

NetsmartCONNECT Solution Support Portal

Training for Simple clients

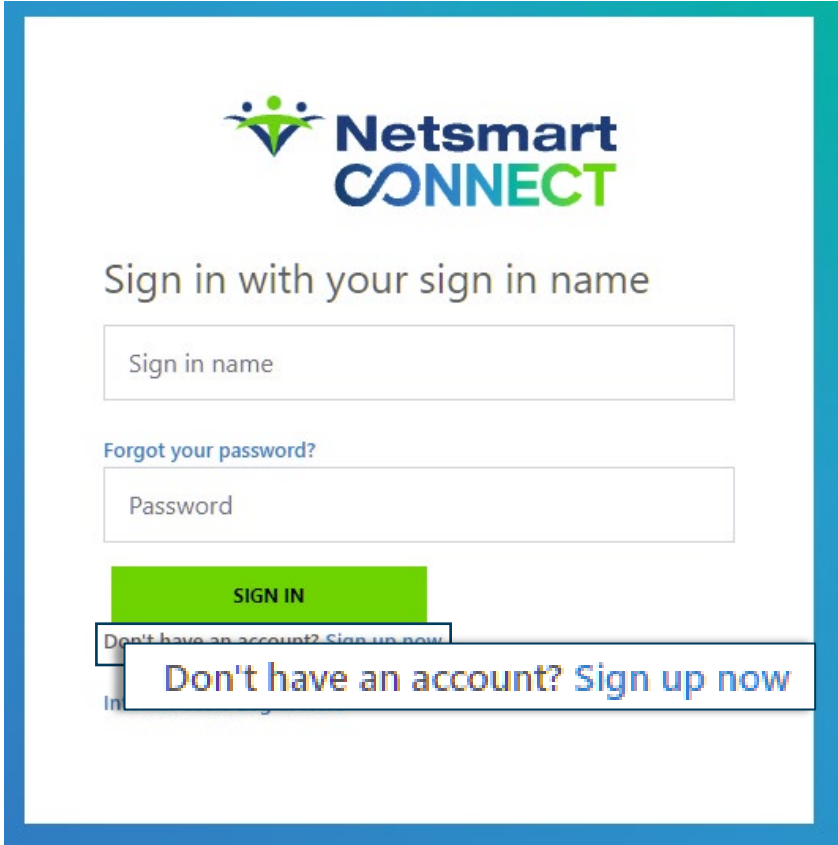
Register for NetsmartCONNECT


Register for NetsmartCONNECT

- ① “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
- ① Begin with registration on NetsmartCONNECT home page

Click [Sign up now](#)

<https://netsmartconnect.com>





Sign in with your sign in name

[Forgot your password?](#)

SIGN IN

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

Complete registration

Fill in required fields

- Client code is your Netsmart account number

- Find your client code in the email mentioned on the previous slide
- If you are unsure of your code...
 - Ask someone at your facility who knows the code
 - Call Simple support if you are not able to find it

Netsmart CONNECT

Email Address*

New Password* Confirm New Password*

First Name* Last Name*

Mobile Phone Primary Phone*


Street Address City

Select State ▾ Zip Code

Title* Client Code*

CREATE CANCEL

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 *Please wait while we process your information.*

