

# Client Support Portal

Training for Netsmart EVV Clients

# Accessing Client Support Portal

# Requesting Access

- ① Contact your Agency Administrator as they can request a Support Portal account on your behalf.
  - All users must have a unique e-mail address, e-mails may not be shared.
  
- ① Call Support, be prepared with:
  - Your Full Name
  - Your e-mail address
  - Your Phone Number
  - Your Agency Name
  - You Agency Administrator Name and Contact Details
  
- Netsmart EVV Toll-Free Support Line: 1-833-483-5587

# When access is granted

- New user welcome email

Subject: Welcome to ServiceNow

Hi Susy,

Welcome to ServiceNow. To get started, go to

<https://netsmartcares.force.com/>

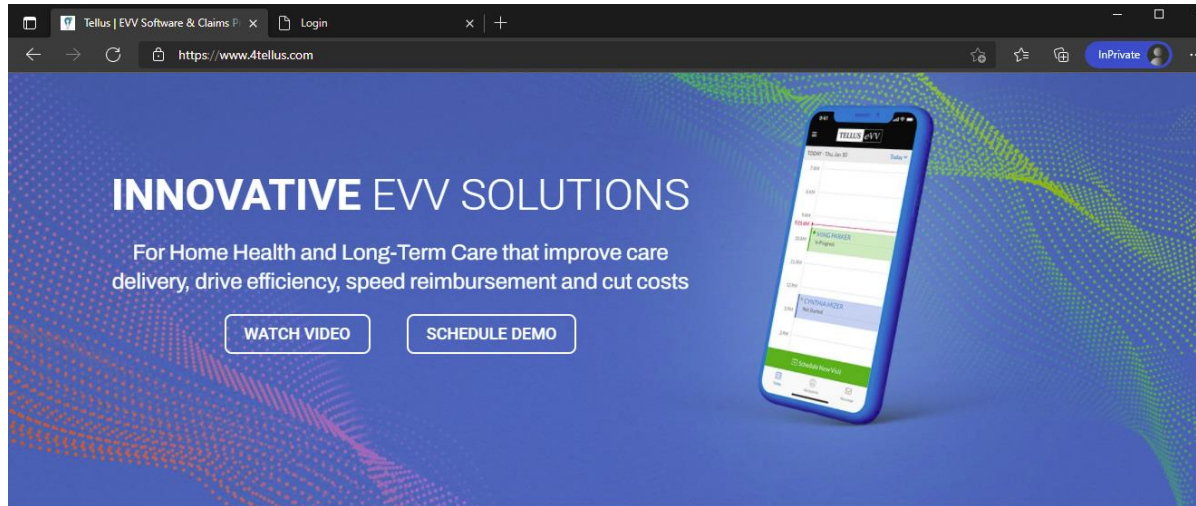
Your Username: yourname@agencydomain.com

Thanks,

NetsmartCares

- Login using temporary password then follow prompts

# Access Support Portal: 4Tellus.com website



The Open Support Ticket button on the 4tellus website will now redirect you to the NetsmartCares login portal.

**IMPORTANT UPDATES**

Netsmart Acquires Tellus. Adds seamless EVV capabilities and enhancements to the Netsmart population health management offering.

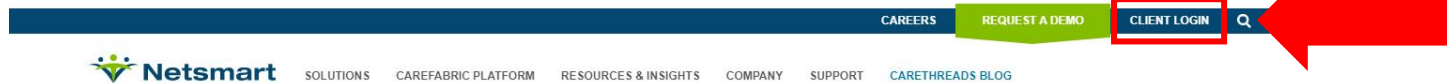
[VIEW RELEASE](#)

**TRAINING WEBINARS**

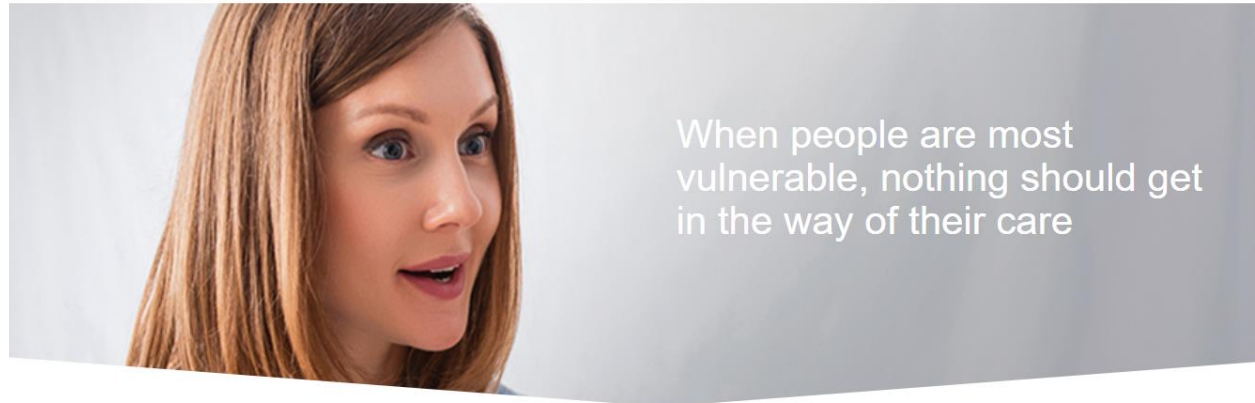
**OPEN SUPPORT TICKET**



# Access Support Portal: ntst.com website



SOLUTIONS CAREFABRIC PLATFORM RESOURCES & INSIGHTS COMPANY SUPPORT CARETHREADS BLOG



When people are most vulnerable, nothing should get in the way of their care

Recommended: Use the ntst.com main page and click **Client Login**

## PARTNERING WITH PROVIDERS TO DELIVER VALUE-BASED CARE THROUGH TECHNOLOGY, SERVICES AND ADVOCACY

### Helping you integrate care

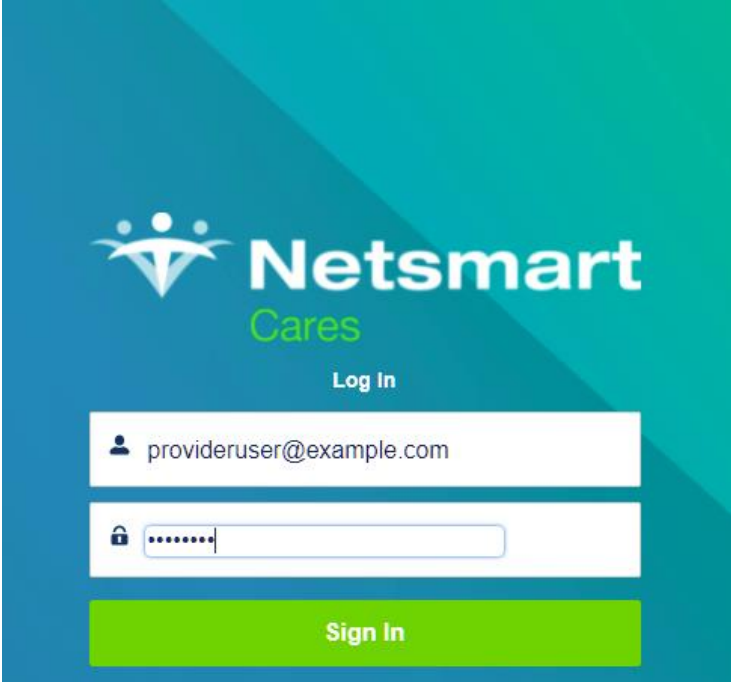
You help those who need it the most. You want to do more. Take more action. Help more people.

As dedicated as you are to serving vulnerable communities during this time of need, you need an equally dedicated partner to support you. Never has our promise to you been more true than during COVID-19. We are in this together with our clients, and real-time feedback from clients has resulted in rapid innovations to update our CareRecords to deliver COVID-19 screener questions right into our EHR systems. This rapid update to systems have enabled care providers to effectively adopt CMS guidelines for COVID-19 screening and generate reporting to proactively inform care decisions.


