

CliniSync Support Guide



Ohio Health Information Partnership
Health Information in a Heartbeat

Ohio Health Information Partnership – CliniSync HIE
3455 Mill Run Drive, Suite 315
Hilliard, OH 43026

Web Portal: www.support.clinisync.org
Support line: 1-800-645-8192

Your CliniSync Support Guide

Overview

This document describes the support services provided for CliniSync Health Information Exchange (HIE) customers in addition to how to access support and expectations for issue resolution.

CliniSync will provide the first level of support for all HIE-related issues. These issues generally include connectivity between your system and another organization on the HIE network. These issues often include the following:

- Failed connections
- Missing messages
- Message errors
- Delivery timeouts
- Other aspects of the services provided by CliniSync.

Additionally, the CliniSync support team proactively monitors interface connections and notifies customers of issues and errors as they arise.

Third Party and Vendor Support

Issues that cannot be resolved by CliniSync are escalated to our HIE vendor or the appropriate third party, such as:


- **EHR systems/interfaces:** Your EHR vendor who installed your system and interfaces will provide support through your maintenance agreement.
- **Contributing systems:** Data contributors are responsible for maintaining and communicating with CliniSync on changes made to their message structures and for ensuring messages are sent to CliniSync. If a message structure or a missing message is the cause for delivery errors, CliniSync will work with the providing system on behalf of our clients to solve the problem.

Information You Will Need

Providing as much information as possible will assist the support centers in troubleshooting an issue. Information to provide when submitting a support ticket or making a support call includes:

- **Contact information** on how to reach the person reporting the issue for follow-up questions
- **Name and version of your electronic health record (EHR) application**
- **Initial steps taken thus far** in an attempt to resolve the issue
- **A status report from your EHR vendor** stating that the interfaces are operating properly, when applicable
- Any recent **changes to your system** or network, when applicable
- Any **major projects occurring at your organization** that could be impacted by the issue, i.e., training, testing, conversions, upgrades, etc.
- Error messages or sample information used either to illustrate or investigate the issue reported

Please be careful when submitting Patient Health Information. Be sure to place patient health information in the correct box, titled Patient Health Information, when submitting an incident.



The screenshot shows a form field with the title "Patient Health Information" and a "More information" link. Below the field is a red warning message: "If patient health information is required to troubleshoot your issue, please place it in the box above titled 'Patient Health Information'".

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Steps for Troubleshooting and Getting Support for an Interface Issue

Interfaces have three components:

- A data source (e.g., a hospital lab)
- The network that connects the source and destination (e.g. CliniSync)
- A data destination (e.g., a practice, EMR/EHR)

*Note that a source can also be a destination, (i.e. a practice is the **source** of patient demographics for the Immunization Registry as well as the **destination** for lab results).*

Contacting CliniSync Support

Please use the information below when you need to contact CliniSync with any HIE-related issues. The support staff at CliniSync will contact you as soon as possible and will inform you if the issue is not related to our services (e.g. EHR issues, hospital issues).

CliniSync Business Hours	Business Hours Support	Off-Hours Support
8 a.m. – 5 p.m. ET, M-F	<p>Critical issues: 1-800-645-8192</p> <p>All other issues: www.support.clinisync.org</p>	<p>Critical issues: 1-800-645-8192</p> <p>All other issues: www.support.clinisync.org (Addressed the next business day)</p>

Priority Definitions

Customers establish the initial priority of an issue. The information provided below will assist you in determining an issue's priority.

Priority	Description	CliniSync Response Timing
<p>Critical (1)</p> <p>Call Support Line at 1-800-645-8192</p>	<ul style="list-style-type: none"> • Full system down, no workarounds available • Patient safety at risk 	<ul style="list-style-type: none"> • Upon receiving the notification, contact the customer's primary contact to acknowledge the problem report and begin problem resolution within 15 minutes during the day or within 30 minutes during the hours of 5:00 p.m. and 8:00 a.m. (EST). • Verify the problem and notify the customer's primary contact with the plan of action within one hour. • Provide updates at least once every hour or at a frequency mutually agreed upon by the customer and CliniSync.