Mobile Phone (417) 111-2222

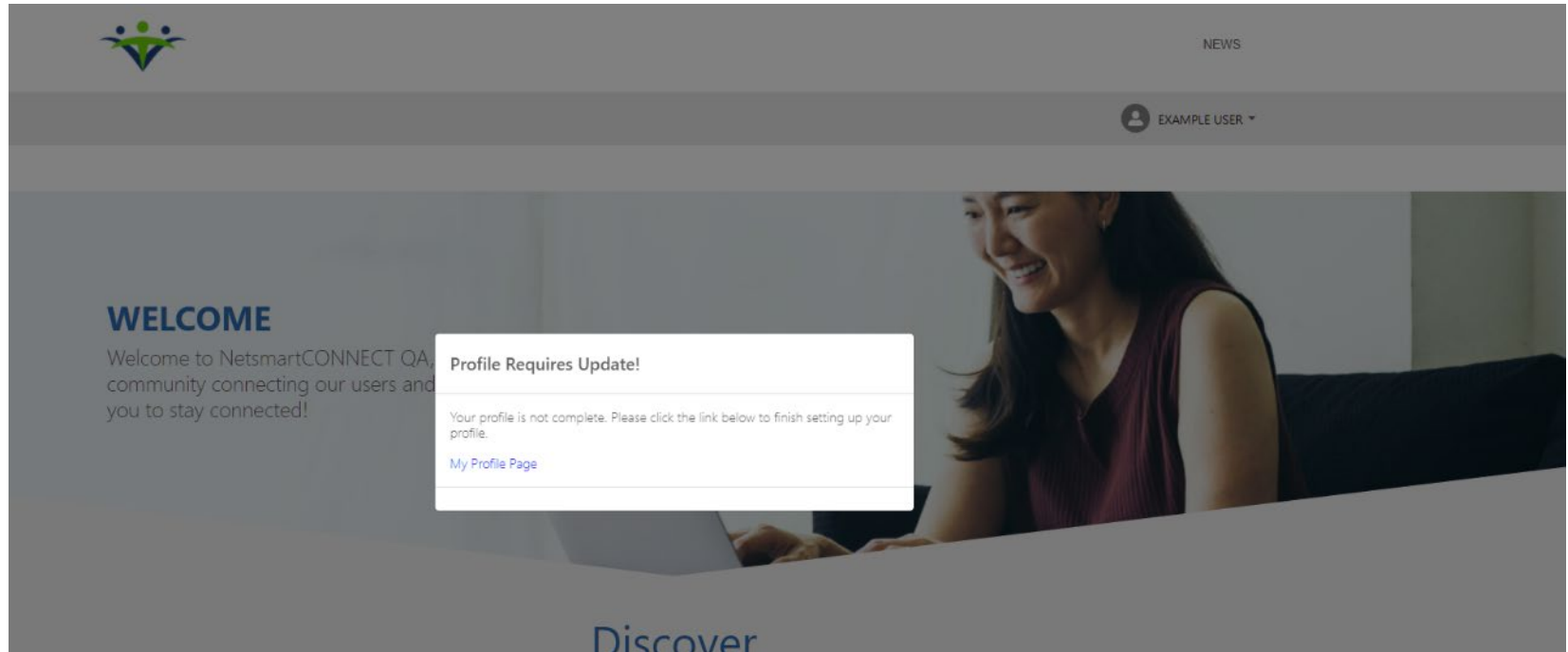
Street Address City

MO Zip Code

Example Title 1281629

CREATE CANCEL

Profile Updates



The screenshot shows a web application interface. At the top left is a logo with three stylized human figures in green and blue. At the top right, the word "NEWS" is visible. Below that, a user profile dropdown shows "EXAMPLE USER" with a small user icon. The main content area features a large background image of a woman smiling while working on a laptop. On the left side of this area, the text reads "WELCOME" in bold, followed by "Welcome to NetsmartCONNECT QA, community connecting our users and you to stay connected!". A white notification box is overlaid in the center, containing the following text: "Profile Requires Update!" in bold, "Your profile is not complete. Please click the link below to finish setting up your profile.", and a blue link labeled "My Profile Page". At the bottom of the main content area, the word "Discover" is partially visible.

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

My Profile

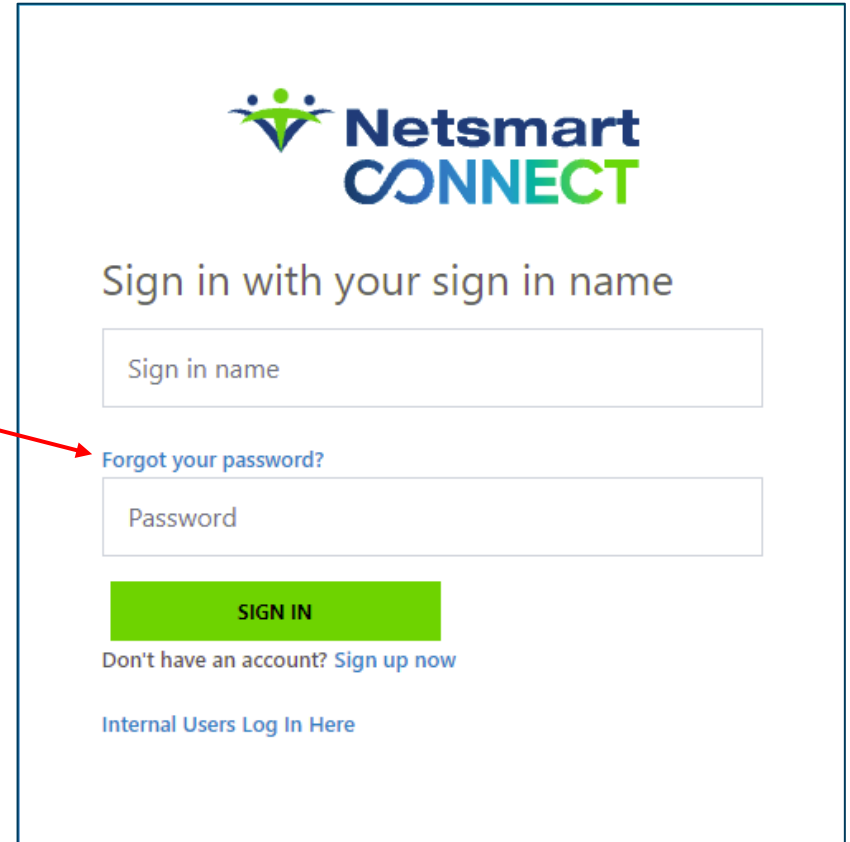
First Name *	Last Name *	
<input type="text" value="Example"/>	<input type="text" value="User"/>	
Title *	Email *	
<input type="text" value="Example Title"/>	<input type="text" value="exampleuser@ntst.com"/>	
<input checked="" type="checkbox"/> Public Display?	<input checked="" type="checkbox"/> Public Display?	
Primary Phone *	Mobile Phone	
<input type="text" value="(417) 111-2222"/>	<input type="text"/>	
<input checked="" type="checkbox"/> Public Display?	<input checked="" type="checkbox"/> Public Display?	
Street Address		
<input type="text"/>		
<input checked="" type="checkbox"/> Public Display?		
City	State	Zip Code
<input type="text"/>	<input type="text" value="MO"/>	<input type="text"/>
<input checked="" type="checkbox"/> Public Display?	<input checked="" type="checkbox"/> Public Display?	<input checked="" type="checkbox"/> Public Display?
Focus Areas *	Regions *	
<input type="text" value="Choose Focus Area(s)"/>	<input type="text" value="Choose Region(s)"/>	
Lines of Service *		
<input type="text" value="Choose Line(s) of service"/>		
<input checked="" type="checkbox"/> Public Display?		