### THE NETSMART STORY



# Enter your login credentials



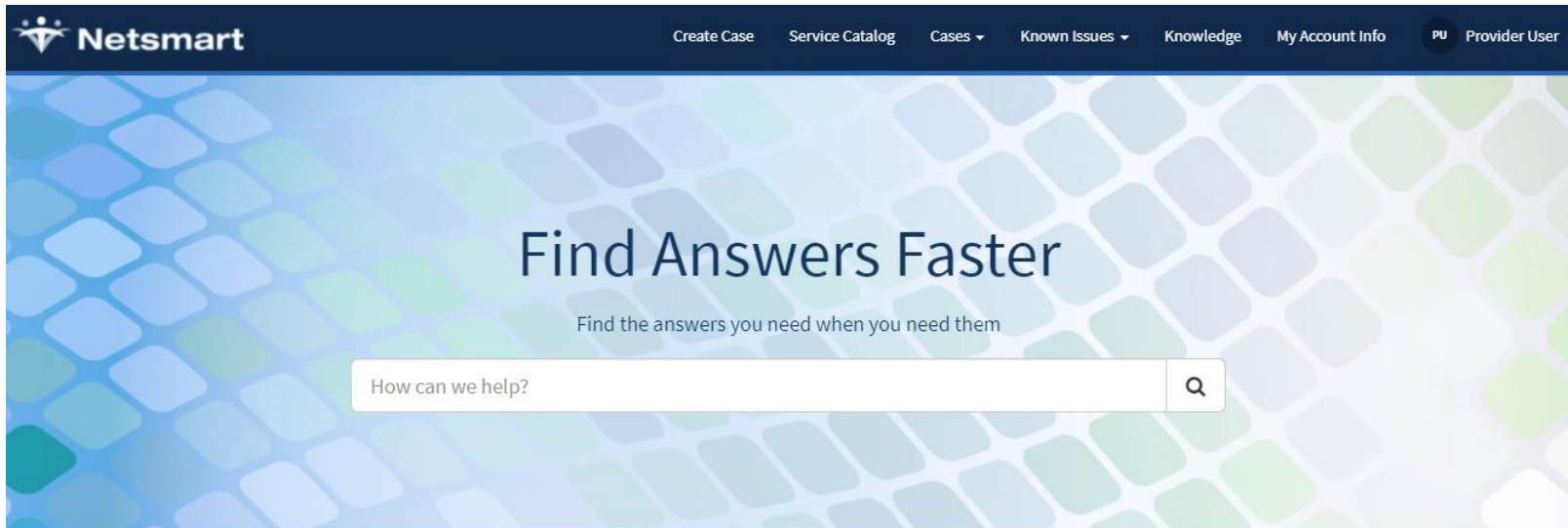
The image shows a login form for 'Netsmart Cares'. The background is a teal-to-blue gradient. At the top left is the Netsmart logo, which consists of three stylized human figures in white. To the right of the logo, the word 'Netsmart' is written in white, and 'Cares' is written in a light green color below it. Below the logo and text, the words 'Log In' are centered in white. There are two input fields: the first is for an email address, containing 'provideruser@example.com', and the second is for a password, shown as a series of dots. Below these fields is a large green button with the text 'Sign In' in white.

 **Netsmart**  
Cares

Log In

Sign In

# Successful Login



The screenshot shows the Netsmart website homepage. At the top, there is a dark blue navigation bar with the Netsmart logo on the left and several menu items: "Create Case", "Service Catalog", "Cases", "Known Issues", "Knowledge", "My Account Info", and "PU Provider User". The main content area has a light blue and green patterned background. In the center, the text "Find Answers Faster" is displayed in a large, dark blue font, with the subtitle "Find the answers you need when you need them" below it. A search bar is positioned below the text, containing the placeholder text "How can we help?" and a magnifying glass icon on the right. The search bar is white with a thin border.



Netsmart

Visit the Netsmart homepage



Knowledge

Search for articles and submit feedback.



Get Help

Contact support to create a case or report a problem



# Features and Functionality

# 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

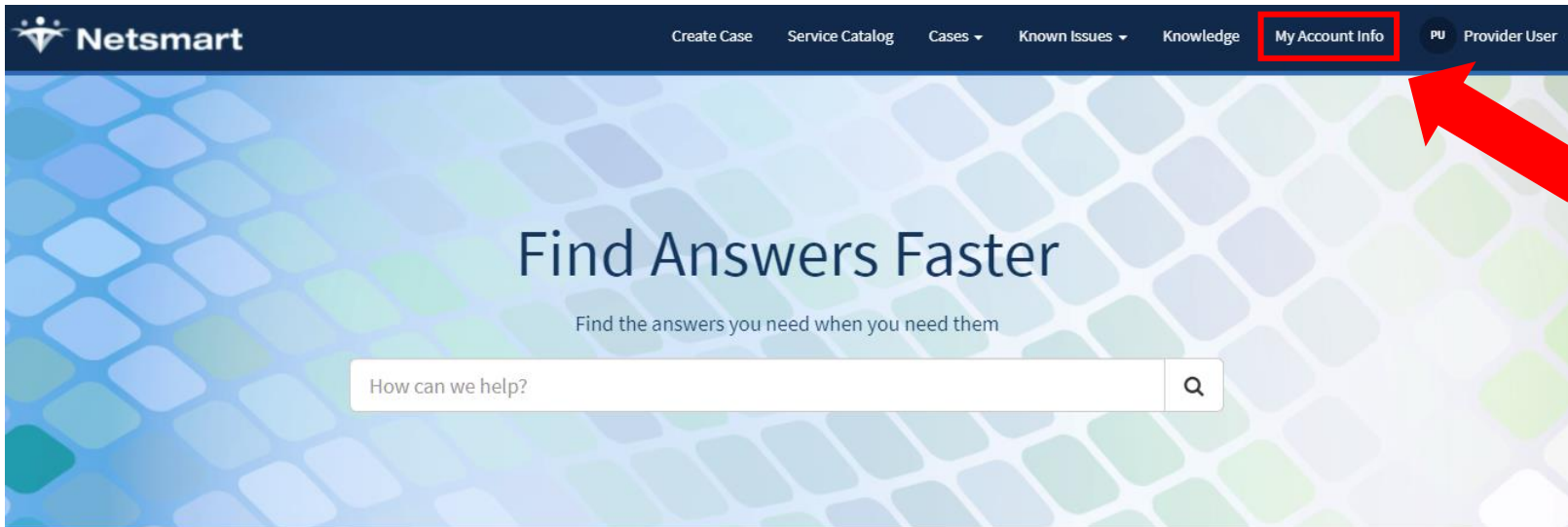
## Knowledge base

- Find answers to questions quickly

## Known Issues

- Search and tag current Known Issues for update notifications

# Important Information – Your Account Number



**Netsmart** Create Case Service Catalog Cases ▾ Known Issues ▾ Knowledge **My Account Info** PU Provider User

## Find Answers Faster

Find the answers you need when you need them

How can we help?



**Netsmart**

Visit the Netsmart homepage



**Knowledge**

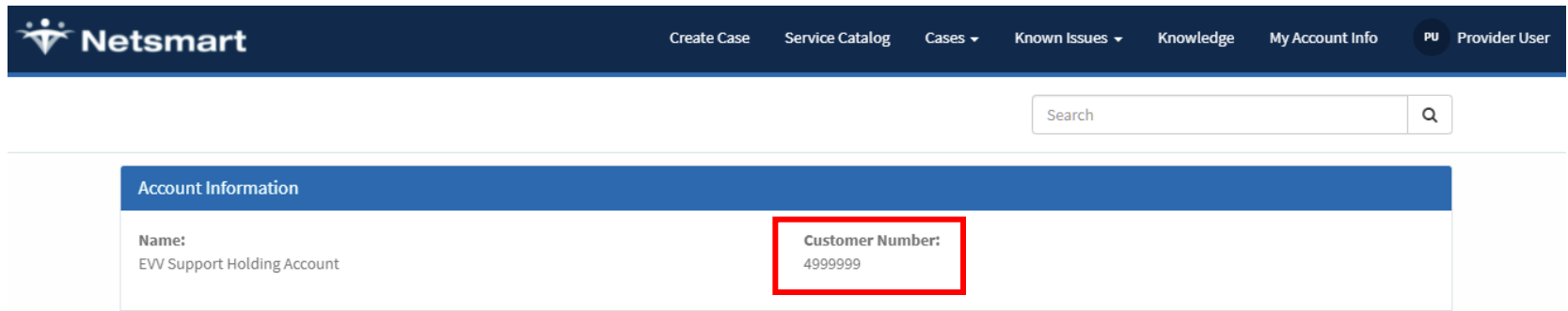
Search for articles and submit feedback.