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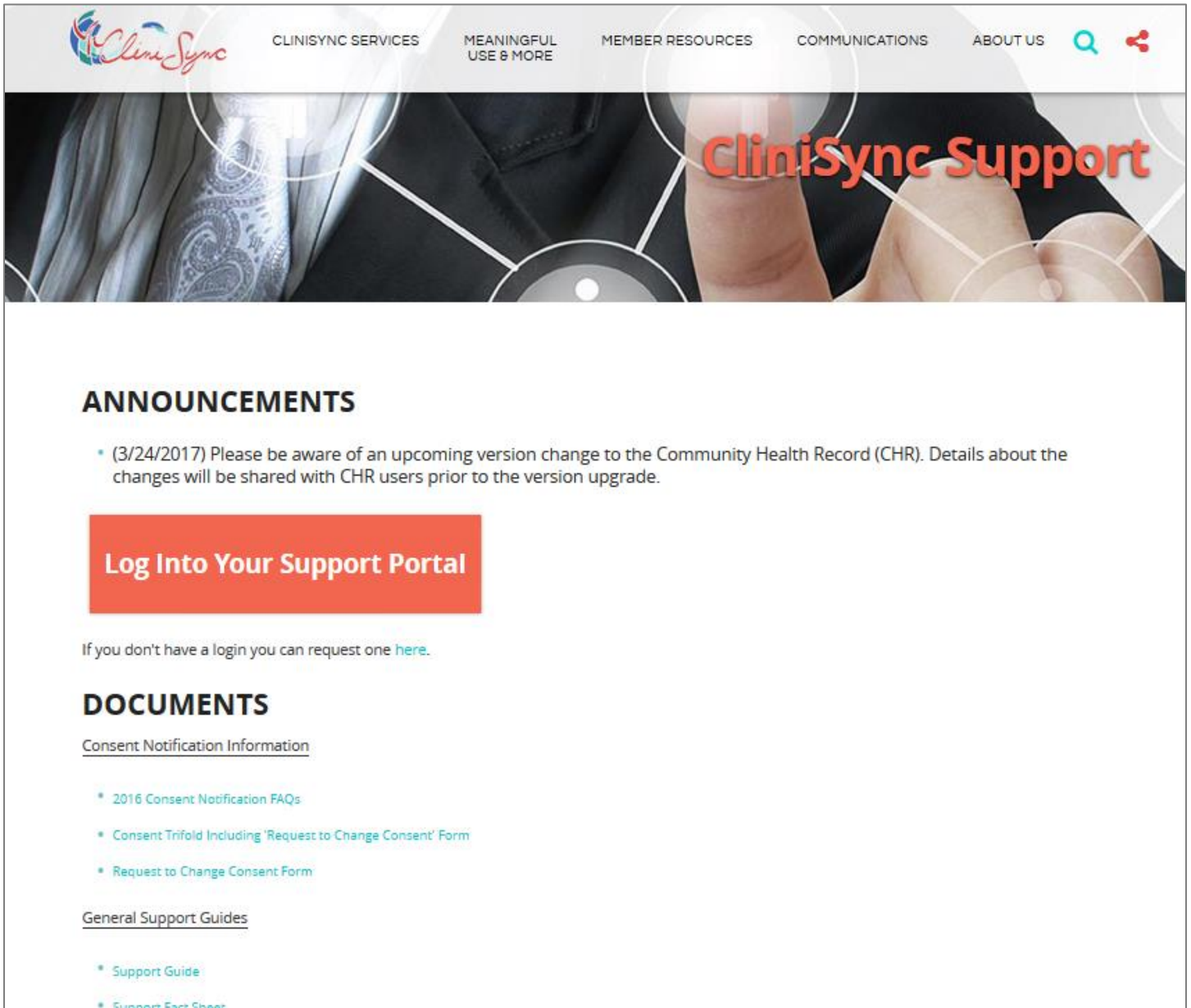
Priority	Description	CliniSync Response Timing
<p>High (2)</p> <p>Submit support ticket at www.support.clinisync.org</p>	<ul style="list-style-type: none"> Missing critical messages; for example, lab results Unable to perform some essential job functions 	<ul style="list-style-type: none"> Upon receiving the notification, contact the customer's primary contact to acknowledge the problem report within one hour. Verify the problem and notify the customer's primary contact with the plan of action within four hours. Provide updates at a frequency mutually agreed upon by the customer and CliniSync.
<p>Normal (3)</p> <p>Submit support ticket at www.support.clinisync.org</p>	<ul style="list-style-type: none"> General maintenance or support issue 	<ul style="list-style-type: none"> Upon receiving report of the problem, verify the problem and notify the customer's primary contact with an acknowledgement and plan of action within 48 hours. Provide updates at least once every five business days or at a frequency mutually agreed upon by the customer and CliniSync.
<p>Low (4)</p> <p>Submit support ticket at www.support.clinisync.org</p>	<ul style="list-style-type: none"> Low impact, or informational requests 	<ul style="list-style-type: none"> Upon receiving report of the request, verify the request and notify the customer's primary contact with an acknowledgement and plan of action within 48 hours.