SAVE

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



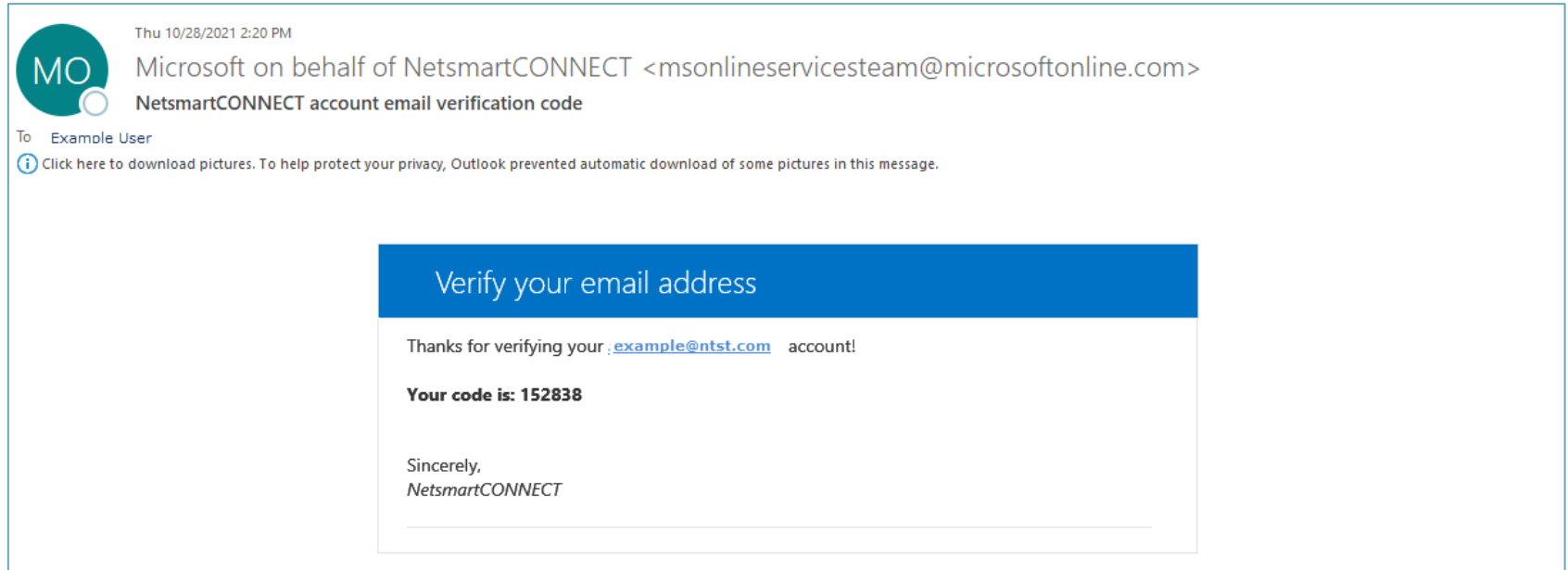
Verification is necessary. Please click Send button.

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

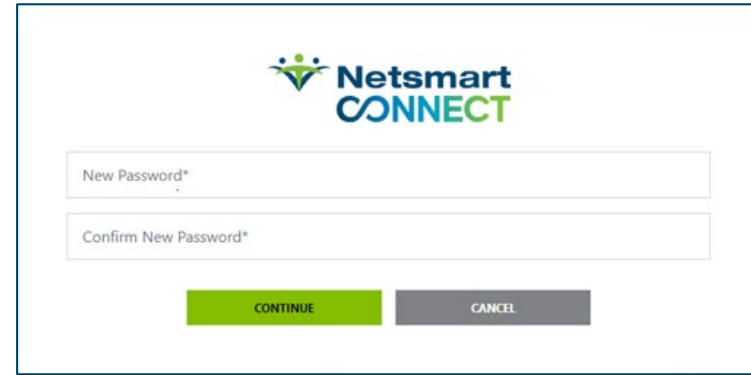
VERIFY CODE SEND NEW CODE

CONTINUE CANCEL

Create new password

Enter desired password to complete login process

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



The screenshot shows the Netsmart CONNECT password creation interface. At the top center is the Netsmart CONNECT logo, featuring a green stylized figure above the text "Netsmart" in blue and "CONNECT" in green. Below the logo are two input fields: "New Password*" and "Confirm New Password*", both with asterisks indicating they are required. At the bottom of the form are two buttons: a green "CONTINUE" button and a grey "CANCEL" button.

