# Midas+ Support Center User Manual

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# **Midas+ Support Center User Manual**

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# Introduction

The Support Center system functions as a wizard to allow you to submit questions and log issues about Midas+ software directly to an assigned Midas+ Solutions Support expert. This includes the ability to track any previously submitted requests, and communicate directly with the assigned Midas+ Solutions Support staff member by email.

# **Purpose of the Support Center**

Our goal is to provide the fastest route to getting your support questions answered. The Support Center application will expedite the support process by immediately directing your questions to the appropriate resource. Although it is intended to provide assistance in urgent matters, the Support Center application is not designed for emergency issues.

**Important:** If you have an emergency such as a system failure, call your Account Manager.

These are the primary functions of the Support Center application:

- Submit questions/issues/enhancements to key Midas+ product experts.
- Provide a means to track outstanding issues and retain a history of all previously submitted questions/issues/enhancements.

### **Notifications**

Once a request has been submitted, an email confirmation is sent notifying you your question has been successfully submitted. Additional emails will be sent for any change in status, and upon the resolution of the issue. To receive all emails regarding Midas+ Solutions Support issues related to your facility, regardless of the type, contact your Account Manager.

### **System Requirements**

The Midas+ Support Center is a Web-based application that does not require the installation of additional software, with the exception of prompting you to install an Active X control the first time you log in. This control allows you to copy and paste screenshots directly into the application.

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# **Accessing the Midas+ Support Center**

There are two types of product-dependent securities for access to the Midas+ Support Center.

A user may be granted one or both of the following types of security:

- CPMS/DataVision
- Care Management, Seeker, Statit, Midas+ Live, Midas+ Comply or Other Requests

### **Security Rights for CPMS/DataVision Requests**

If a user is assigned to a facility that is actively contracted for CPMS or DataVision services, the user will be assigned the following rights:

- Access to the Support Center application
- The ability to select CPMS or DataVision as a product type for any problem or question
- Access to the History section of the Support Center to view questions or problems that the user has submitted, either via a request through the Support Center, or a request to an ACS Midas+ staff member

# Security Rights for Care Management, Seeker, Statit, Midas+ Live, Midas+ Comply or Other Requests

For the purposes of submitting questions or problems related to Care Management, Seeker, Statit, Midas+ Live, Midas+ Comply or Other non-CDSS related issues, a user may be given access to the Support Center by their Midas+ Account Manager. With this level of access, the user will be able to

- Access the Support Center
- Select Care Management, Seeker, Statit, Midas+ Live, Midas+ Comply or Other as a product type for any problem or question
- Access the History section of the Support Center and view questions or problems that a system manager or designated site manager has submitted, either via a request through the Support Center, an e-mail, or phone request to an ACS Midas+ staff member

# **Additional Security Rights**

Users may be granted additional rights that will allow them to view the Support History for any questions or problems that any user within their facility has submitted for a Midas+ product, either via a request through the Support Center, an e-mail, or phone request to their Midas+ Account Manager. 4

# **Support Center Icon and Menu Option**

If a user has rights to the Support Center, an icon will be visible on the Clients Only Website Home page (Figure 1). To enter the Support Center, click the Support Center icon, or select Support Center from the Support Menu.



Figure 1: Support Center Access from Clients Only Website

User Manual

# Midas+ Support Center Home Page

From the Midas+ Support Center home page (Figure 2), you can submit a request, view the support history of all previously submitted requests, and download the current Support Center release notes, quick reference card, and user manual from the Help menu.

Welcome		
Melissa Akers The Midas+ Suppo efficiently and prov a request for suppo	To Support Center ort Center allows you to manage your Midas+ support activities more ides direct access to Midas+ support experts. Click on a link above to submit ort, view your facility's support history, or search the knowledge base.	My Support Cent My Active Logs - 6 Awaiting Client Follow-up Resolved – Pending Confirmation - 2 Most Recently Closed Lo
	Submit a Request Allows you to Submit a Request based on product, functions, category and sub-categories.	Corvallis Time:4:42 PM Tucson Time: 4:42 PM Account Manager - Extn.
	View Support History Track the requests you submit to Midas+ Support from this page.	- Quick Links

*Figure 2: Midas*+ *Support Center Home Page* 

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# **Requesting Access to the Midas+ Support Center**

Requesting access to Support Center will be based on the two types of productdependent securities currently used for managing access to the Midas+ Support Center.

