Support Issue Process for *EHR Integration Services*

EHR Integration Services *Support Issue Process*

The document describes the process you can use to log all your questions, requests and support issues via EHR's ExtraView issue tracking tool. This tool allows us to receive, triage, assign and resolve your issues in the most efficient manner. Depending on the nature of the issue, your issue will be assigned and serviced as described below.

You access ExtraView directly through the EHR Integration Services website (www.ehr-integration.com), and using your own ExtraView user id/password, you have the ability to add an issue as well as track the progress of all issues posted by anyone within your organization.

For every new issue you post, as well as ALL updates made to your existing issues, you will receive an automatic email notification, showing you the Issue's status and any Customer Dialog logged to that issue.

Following is a brief description of how to Log in, use your Home Page, Add a new Issue, Update an existing Issue and Query your existing Issues.

Log in and Home Page use:

1. Go to www.ehr-integration.com
2. Click on the ***Support*** button located on the top Menu of the Home Page

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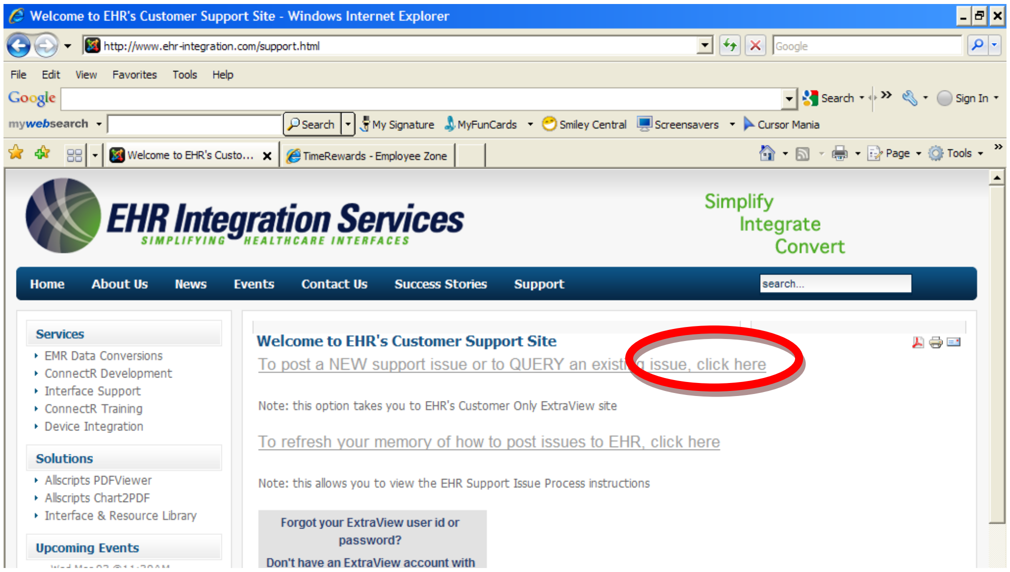
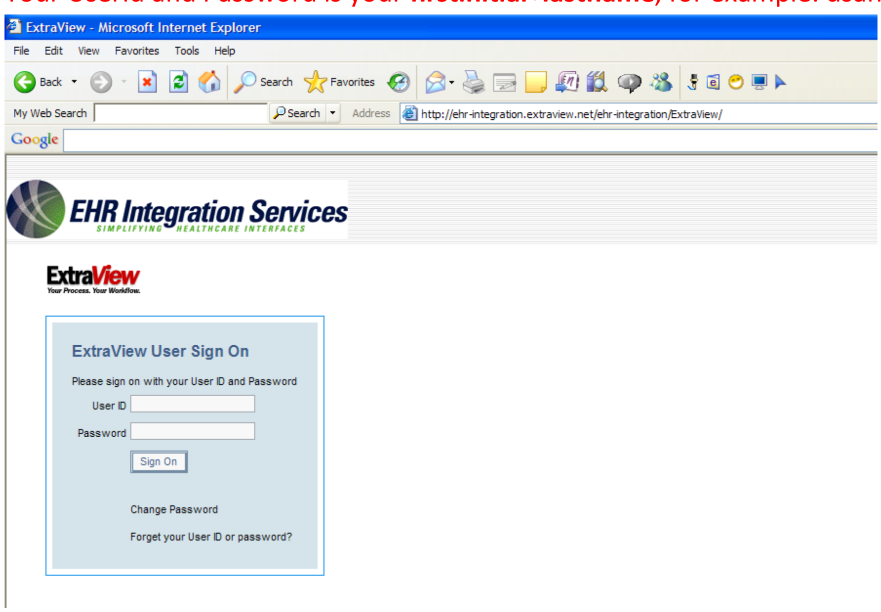
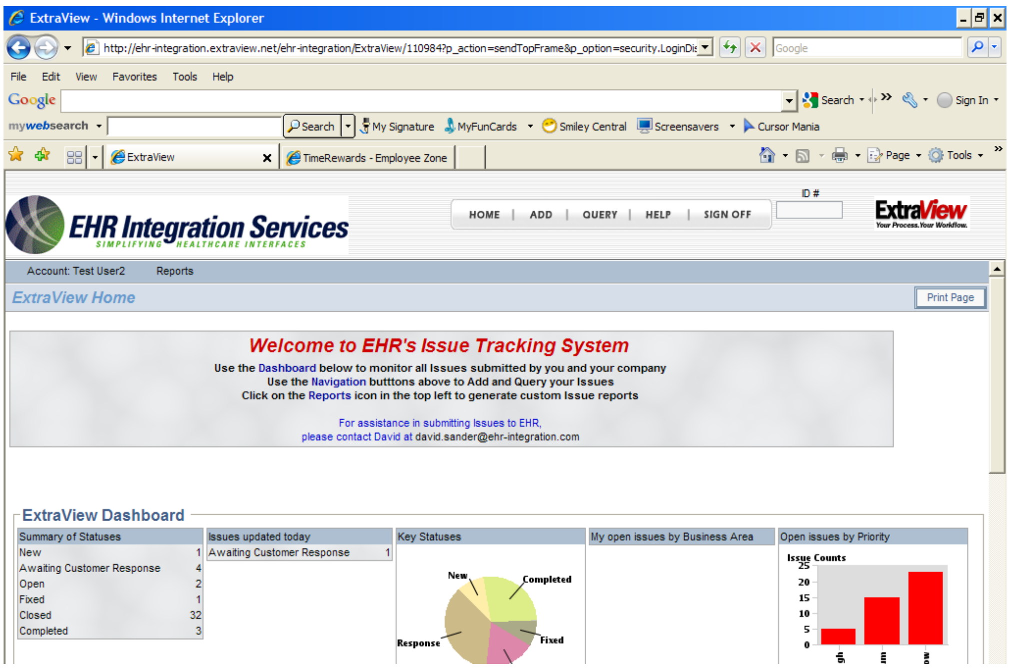
3. On the *Customer Support* page, click on "To Post a NEW Support Issue…"