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

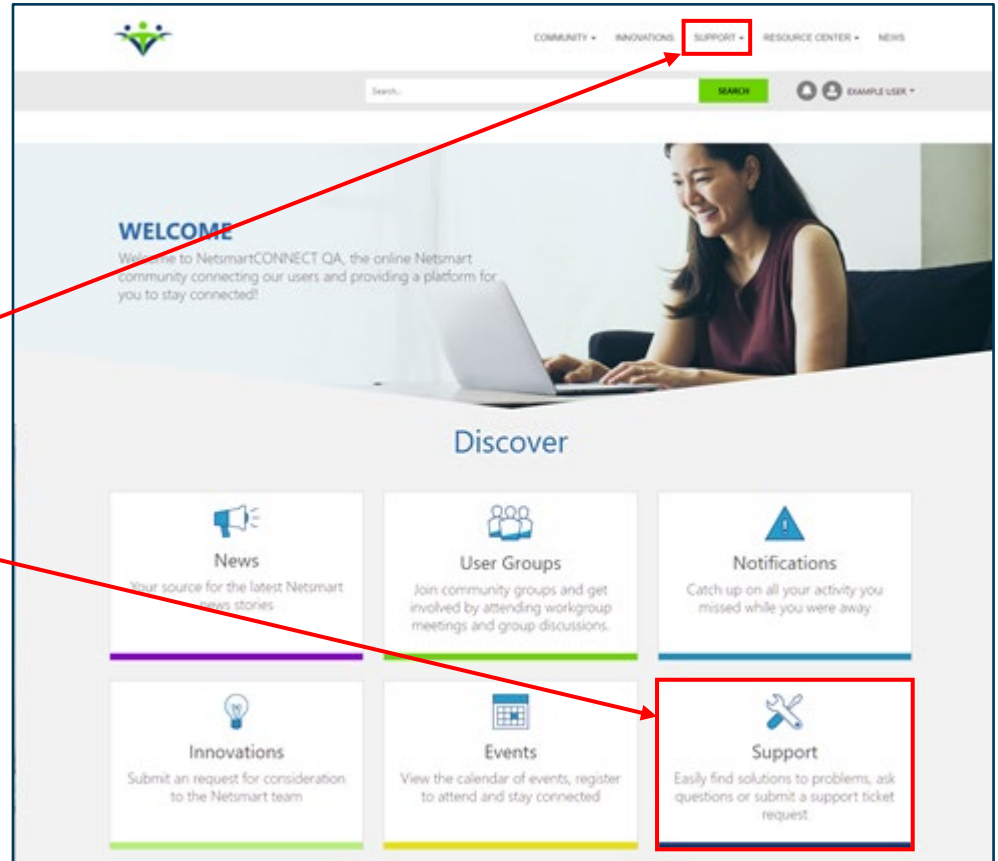
- Find answers to questions quickly (*coming soon*)

Known Issues

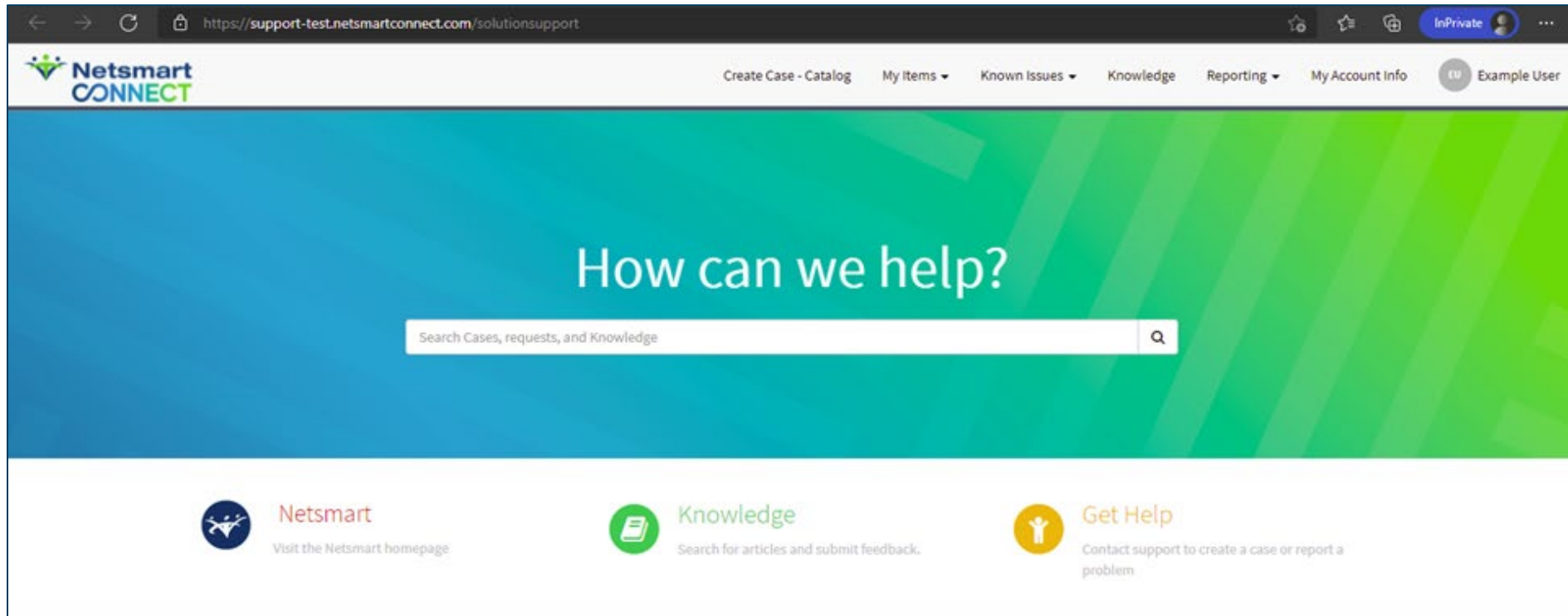
- Search and watch current Known Issues for update notifications

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



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. A user profile for 'Example User' is visible in the top right. 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 action cards: '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).