**Get Help**

Contact support to create a case or report a problem

# Important Information – Your Account Number



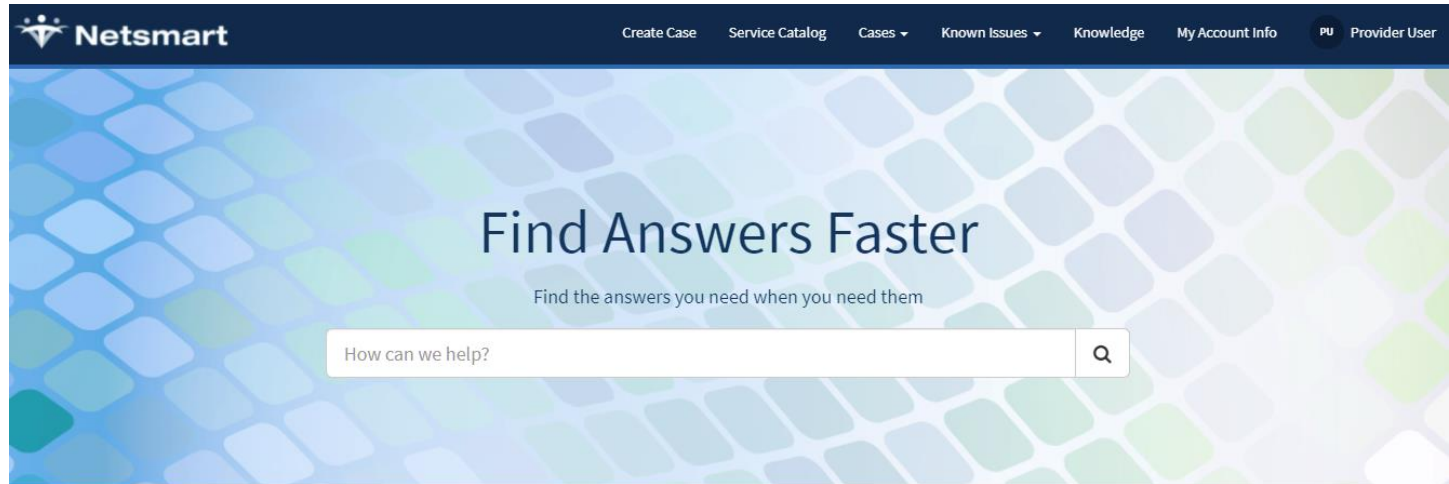
The screenshot displays the Netsmart user interface. At the top, there is a dark blue navigation bar with the Netsmart logo on the left and several menu items: 'Create Case', 'Service Catalog', 'Cases', 'Known Issues', 'Knowledge', 'My Account Info', and 'PU Provider User'. Below the navigation bar is a search bar with the text 'Search' and a magnifying glass icon. The main content area features a blue header for 'Account Information'. Below this header, there are two fields: 'Name: EVV Support Holding Account' and 'Customer Number: 4999999'. The 'Customer Number' field is highlighted with a red rectangular border.

Account Information	
<b>Name:</b> EVV Support Holding Account	<b>Customer Number:</b> 4999999

Make a note – Having your account number ready will simplify opening a case with our Support Call Center

# Creating Support Case

# Unified Search



Netsmart

Visit the Netsmart homepage



Knowledge

Search for articles and submit feedback.

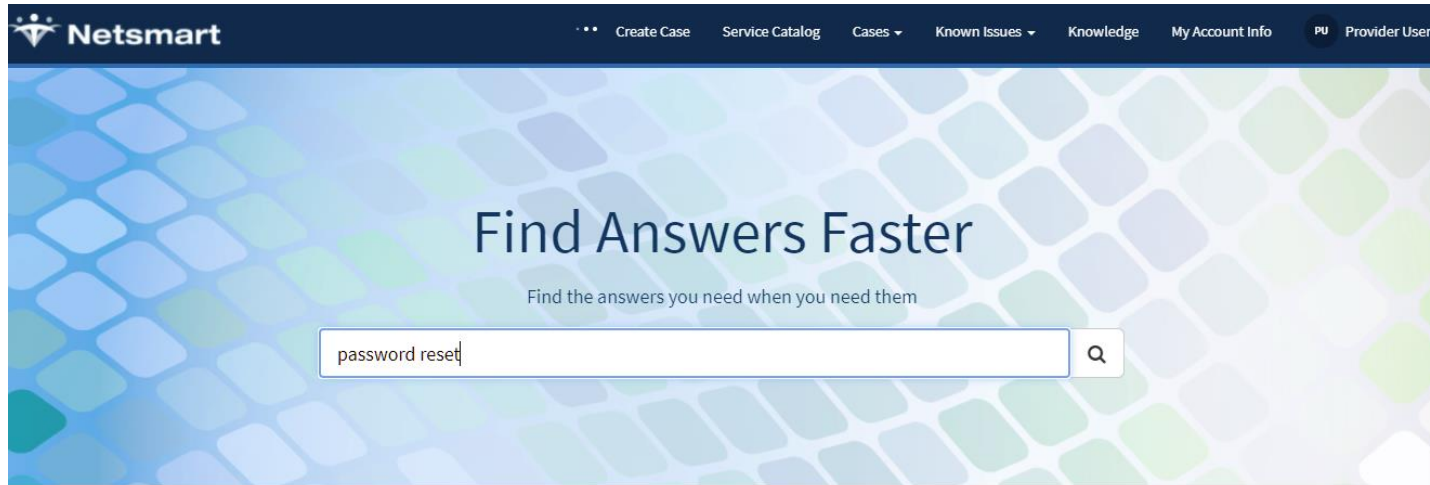


Get Help

Contact support to create a case or report a problem

Always start with our unified search. This will let you lookup current cases, Knowledgebase Articles and Known Issues.

# Unified Search



The screenshot shows the Netsmart website interface. At the top, there is a dark blue navigation bar with the Netsmart logo on the left and several menu items: 'Create Case', 'Service Catalog', 'Cases', 'Known Issues', 'Knowledge', 'My Account Info', and 'Provider User'. Below the navigation bar is a large banner area with a blue and green geometric pattern. The banner contains the text 'Find Answers Faster' and 'Find the answers you need when you need them'. A search bar is positioned in the center of the banner, containing the text 'password reset' and a magnifying glass icon to its right.



Netsmart

Visit the Netsmart homepage



Knowledge

Search for articles and submit feedback.



Get Help

Contact support to create a case or report a problem

For example, search for Password Reset then hit Enter

# Unified Search




> All

> Case


> Known Issues

> Knowledge Bases

Search results for 'password reset'

 Need password reset


Number: CS1237295 · Priority: 4 - Low · State: Closed · Updated: 19d ago

 I need a password reset

Number: CS1237337 · Priority: 4 - Low · State: Closed · Updated: 18d ago

 I need a password reset

Number: CS1237374 · Priority: 4 - Low · State: New · Updated: 19d ago

 Password reset

Number: CS1233000 · Priority: 4 - Low · State: Closed · Updated: 19d ago

Search will return current and prior cases, Known Issues and Knowledgebase Articles which may help you find what you need right away.



# Create Support Case

The screenshot shows the Netsmart website interface. At the top, a dark blue navigation bar contains the Netsmart logo on the left and several menu items on the right: 'Create Case' (highlighted with a red box), 'Service Catalog', 'Cases' (with a dropdown arrow), 'Known Issues' (with a dropdown arrow), 'Knowledge', 'My Account Info', and 'Provider User' (with a 'PU' icon). Below the navigation bar is a large banner with a blue and green geometric pattern. The banner features the text 'Find Answers Faster' in a large font, followed by the subtitle 'Find the answers you need when you need them'. Below this is a search bar with the placeholder text 'How can we help?' and a magnifying glass icon. At the bottom of the page, there is a white footer area with three columns of content. The first column has the Netsmart logo and the text 'Netsmart Visit the Netsmart homepage'. The second column has a green icon of a document and the text 'Knowledge Search for articles and submit feedback.'. The third column has an orange icon of a person and the text 'Get Help Contact support to create a case or report a problem'. This 'Get Help' section is highlighted with a red box.

