

<b>USER GUIDE</b>	<b>REVISION DATE:</b> 02/11/2026	
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Effective 03/29/2023 MEDDATA/MEDTRON (MDS/MSI) moved client support to a new Internet-based HelpDesk portal available via <https://helpdesk.medtronsoftware.com>.

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 ([www.medtronsoftware.com](http://www.medtronsoftware.com)).

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.

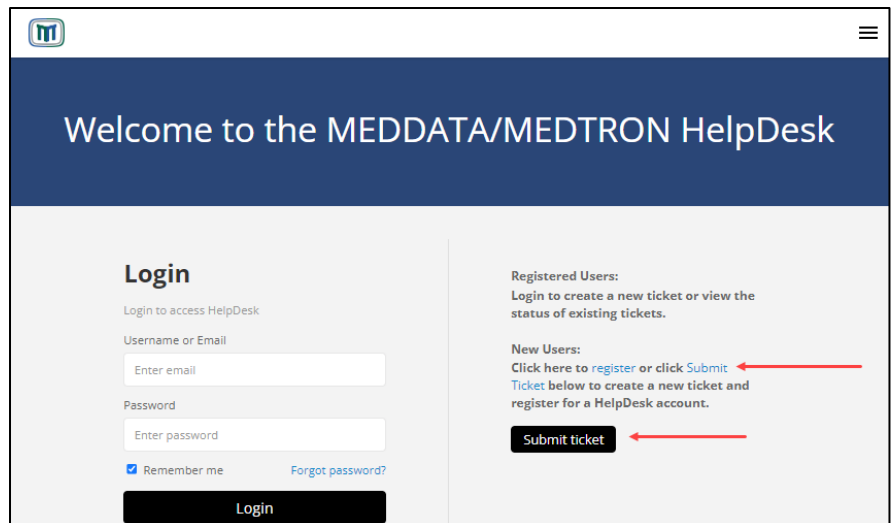
With this transition we will be retiring the [support@medtronsoftware.com](mailto:support@medtronsoftware.com) and [tech@medtronsoftware.com](mailto:tech@medtronsoftware.com) email addresses previously used for support. Emails sent to these addresses will begin sending undeliverable messages.

**To Create a HelpDesk Account**

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

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

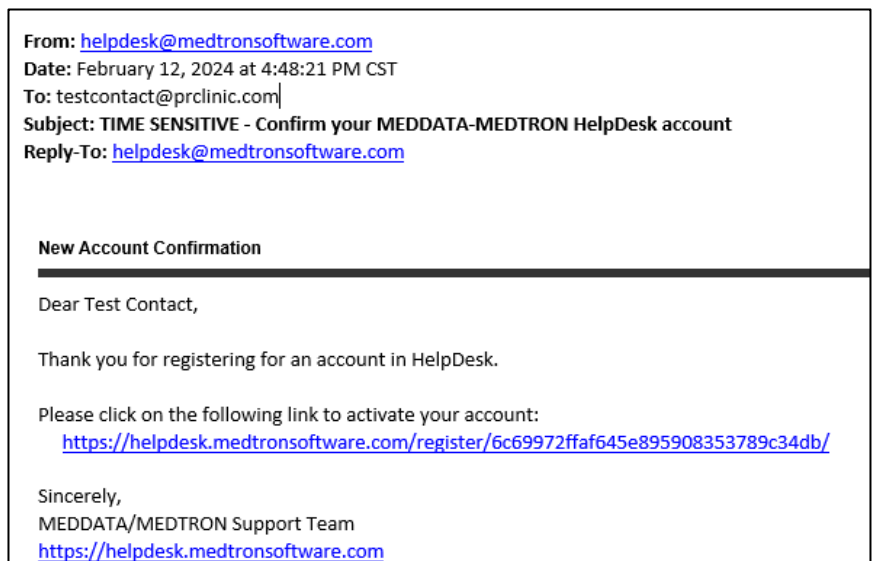
If you select 'Register', the portal will require you to submit your full name and email address to obtain a confirmation email to create your HelpDesk account (you are not required to create a HelpDesk ticket).



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.

