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.

![Patient Health Information]

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).

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

Priority Definitions

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

<table>
<thead>
<tr>
<th>Priority</th>
<th>Description</th>
<th>CliniSync Response Timing</th>
</tr>
</thead>
</table>
| Critical (1) | • Full system down, no workarounds available  
|              | • Patient safety at risk                        | • 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.  
<p>| Call Support Line at 1-800-645-8192 |                                                                                           | |</p>
<table>
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</table>
| **High** (2) | • Missing critical messages; for example, lab results  
• Unable to perform some essential job functions | • 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. |
| **Normal** (3) | • General maintenance or support issue | • 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. |
| **Low** (4) | • Low impact, or informational requests | • 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. |

Submit support ticket at www.support.clinisync.org
Navigating within the Support Portal

Accessing the CliniSync Support Portal

On your web browser, go to [www.support.clinisync.org](http://www.support.clinisync.org) to reach the CliniSync Support Information Page.

ANNOUNCEMENTS

*(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.*

Log Into Your Support Portal

If you don't have a login you can request one [here](#).

DOCUMENTS

Consent Notification Information

*[2016 Consent Notification FAQs]*

*[Consent Trifold Including 'Request to Change Consent' Form]*

*[Request to Change Consent Form]*

General Support Guides

*[Support Guide]*

*[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 button to be brought to the Support Portal to log in. To login, select the button to be taken to the login page.

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

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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.

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.
If you decide to add additional information, you can do so here. Selecting **Update** will save your details and bring you to your incident list, where you can review your outstanding incidents. Selecting **Save** will save your details and keep you on the incident summary page where you can continue to modify your incident if needed.

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