If you do not find an answer, log a Support Case using either of the two buttons highlighted above.

# Create Support Case

Home > Create Support Case

## Create Support Case


\* 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

 Add attachments

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

Search

**Urgent Issue?**


If the issue is urgent, please contact support at:

Netsmart EVV:  
+1 (833) 483-5587

This initial question is to remind you to call if there is a critical outage occurring.

For typical questions, click No and then continue.

# Create Support Case

 Please call Support for your Netsmart Solution listed on the right. – Thank You. ✕ PU Provider User

[Home](#) > [Create Support Case](#)

## Create Support Case

\* 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

 Add attachments

Search Q

**Urgent Issue?**

If the issue is urgent, please contact support at:

Netsmart EW:  
+1 (833) 483-5587

We pop-up a reminder for those who click yes, you cannot log an outage case through the portal.

# Create Support Case

Home > Create Support Case

## Create Support Case

Contact: Provider User x

Contact number: (414) 554-4456

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

Alternate contact:

**\* Product family**

- Netsmart EVV
- NetsmartCares Portal Access Requests

**\* Category**

**\* Subject** (Refrain from including any sensitive information including PHI in this field)

**\* Describe your issue** (Refrain from including any sensitive information including PHI in this field)

PHI data (Use this field for all sensitive information)

Client internal ticket #

Search

**Urgent Issue?**

If the issue is urgent, please contact support at:

Netsmart EVV:  
+1 (833) 483-5587

Pick your Product Family

Typically, this will be Netsmart EVV

# Create Support Case



Home > Create Support Case

## Create Support Case

Contact

Provider User

\* Product family

Netsmart EVV

Contact number

(414) 554-4456

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

Alternate contact

\* Product

- IVR for EVV
- MobileCaregiver + Mobile App
- Provider Dashboard

\* Subject (Refrain from including any sensitive information including PHI in this field)

\* Describe your issue (Refrain from including any sensitive information including PHI in this field)

PHI data (Use this field for all sensitive information)

Client internal ticket #

Search

### Urgent Issue?

If the issue is urgent, please contact support at:

Netsmart EVV:  
+1 (833) 483-5587

Pick your Product

For Mobile – select Mobile Caregiver+

For Provider Dashboard options, select the Provider Dashboard Option.

# Create Support Case

**Netsmart** Create Case Service Catalog Cases Known Issue

Home > Create Support Case

## Create Support Case

Contact: Provider User x v

Contact number: (414) 554-4456

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

Alternate contact: v

\* Product family: Netsmart EW x v

\* Product: MobileCaregiver + Mobile App x v

Function: v

\* Category: Alert / Error / Warning (highlighted), Don't have access, Malfunction / Unexpected Behavior, Missing or Incorrect Content, Performance Issue, Question, Request

\* Subject (Refrain from including any sensitive information including PHI):

\* Describe your issue (Refrain from including any sensitive information including PHI):

PHI data (Use this field for all sensitive information):

Pick your Category that best describes the nature of the problem you are experiencing.

Is this a question about how to use the application?

Are you receiving an Error?

# Create Support Case

**Netsmart** Create Case Service Catalog Cases Known Issues Knowledge My Account Info PU Provider User

Home > Create Support Case

## Create Support Case

Contact: Provider User x

Contact number: (414) 554-4456

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

Alternate contact:

\* Product family: Netsmart EV x

\* Product: MobileCaregiver + Mobile App x

Function:

\* Category: Question x

\* Subject (Refrain from including any sensitive information including PHI in this field): My password is not working

\* Describe your issue (Refrain from including any sensitive information including PHI in this field): I enter my user ID and password then get an error. I tried resetting my password and am still having issues.

PHI data (Use this field for all sensitive information): ALL PATIENT DATA ENTERED HERE

Client internal ticket #:

Search

**Urgent Issue?**

If the issue is urgent, please contact support at:

Netsmart EV:  
+1 (833) 483-5587


Your **Subject** field should be descriptive.

Example: PNOT Error in the Worklist

Your **Description** should include step-by-step instructions on how to recreate the error.

If **PHI** is required, place it in the **PHI data** field. **EX:** a recipient name or Medicaid ID.

# Create Support Case

 Create Case Service Catalog Cases ▾ Known Issues ▾ Knowledge My Account Info PU Provider U

Contact number

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

Alternate contact

\* Product

Function

\* Category


\* Subject (Refrain from including any sensitive information including PHI in this field)

\* Describe your issue (Refrain from including any sensitive information including PHI in this field)

PHI data (Use this field for all sensitive information)

Client internal ticket #


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


 Add attachments

Don't forget to add attachments and then hit **Submit**



# Create Support Case

 Create Case Service Catalog Cases Known Issues Knowledge My Account Info **PU** Provider User

Search  

### My password is not working

**Description:**  
Care setting:

I enter my user ID and password then get an error. I tried resetting my password and am still having issues.

\* Contact  x v Client internal ticket #

\* Contact number  myNote

Alternate contact

PHI note

### Case Details

**Number:**  
CS1250796

**Stage:**  
New

**Account:**  
EVV Support Holding Account

**Contact:**  
Provider User


**Case priority:**  
4 - Low

**Category:**  
Question

**Product family:**  
Netsmart EVV

**Product:**  
MobileCaregiver + Mobile App

**Updated:**  
8h ago

**Attachments** 

Drop files here

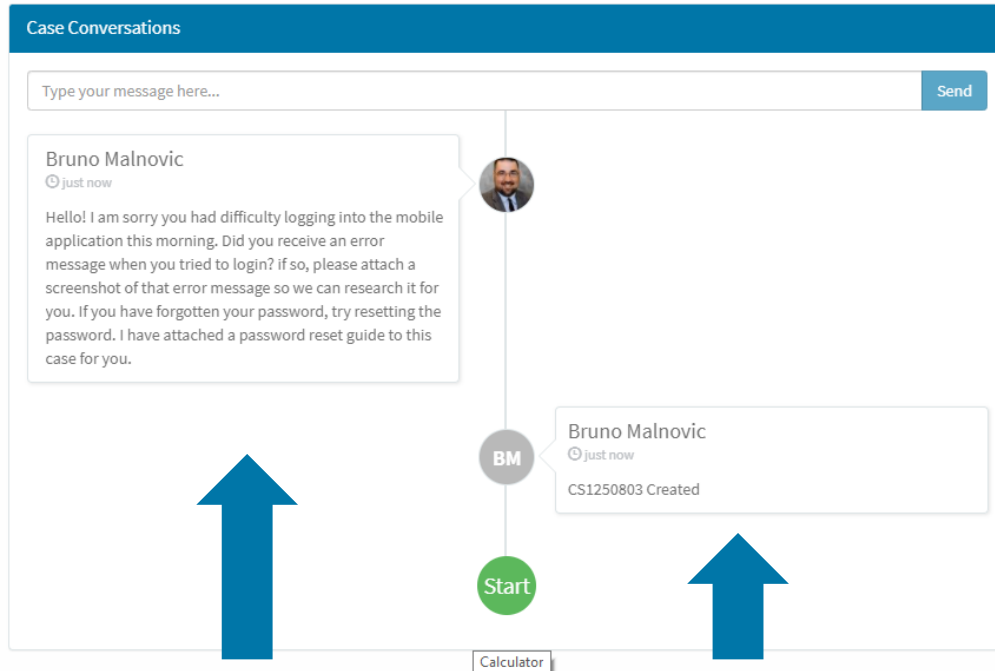
Once a case is created, you can see the current status and when the case was last updated in the case view.

