Version 4.20.21

CentralReach Community

This document provides an introduction of CentralReach Community to end-users. Once your Administrator has enabled your permissions, this document will help you to onboard the support site and begin working collaboratively with the CR Support team. This document also highlights how the Support Admin can authenticate and assign cases to their end-users within the Community. With these additional permissions and licenses, Support Admin will have more control over case management and workload.

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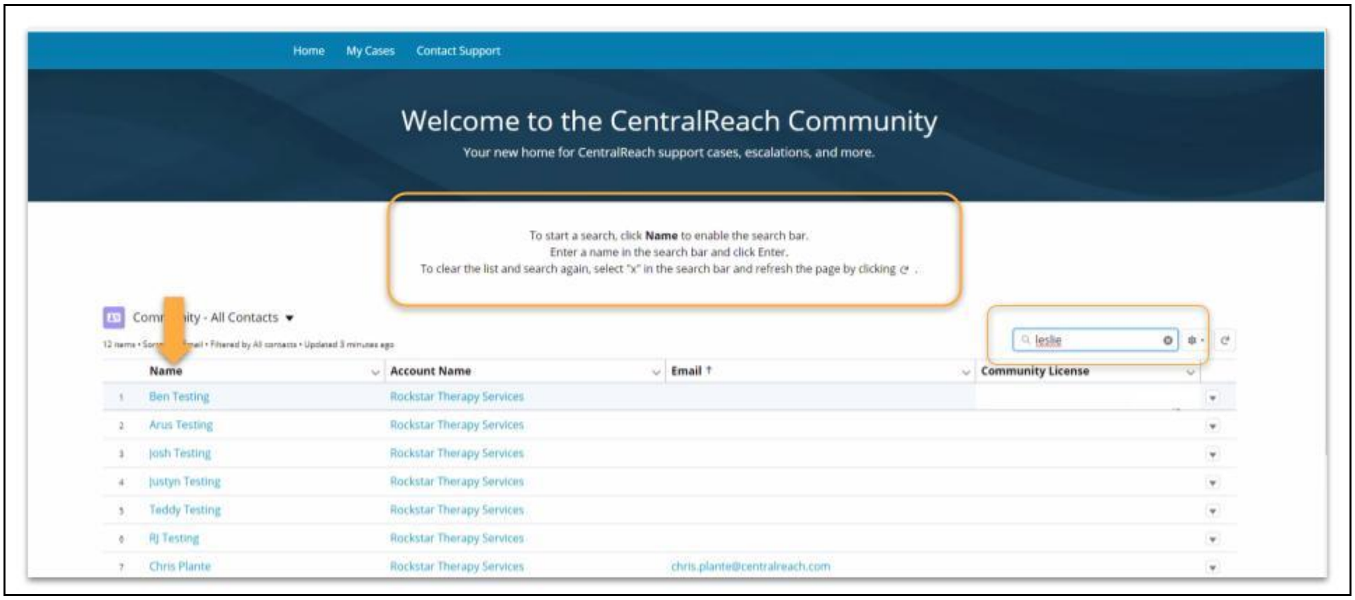
The Account Management Section

In CR Community, when selecting the **Account Management** section on the Support Admin page, there is a pre-populated list of contacts under the organization. Users can authenticate and assign licenses to end-users.

Please note, 1 user can be authenticated at a time.

To authenticate and assign licenses to end-users:

1. Select **Account Management** in the Support Admin page
2. Select the **Name** column to access the search bar and enter the user's name instead of searching through the entire list of contacts.
    - To clear the list and search again, select the **x** in the search bar and refresh the page.
3. Click **Enter**
4. Select the contact's name that is missing the "End User" populated in the License column
    - The Administrator must provide the user with their unique username, nickname and alias.



Add Support Reasons

Case Reason	Case Definition
Add/ Update User Info	Organization needs to make a change or update all imperative information for Admin, change of email address, and anything related to a CR user.
Add Payor/ Enrollment	Organization needs to add new payor or insurance into the system.
Feature Request/ Enhancement	Organization is looking for a software feature we have yet to roll out or does not currently exist within CentralReach.
General Question	Organization has a generalized question about CentralReach unrelated to any other field listed.
Password Support	Organization requests support when it comes to password set up, resolution, and general inability to log into the software.
Problem/ Error	This option is for 1-off questions that do not fit the other criteria.
Product Defect	Organization reports that the system is not working as designed. Potentially a bug in the software.
Report/ Dashboard Request	Organization is looking for a report or dashboard to be created.
Request for Training	Organization needs support or training on current workflows or features within the software.