### **Initial Use - No Current Access Rights**

If you click the Support Center link and you are not associated with a CDSS or DataVision facility, and you have not been granted access to Care Management, Seeker, Statit, Comply or Other product support requests by your system manager, the system will display the Request Access form (Figure 3).

Support Co	idas+*			
Support Home	Submit a Request	Support History	Help	
Request Access Hello Frank Flocco, To su from your facility's syster manager in approving this that apply) Care Management Seeker Statit System(Technical issue Other(Administrative is	ubmit support requests via m manager. Do you wish i is request, please indicate es) essues) Send Email	Support Center, access n to request access? To a below the type of user below the type of user	nust be requested issist your system you are: (check all	My Support Center My Active Logs - 0 All Active Logs - 181 Awaiting Client Follow-up - 5 Most Recently Closed Logs - 25 Corvallis Time : 4:51 PM Tucson Time : 4:51 PM

Figure 3: Request Access Form

Click the appropriate checkboxes (Figure 3) and click the **Send Email** to submit your access request. To cancel and close the form without submitting a request for access, click **Close**.

When you click Send Email, the system sends the request in an email to the system manager for your facility and the Midas+ Account Manager for your facility, and displays a confirmation page (Figure 4).



Figure 4: Request Access Confirmation Page

# CPMS or DataVision Users Requesting Care Management, Seeker, Statit, or Other

If your facility has contracted for CPMS or DataVision services, and you select a site from the Site drop-down list that only has CPMS or DataVision rights when submitting a support request, the system will display a hyperlink to the form used for requesting Care Management, Seeker, Statit, or Other support types (Figure 5).

• To request access to Care Management, Seeker, Statit, or Other support types as a CPMS or DataVision user:

	upport Center	
Support Ho	ome Submit a Request Support History Help	
Submit a Please select the you click Submit a	Request product, functions, category, and sub-categories that best identify your issue or question. When Request, your question or issue will be routed to the corresponding Midas+ support staff.	My Support Center My Active Logs - 0
Site:	MIDAS GENERAL HOSPITAL	Awaiting Client Follow up 5
Product:	DataVision Request access for CM/Seeker/Statit/Other	Most Recently Closed Logs - 25
Category:	* Cancel	
Quarter:	Year:	Corvallis Time : 4:49 PM Tucson Time : 4:49 PM

Figure 5: Request Access Hyperlink

1 Click the **Request access for CM/Seeker/Statit/Other** hyperlink. The system displays the Request Access form (Figure 6).

Support Center Support Home Submit a Request Support History Help	
Request Access         Hello Frank Flocco, To submit support requests via Support Center, access must be requested from your facility's system manager. Do you wish to request access? To assist your system manager in approving this request, please indicate below the type of user you are: (check all that apply)         Care Management         Seeker         Statit         System(Technical issues)         Other(Administrative issues)	My Support Center My Active Logs - 0 All Active Logs - 181 Awaiting Client Follow-up - 5 Most Recently Closed Logs - 25 Corvallis Time : 4:51 PM Tucson Time : 4:51 PM

Figure 6: Request Access Form

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2 Mark the appropriate checkboxes.

#### 3 Click the **Send Email** button.

The system sends the request in an email to your facility's system manager and the Midas+ Account Manager, and displays a confirmation page (Figure 7).

Support	Center			
Support Home	Submit a Request	Support History	Help	
Request Acces The request has been subn VINAY.KUMAR@xerox.com	S nitted to SIVASUBRAMANIAN.S@ M . Click here to close.	€ xerox.com SATHISHA.GOW	DA@ xerox.com ,	My Support Center My Active Logs - 00 Awaiting Client Follow-up - 00 Most Recently Closed Logs - 00

Figure 7: Request Access Confirmation Page

# **Installing the ActiveX Control**

The Midas+ Support Center is a Web-based application. You will be prompted to install a required ActiveX control the first time you use it.