# Create Support Case – PHI Data

The screenshot displays a support case interface. At the top, there is a blue header labeled 'Case Conversations'. Below it is a text input field with the placeholder 'Type your message here...' and a 'Send' button. A vertical line connects the input field to a profile card for 'Provider User' (PU), which shows '8h ago' and 'CS1250796 Created'. Below the profile card is a green 'Start' button. To the right, there is an 'Actions' panel with a green 'Close Case' button. Below that is a 'Secure Data' panel, highlighted with a red border, containing the following information: 'SDI0638178', 'Number: SDI0638178', 'Type: PHI Note', 'Updated: 07/06/2021 10:39:00 PM', 'Updated by: provideruser@example.com', and 'Tags: Relevant'. At the bottom of the 'Secure Data' panel is a 'Show:' dropdown menu set to 'Relevant only'.

- PHI Data is securely stored in the Secure Data area
- All Attachments are automatically added to this area as well

# Post Comments to a Case



Netsmart Comments

Client Comments

- Add comments to the case using the Case Conversations function.
- Easy to read the conversation in this format.

# Add Attachments Securely

## Unable to login to mobile app

**Description:**

Care setting:

I could not login this morning

\* Contact

Bruno Malnovic

\* Contact number

(913) 202-1607

Alternate contact

PHI note

Client internal ticket #

myNote

Save (Ctrl + s)

## Case Details

**Number:**

CS1250803

**Stage:**

Open: Pending Level 1 Analysis

**Account:**

Netsmart (Avatar EHR) / Legacy EW

**Contact:**

Bruno Malnovic

**Case priority:**

4 - Low

**Category:**

Don't have access

**Product family:**

Netsmart EW

**Product:**

MobileCaregiver + Mobile App

**Updated:**

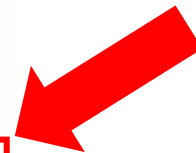
2m ago

Attachments



Drop files here

Additional attachments may be added here.



# Attachments Automatically moved to PHI section

The screenshot displays a 'Case Conversations' interface. At the top, there is a blue header with the text 'Case Conversations'. Below this is a text input field with the placeholder 'Type your message here...' and a 'Send' button. A message bubble from a 'Provider User' (PU) is shown, indicating it was sent '8h ago' and contains the text 'CS1250796 Created'. A green 'Start' button is visible below the message. To the right, an 'Actions' panel contains a green 'Close Case' button. A red-bordered box highlights a 'Secure Data' section, which displays the following information: 'SDI0638178', 'Number: SDI0638178', 'Type: PHI Note', 'Updated: 07/06/2021 10:39:00 PM', 'Updated by: provideruser@example.com', and 'Tags: Relevant'. A 'Show:' dropdown menu is set to 'Relevant only'.

Remember, additional attachments will automatically be added to the Secure Data area.

# Close your own Cases

The screenshot shows the 'Case Conversations' interface. At the top, there is a blue header with the text 'Case Conversations'. Below the header is a white input field with the placeholder text 'Type your message here...'. To the right of the input field is a blue 'Send' button. Below the input field is a preview of a case conversation, which includes a 'NetSMART' logo and a table with columns for 'Case Number', 'Case Description', 'Product', 'Case Status', 'Case Priority', and 'Updated'. At the bottom center of the interface is a green circular button with the text 'Start'.

This block shows a blue header with the text 'Actions'. Below the header is a green button with the text 'Close Case'. The entire 'Actions' section is enclosed in a red rectangular border.

The 'Secure Data' panel displays the following information:

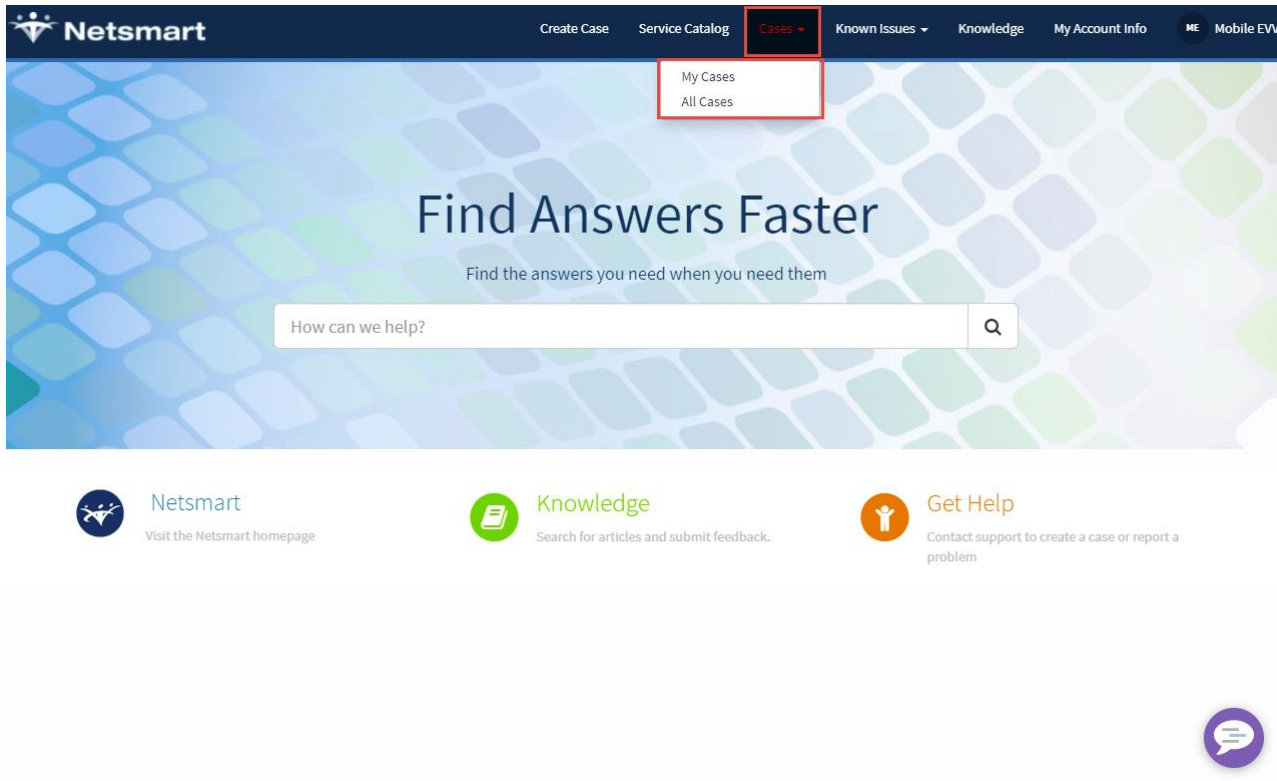
- SDI0638178
- Number:** SDI0638178
- Type:** PHI Note
- Updated:** 07/06/2021 10:39:00 PM
- Updated by:** provideruser@example.com
- Tags:** Relevant

At the bottom, there is a 'Show:' dropdown menu with 'Relevant only' selected.

If a case has been resolved, you can close it out to clean up your view of cases. Just click Close Case and complete the reason requested.

# Access Support Cases

# Netsmart Support Portal – Access Cases



The screenshot shows the Netsmart Support Portal interface. At the top, there is a dark blue navigation bar with the Netsmart logo on the left and several menu items: 'Create Case', 'Service Catalog', 'Cases', 'Known Issues', 'Knowledge', 'My Account Info', and 'ME Mobile EV'. The 'Cases' menu item is highlighted with a red box, and a dropdown menu is open below it, showing 'My Cases' and 'All Cases' options, also highlighted with a red box. Below the navigation bar is a large banner area with a blue and green patterned background. The banner contains the text 'Find Answers Faster' and 'Find the answers you need when you need them'. Below this text is a search bar with the placeholder text 'How can we help?' and a search icon. At the bottom of the page, there are three main sections: 'Netsmart' (with a blue icon and the text 'Visit the Netsmart homepage'), 'Knowledge' (with a green icon and the text 'Search for articles and submit feedback.'), and 'Get Help' (with an orange icon and the text 'Contact support to create a case or report a problem'). A purple chat icon is visible in the bottom right corner.

To view open support cases, Click the Cases Drop-down at the top of the menu.

Select My Cases to see your cases.

Or Select All Cases to see any cases from your organization.



