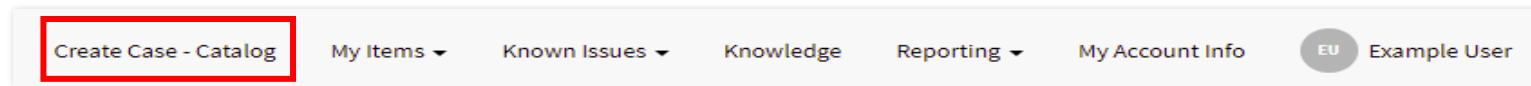# NetsmartCONNECT Solution Support Portal

Training for Simple clients
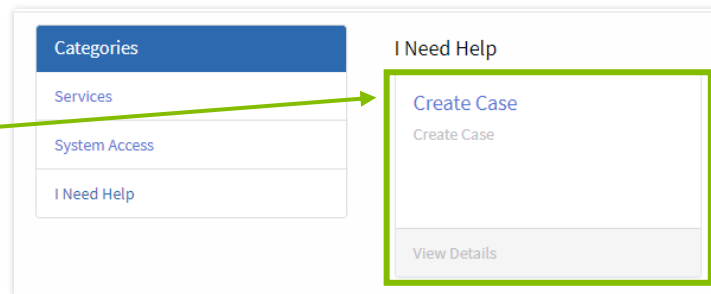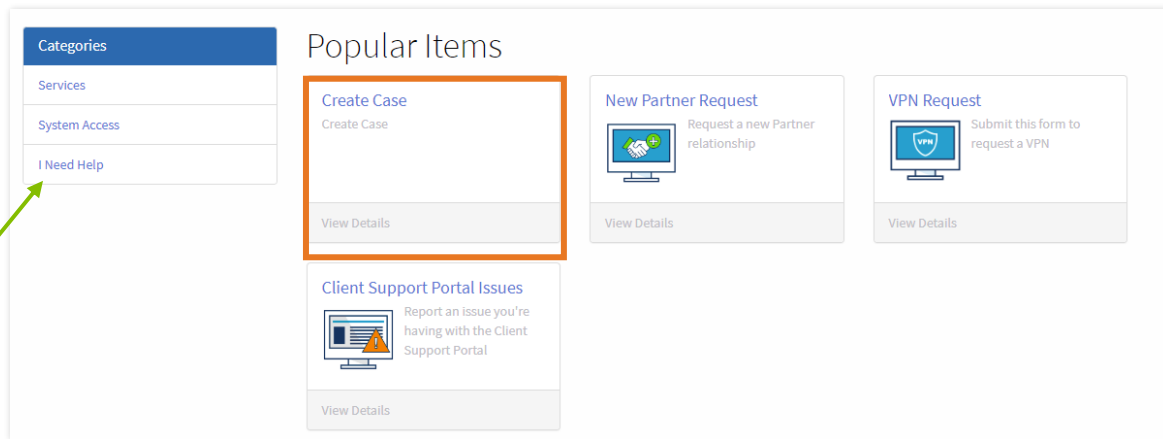
Netsmart

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**

Categories

Services

System Access

I Need Help

Popular Items

Create Case
Create Case

View Details

New Partner Request
Request a new Partner relationship

View Details

VPN Request
Submit this form to request a VPN

View Details

Client Support Portal Issues
Report an issue you're having with the Client Support Portal

View Details

Categories

Services

System Access

I Need Help

I Need Help

Create Case
Create Case

View Details

✦ Netsmart

Main Case Form

Main Case Form

Netsmart CONNECT SUPPORT

NetsmartCONNECT | Create Case - Catalog | My Items ▾ | Known Issues ▾ | Knowledge | Notification ❷ | Surveys ❸ | Reporting ▾ | My Account Info | DU Demo User

⚠ Please call Support for your Netsmart Solution listed on the left. – Thank You. ✕

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 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

Since you selected Yes, 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

Netsmart

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

Netsmart

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

* 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

▾

✨ Netsmart

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

Refrain from including any sensitive information including PHI in this field.

* Description/Re-creation steps

Refrain from including any sensitive information including PHI in this field.

PHI

Important ❓

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

⌗ Add attachments

✚ Netsmart

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

✚ Netsmart

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®

Netsmart

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 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

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

Netsmart

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

Netsmart Support Portal – Access Case Lists
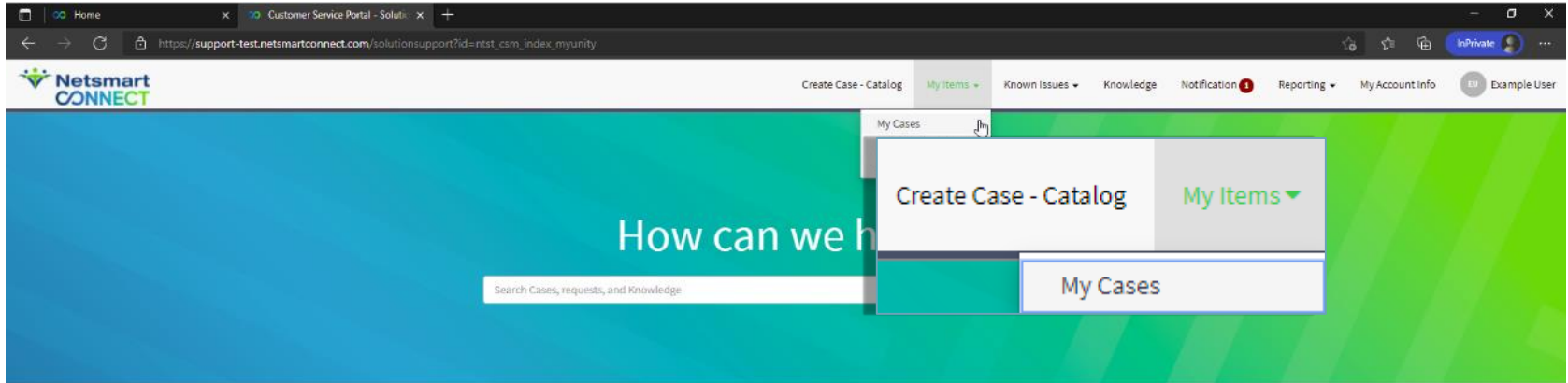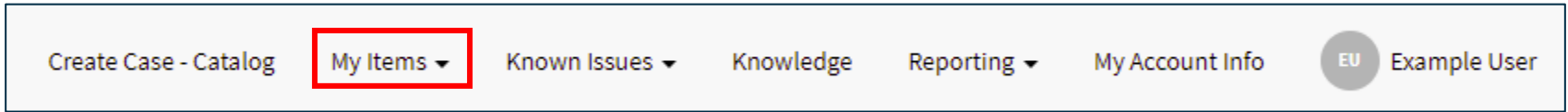
Navigation options for viewing active cases
- May vary depending on Support level access

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