*Note:* If you have difficulties installing the ActiveX control, please contact your IT department. To Install the ActiveX Control:

1 Click the Information Bar. The drop-down list is displayed.

🚖 🎄 👔	🗄 🔹 🔊 Support Overview	Midas+ Submit a Request 🗙	🙆 🕶 (	🔊 🔹 🖶 🔻 🔂 Page 👻 🏠 Tools 👻 🕢 🌘	N 🚳
C This webs	ite wants to install the following add-or Support Ce Support Home	n: 'ACS Midas+. This is used to capture screen shot.	from 'ACS HEALTHCARE'. If you trust the w Install ActiveX Control What's the Risk? More information Help	vebsite and the add-on and want to install it, click here.	×
	Submit a Reques	St tions, category, and sub-categories that best i ir question or issue will be routed to the corre	dentify your issue or question. When sponding Midas+ support staff.	My Support Center My Active Logs - 0 All Active Logs - 181 Awaiting Client Follow-up - 5 Most Recently Closed Logs - 25	

#### Figure 8: Install AtiveX Control

#### 2 From the drop-down list, select Install ActiveX Control.

A dialog box is displayed asking if you want to install the ActiveX Control software.



3 Click Install.

# **Using the Dashboard**

C

The dashboard (Figure 9) provides links and information pertaining to current log activity, as well as links to additional Midas+ support resources.

My Support Center
My Active Logs - 6
All Active Logs - 372
Awaiting Client Follow-up - 21
Resolved – Pending Confirmation - 2
Most Recently Closed Logs - 4
Tucson Time: 3:28 PM
Service Manager - Extn.
Noemi Contreras - 4367
Noemi Contreras - 4367
Noemi Contreras - 4367 Quick Links
Noemi Contreras - 4367 Quick Links CPMS/DV Current Known Issues
Noemi Contreras - 4367 Quick Links CPMS/DV Current Known Issues CPMS/DV Upcoming Events
Noemi Contreras - 4367 Quick Links CPMS/DV Current Known Issues CPMS/DV Upcoming Events CPMS/DV Resources
Noemi Contreras - 4367 Quick Links CPMS/DV Current Known Issues CPMS/DV Upcoming Events CPMS/DV Resources Support Center Release Notes
Noemi Contreras - 4367 Quick Links CPMS/DV Current Known Issues CPMS/DV Upcoming Events CPMS/DV Resources Support Center Release Notes Troubleshooting Guide

Figure 9: Dashboard

My Active Logs Link to and the number of active logs you have submitted

All Active Logs Link to and the number of active logs associated with your site

**Awaiting Client Follow-up** Link to and the number of logs requiring additional information from you

**Resolved-Pending Confirmation** Link to and the number of logs awaiting client confirmation of the resolution

**Most Recently Closed Logs** Link to and the number of logs closed within the last 7 days with a count

**Service Manager and Extn.** Name and extension of Midas+ Service Manager (now called Account Manager) assigned to your site

**CPMS/DataVision Current Known Issues** Link to list of known CPMS/DataVision Issues

**CPMS/DataVision Upcoming Events** Link to a calendar view of CPMS/DataVision Events

**CPMS/DataVision Resources** Link to the Midas+ DataVision Web page Support Center

Release Notes Link to PDF of current Support Center release notes

Troubleshooting Guide Link to tips for how to troubleshoot support issues

# **Troubleshooting Guide**

A troubleshooting guide is available from the Quick Links section of the Dashboard (Figure 10) to assist you in isolating the conditions under which you experience an issue. Use the guide either for resolution the issue on your own or as troubleshooting answers to provide to your Account Manager.