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Navigating within the Support Portal

Accessing the CliniSync Support Portal

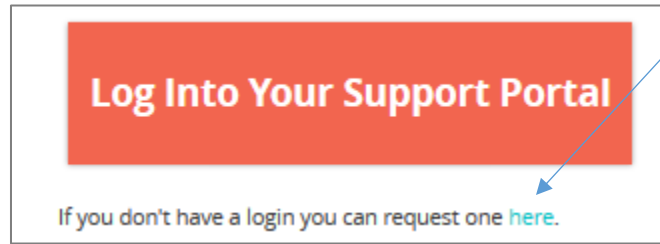
On your web browser, go to www.support.clinisync.org to reach the CliniSync Support Information Page.



The screenshot shows the CliniSync Support Portal homepage. At the top is a navigation bar with the CliniSync logo on the left and menu items: CLINISYNC SERVICES, MEANINGFUL USE & MORE, MEMBER RESOURCES, COMMUNICATIONS, and ABOUT US. There are also search and share icons on the right. Below the navigation bar is a large banner image featuring a person in a white lab coat and a hand pointing at a screen, with the text "CliniSync Support" overlaid in orange. Underneath the banner is a section titled "ANNOUNCEMENTS" with a single bullet point: "(3/24/2017) Please be aware of an upcoming version change to the Community Health Record (CHR). Details about the changes will be shared with CHR users prior to the version upgrade." Below this is a prominent orange button that says "Log Into Your Support Portal". Underneath the button, it says "If you don't have a login you can request one [here](#)." The next section is titled "DOCUMENTS" and is divided into two sub-sections: "Consent Notification Information" and "General Support Guides". Under "Consent Notification Information", there are three bullet points: "2016 Consent Notification FAQs", "Consent Trifold Including 'Request to Change Consent' Form", and "Request to Change Consent Form". Under "General Support Guides", there are two bullet points: "Support Guide" and "Support Fact Sheet".