# Case Information Screen - Description

**NetSMART** Create Case Service Catalog Cases Known Issues Knowledge My Account Info PU Provider User

Search

Create New Case

Cases Keyword Search

All > Active = true > Contact = Provider User > Catalog Item is empty > Product family Allow in Portal CONTAINS myUnity

Number	Short description	Stage	Case priority	Contact	Category	Product family	Product	Account	Updated	myNote	Location	Created
CS1250796	My password is not working	New	4 - Low	Provider User	Question	Netsmart EVW	MobileCaregiver + Mobile App	EVV Support Holding Account	07/06/2021 10:39:49 PM			07/06/2021 10:39:00 PM
CS1250778	Missing recipient	Open: Level 2 Working	4 - Low	Provider User		Netsmart EW	Provider Dashboard	EVV Support Holding Account	07/06/2021 05:11:55 PM			07/06/2021 05:11:07 PM
CS1250774	Referring physician missing	Open: Level 2 Working	4 - Low	Provider User		Netsmart EW	Provider Dashboard	EVV Support Holding Account	07/06/2021 05:03:35 PM			07/06/2021 04:55:16 PM
CS1250762	My password is not working	Open: Level 2 Working	4 - Low	Provider User		Netsmart EW	MobileCaregiver + Mobile App	EVV Support Holding Account	07/06/2021 05:01:15 PM			
CS1250776	Missing prior authorization	Open: Level 2 Working	4 - Low	Provider User		Netsmart EW	MobileCaregiver + Mobile App	EVV Support Holding Account	07/06/2021 04:59:35 PM			

Rows 1 - 5 of 5

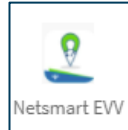
You can see your list of cases here

# Knowledge base

Known Issues and Solution Articles

# Knowledge bases

- Global Knowledge base Search
  - Use the Search feature to view all relative articles

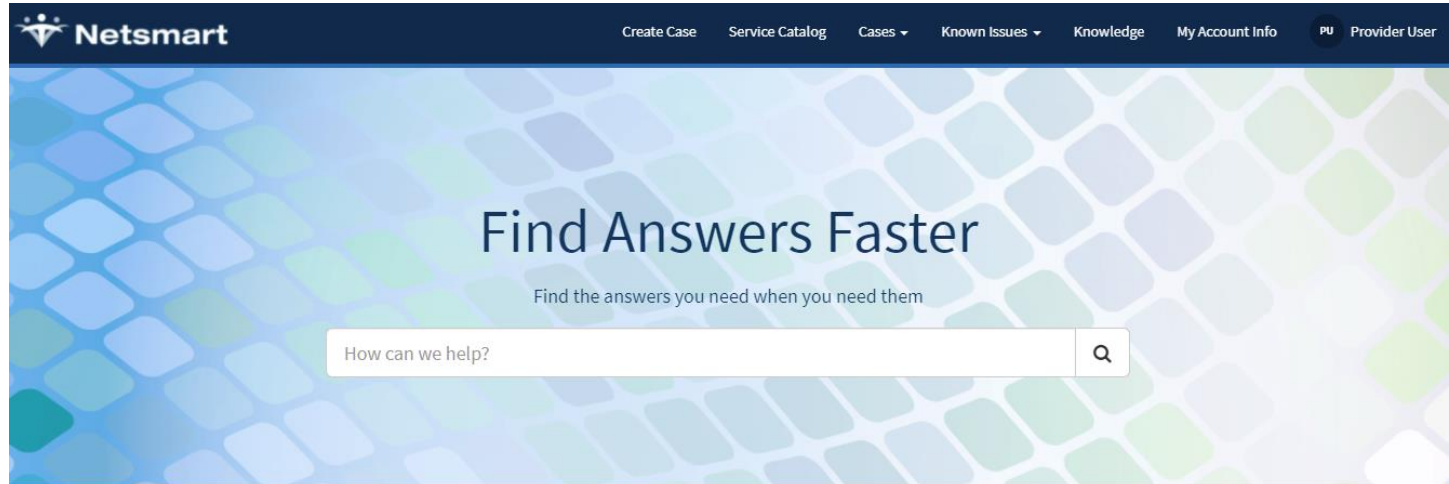


- EVV Knowledge Articles
  - Global search for the Netsmart EVV solution related 'How to' and 'Troubleshooting' articles



- EVV Known Issues
  - Global Search for Known Issues
    - Product issues sent to Development

# Option 1: Use the Unified Search



Netsmart

Visit the Netsmart homepage



Knowledge

Search for articles and submit feedback.

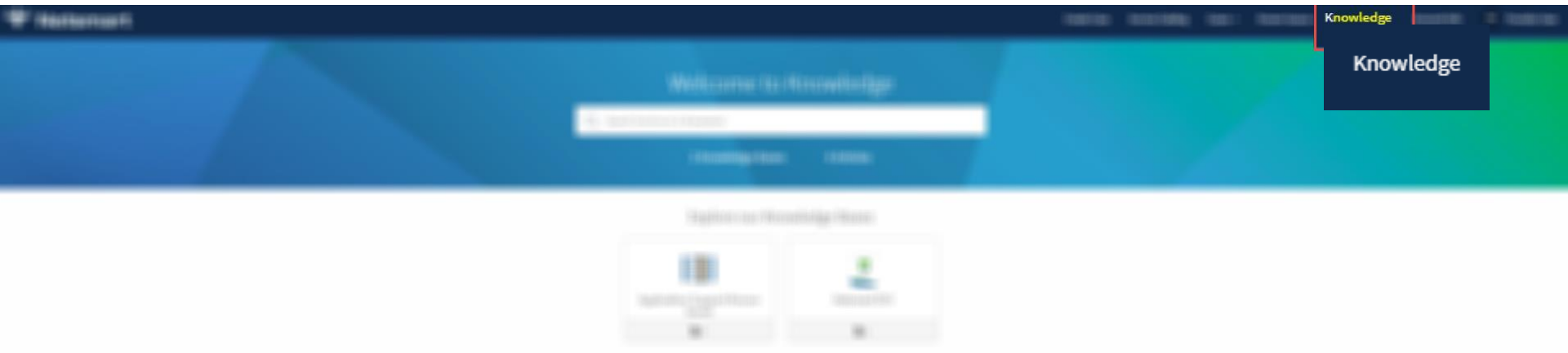


Get Help

Contact support to create a case or report a problem

Unified search is a quick way to search for both Known Issues and Knowledge Articles which may help you.

# Option 2: Focused, Knowledge Search



You can also select the Knowledge link at the top of the page as well to search only Knowledge Articles.

# Knowledge Menu Search

The screenshot shows the Netsmart Knowledge Menu Search interface. At the top left is the Netsmart logo. The top right navigation bar includes links for 'Create Case', 'Service Catalog', 'Cases', 'Known Issues', 'Knowledge', 'My Account Info', and 'Provider User'. The main header area features the text 'Welcome to Knowledge' and a search bar with the placeholder text 'Search (minimum 3 characters)'. Below the search bar, it displays '2 Knowledge Bases' and '4 Articles'. The section 'Explore our Knowledge Bases' contains two cards: 'Application Support Known Issues' with a book icon and '1' article count, and 'Netsmart EVV' with a lightbulb icon and '1' article count.

Search using keywords related to your inquiry

# Knowledge Menu Search

The screenshot shows the Netsmart Knowledge Menu Search interface. At the top left is the Netsmart logo. The top right navigation bar includes links for 'Create Case', 'Service Catalog', 'Cases', 'Known Issues', 'Knowledge', 'My Account Info', and 'Provider User'. The main content area features a blue header with the text 'Welcome to Knowledge' and a search bar with the placeholder text 'Search (minimum 3 characters)'. Below the search bar, it displays '2 Knowledge Bases' and '4 Articles'. Underneath, there is a section titled 'Explore our Knowledge Bases' with two cards: 'Application Support Known Issues' (with a book icon and a count of 1) and 'Netsmart EVV' (with a lightbulb icon and a count of 1).