Quick Links
CPMS/DV Current Known Issues
CPMS/DV Upcoming Events
CPMS/DV Resources
Support Center Release Notes
Troubleshooting Guide

Figure 10: Link to Troubleshooting Guide

1 Click the Troubleshooting Guide link. The following page is displayed.

TROUBLESHOOTING
What was the result you expected when you performed this activity? How is it different from the results you are getting?
Was the entered data lost when this problem occurred?
Are you able to reproduce the problem by attempting the same operation again using the same steps?
Are you able to reproduce the problem on another workstation?
How did you access the function? Function Menu, SmartButton, Patient Navigator, from Worklist.
Where you using the mouse or tabbing between fields when the problem occurred?
On which field or button did the error occur? (e.g., Save, Add, Print, Close,, etc.)
What were you doing in the field when the error occurred? (e.g., clicking, deleting, right-click, typing, pasting, dict lookup, selecting single or multiple field.)
Describe any recent changes or modifications made.
Indicate if there were other functions forms or windows open at the time the problem occurred.
If this scenario previously worked, have you installed/upgraded ANY software (MIDAS+ or other) on the workstation since it last worked?
What (if any) other applications besides MIDAS+ were open on your computer?
Are you experiencing similar problems with other applications?
Are you aware of any other system-wide or network problems happening at this time?
Close

Figure 11: Troubleshooting help document

2 Click **Close** to exit the Troubleshooting help.

# **Submitting a Request**

To submit a request, follow the instructions below.

#### **•** To submit a request:

Select **Submit a Request** from the main menu bar or click the Submit a Request icon.

Support C	enter bmit a Request Support History Help	
Welcome Frank Flocco The Midas+ Suppi efficiently and prov submit a request to base.	To Support Center ort Center allows you to manage your Midas+ support activities more vides direct access to Midas+ support experts. Click on a link above to for support, view your facility's support history, or search the knowledge	My Support Center My Active Logs - 2 All Active Logs - 138 Awaiting Client Follow-up - 7 Most Recently Closed Logs -
	Submit a Request Allows you to Submit a Request based on product, functions, category and sub-categories.	Corvallis Time : 10:42 AM Tucson Time : 10:42 AM Service Manager - Extn. Noemi Contreras - 4367
	View Support History Track the requests you submit to Midas+ Support from this page.	Quick Links CPMS/DV Current Known Iss CPMS/DV Upcoming Events CPMS/DV Resources Support Center Release Note Troubleshooting Guide

#### Figure 12: Submit a Request tab

The system displays the Submit a Request form (Figure 13).

$( \land$	Aidas	+		
Suppo	ort Center			
Support Home	Submit a Request	Support History	Help	
ubmit a Re ase select the produ click Submit a Req e:	equest uct, functions, category, ar uest, your question or issu	Id sub-categories that best Je will be routed to the corr	identify your issue or question. When esponding Midas+ support staff.	My Support Center My Active Logs - 6 All Active Logs - 372
				Awalting Client Follow-up - 2



**3** Select the affected **Site** from the drop-down list.

#### Note:

- The Site selection will determine the available Product options.
- Asterisks indicate required fields.
- If your user account is affiliated with only one site, the Site field will default to it.
- The session timer will count down from twenty minutes, but will reset when you click a button to proceed or click another tab. Data entry into the form does not reset the timer, nor does selecting a dictionary field from the drop-down list.
- 4 Choose one of the following options:
  - If you select CPMS or DataVision Product, see "Entering Request Details for CPMS/ DataVision Products" on page 15.
  - If you select any other product, see "Entering Request Details for Midas+ Care Management, Seeker, Statit, Live, Comply or Other Products" on page 16.

### **Entering Request Details for CPMS/DataVision Products**

Follow these instructions for submitting requests for CPMS or DataVision Products.

- **•** To submit a support request for CPMS or DataVision products:
- 1 From the **Product** drop-down list, select **CPMS** or **DataVision**.

