Welcome to Assist!

Assist is a Service Desk solution available to Medata's Employee's, Client's, Vendor's and the Public. Each group is serviced via custom taylored portals and requests to provide a means for stakeholders communicate directly with Medata's support teams. Data elements are predefined by the support teams to aid in first touch resolution.

Support conversations are managed within the application but integrate with traditional e-mail through notifications for status updates, comments, and approvals so users can stay on top of resolution progress.

Through the Requests Page, the user can create and save filters to keep on top of critical items. The customizable interface allow request participants to see at a glance request progress and customize and sort data columns and filters.

In this handout, we will cover

1. Creating an Account
2. Registration

Quick Access Instructions

Inquiries can be made through the Provider Portal. Please follow the instructions and hyperlinks below to obtain access to the website.

1. To create a portal account go to Sign up for an account . Once the account is created, you will receive a confirmation e-mail.
2. After your account is created, you can complete the one-time registration at Register Account. Once you have completed registration, you will receive, **in the comments**, a link to your authorized service request portal.

Providers, If you would like to submit bills and reconsiderations using the portal a digtial access code is required.

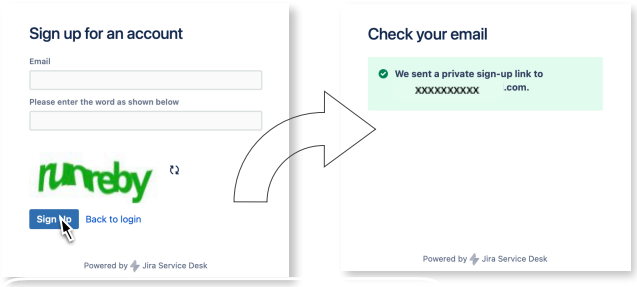
Medata Employees, Clients and Vendors require both a digital access code and valid e-mail.

If you have additional questions or are unable to complete the registration process, send an e-mail to Medata Account Support for support. Only account support request will be serviced via this email.

Creating an Account

1

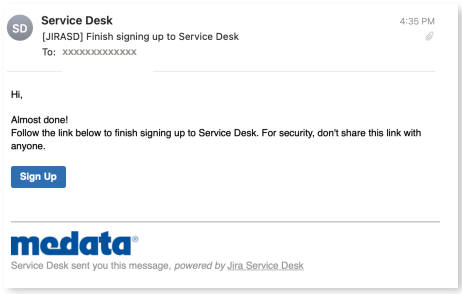
To create an account, navigate to Sign up for an account and provide the e-mail you would like to associate to this account and enter the CAPTCHA as indicated on your screem. The e-mail entered will be used to send ticket notifications to. You can change this e-mail later in the Profile section of the application. Select the “Sign Up” to create an account.



Note, Medata client’s and vendors must use an approved e-mail to complete the subsequent registration process. Medata employee do not need to create an account.

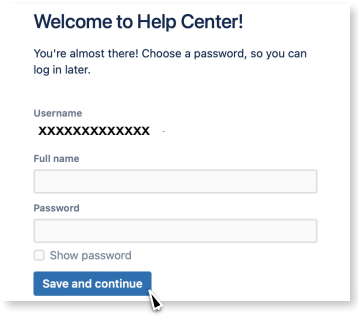
2

After creating the account (Clicking the Sign Up Button), you will receive a notice to check your email. In your e-mail account, please find the e-mail with the subject, “[JIRASD] Finish signing up to Service Desk.” In the email, locate the “Sign Up” button and click it. You will be directed back to the portal to create your display name and password.



3

To complete account creation, enter your Full name (this will be your display name) and a password. Select “Save and continue” to login to your account.



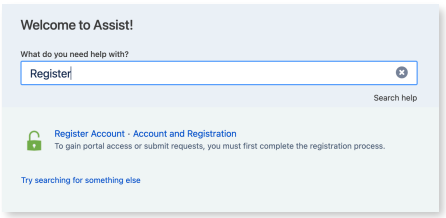
Registering an Account

1

Registration is a one time event. Although, you may return to the registration portal to update your account profile, add an access code, or request account deletion.

On initial login you will be presented the screen “Welcome to Assist!” With the option to search for a request or the ability to Navigate directly to a project under “Popular.”

In the search bar, type “Register Account,” or select from Popular “Accounts and Registration.” Either way, you will be presented the request type to Register Account. Click on the Register Account link.



Note, Providers are not required to enter an access code to complete the registration process and will be able to make status inquiries to the inquiries team once registration is complete. All other user classes must have a access code and a valid e-mail associated to the portal account.

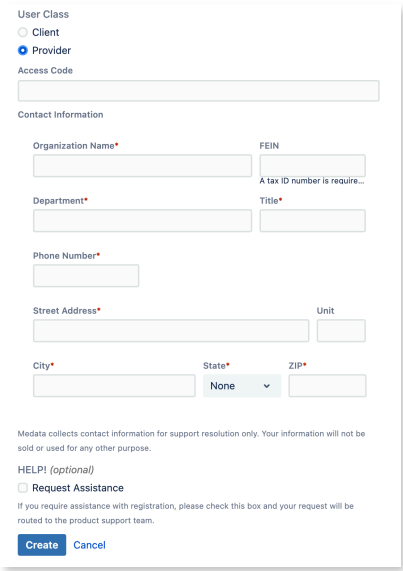
2

Selecting Register Account will present the Account Registration page. This will allow you to complete the one time registration process.