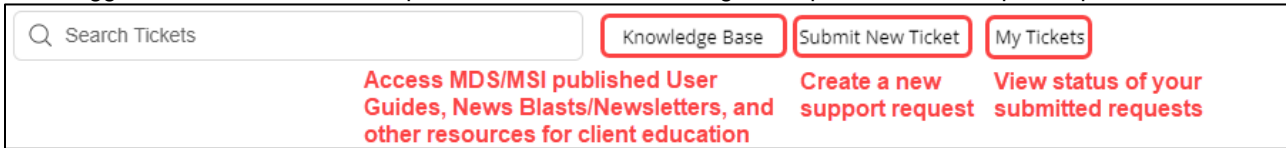
As an alternative, you can select 'Submit Ticket' which will guide you through the steps to create a ticket and the HelpDesk portal will auto-send the account creation confirmation email immediately after the ticket is submitted.



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**To Navigate the HelpDesk Portal**

Once logged in, the banner at the top of the screen lists the navigation options for the HelpDesk portal.



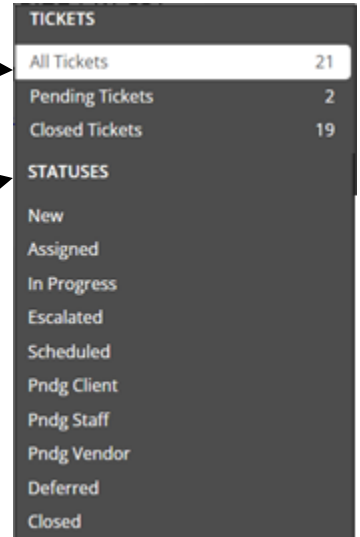
The left-hand pane will present the categories for user-created tickets, allowing user to sort by ticket status and category.

'All Tickets' will present all tickets created by the user, whether open or closed.

'Pending Tickets' will present only open tickets.

'Closed Tickets' will present only closed tickets.

Tickets can also be viewed by the status listed.



**To Create a New Ticket**

Click 'Submit New Ticket' from the top right of the screen.

Complete the required fields indicated with an asterisk (\*).

Once 'Sub-Category' is selected, the 'Type' field will present; select the appropriate type.

For some selections in the 'Type' field, a 'Detail' field will present.

If the 'Detail' field presents, select the appropriate detail.

Type a brief description of the issue in the 'Subject' field.

Type a detailed description in the 'Message' field.

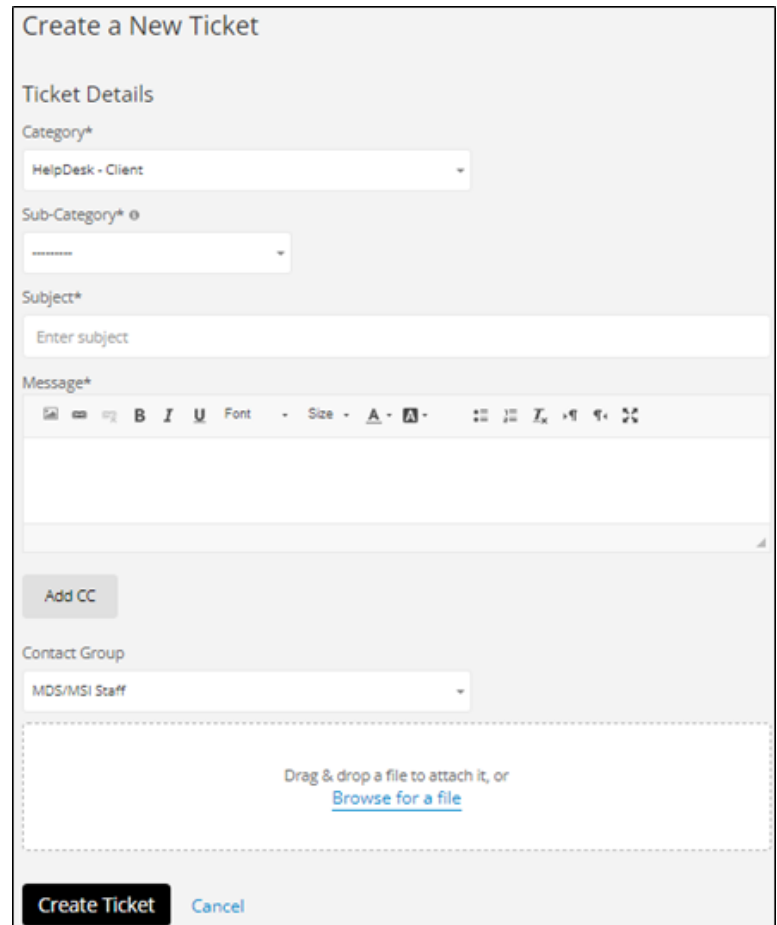
If necessary, add attachments in the 'Drag & drop a file to attach it or Browse for a file' field.