Case Management

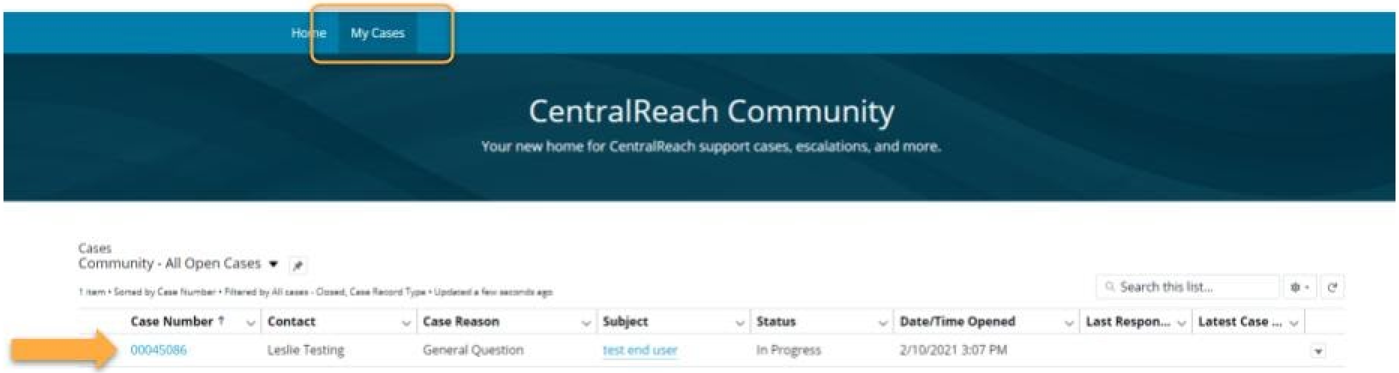
Support Admins can comment and troubleshoot cases, as well as assign ownership.

To assign for a new case:

1. Open a support case by selecting either **Contact Support** or **Open a support case**
2. The case will be pre-populated with your contact name
3. Click **X** to remove the contact name. This removes that user from the case.
4. A search will appear to choose an end user's name

Changing Existing Case Owners

To change case owners for existing cases:



1. Navigate to the **Case Detail** page and select an open case
2. Click **Change Case Owner**
3. A list of current End Users & Support Admins will populate in the "Case - Change Owner" pop-up. Select the appropriate name.

4. Click **Next**
5. Click **Save**. After saving, the new case owner will receive an email informing them that they have been assigned a case.

The Contact Page

The Contact page in CR Community includes the entire organization for users to view. This screen can be filtered and sorted by:

- All Contacts: The entire contact list that CentralReach is aware of. The Support Admin and users are a subset of the "All Contact" category.
    - Support Admins: A list of designated Support Administrators.
    - End Users: A list of the individuals that have been granted "End User" access.
        - Please note, if a member of the team is not included here, submit an "Add/Update User Case" with:
            - The area of software: "Community"
            - The full name of the individual

Creating and Maintaining Support Administrators

"Support Administrators" are designated employees who can create cases in CentralReach Community to receive help from the CentralReach Support Team. Each organizational account can have 2 Support Administrators.

To set up a new Support Administrator:

1. Ensure the employee has a valid, personal email address located in My Profile > Basics > E-mail section of their profile. This enables the employee to receive CentralReach support email updates.
2. Navigate to the **Tasks** module and select **Task and Support Settings**
3. Click the employee name to expand their settings
4. Select **Yes** under the "Is a support administrator?" setting
5. Navigate to community.centralreach.com. Either request access (if you cannot login), or log in and Open a Case > Reason > Request Community Access.

To remove/replace a support administrator:

1. Navigate to the **Tasks** module and select **Support Admin Settings**
2. Click the employee name to expand their settings
3. Select **No** under the "Is a support administrator?" setting, or click the **trash can** icon to remove the individual from Support entirely.
    - If adding another staff as a support administrator, first be sure they have a valid, personal email address in their employee profile.
    - Click the **Add support contact** search bar and search for the employee that needs to be added as a support administrator.
    - Click the employee name to expand their settings
    - Select **Yes** under the "Is a support administrator?:" setting
4. Navigate to community.centralreach.com.

- If you have a valid login, Open a Case > Reason > Add/Update User information. Include the new (and old) Support Administrator's full name and individual email.
- If you do not have a valid login, click **Request Community Access** and fill out the form.