For Best Results:  
Type in your search phrase in the form of a question, using keywords, then click Enter

# Knowledge Menu Search

The screenshot displays the Netsmart Knowledge Menu Search interface. At the top, the Netsmart logo is on the left, and navigation links for 'Create Case', 'Service Catalog', 'Cases', 'Known Issues', 'Knowledge', 'My Account Info', and 'Provider' are on the right. Below the navigation bar, the breadcrumb trail reads 'Home > Knowledge > Knowledge Search'. A search bar contains the text 'mobile' with a magnifying glass icon to its right. Below the search bar is a 'Show filters' link. To the left of the search results is a 'Refine results' sidebar with sections for 'Knowledge Bases' (listing 'Application Support Known Issues' and 'Netsmart EVV') and 'Category' (with a 'Filter' input field and checkboxes for '(empty)' and 'Best Practices'). The main search results area shows '5 results for "mobile"' with sorting options: 'Sort by | Relevance | Views | Newest | Alphabetical'. Under 'Showing All Results', three results are listed, each with a lightbulb icon: 1. 'How Start and End a visit Mobile App' from 'Netsmart EVV | Caregiver Mobile+ > Best Practices', with a snippet: 'This article steps through the process of starting and ending a mobile visit Begin by navigating to: Tellus eVW Mobile App Managing Visits Starting and Ending a Visit. To start a visit: 1. On the Home page, tap the appointment for the...'. 2. 'MobileCaregiver+' from 'Application Support Known Issues'. 3. 'How to Reset your Password' from 'Netsmart EVV | Caregiver Mobile+ > Best Practices', with a snippet: 'Steps to reset your password on the Dashboard page. 1. Click on the Password Help link on the Netsmart EVV dashboard login page or on the mobile app login page. 2. Enter the email address or the phone number that is listed ...'.

Search results will display noting the associated Knowledge base. These may be educational articles or a known issue article.



# Known Issues Knowledge base

# Accessing General Known Issues

The screenshot displays the Netsmart website interface. At the top, a dark blue navigation bar contains the Netsmart logo on the left and several menu items: 'Create Case', 'Service Catalog', 'Cases', 'Known Issues', 'Knowledge', 'My Account Info', and 'PU Provider User'. A red arrow points to the 'Knowledge' menu item, which is also enclosed in a red rectangular box. Below the navigation bar is a large banner with a blue and green geometric pattern. The banner features the text 'Find Answers Faster' and 'Find the answers you need when you need them'. A search bar with the placeholder text 'How can we help?' and a magnifying glass icon is positioned below the banner. At the bottom of the page, there are three main navigation options: 'Netsmart' (with a sub-link 'Visit the Netsmart homepage'), 'Knowledge' (with a sub-link 'Search for articles and submit feedback.'), and 'Get Help' (with a sub-link 'Contact support to create a case or report a problem'). The 'Knowledge' option is highlighted with a red rectangular box.

Public known issues may also be search using either the Unified search, or the Knowledge search.

# Known Issues Knowledge base

Search (minimum 3 characters)

Show filters

3 Results Sort by | Views ▾ **Newest** Alphabetical

Showing Application Support Known Issues **X** Clear All

Refine results




Knowledge Bases Clear

**Application Support Known Issues**

Category

Filter

(empty)

-  **Testing Problem record workflow**  
Application Support Known Issues
-  **Testing adding a new Jira**  
Application Support Known Issues
-  **MobileCaregiver+**  
Application Support Known Issues

Select the “Application Support Known Issues” to filter for just Known Issues and exclude any User Guides or other educational articles

# Known Issues Knowledge base

## Known Issue Article view

- KB number notes this known issue has been published for global searching
- NTSTEVV-### tracking number is how our Dev teams track and manage issue.
  - Click the hyper-link to add your name to the watch list

KB0061878

### MobileCaregiver+

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**Issue Status:** **Discovery**

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**Solution Family:** Netsmart EVV

**Solution:** MobileCaregiver + Mobile App

**Release Identified:**

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**What is the issue?**  
Visit error when saving the patient information

**Reproduction Steps**  
Try to save the visit and I got an error

---

**This Issue Affects Me:** [NTSTEVV-706](#) (follow the link to Watch the Issue)

# Known Issues Knowledge base

Issue Information	
<b>Issue number:</b> NTSTEVV-706	<b>Short description:</b> MobileCaregiver+
<b>Product family:</b> Netsmart EVV	<b>Issue priority:</b> 3-Medium
<b>Product:</b> MobileCaregiver + Mobile App	<b>Issue status:</b> Discovery
<b>Issue type:</b> New Feature	

### Actions

[Watch Issue](#)

[Share Issue](#)

Details
<b>Description:</b> Visit error when saving the patient information

Once you have found a Known Issue, you may choose to Watch it or Share it. Watching it will allow you to receive notifications when the Issue has been updated.

# Known Issues Knowledge base

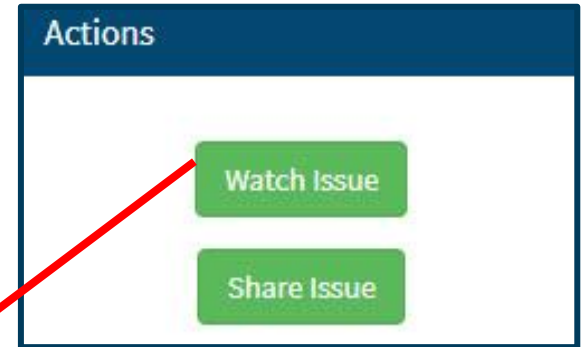
## 🕒 Watch Issue

- Click link to add your contact name to this known issue
- Receive an email notification when issue status changes

Your name has been added to the Watch List.

- Click Unwatch Issue to remove your contact name from the known issue

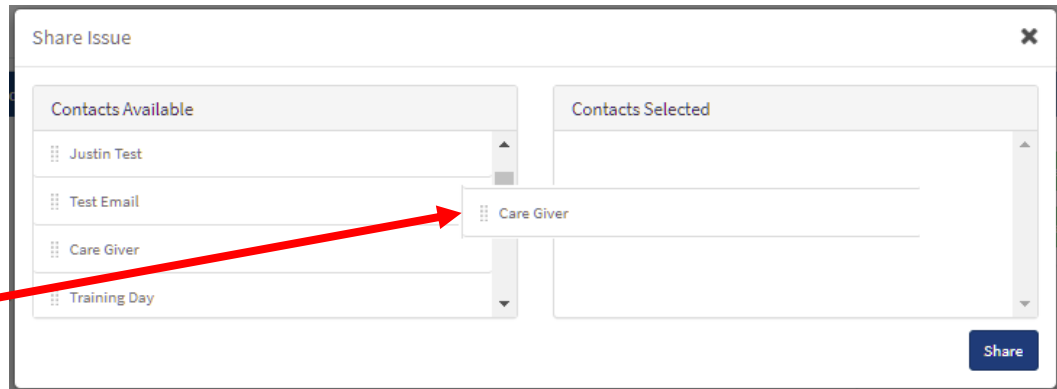
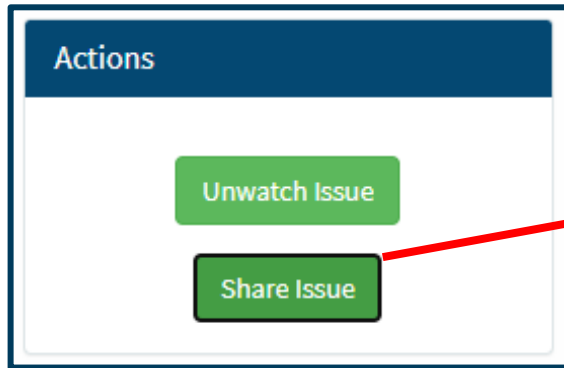
Your name has been removed from the Watch List.