Click 'Create Ticket'.

The system will send an automated email to the ticket creator (Contact) with the assigned ticket number.

NOTE: If user is not already logged into an account, additional fields will present for name, email address, etc.

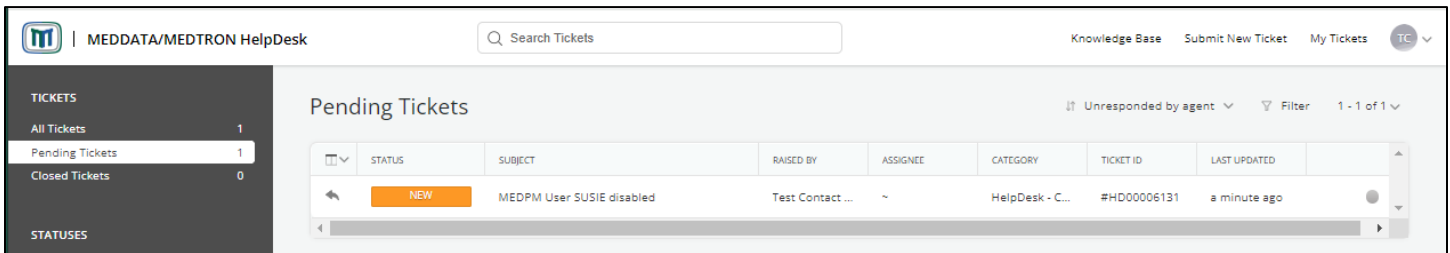
Once the ticket is submitted the user will be prompted to save their account for future access to the HelpDesk portal.



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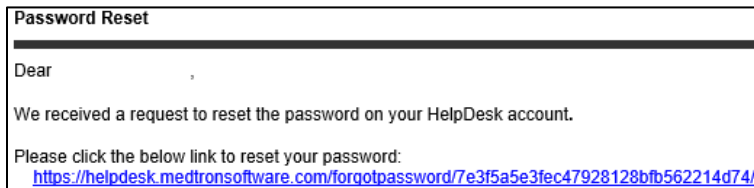
**To Update An Existing Ticket**

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.



**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 [helpdesk@medtronsoftware.com](mailto:helpdesk@medtronsoftware.com) with a password reset link.  
 If the email does not present in the User's inbox, check your spam folder.



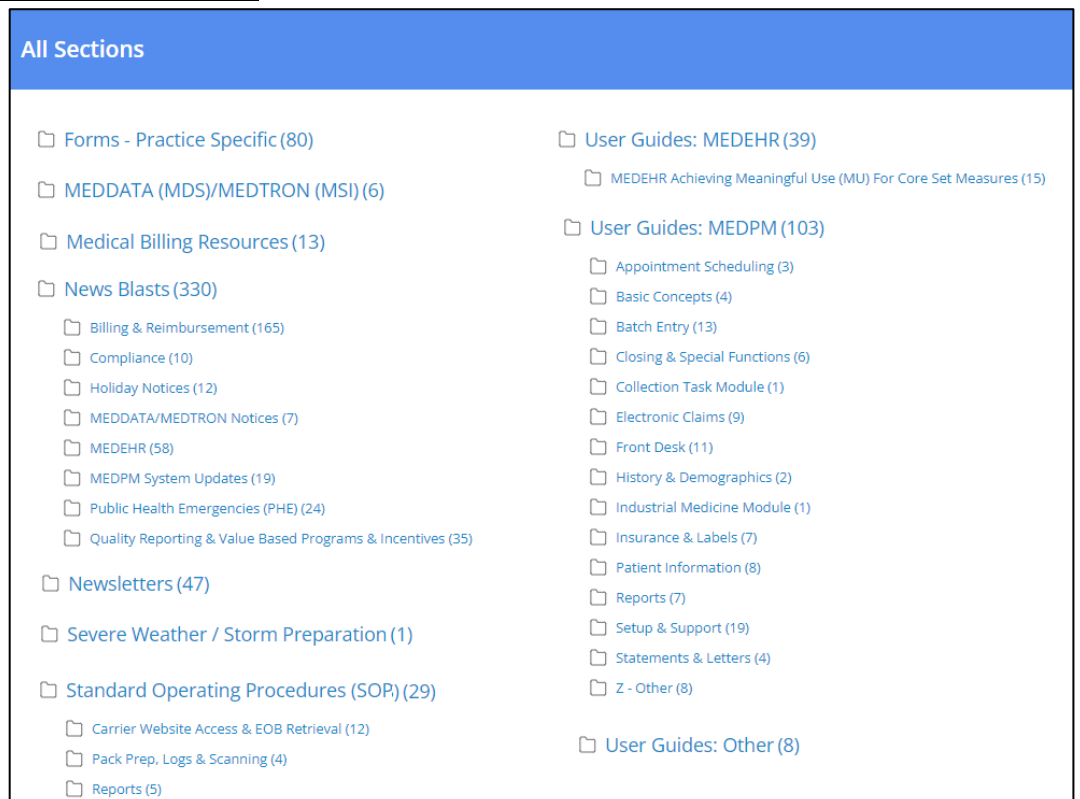
**Access MDS/MSI Resources Via Knowledge Base**