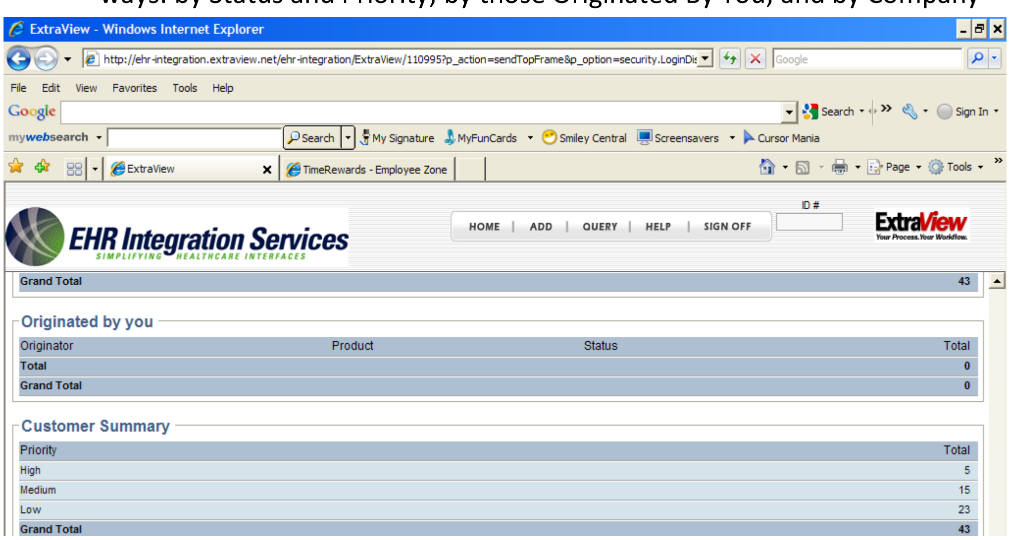
4. This takes you to the ExtraView Sign On screen. Sign on using your unique ExtraView user id/password
   a. Your UserId and Password is your **firstinitial+lastname**, for example: dsander