To update a support administrator's email address or name:

1. Update the name or address located in My Profile > Basics > E-mail. This enables the employee to receive support email updates from CentralReach Community.
2. Navigate to community.centralreach.com.
   - If you have a valid login, Open a Case > Reason > Add/Update User information. Include the administrator's full name and individual email address.
   - If you do not have a valid login, click **Request Community Access** and fill out the form.

Creating and Viewing a CentralReach Support Case

Only designated Support Administrators can submit cases to CR Community, to receive help from CentralReach Support.

1. Navigate to community.centralreach.com
   - Users can navigate to CentralReach Community by clicking on their account name in the top right corner and selecting **Open CentralReach Support Case**.
     - Or, by clicking on **Open a CentralReach Support Case** when viewing an internal support ticket.
2. Log in
   - If you do not have a login, (a) ensure you are designated as a "Support Administrator" in your account, and (b) complete the **Request Community Access** form. A welcome email should be received within 24 hours during the business week.
3. Click **Open a Case**
4. Fill out all required fields. If requesting a new payor to be added, additional fields need to be completed in order to process the request.

CentralReach Support will provide a first-touch response to your case within 24 hours during the business week.

To check the status of your case:

1. Navigate to community.centralreach.com and login.

- Users can either navigate to CR Community by going to community.centralreach.com directly in their browser, or by clicking on their account name in the top right corner and selecting **Open CentralReach Support Case**.

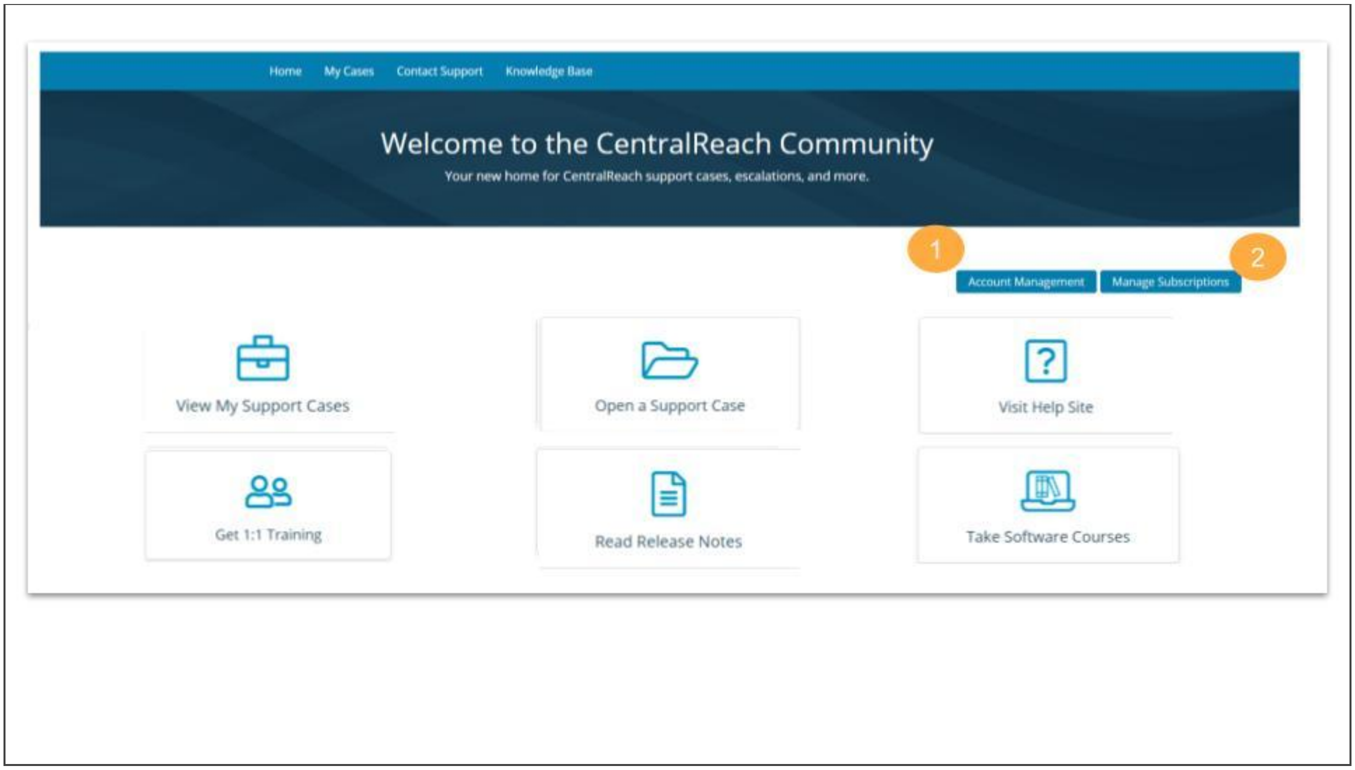
2. Click **My Cases**
3. To view an individual case, click on it. From here, you can:
   - **Close Case**. If you want to close your support case, choose a reason from the drop-down menu. Click the **slider** to indicate “close case,” and click **Next** to close the case.
   - **Upload a file**. CentralReach Community is HIPAA compliant, screenshots and files pertinent to your case should be uploaded in this location.
   - **Comment**. By "Case Comments," click **New** to leave a new case comment. To protect client PHI, support questions must be responded to here.
4. To view closed cases and re-open a case:
   - Go to **My Cases**
   - Click the **down arrow** next to “Community - Open Cases” and select a view that includes your closed cases.
   - Click on a case to re-open.
   - Under "Re-Open Case," click the slide to indicate “re-open case,” and select **Next** to re-open the case. *Please note, cases can only be re-opened **one time**, and only if they have closed **within the last 5 days**.*