Support Home	Submit a Request Support History Hale	
Submit a R Please select the pro ou click Submit a Re Site: Product: Category: Sub-category 1: Quarter: Subject: Briefly st in this field	equest duct, functions, category, and sub-categories that best identify your issue or question. When quest, your question or issue will be routed to the corresponding Midas+ support staff. MIDAS GENERAL HOSPITAL DataVision V Web Application Data Results Q1 Vear: 2012 ate the subject of this request (60 characters), Do not include PHI *	My Support Center My Active Logs - 6 All Active Logs - 372 Awaiting Client Follow-up - 21 Resolved – Pending Confirmation - 2 Most Recently Closed Logs - 4 Corvallis Time : 3:39 PM Tucson Time : 3:39 PM Service Manager - Extn.
Question / Issue:	(include examples and account numbers)	Quick Links CPMS/DV Current Known Issue

Figure 14: Example of CPMS Request

- 2 Select the appropriate **Category** and **Sub-categories** from the drop-down lists.
- 3 Enter the **Quarter** and **Year** for requests related to CPMS or DataVision products.
- 4 Enter a **Subject**. This is a brief description of the subject matter and is limited 60 characters. The data in the subject field will display in an unsecured auto-generated email, therefore, no PHI should be entered.
- 5 Enter a **Question / Issue**. Include helpful examples or account numbers. PHI data entered in this field is secure.
- 6 Once you complete the required fields, you can optionally attach files or paste a screenshot, see "Attaching a File and Pasting a Screenshot" on page 18.
- 7 Click **Submit**.

# Entering Request Details for Midas+ Care Management, Seeker, Statit, Live, Comply or Other Products

- **•** To submit a support request for a Midas+ product:
- 1 Select the **Product** from the drop-down list.
- 2 Select the **Functions** from the drop-down list.
- **3** Select the **Category** from the drop-down list.
- 4 Select the **Sub-category** from the drop-down list.

	Vidas+				
Sup Support Home	port Center Submit a Request Support	ort History	Help		
Submit a F 'lease select the pr ou click Submit a R	Request oduct, functions, category, and sub-cat equest, your question or issue will be	egories that best ide routed to the corresp	entify your issue o conding Midas+ s	or question. When support staff.	My Support Center My Active Logs - 6
40 U.S.			· · · · · · · · · · · · · · · · · · ·	Castinus	All Active Logs - 372
Site:	MIDAS GENERAL HOSPITAL	× *	*	Continue	All Active Logs - 372 Awaiting Client Follow-up - 21
Site: Product: Functions:	MIDAS GENERAL HOSPITAL Care Management Worklists	× *	×	Continue Cancel	All Active Logs - 372 Awaiting Client Follow-up - 21 Resolved – Pending Confirmation - 2
Site: Product: Functions: Category:	MIDAS GENERAL HOSPITAL Care Management Worklists SmarTrack Worklists	× × ×	<b>v</b> *	Continue	All Active Logs - 372 Awaiting Client Follow-up - 21 Resolved – Pending Confirmation - 2 Most Recently Closed Logs - 4
Site: Product: Functions: Category: Sub-category:	MIDAS GENERAL HOSPITAL Care Management Worklists SmarTrack Worklists Worklist Rule Processing	v * v * v *	*	Continue	All Active Logs - 372 Awaiting Client Follow-up - 21 Resolved – Pending Confirmation - 2 Most Recently Closed Logs - 4

5 Click **Continue**.

The system displays the Additional Details Forms page (Figure 16), which is specific to the Product, Function, Category and Subcategory selected.

Support Center Support Home Submit a Request Help	
Additional Details Forms Please provide details below: Subject: Briefly state the subject of this request (60 characters), Do not include PHI in this field:  Question/Issues:  User Name: Facility: Requesting Assistance with: Provide additional details below as they apply to this issue: Detailed Description:	My Support Center My Active Logs - 6 All Active Logs - 372 Awaiting Client Follow-up - 21 Resolved – Pending Confirmation - 2 Most Recently Closed Logs - 4 Corvallis Time : 3:42 PM Tucson Time : 3:42 PM Service Manager - Extn. Noemi Contreras - 4367
Error Message:	Quick Links CPMS/DV Current Known Issues CPMS/DV Upcoming Events CPMS/DV Resources Support Center Release Notes Troubleshooting Guide

Figure 16: Example of Additional Details Form

# **Additional Details Form**

The purpose of the Additional Details Form (Figure 16) is to provide additional information that will expedite resolution of your request. Completing applicable fields, especially those labeled in bold type, will be most helpful in assisting with the resolution of your issue.