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

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



Create Case - Catalog

My Items ▾

Known Issues ▾

Knowledge

Reporting ▾

My Account Info

EU Example User

How can we help?

Search Cases, requests, and Knowledge



Netsmart

Visit the Netsmart homepage



Knowledge

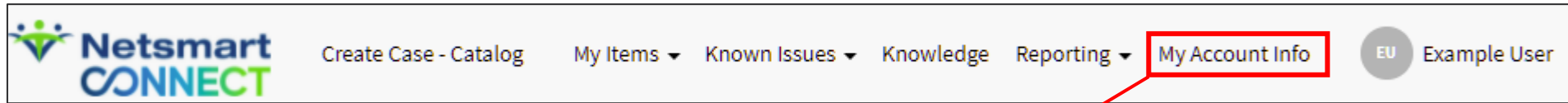
Search for articles and submit feedback.



Get Help

Contact support to create a case or report a problem

Important Information – Your Account Number



The screenshot shows the top navigation bar of the Netsmart CONNECT application. On the left is the Netsmart CONNECT logo. To its right are several menu items: 'Create Case - Catalog', 'My Items' with a dropdown arrow, 'Known Issues' with a dropdown arrow, 'Knowledge', 'Reporting' with a dropdown arrow, and 'My Account Info' which is highlighted with a red rectangular box. On the far right, there is a user profile icon with the initials 'EU' and the text 'Example User'.



The screenshot shows a section titled 'Account Information' with a red header. Below the header, there are four fields arranged in two columns. The first column contains 'Name: NTST Homecare Agency' and 'Primary Market: Care at Home'. The second column contains 'Customer Number: 1281629' and 'Primary Sector: Home Health'. The 'Customer Number' field is highlighted with a red rectangular box, and a red arrow points from this box to the 'My Account Info' menu item in the navigation bar above.

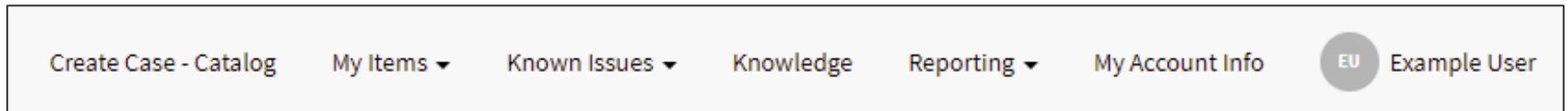
Providing your account number will simplify opening a case when calling Support



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

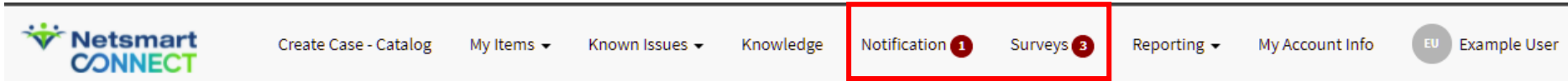
Navigating Solution Support Menu

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

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

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

OR

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

The screenshot shows the 'Popular Items' section of the user interface. On the left, there is a 'Categories' sidebar with 'I Need Help' selected. The main area displays three cards: 'Create Case' (highlighted with an orange border), 'New Partner Request', and 'VPN Request'. Below these is a card for 'Client Support Portal Issues'. Each card includes a 'View Details' link at the bottom.

The screenshot shows the 'I Need Help' category page. The 'Categories' sidebar on the left has 'I Need Help' selected. The main area displays a single card for 'Create Case', which is highlighted with a green border. A 'View Details' link is located at the bottom of the card.

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

* 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

Required information

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

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

* 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 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

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 is titled 'Create Case' and includes a search bar at the top right. The form is divided into several sections:

- Urgent Issue?**: A section with an orange header and a text box containing 'Simple: +1 (877) 521-9834'.
- Case Form Data**: A section with several fields:
 - Account**: A dropdown menu with 'NTST Agency' selected.
 - Contact**: A dropdown menu with 'Demo User' selected.
 - Contact number**: A text input field with '(417) 555-1212' entered.
 - Preferred time of call**: A text input field with a note '(limited to business hours)'. There is a checkbox for 'Communication will be provided via portal, if you prefer a phone call, please check here.' which is currently unchecked.
 - Alternate contact**: A dropdown menu.
- Product family**: A dropdown menu with 'Simple' selected.
- Product**: A dropdown menu with 'SimpleAnalyzer' selected.

Red asterisks (*) indicate required fields. The 'Submit' button is located at the bottom right of the form.

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 callout box. The callout box, which has a blue border, contains the text "PHI" in bold and "ALL PHI IS POPULATED IN THIS FIELD" in a grey box. The form fields include:

- * Short description
- Claim file
- * Description
- Details a
- PHI
- Important ⓘ
- A red warning box: "By clicking the Submit button, you agree to grant Netsmart permission to access your system remotely. ✕"
- Ⓞ Add attachments

At the bottom right, there is a button with a paperclip icon and the text "Add attachments", which is highlighted with a blue border.