5. Home Page
    a. Your Home Page will display an ExtraView Dashboard that summarizes all Issues for you and your organization, based on key Statuses. Use this Home Page to easily view your Open Issues, Issues submitted specifically by you, and Issues submitted by anyone from your organization.



    b. Home Page Issue Summaries:
        i. Below your Dashboard, your Home Page will list all Issues sorted in a variety of ways: by Status and Priority; by those Originated By You; and by Company



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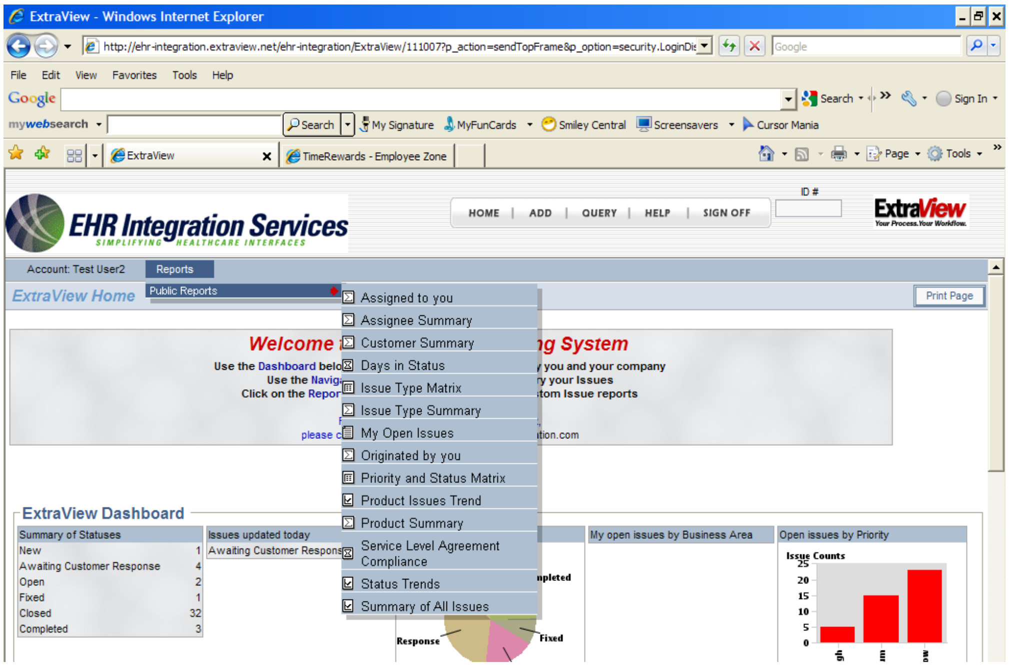
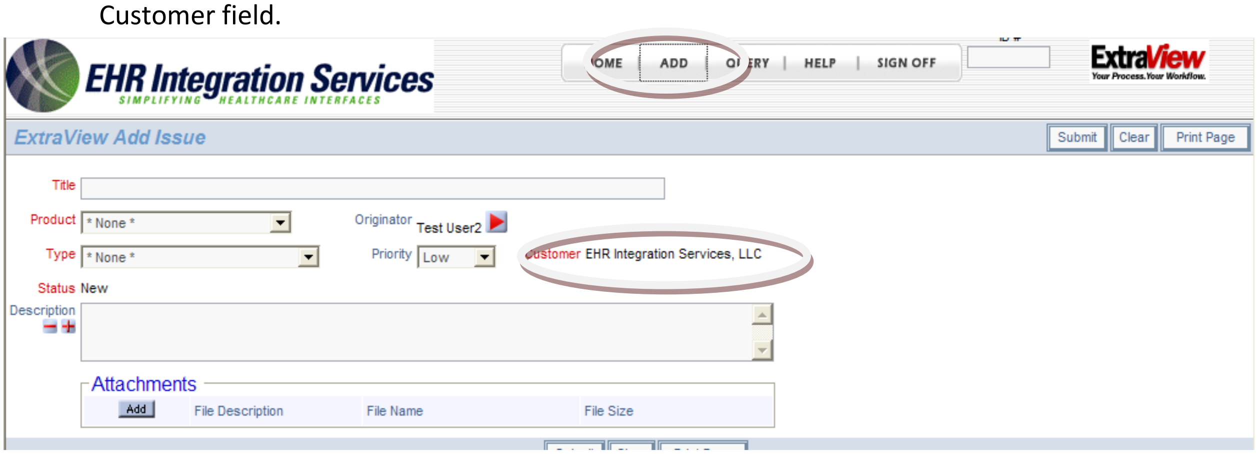
c. Home Page Reports:

i. You can also print/view a variety or Reports using the Reports menu located at the top left of your Home Page.



Add a New Issue:

1. To ADD an Issue, click on the ADD button on the top menu of any page.
2. This takes you to the Add Issue Screen, where you will see your organization's name next to the Customer field.



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3. Complete the Add Issue template , as follows:
   a. **Title**: Please us a succinct and descriptive title that describes the nature of your issue
   b. **Product**: Choose the Product that your particular issue pertains to:
      i. ConnectR
      ii. Conversion Services
      iii. Group Management Mentoring
      iv. Interface- Group Management
      v. Interface- ConnectR
   c. **Type**: Choose the Type that best describes the nature of this Issue:
      i. **Enhancement Request:** Select Enhancement Request when you would like to log an idea or suggestion as to how to improve (enhance) ConnectR, a library interface, EHR Integration's service, or anything else you'd like to give feedback on.
      ii. **Install:** Select Install for any issue pertaining specifically to a ConnectR Installation effort.
      iii. **Question:** Question Issues are typically low urgency, whether it because you are curious about a service we might offer, or you have a need you are exploring and want to discuss with us, or something you are just wondering about.
      iv. **Request:** Select Request when you are making a specific request for services from EHR Integration Services, such as mentoring, an interface development contract, conversion services, etc.
      v. **Support**: Select a Support Issue when you need clarity around something you learned from your training workshop ("Please remind me how to …"), or just need a little advice or coaching as to how to get started on or complete an interface ("Why am I not getting messages mapped to…")
      vi. **Training:** Select a Training Issue to indicate that you want to attend a specific training event (workshop, webinar, etc.).
      vii. **Bug:** A Bug Issue is critical in that you are experiencing some type of glitch in your system and need help. Use the Priority level below to tell us how urgent the Bug actually is for you. **NOTE:** If you want us to investigate a Bug in your interface, please provide the following three items so that we can easily go to your server, into the message log and investigate the bug
         1. Name and number of the interface
         2. Date in the message log
         3. Message ID

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d. **Priority**: Choose the Priority based on the following criteria:
   i. HIGH
      1. This means your **system is DOWN**, and it is critical that it come back up as soon as possible, and you are requesting immediate attention
      2. EHR Integration response time: less than 4 hours
   ii. MEDIUM
      1. This means you need our attention and expect us to get back to your soon, but **you are not in a downtime situation**
      2. EHR Integration response time: within one business day
   iii. LOW
      1. This means your issue is not urgent, but you expect a timely response
      2. EHR Integration response time: within 3-5 business days

e. **Status**:
   i. The Status of a new issue is automatically set to NEW. It will be modified accordingly by the EHR Integration Team as the issue is processed.
   ii. You can track the Status of your issue at any time using the Query feature described below.