- Subject: This is a brief description of the subject matter and is limited 60 characters. The data in the subject field will display in an unsecured autogenerated email, therefore, no PHI should be entered.
- Question/Issues: Include helpful examples or account numbers. PHI data entered in this field is secure.
- 6 Provide any Additional Details and optionally attach files or paste screenshots, see "Attaching a File and Pasting a Screenshot" on page 18.
- 7 Click Submit.

# **Attaching a File and Pasting a Screenshot**

Click the **Attach/Paste** button to display the Midas+ Support File Upload dialog box (Figure 17). You can securely add file attachments containing PHI from your computer or network and copy images here.

Midas+ Support - File Upload	×			
Attach a File	Save &			
You can attach one or more files and/or screenshots that you have saved on a drive accessible locally or on your network. Click the "Add" button and browse to the location where the file is stored to select it. You can also delete and view the attached file.				
Add Delete View				
Copy and Paste Screenshot Images				
You can paste a copy of your screenshot image directly into this form. Just click on the "Paste" button. Your image will appear here and be viewable in the support log.				
Paste				

Figure 17: File Upload Dialog Box

# **Buttons for Adding, Deleting, or Viewing Files**

Select **Add** to browse to the location where the file is stored on your computer or network, select it, and attach the file.

Select **Delete** to remove a selected file from the frame.

Select View to view a selected file before sending.

# **Copying and Pasting Screenshots**

#### > To copy and paste screenshots:

- 1 Copy an image to the clipboard on your PC, click inside the frame, then click **Paste**.
- 2 Click thumbnails in the frame to review submitted files and screenshots or to remove them.

- 3 After you have attached all desired files and screenshots, choose one of the following buttons:
  - Save and Close Form to return to the Submit a Request screen
  - Image: to cancel and return to the Submit a Request screen without attaching files or screenshots.

# **Confirmation of your Request Submission**

When you submit your request, the system will display a confirmation (Figure 18).



Figure 18: Confirmation Message Support Log History

# **Viewing Support Log History**

You can track support requests received by Midas+ Solutions Support. If you have security rights, you will see ALL support issues associated with your site in the Support Log History. Otherwise, you will only be able to view issues that you have submitted.

You can use the filter options (Figure 19) to narrow your search. The results are displayed in the Support History grid (Figure 20).

Support Ho	Support Center	as+"	hony Halp		
Support no			пер		
Support	History Sear	ch			My Support Center
Site:	All			*	My Active Logs - 8
Product:	All	Category:	All	*	All Active Logs - 468
Sub Category:	All	Reported By:	All	*	Awaiting Client Follow-up - 23
Assigned to:	All	✓ Status:	All	*	Resolved – Pending
From:		To:			Most Basenthe Classed Laws
Log ID#:		<ul> <li>✓ Active Logs</li> <li>✓ Items close</li> </ul>	Only ed in the last 7 days	5	Convallies Time - 1-02 PM
Keywords:			Search		Tucson Time : 2:02 PM

Figure 19: Filter Options

The filter options include the following fields:

Site: Site for which the request was reported

**Product:** Name of Midas+ product associated with the request

Functions: Name of function associated with request (based on selection of Product)

**Category:** Name of category associated with request (based on selection of Functions)

**Sub Category:** Name of sub category associated with request (based on selection of Category)

Reported By: Name of employee that submitted support request

Assigned To: Name of Midas+ Solutions Support staff member assigned to the log

Status: Current status assigned to the log by Midas+ Support

From: and To: Date range in which requests were submitted

Log ID: System-generated ID for log

Keywords: Specify words contained in the log

**Active Logs Only:** Displays only logs that do not have a status of Closed. Clear this checkbox to include all logs in your search.

**Items closed in the last** <u>days</u>: Mark the checkbox and type a value in the text box to filter the list to show logs closed within a specific number of days from the current date.

### **Sorting Column Headers**

You can sort the Support History grid (Figure 20) by clicking any of the column headers. Click any row in the grid to view additional information contained in the Details View (Figure 21).