Select Knowledge Base from the top right of the screen.

All HelpDesk resource sections will present per below.

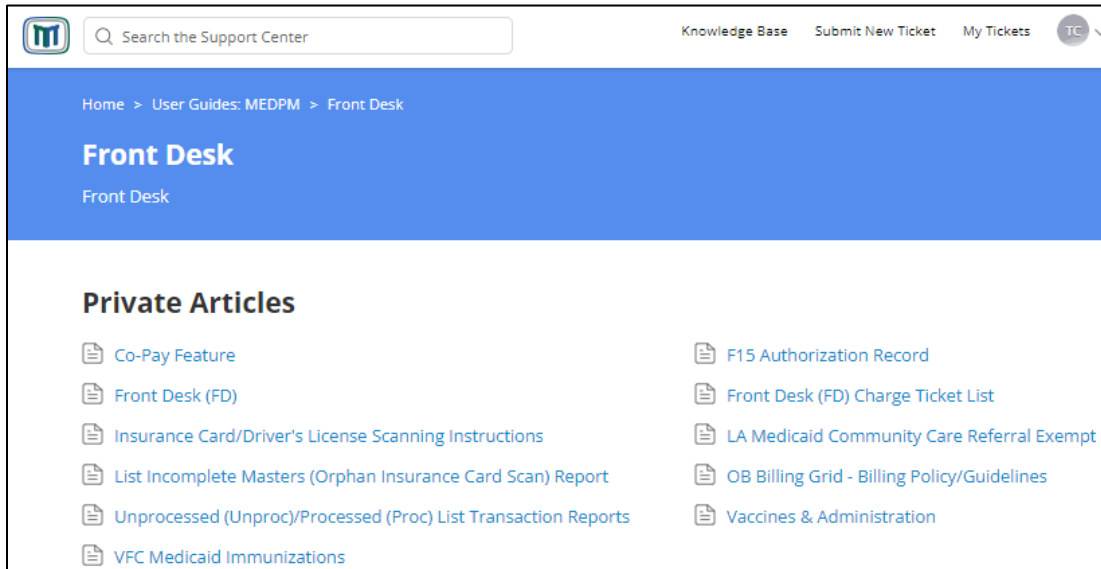
Document availability within the section is determined by client and resource type.