f. **Description**:
   i. Describe your situation , problem and any other information that would be helpful to streamline a resolution

g. **Attachments**:
   i. Please attach screen prints or relevant data that would be helpful to streamline a resolution

Update Existing Issues:

You can easily update the *Customer Dialog* box of your existing issues at any time via email by doing the following:

1. On the email notification of the issue you want to update, just hit REPLY TO.

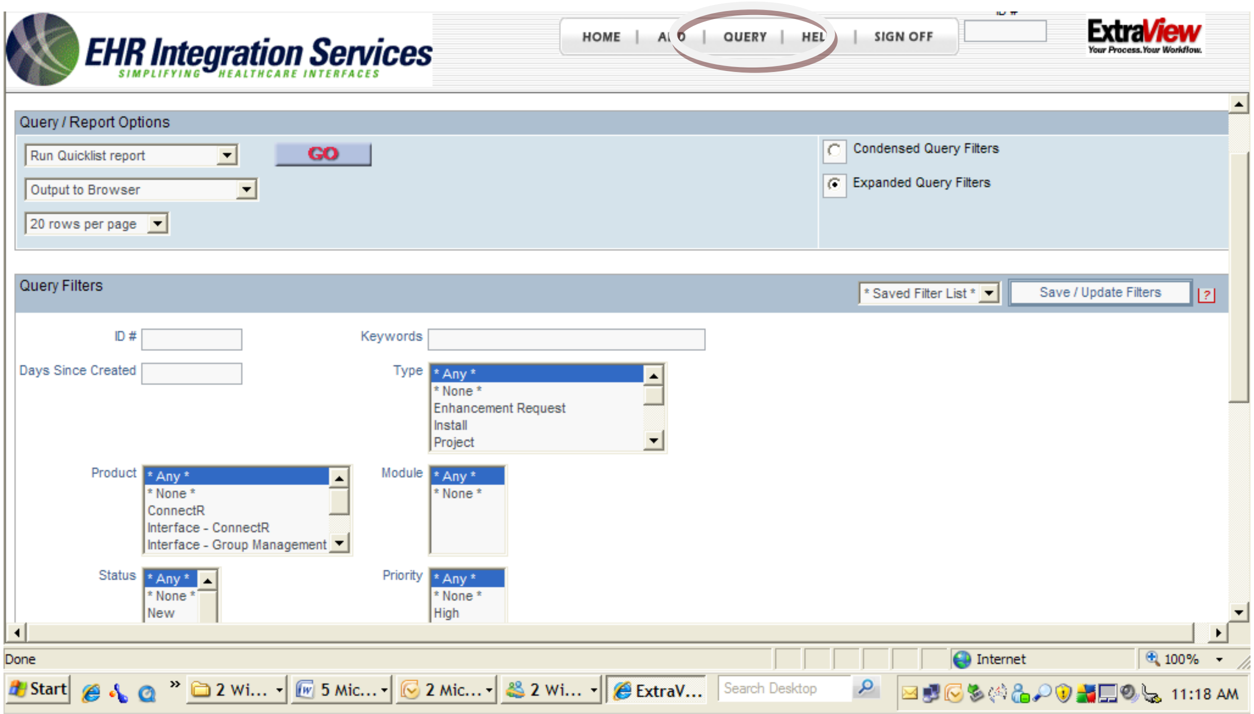
    a. As long as the REPLY TO email address is ehrissue@ehr-integration.com, and the Subject Line contains the issue number in brackets (for example: [10101]) then the issue will be updated with the entire contents (and any attachments) of your email.

2. Once you send that REPLY, you and the EHR Consultant assigned to that issue will receive an automated email notification showing your update.

3. NOTE: You cannot edit your issue, other than adding more *Customer Dialog* notes. If you need to change the status, title or description of the issue, then just indicate that in your email and the EHR Consultant will make those changes to the issue for you.

Query Your Existing Issues:

You can easily view the entire list of your organization's existing issues by clicking on the QUERY button in the top menu.



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1. Query/Report Options section
   a. Choose the best reporting option that will give you the visibility to issues that you need
2. Query Filters section
   a. Choose the best filtering options that will give you the visibility to issues that you need
3. Saved Reports section
   a. Save any query/report criteria for future use