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Effective 03/29/2023 MEDDATA/MEDTRON (MDS/MSI) moved client support to a new Internet-based HelpDesk portal available via <u>https://helpdesk.medtronsoftware.com</u>.

- The portal facilitates clients submitting tickets directly to MDS/MSI and allows clients to view their outstanding tickets and ticket updates as they occur.
- Effective 02/12/2024, MDS/MSI transitioned all client resources to the HelpDesk portal and these resources will no longer be available via the MEDDATA/MEDTRON website (<u>www.medtronsoftware.com</u>).
- Each client user can create a HelpDesk account to access the portal, open new support tickets, check the status of existing tickets, and access the Knowledge Base for User Guides, News Blasts/Newsletters, and other MDS/MSI published client resources.
- With this transition we will be retiring the <u>support@medtronsoftware.com</u> and <u>tech@medtronsoftware.com</u> email addresses previously used for support. Emails sent to these addresses will begin sending undeliverable messages.

To Create a HelpDesk Account

Access <u>https://helpdesk.medtronsoftware.com/</u>.

Select 'Register' or 'Submit Ticket' to create a new account.

If you select 'Register', the portal will require you to submit your full name and email address to obtain a confirmation email to create your HelpDesk account (you are not required to create a HelpDesk ticket).



You will then receive an auto-reply email requesting you to create a password and confirm your account.

Follow the steps specified in the email and on the HelpDesk screen to complete your HelpDesk account creation.

As an alternative, you can select 'Submit Ticket' which will guide you through the steps to create a ticket and the HelpDesk portal will auto-send the account creation confirmation email immediately after the ticket is submitted. From: helpdesk@medtronsoftware.com Date: February 12, 2024 at 4:48:21 PM CST To: testcontact@prclinic.com Subject: TIME SENSITIVE - Confirm your MEDDATA-MEDTRON HelpDesk account Reply-To: helpdesk@medtronsoftware.com

New Account Confirmation

Dear Test Contact,

Thank you for registering for an account in HelpDesk.

Please click on the following link to activate your account: https://helpdesk.medtronsoftware.com/register/6c69972ffaf645e895908353789c34db/

Sincerely, MEDDATA/MEDTRON Support Team https://helpdesk.medtronsoftware.com



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To Navigate the HelpDesk Portal				
Once logged in, the banner at the top of the s	creen lists the navi	igation options for the Hel	pDesk portal.	
Q Search Tickets	Knowledge	Base Submit New Ticket	My Tickets	
Access MDS/	MSI published User	Create a new	view status of your	
Guides, News	Blasts/Newsletters as for client educations	s, and support request s	submitted requests	
oulei resourc	es for client educat			
The left-hand name will present the cated	ories for user-cres	ated tickets allowing use	er to sort TICKETS	
by ticket status and category.		ated tickets, allowing use	All Tickets	2
			Pan lickets	2
'All Ticket' will present all tickets created	by the user, wheth	ner open or closed.	Closed Ticket	5
	-	-	closed fickets	' '
'Pending Tickets' will present only open t	ickets.		STATUSES	
	• • •		New	
Closed Tickets' will present only closed t	ickets.		Assigned	
Tickets can also be viewed by the status	listed		In Progress	
Tickets can also be viewed by the status	listeu.		Escalated	
			Scheduled	
<u>To Create a New Ticket</u>			Pndg Client	
Click 'Submit New Ticket' from the top right	of the screen.		Pndg Staff	
Complete the required fields indicated with	an asterisk (*).		Pndg Vendor	
Once 'Sub-Category' is selected, the 'Type	field will present;	select the appropriate ty	ype. Deferred	
For some selections in the Type field, a D	etall' field will pres	sent.	Closed	
Type a brief description of the issue in the '	Subject' field	Create a New Ticket		
Type a detailed description in the 'Message	e' field	Create a New Ticket		
If necessary, add attachments in the 'Drag	& drop a file to	Tisket Details		
attach it or Browse for a file' field.		licket Details		
Click 'Create Ticket'.		Category*		
The system will send an automated email to	o the ticket	HelpDesk - Client	-	
creator (Contact) with the assigned ticket n	umber.	Sub-Category* @		
		······· ·· ·· ·· ·· ·· ·· ·· ·· ·· ·· ·		
NOTE: If user is not already logged into an	account,	Cublicate		
additional fields will present for har	ne, email	Subject*		
Once the ticket is submitted the use	er will be	Enter subject		
prompted to save their account for	future access	Message*		
to the HelpDesk portal.		📾 📼 👳 B I U Font -	Size - A - 🖸 - 📰 📰 👖	⊊⇒n n< 2¢
• •				
		Add.CC		
		Contact Group		
		MDS/MSI Staff		
		1		
			Trag & drop a file to attach it, or Browse for a file	
			W 111W	

Cancel

Create Ticket



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To Update An Existing Ticket

Select 'Pending Tickets' to view open tickets.

Click on the ticket 'Subject' to view the ticket details.

Click 'Reply' in the lower left-hand corner of the portal to add additional information or request information related to the ticket. Once information is added (including any necessary attachments), click 'Send Reply'.