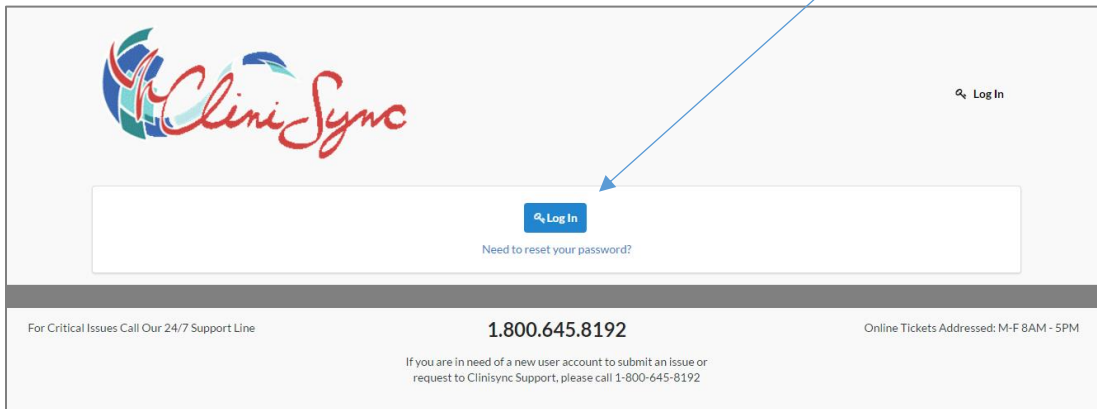
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If you do not already have a username and password to submit tickets, you can call Support at 1-800-645-8192 or submit a form for Support Portal credentials below the login button.



If you do have a username and password already, click the **Log Into Your Support Portal** button to be brought to the Support Portal to log in

To login, select the **Log In** button to be taken to the login page.

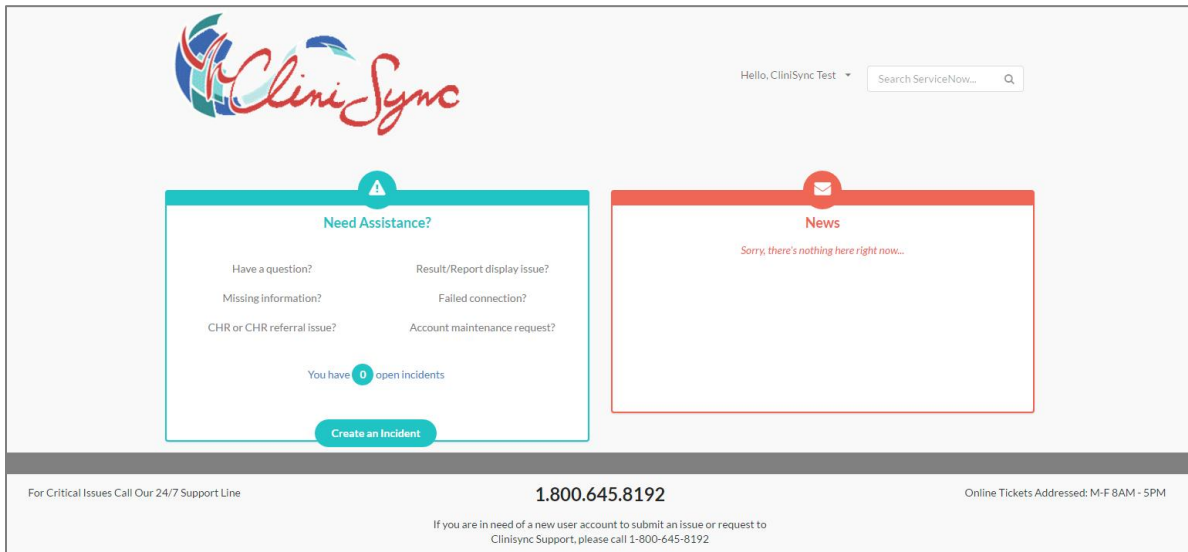


After clicking **Log In** you will be asked to enter your User name and Password.

A screenshot of the login form. It has two input fields: "User name" and "Password". Below the "Password" field is a checkbox labeled "Remember me". At the bottom right of the form is a blue "Login" button.

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Once you have entered your User name and Password, select the blue **Login** button. You will now be taken back to the Support Portal homepage where you can submit a new incident, or view your previously submitted incidents.