# Known Issues Knowledge base

## 🕒 Share Issue

- Click and hold the desired contact name tile
- Drag to **Contacts Selected**
- Click **Share**
- The contact will receive an email alert



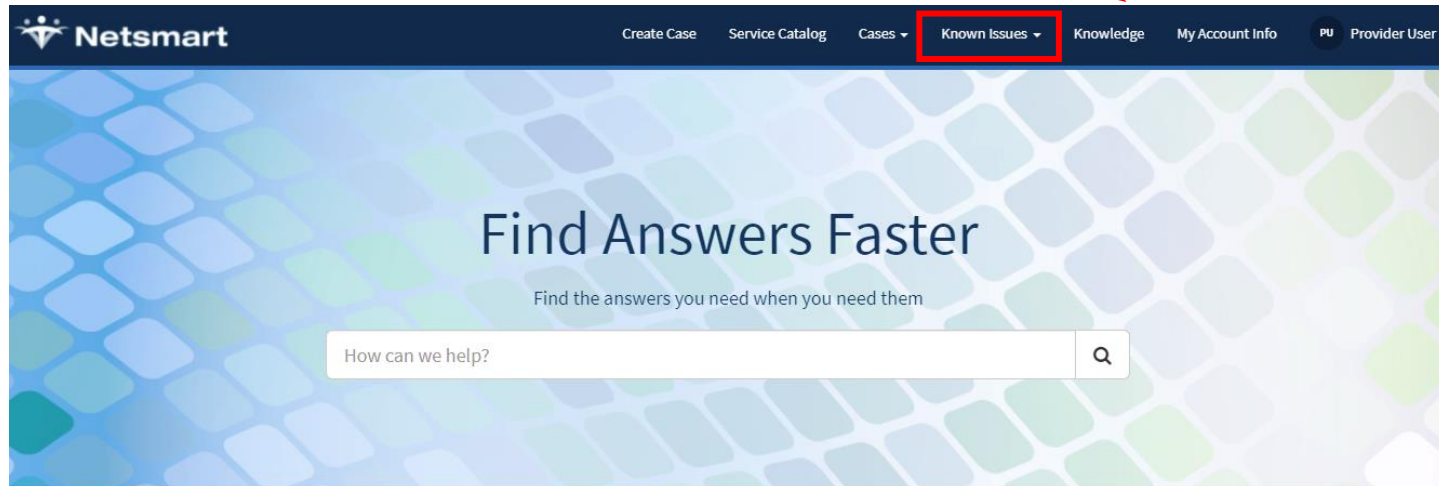
# Known Issues



# Known Issue Tracking

- ① Directly 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

# Accessing Your Known Issues

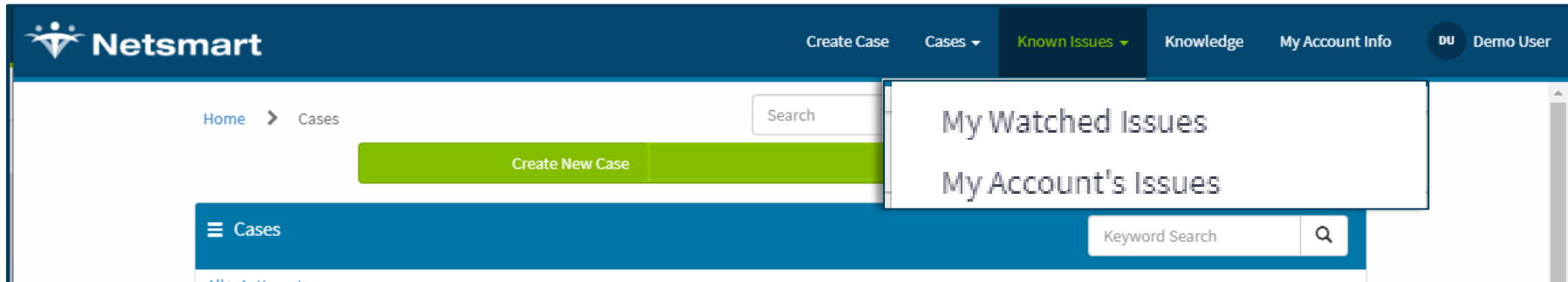


The screenshot shows the Netsmart website interface. At the top, there is a dark blue navigation bar with the Netsmart logo on the left and several menu items on the right: 'Create Case', 'Service Catalog', 'Cases', 'Known Issues' (highlighted with a red box and a red arrow), 'Knowledge', 'My Account Info', and 'PU Provider User'. Below the navigation bar is a large banner with a blue and green patterned background. The banner contains the text 'Find Answers Faster' and 'Find the answers you need when you need them'. Below this text is a search bar with the placeholder text 'How can we help?' and a search icon. At the bottom of the page, there are three columns of links: '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).

Click the Known Issues drop-down to view Known Issues you are currently tracking.

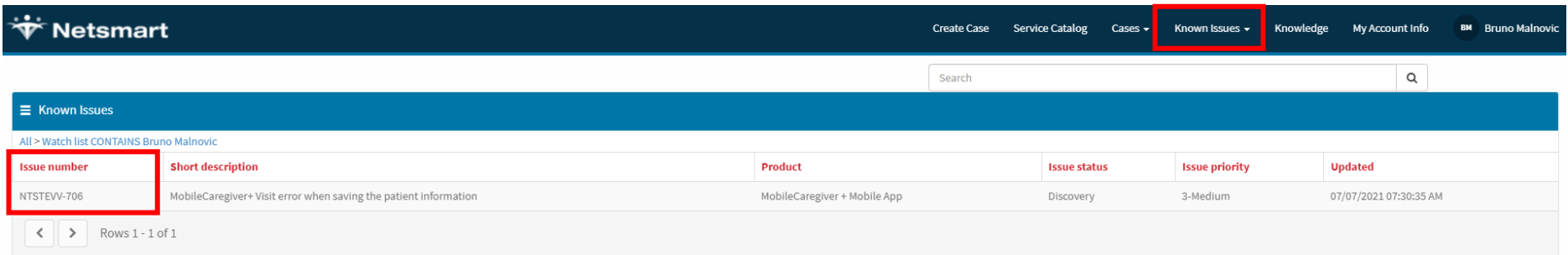
# Known Issues Knowledge base

- Current Known Issues View
  - Drop Down Menu displayed
    - My Watched Issues
    - My Account's Issues
  - Issue associated to your account through a case
  - Displayed in list view when selecting the menu option



The screenshot displays the Netsmart web application interface. At the top, the Netsmart logo is on the left, and navigation links for 'Create Case', 'Cases', 'Known Issues', 'Knowledge', and 'My Account Info' are on the right. The 'Known Issues' link is highlighted in green. Below the navigation bar, there is a breadcrumb trail 'Home > Cases', a search box, and a green 'Create New Case' button. A dropdown menu is open under 'Known Issues', showing two options: 'My Watched Issues' and 'My Account's Issues'. At the bottom of the page, there is a blue sidebar with a 'Cases' menu and a search bar labeled 'Keyword Search'.

# Client Support Portal – Known Issues



The screenshot shows the Netsmart Client Support Portal interface. The top navigation bar includes the Netsmart logo, a search bar, and several menu items: 'Create Case', 'Service Catalog', 'Cases', 'Known Issues' (highlighted with a red box), 'Knowledge', 'My Account Info', and a user profile for Bruno Malnovic. Below the navigation bar, there is a search bar and a 'Known Issues' section header. Underneath, a breadcrumb trail reads 'All > Watch list CONTAINS Bruno Malnovic'. A table displays a list of known issues. The first row is highlighted, and the 'Issue number' column is also highlighted with a red box. The table has the following columns: Issue number, Short description, Product, Issue status, Issue priority, and Updated.

Issue number	Short description	Product	Issue status	Issue priority	Updated
NTSTEVV-706	MobileCaregiver+ Visit error when saving the patient information	MobileCaregiver + Mobile App	Discovery	3-Medium	07/07/2021 07:30:35 AM

Rows 1 - 1 of 1

The issue number is the identifier for the specific known issue. You can **click** on this issue number to see additional information.

# Client Support Portal – Known Issues

## Issue Information

**Issue number:**

NTSTEVV-706

**Product family:**

Netsmart EVV

**Product:**

MobileCaregiver + Mobile App

**Issue type:**

New Feature

**Short description:**

MobileCaregiver+ Visit error when saving the patient information

**Issue priority:**

3-Medium

**Issue status:**

Discovery

## Actions

Unwatch Issue

Share Issue

## Session Info



Bruno Malnovic  
viewing

## Details

**Description:**

Visit error when saving the patient information, I cannot continue.

**Workaround:**

You may update the patient information in the provider dashboard as a workaround for this issue.

Description and if available, a workaround will be visible on the details page.

# Thank you!!