The fields displayed are User Class dependant and may vary between selected user classes. If you have difficulty creating a request, please select the “Request Assistance” button to route the request to Medata’s product support team. An additional field will be displayed for you to indicate what issue you are having.

Once all manadatory fields have been populated, select “Create” to submit your request.

If you have additional questions or are unable to complete the registration process, send an e-mail to Medata Account Support for support. Only account support request will be serviced via this email.



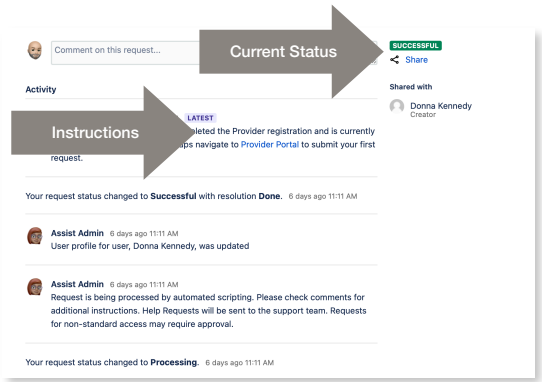
Note, User Classes Defined

Employee: A paid employee of Medata
Client: A business enity and its employees in a contractual relationship with Medata
Provider: A member of the public
Vendor: A enity and employees contracted to complete work on Medata’s behalf

3

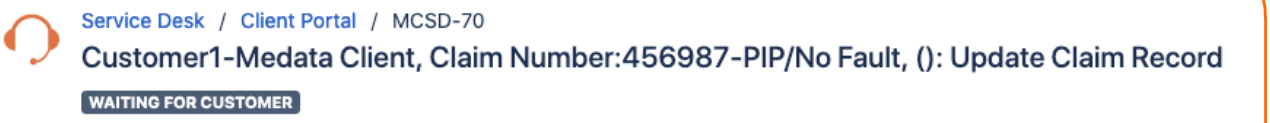
After selecting “Create,” the system will process your request. Comments are generated by the system indicating the status of your request and providing instructions as needed. If your request has been successfully processed, the status will indicate “Successful” and you will be provided a hyperlink in the comments to navigate to your registered portal. Some User Classes may have additional authorization levels. Some authorization levels will require Medata’s IT approval prior to the request being successfully processed.

Commenting on an issue after it has been processed “Successful” will route the request to the Product Support team. Please do not attempt inquires, product support request, or other submission types as part of the registration process.



Ticket Details

Awesome! You have created a request and it is now available for you Medata to work. Let's look at the various elements of a created request. You can use this screen to interact with the request, add comment or attachments, cancel and re-open requests and opt in or out of notifications.



Key: A unique project and ticket identifier that can be used to quickly search or reference a request.
Summary: Contains a shortened version of the data elements provided in the request.
Status: The current condition of the request start in a status of:

- **Triage:** No work has been completed.
- **In Progress:** Currently assigned to a PI team member.
- **Waiting for Customer:** The request has been returned to the provider for additional information.
- **Completed:** The request has been fulfilled and no additional info is required.



Comment Box: The comment box allows the user to communicate directly with other users that have been added to the ticket. Note, only the reporter will receive an e-mail notification when a ticket is commented. When waiting for customer, a comment will return the ticket to user requesting additional information. The comment and transition history is retained and available for reference below.



Don't Notify: Allows the user to opt out of e-mail communication.
Share: Allows a user to share the request with other organization members.
Shared With: See other individuals and organizations that have ticket access.
Actions: Allows the user to edit and change ticket fields.
Dates: Milestone events related to the request.

Searching and Organizing Requests

The Requests page allows the user to search and organize his or her requests or any request that he or she is a participant of.

The Requests page can be accessed by selecting the “Requests” drop down in the upper-righthand portion of the screen. Saved filters can be added to this drop down.

Request Column

- **Default:** View all, Open or Closed issues.
- **My Filters:** List of filters created by you.
- **Shared:** Search and save filters created by other users. To search for standard PI filters, select “Browse All” and type “PI.” Remember to save the filter and add to the Navigation bar for quick access.

Layout and Filtering

- **Columns:** Add and reorganize data columns to display.
- **Filter:** Using exact matching, filter issue list.

Adding Data Elements

- **Search Box:** Search summary content or by issue key.
- Selecting the icons allows the user to add or remove. columns or filters from display.

Saving and Managing Filters

- Allows remembers to save filters or layouts you may want to access again.

Issue List

- List of displayed issues based on applied filter and available columns.

Filter and Search Controls

The slider icon allows the user to add or remove columns. Added Columns can reordered via drag and drop in columns bar or column header.

The Cog icon allows the user to select available filtering criteria.

Export the displayed list of issues in .csv format.

The Search Bar allows the user to search by Issue Key or words contained in the Issue Summary.

Located next to the filter title, these options allow the user to save, edit, delete or share filters or view filter details.

Hide list of filters and enter full screen mode. The filter list can be made visible by selecting the icon.