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 = LowMinimal Impact = With minimal daily operational impactProduction 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.

Claim file question 

Case

Contact **Client internal ticket #**

Contact number **myNote**

Alternate contact **Affected Environment**

PHI note

Case Details

Number:
CS2368574

Catalog Item:
Create Case

Account:
NTST Agency

Contact:
Demo User

Case priority:
4 - Low

Category:
Question

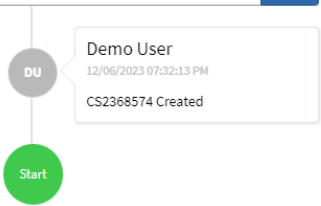
Product family:
Simple


Product:
SimpleClaims

Updated:
2m ago

Claim file question

Type your message here...



Attachments 
Drop files here

Actions

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

Show:

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

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

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

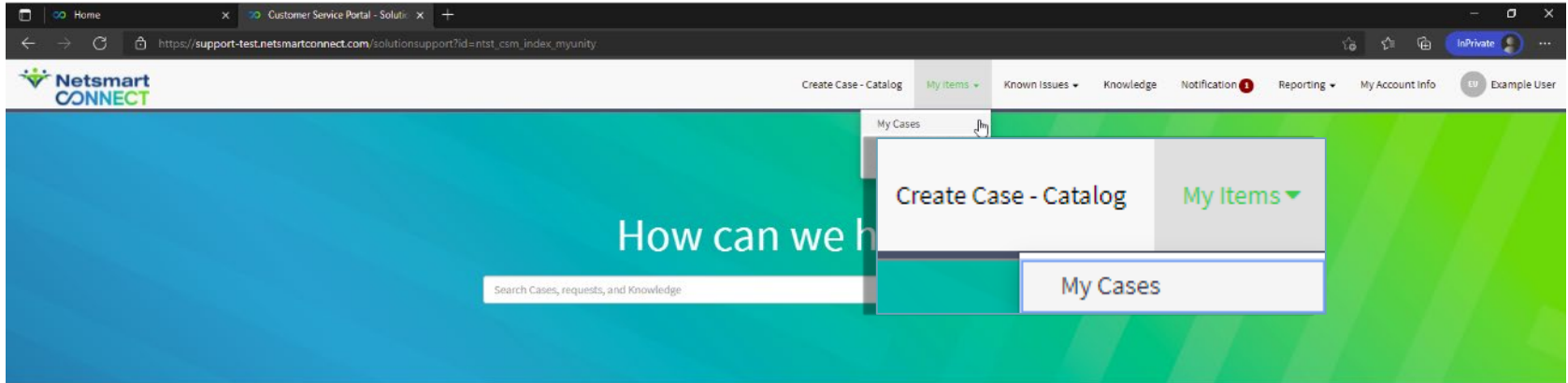
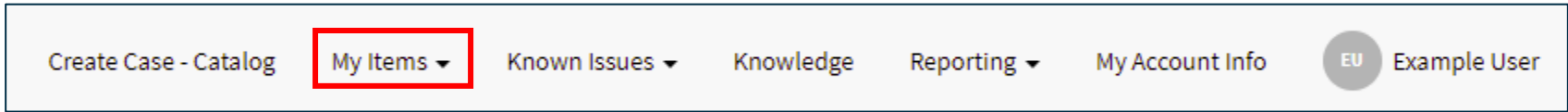
Number: SDI1199459
Type: PHI Note
Updated: 12/12/2022 01:09:57 PM
Updated by: billcontact@fake.com
Tags: Relevant

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

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

The screenshot displays a case management interface. A modal dialog box titled "Provide a reason for Closing" is open, featuring a text input field labeled "Comments required" and a blue "Submit" button. A red arrow points from the "Submit" button to a green "Close Case" button located in the "Actions" section of the case details panel on the right. The background interface includes a "Tell us what's wrong" section with a "Save (Ctrl+s)" button, a "Case" section with fields for "Contact" (Demo User), "Contact number" ((417) 555-1212), "Alternate contact", and "Affected Environment" (None). The right-hand panel shows case details such as "Stage: Open: Received Client Response", "Catalog Item: Create Case", "Account: NTST Agency", "Contact: Demo User", "Case priority: 3 - Moderate", "Category: Question", "Product family: Simple", "Product: SimpleAnalyzer", "Assigned to: Susy Ryan", "Updated: 3d ago", and "Known issue(s): SIM-3 (Primary)".

Resuming Cases – Resolved 2-day Workflow

Resume Case

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

The screenshot displays a web-based case management interface. A modal dialog box is open, titled "Resume Case". The dialog contains the following text: "If the resolution provided has not resolved the reported issue, provide additional details so we may continue investigating." and "If this is a new or unrelated issue, please click Cancel and create a new case." Below the text is a text input field labeled "Comments required" and two buttons: "Submit" and "Cancel". A red arrow points from the "Resume Case" button in the background interface to the "Comments required" field in the dialog. The background interface shows a case titled "Have a billing question" with a description and resolution notes. The case details include a contact named "Demo User", a contact number "(417) 556-5454", and a "PHI note" field.