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



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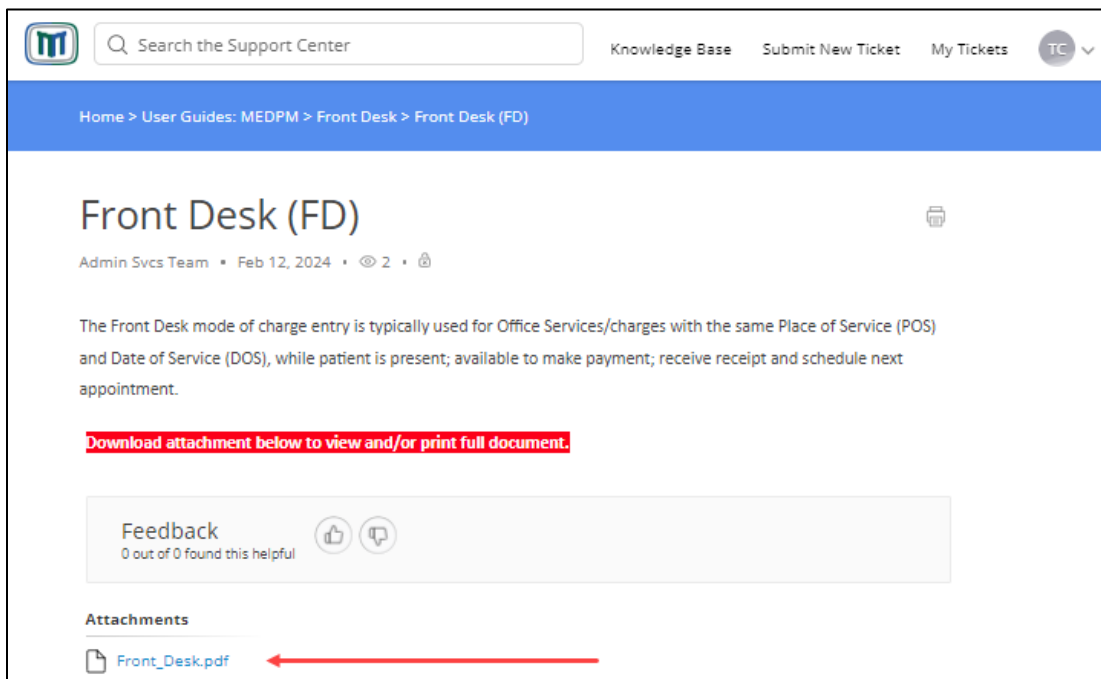
Select a section to view the available articles within the section.



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.

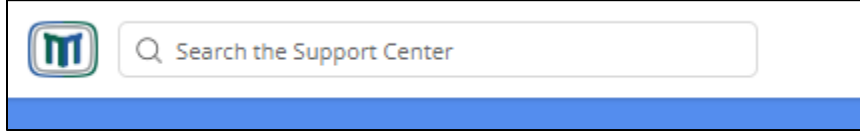
To view the full PDF document, scroll to the bottom of the article and click on the attachment name to download and print the document (**preferred method**).



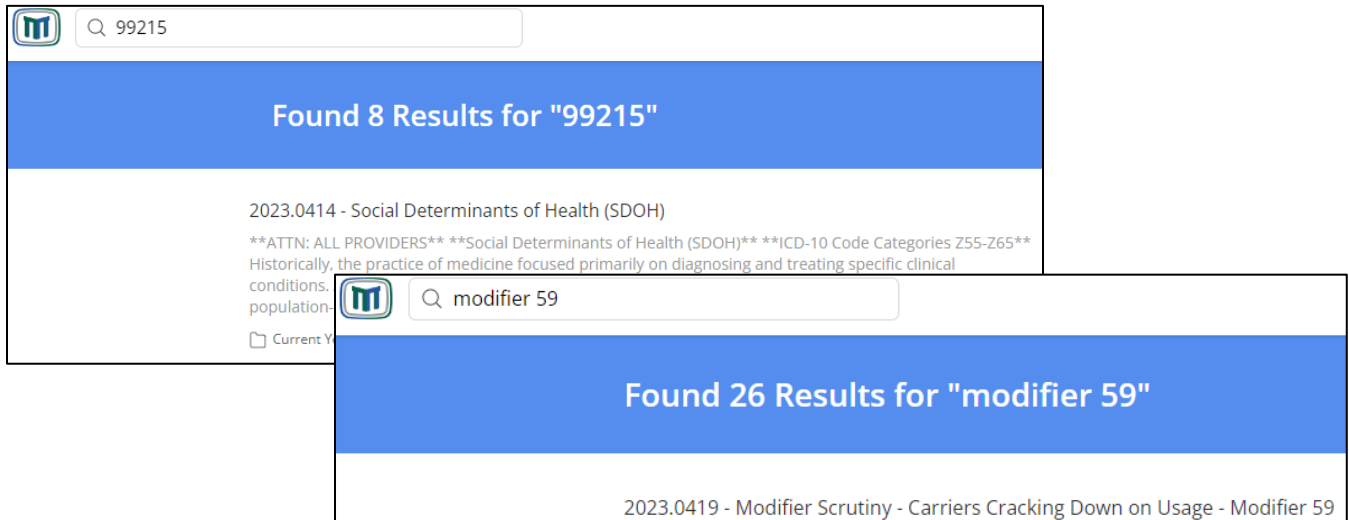
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**To Search By Keyword**

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



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



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