The assigned MDS/MSI staff member will review your ticket and provide an update.

MEDDATA/MEDTROM	N HelpDe	esk		Q Search Tickets			Kn	owledge Base S	ubmit New Ticket	My Tickets	тс ~
TICKETS All Tickets	1	Pend	ling Tickets				11	Unresponded by ag	gent 🗸 🛛 🖓 Filte	er 1-1of1	~
Pending Tickets	1	Щ٧	STATUS	SUBJECT	RAISED BY	ASSIGNEE	CATEGORY	TICKET ID	LAST UPDATED		•
Closed lickets	U	*	NEW	MEDPM User SUSIE disabled	Test Contact	~	HelpDesk - C	#HD00006131	a minute ago	•	-
STATUSES		4								•	

To Reset HelpDesk Account Password

From the login screen select 'Forgot password?' Enter the email address associated with the account. An email will be sent from <u>helpdesk@medtronsoftware.com</u> with a password reset link. If the email does not present in the User's inbox, check your spam folder.

Password Reset
Dear ,
We received a request to reset the password on your HelpDesk account.
Please click the below link to reset your password: https://helpdesk.medtronsoftware.com/forgotpassword/7e3f5a5e3fec47928128bfb562214d74

Access MDS/MSI Resources Via Knowledge Base

Select Knowledge Base from the top right of the screen.

All HelpDesk resource sections will present per below.

Document availability within the section is determined by client and resource type.

For example, the 39 resources listed in the 'User Guides: MEDEHR' will only present for MEDEHR clients.

Il Sections	
🗅 Forms - Practice Specific (80)	🗅 User Guides: MEDEHR (39)
🗅 MEDDATA (MDS)/MEDTRON (MSI) (6)	MEDEHR Achieving Meaningful Use (MU) For Core Set Measures (15)
Medical Billing Resources (13)	User Guides: MEDPM (103)
🗅 News Blasts (330)	Basic Concents (4)
Billing & Reimbursement (165)	Batch Entry (13)
Compliance (10)	Closing & Special Functions (6)
Holiday Notices (12)	Collection Task Module (1)
MEDDATA/MEDTRON Notices (7)	Electronic Claims (9)
MEDEHR (58)	Front Desk (11)
MEDPM System Updates (19)	History & Demographics (2)
D Public Health Emergencies (PHE) (24)	Industrial Medicine Module (1)
Quality Reporting & Value Based Programs & Incentives (35)	Insurance & Labels (7)
	Patient Information (8)
Newsletters (47)	Reports (7)
Severe Weather / Storm Preparation (1)	Setup & Support (19)
	Statements & Letters (4)
Standard Operating Procedures (SOP) (29)	C Z - Other (8)
 Carrier Website Access & EOB Retrieval (12) Pack Prep, Logs & Scanning (4) Reports (5) 	D User Guides: Other (8)



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Select a section to view the available articles within the section.

Q Search the Support Center	Knowledge Base Submit New Ticket My Tickets TC ~
Home > User Guides: MEDPM > Front Desk	
Front Desk	
Front Desk	
Private Articles	
Co-Pay Feature	F15 Authorization Record
Front Desk (FD)	🖹 Front Desk (FD) Charge Ticket List
Insurance Card/Driver's License Scanning Instructions	🖹 LA Medicaid Community Care Referral Exempt
🖹 List Incomplete Masters (Orphan Insurance Card Scan) Report	OB Billing Grid - Billing Policy/Guidelines
Unprocessed (Unproc)/Processed (Proc) List Transaction Reports	Vaccines & Administration
VFC Medicaid Immunizations	

Click on an article to select.

The article will contain basic text to allow for keyword searches but is not formatted for ease of viewing nor does it include all the images contained in the full document.

To view the full PDF document, scroll to the bottom of the article and click on the attachment name to download and print the document (preferred method).





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To Search By Keyword

Type keywords/topics in the search bar located in the upper left-hand corner of the portal.

Q Search the Support Center

For example, if user was looking for the latest information on a specific CPT or modifier:

Q 99215	
	Found 8 Results for "99215"
	2023.0414 - Social Determinants of Health (SDOH) **ATTN: ALL PROVIDERS** **Social Determinants of Health (SDOH)** **ICD-10 Code Categories Z55-Z65** Historically, the practice of medicine focused primarily on diagnosing and treating specific clinical conditions. population Q modifier 59
	Found 26 Results for "modifier 59"
	2023.0419 - Modifier Scrutiny - Carriers Cracking Down on Usage - Modifier 59

Articles containing the keyword/topic will present with a summary for the user to select the applicable article.

For MEDDATA Clients:

The 'Forms – Practice Specific' section contains the following forms customized for your practice:

- Demographic Intake Forms
- Charge Tickets
- Reconciliation Forms

The 'Standard Operating Procedures (SOP)' section contains resources related to the below:

- Carrier Website Access & EOB Retrieval
- Pack Prep, Logs and Scanning
- Reports
- Batch Naming Scheme
- To Comment Patient Accounts