Click here for a video explaining how to use CentralReach Community.

The Support Admin Page

In CR Community, the Support Admin page contains the following section on the right-hand side:

- Account Management: This section is where the Administrator manages and authenticates access and permissions for the organization. Click here to learn more about Account Management.
- Manage Subscriptions: This section is how Administrators manage the engagement related to cases they do not own. Click here to learn how to manage subscriptions.

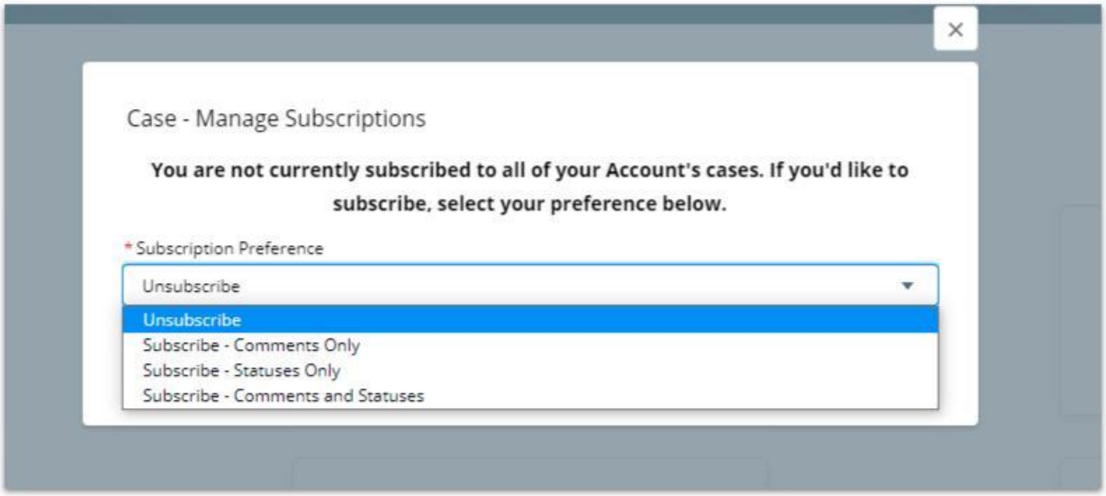


Managing Subscriptions in CR Community

When selecting the **Manage Subscriptions** section on the Support Admin page, users are prompted to select an option from a drop-down list, related to Engagement preferences. These options outline the communication subscription between CentralReach & Support Admin Notifications. Please note, this applies to All Cases, not just on a case by case basis.

To manage subscriptions:

1. After logging in to CR Community, select **Manage Subscriptions** on the Support Admin page
2. In the “Case - Manage Subscriptions” pop-up, select from the following options:
   - Unsubscribe: No alerts or communications on cases the Admin user does not own.
   - Comments Only: The Admin user will only be notified about new case comments on cases they do not own.
   - Statuses Only: The Admin user will only be notified about status changes related to cases they do not own.
   - Comments and Statuses: Notifications for both comments and changes in status on cases they do not own.


Case - Manage Subscriptions
You are not currently subscribed to all of your Account's cases. If you'd like to subscribe, select your preference below.
* Subscription Preference
Unsubscribe
Unsubscribe
Subscribe - Comments Only
Subscribe - Statuses Only
Subscribe - Comments and Statuses