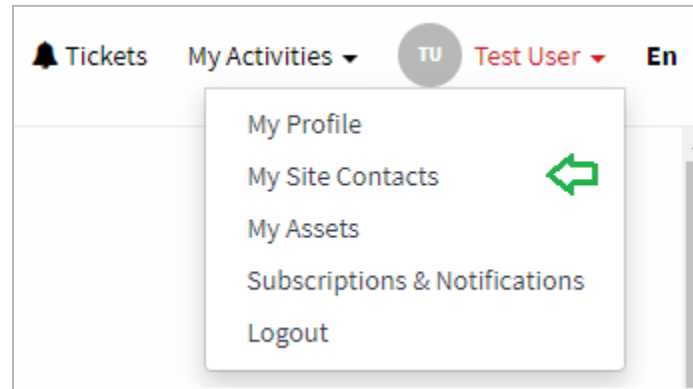


How To Manage Your Site Contacts

Once you can access Intelrad Service Portal, please view the list of users associated with your organization that was transferred over to the ServiceNow platform and its customer portal.

1. Select your profile menu
2. Select **My Site Contacts**



Those users listed can access the portal to view cases activities, support and services, request and project tickets, and they are attributed a clearance level to identify their level of authority.

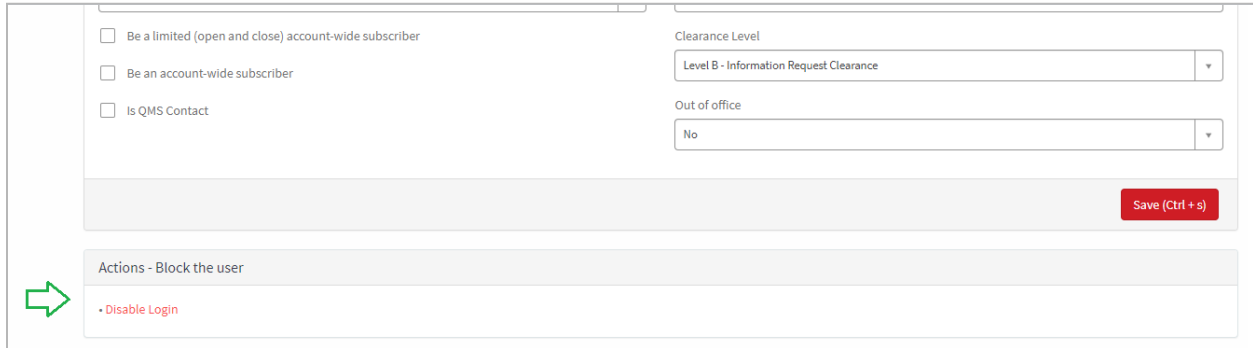
New users can register to the Service Portal login screen to be added to this list of site contacts. See the **New User Registration** section below.

Contact profiles

Each user or contact has their own user profile in the portal, gathering their contact information, granting permissions and allowing notifications of specific activities.

- First name, last name, email address, phone number, title, language, etc
- Appropriate Clearance Level - See below for explanation and details.
- Account-wide subscriptions to case, change requests and requested items activities:
 - Limited (open/Close) account-wide subscriber
 - Account-wide subscriber (auto-subscriber on every case)
- Out of office (OOO)
 - Set a user profile as away, providing a warning to the support analyst working on cases where the user is the main contact.
- Is a QMS contact
 - In the event of any regulatory-related situation (recall, field correction, etc.), this contact will receive information from Intelrad's Regulatory Affairs department

- Enable or disable the user (manage user locked out)
 - Level A user only



The screenshot shows a user management interface. On the left, there are three checkboxes: "Be a limited (open and close) account-wide subscriber", "Be an account-wide subscriber", and "Is QMS Contact". On the right, there are two dropdown menus: "Clearance Level" (set to "Level B - Information Request Clearance") and "Out of office" (set to "No"). A red "Save (Ctrl + s)" button is located at the bottom right. Below the main form, there is a section titled "Actions - Block the user" with a green arrow pointing to a red "Disable Login" link.

Clearance Levels

Clearance Level A

- A site admin, PACS or product administrators or lead users for your organization can be attributed this clearance level.
- It is the highest level of clearance a person can have
- They are also typically the ones who approve or reject scope and schedule approvals of changes for your software or system:
 - Change requests are used to either change configurations of the system (i.e. modify main configuration files), or the state of the system (i.e. restarting or shutting down servers).
 - An administrator with this clearance level can request any type of changes
- Level A includes all the services provided by level B
- Level A contacts are can approve or reject new user registration requests for your organization:
 - These users receive notifications of pending registration requests and need to take action for the access to be granted (see new user registration section).

Clearance Level B

- Information request
- This clearance level allows contacts to obtain information about the system from the support team, such as confirming the reception of images or HL7 messages, submit software issues and get it fixed without a central change to the system or obtain an answer/information to a question.