As a user, you will also be able to keep yourself informed of recent support related announcements regarding our products and services via the News location on the righthand side of the homepage.

Submitting a New Incident

Once you have logged in and are in need of submitting a new support request, select the **Create an Incident** button at the bottom of the "Need Assistance" box on the lefthand side. You will be taken to a new page where you will be asked to submit details regarding your issue or request.

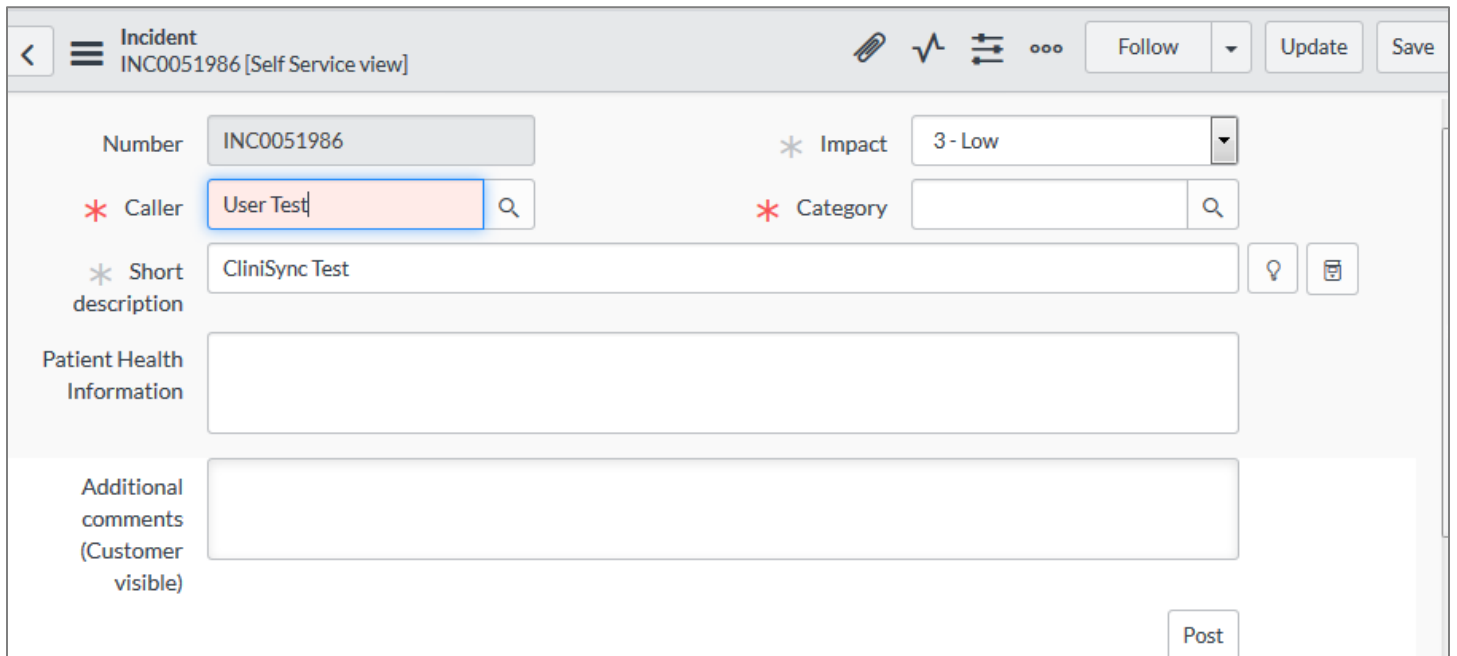
The screenshot shows the "Something Broken" incident submission form. At the top left is the CliniSync logo. To the right, there is a user greeting "Hello, CliniSync Test" and a search bar labeled "Search ServiceNow...". The form itself is titled "Something Broken" and contains the following fields: a text area for "Thank you for contacting the service desk. Please describe the nature of your problem in the fields below. Upon receipt, the service desk will categorize and prioritize your problem at which time you will receive an automated email with the details of that update."; a dropdown menu for "Open on behalf of this user" with "CliniSync Test" selected; a text input field for "Callback Number"; a dropdown menu for "Impact" with "3 - Low" selected; a dropdown menu for "Category" with "-- None --" selected; and a text input field for "Hospital". At the bottom right of the form is a blue "Submit" button.