						Export	Tucson Time : 4:12 PM
Log ID	Subject	Reported Date	Reported Bv	Assigned To	Status	Completed Date	Comico Monoro - Evito
12- 00318	ASHA TEST	08/21/2012	Asha	⊠ Mimi Vitello	Reopened Log		Noemi Contreras - 4367
12- 00316	AXP	08/20/2012	Asha	⊠ Mimi Vitello	Reopened Log		
12- 00306	TEST AUTOCLOSE	08/16/2012	Asha	⊠ Mimi Vitello	Reopened Log		Quick Links
12- 00304	ASHA	08/15/2012	Unregistered User	⊠ Mimi Vitello	Reopened Log		CPMS/DV Current Known Issues
12- 00303	MID	08/14/2012	Unregistered User	⊠ Mimi Vitello	Reopened Log		CPMS/DV Upcoming Events
12- 00110	TESTING	02/23/2012	Unregistered User	⊠ Christopher Keaton	Support Log received		Support Center Release Notes
12- 00093	Enhancement Request - DataVision, Core Measures	01/31/2012	Asha, Patil	🖂 Amy Levy	Support Log received		Troubleshooting Guide
12- 00080	test	01/29/2012	Asha, Patil	⊠ Christopher Keaton	Support Log received		
12- 00074	Enhancement Request - DataVision, Core Measures	01/29/2012	Asha, Patil	🖂 Amy Levy	Support Log received		
11- 19339	test	12/21/2011	Asha, Patil	🖂 Barbara Schork	Support Log received		
12					Page 1 o	of 2 (20 items)	

Figure 20: Support History grid

Log ID: Internal ID assigned to the request Subject: Subject line of the original request Reported Date: Date the request was submitted Reported By: Email of the person who submitted the request Assigned To: Midas+ Solutions Support staff member handling the request Status: Current disposition of the request (see Status Definitions) Completed Date: If resolved, the date of the resolution is displayed here

### **Icon Functions**

Click the following icons to e-mail or export the results.

Click to send an email to the responsible Midas+ Solutions Support staff member

Export Click to export your support log information to a CSV file

# **Viewing Details**

The Details View displays the Status History, Status Notes, and Problem Description associated with the selected log. Click any row in the Support History grid (Figure 20) to display the Details View (Figure 21).

Support History -	Details View			2
	Det	ails View		^
Support Log ID:	12-00345	Subject:	Test	Edit
Reported Date:	8/27/2012	Reported By:	Asha, Patil	Print
Status:	Support Log received	Completed Date	2:	Close
Product:	Care Management	Functions:	Community Case Management	
Category:	Assessment	Sub-Category:		
Attachments:	0			
Status History				=
Status	Date	St	atus Notes	
Support Log rece	ived 8/27/2012 11:0	08 PM Ne	w Support Center Log	
Status Notes: New Support Ce	nter Log		<u>^</u>	
Problem Descrip	tion:		×	
Support Docume	ents Affected? No			~

Figure 21: Details View

The Status field near the top of the page displays the current status of the request. The Status History field displays all of the status changes associated with the request, See"Status Type Definitions" on page 22.

Click **Edit** to update the request with additional information (not available for closed logs).

Click **Print** to print the contents of the Details View window.

Click **Close** to exit the Details View.

### **Status Type Definitions**

**Entered By Midas+ Staff** A Midas+ staff member has entered the log from the internal support log system.

**Support Log Received** A record of the log has been created.

Acknowledgement of Receipt A Midas+ Support staff member has viewed the log.

**Researching** A Midas+ Solutions Support staff member is working on the request.

**Awaiting Client Follow-up** Solutions Support staff member is waiting for a response or additional information from the client.

**On Hold** The client has postponed the request.

**Triaged** The request has been forwarded to another Midas+ Solutions Support staff member.

**Escalated** The request has been forwarded to higher level staff for resolution.

**Resolved-Pending Confirmation** Email has been sent to client and awaiting Yes or No client confirmation response. If there is no response after 7 days, the log is closed automatically.

**Closed-Resolved** The issue has been resolved and the client has been notified.

Reopened Log The log has been reopened by Midas+ staff.