Resuming Cases – Resolved 6-day Workflow

The screenshot displays a case management interface with the following components:

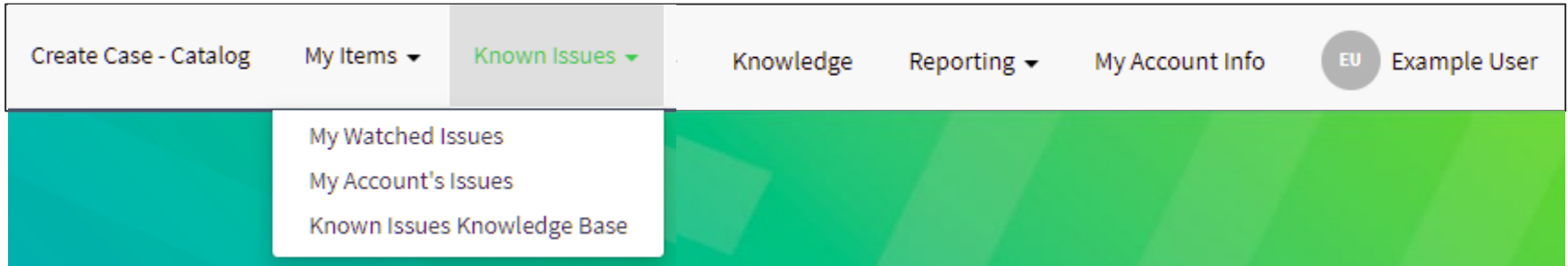
- Batch Not Being Scrubbed** (top left):
 - Description:** Batch 1386 is stuck in the pending state and getting fully scrubbed to move to pending approval.
 - Resolution notes:** Walk-through steps to resolve issue (highlighted in a red box).
- Actions** (top right):
 - Accept Solution** (highlighted in a red box, with a red arrow pointing to the callout).
 - Resume Case** (green button).
- Case Details** (bottom right):
 - Number:** CS2368551
 - Stage:** Resolved: Pending Verification
 - Account:** NTST Agency
 - Contact:** Demo User
 - Case priority:** 2 - High
 - Category:** Don't have access
 - Product family:** Simple
- Case Form** (middle left):
 - Case** header.
 - * Contact:** Demo User (dropdown).
 - * Contact number:** (417) 555-1212 (text input).
 - Alternate contact:** (dropdown).
 - PHI note:** (text input).
- Callout Box** (center):
 - Allows client additional time to validate solution prior to closure.
 - Client can accept solution anytime in 6-day window.

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

The screenshot displays the 'Known Issues' section of the Solution Support Portal. The page header includes the Netsmart CONNECT logo, a search bar, and navigation links such as 'NetsmartCONNECT', 'Create Case - Catalog', 'My Items', 'Known Issues', 'Knowledge', 'Notification', 'Surveys', 'Reporting', 'My Account Info', and 'Demo User'. A dropdown menu is open over the 'Known Issues' header, showing options: 'My Watched Issues', 'My Account's Issues', and 'Known Issues Knowledge Base'. Below the header, there is a table of known issues. The table has columns for 'Issue number', 'Short description', 'Product', 'Issue status', 'Issue priority', and 'Updated'. The issue SIM-5 is highlighted with a white box, and its details are shown in a tooltip: 'SIM-5 Claim error 6540654 when submitting for Medicare SimpleCFS Design 4-Low 12/06/2023 06:03:03 PM'.

Issue number	Short description	Product	Issue status	Issue priority	Updated
SIM-6	Jira workflow example case	SimplePBJ	Design	4-Low	10/20/2023 03:02:56 PM
SIM-5	Claim error 6540654 when submitting for Medicare	SimpleCFS	Design	4-Low	12/06/2023 06:03:03 PM
SIM-4	Claim error 6540654 when submitting for Medicare	SimpleCFS	Design	4-Low	12/06/2023 06:03:03 PM
SIM-3	Testing the Jira workflow	SimpleCFS	Design	3-Medium	10/20/2023 03:38:29 PM
SIM-2	Testing the Simple workflow	SimpleCFS	Discovery	4-Low	11/15/2023 01:58:07 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

Issue number: SIM-5	Short description: Claim error 6540654 when submitting for Medicare
Product family: Simple	Product: SimpleCFS
Issue status: Design	Issue type: Defect
Reproduction steps: how did we get to the error	

Actions

[Unwatch Issue](#)

[Share Issue](#)

Details

Description:
What's the scoop.....

Workaround:
No workaround available.

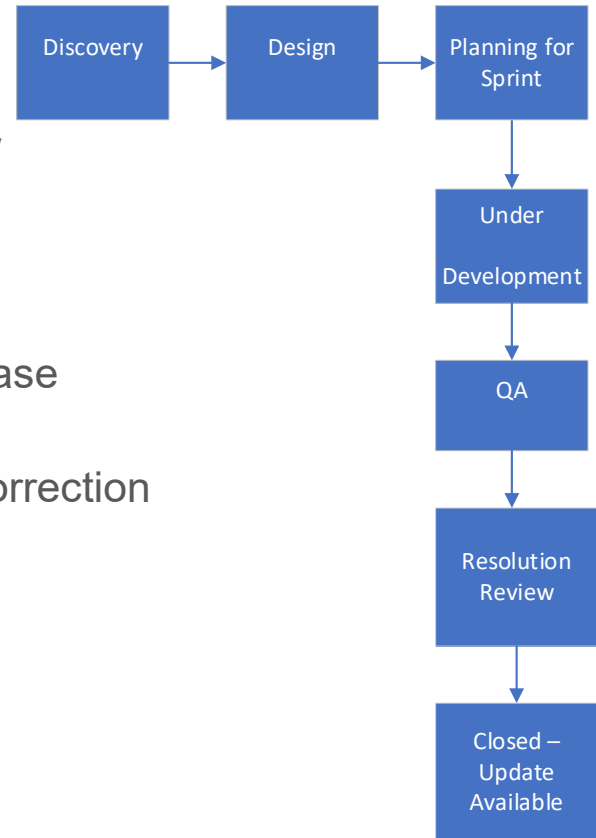
Related Cases

[CS2367899](#) [CS2367900](#)