After you have complete the form, select the **Submit** button located in the bottom right of the page. Once your request has been submitted, you will be taken to your incident summary where you can add/modify ticket information.

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If you decide to add additional information, you can do so here. Selecting will save your details and bring you to your incident list, where you can review your outstanding incidents.

Selecting will save your details and keep you on the incident summary page where you can continue to modify your incident if needed.



The screenshot shows the 'Incident' form for 'INC0051986 [Self Service view]'. The form includes the following fields and controls:

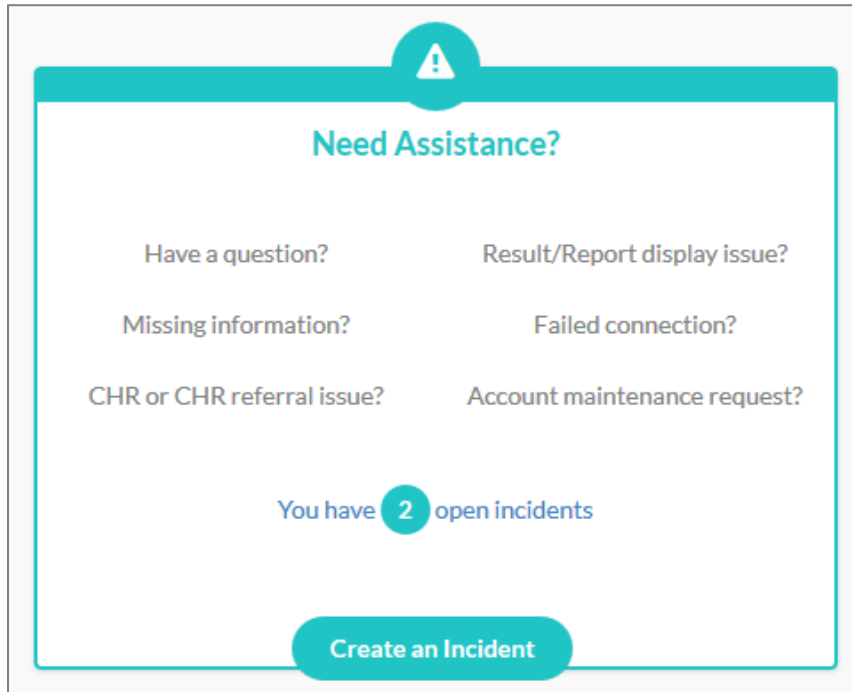
- Number:** Text input containing 'INC0051986'.
- Impact:** Dropdown menu set to '3 - Low'.
- Caller:** Text input containing 'User Test' with a search icon.
- Category:** Text input with a search icon.
- Short description:** Text input containing 'CliniSync Test' with a lightbulb icon and a trash icon.
- Patient Health Information:** Large empty text area.
- Additional comments (Customer visible):** Large empty text area.
- Buttons:** 'Follow', 'Update', 'Save', and 'Post'.

Any ticket you open will also be emailed to you via the email address provided with your username.

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Accessing Your Incidents

To access your outstanding incidents please go to the home page at www.support.clinisync.org. There you will find your number of open incidents within the “Need Assistance?” Box. You can click on that number to access your incident list.



Within your Incident List, you can click on any incident to check the updates made by CliniSync Support and/or add additional details or questions.

	Number	Opened	Short description
<input type="checkbox"/>	INC0051985	2017-03-25 09:59:53	Test Issue
<input type="checkbox"/>	INC0051986	2017-03-25 10:00:52	CliniSync Test