### **Editing an Existing Support Request**

*Note:* You cannot edit a log that has been closed.

- > To add information to an existing, open request:
- 1 In the Details View (Figure 21) click **Edit** for the request for which you want to update with additional information. The Support History Update Description form is displayed (Figure 22).

Support History - Update Description				X
			~	
Problem Description:		Save		ſ
Here is the updated description.	^	Cancel		
	$\mathbf{v}$			
Attach a File			≡	
You can attach one or more files and/or screenshots that you have saved on a drive accessible locally or on your network. Click the "Add" button and browse to the location where the file is stored to select it. You can also delete and view the attached file.  Add Delete View	e			
Copy and Paste Screenshot Images				
You can paste a copy of your screenshot image directly into this form. Just click on the "Paste" button. Your image will appear here and be viewable in the suppor log.	t			
Paste			~	
<		>		-

Figure 22: Support History Update Description form

2 In the **Problem Description** field, type the information you want to add to the request, then click **Save**.

Note: You can attach files and screenshots when editing an existing log.

The system updates the Status History grid and the Problem Description field with a time and date stamp and the information you added (Figure 23).

Support History	- Details View			×
Product:	Care Management	Functions:	Community Case Management	<b>^</b>
Category:	Assessment	Sub-Category:		
Attachments:	0			
Status History				
Status	Date	Stat	us Notes	
Status Updated	8/29/2012	11:37 AM Upda	ated by: Raghavendra	
Support Log rece	eived 8/27/2012	11:08 AM New	Support Center Log	
Status Notes:				
Updated by: Ra	ighavendra		~	1
				=
			×	
Problem Descri	ption:			
Question: Testi	ng		^	7
Support Docum	opta Affected? No			
Support Docum	ents Allecteu? No		_	
8/29/2012 11:3	37 AM Raghavendra :			
Here is the upd	ated description.		×	
└└────				
1				<b>`</b>

Figure 23: Support History Details View-Information and Timestamp

# **Confirming Resolutions**

Once you've submitted your request through the Support Center and the issue is being resolved or has been resolved, you'll receive an e-mail requesting confirmation.

# **Confirming a Resolved-Pending Confirmation Status in an Email**

The system sends you an email when a Midas+ Solutions Support staff member changes the status of your issue to Resolved-Pending Confirmation in the Midas+ Support log (Figure 24). Your confirmation of the resolution is required to close the support request. If you do not confirm the resolution within seven days of the status change, the system will automatically change the status to Closed-Resolved.

Does this answer resolve your request? Please click the hyperlink below your response. Yes, thank you for resolving my issue. Please close this log. <u>https://www.midasplus.com/Pages/ClientsOnly/Login.aspx?LogId=MjcwMDA4&ResponseID=MQ==&Referer=RU1BSUw=&UserResp=WQ==</u> No , I would like to provide additional feedback and keep the log open. <u>https://www.midasplus.com/Pages/ClientsOnly/Login.aspx?LogId=MjcwMDA4&ResponseID=MQ==&Referer=RU1BSUw=&UserResp=Tg==</u> Please confirm the resolution within 7 business days. This log will change to Closed-Resolved if no confirmation is received.

I'm finished with this issue. Take me to the Support Center to submit a new request. <u>https://www.midasplus.com/Pages/ClientsOnly/Login.aspx?</u> <u>Logid=MjcwMDA4&ResponseID=MQ==&Referer=RU1BSUw=&UserResp=U3VwcG9ydENibnRlcg==</u>

Figure 24: Hyperlinks in system email

When you receive the email requesting confirmation, click on the appropriate hyperlink that is displayed in the email.

# **Confirming a Resolved-Pending Confirmation Status in Support History**

- > To confirm the resolution from the Support History page of Support Center:
- 1 Click a record in the results grid with a status of Resolved-Pending Confirmation.

The system displays the Details View of the log.

- 2 Click a record in the Status History grid that has a status of Resolved-Pending Confirmation. A confirmation is displayed to the right of the Status Notes field.
- 3 Click **Yes** to confirm the resolution and close the log. Click **No** to provide additional information and keep the log open.

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