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

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

Claim error 6540654

Description:
The error displayed after I clicked.....

Resolution notes:
This issue has been identified as Known Issue SIM-5-Claim error 6540654 when submitting for Medicare.

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 Support case.

Claim error 6540654

Case

* Contact: Demo User x v

* Contact number: (417) 555-1212

Alternate contact: v

PHI note:

Client internal ticket #:

myNote:

Affected Environment: -- None -- v

Claim error 6540654

Actions

Resume Case

Case Details

Number: CS2368575

Stage: Resolved: Known Issue Identified

Account: NTST Agency

Contact: Demo User

Case priority: 4 - Low

Category: Malfunction / Unexpected Behavior

Product family: Simple

Product: SimpleCFS

Assigned to: Susy Ryan

Updated: just now

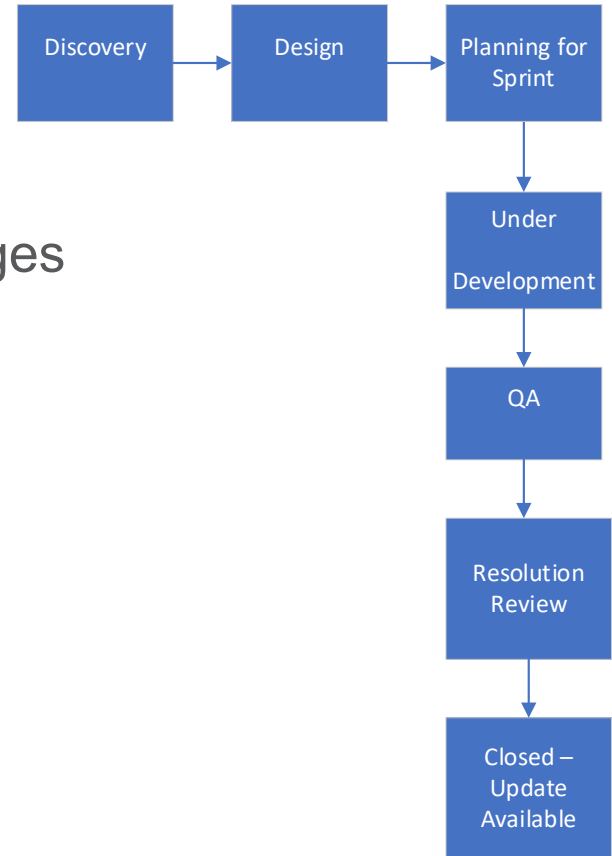
Known issue(s): SIM-5 (Primary)


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





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

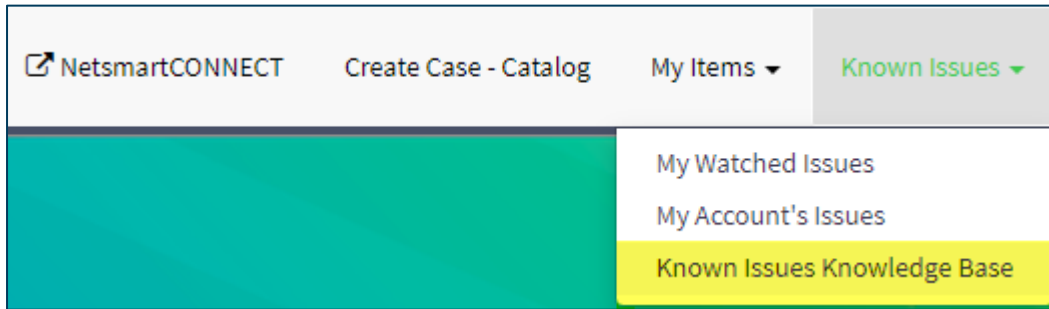
Issue:
Click here to view: [NetsmartConnect Portal](#)
Issue Description: Testing Jira issues



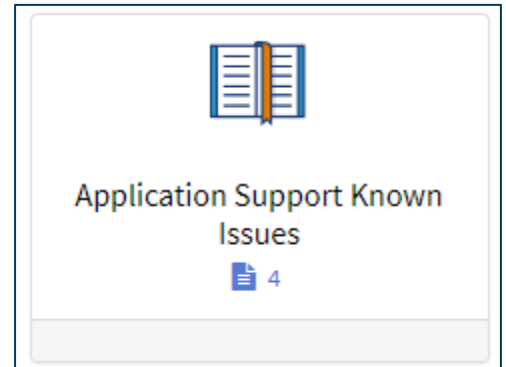
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Known Issue Knowledge Base



- 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!!