Clearance Level Project Only

- These contacts are needed from a Project Management standpoint and may not interact with Technical Support directly. For the most part, these contacts will interact with their assigned Intelrad Project Manager or Account Manager
- They still have access to the Intelrad Service Portal to view organization cases.

No Clearance

- These contacts should not be contacting Intelrad Support directly, but should be contacting their internal Administrator.
- They still have access to the Intelrad Service Portal to view organization cases.

	Level A - Change request	Level B - Information request	Level Project Only	No clearance level
View cases	✓	✓	✓	✓
Submit new cases	✓	✓	✓	✓
Notified of registration requests	✓			
Approval/rejection of registration requests	✓			
Change request approval requests	✓			
Access Knowledge	✓	✓	✓	✓
Request services	✓	✓	✓	✓

Management of site contacts

Clearance Level A users (see below for details) can manage the profile of each contact associated with your organization. Other clearance levels can view contact profiles but can't modify any information.

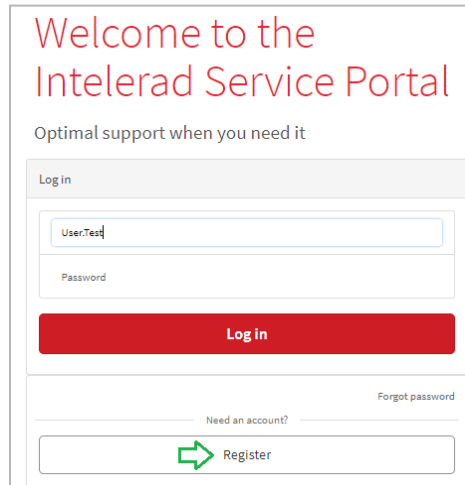
This table indicates the ability of managing user profile settings by clearance levels:

	Level A - Change request	Level B - Information request	Level Project Only	No clearance level
View locked out users from the contacts list	✓			
View QMS contacts from the contact list	✓	✓	✓	
View Out of Office user profiles from the contacts list	✓	✓	✓	
View user profile information	✓	✓	✓	✓
Update my own user profile information	✓	✓	✓	
Update user profile for other contacts	✓			
Assign/modify Clearance level for all contacts	✓			
Set my own Out of Office	✓	✓	✓	✓
Modify Out of Office for other contacts	✓			
Block the user / Disable login	✓			
Set a user as Is QMS Contact (notified for software recalls or regulated)	✓			
Set my profile as a limited account-wide subscriber	✓	✓	✓	✓
Set my profile as an account-wide subscriber	✓	✓	✓	✓
Set other user profiles as a limited account-wide subscriber	✓			
Set other use profiles as an account-wide subscriber	✓			
Modify User ID (username for ISP)	<i>Intelrad only</i>			

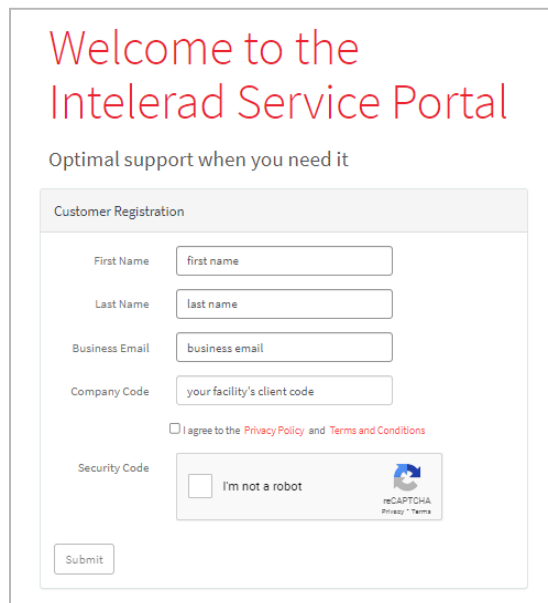
New user registration

Additional members of your organization can register and request an account to the Intelrad Service Portal using the **Register** button from the login screen:

1. Go to <https://serviceportal.intelrad.com>
2. Select **Register**

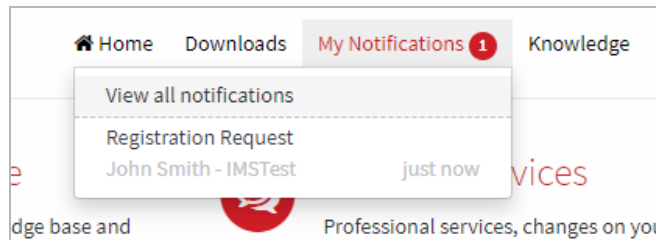


3. Client fills the registration form:
 - a. First name
 - b. Last name
 - c. Email address
 - d. Company Code = Client code, the organization/account the user would like to be granted access
4. Click **Submit** button

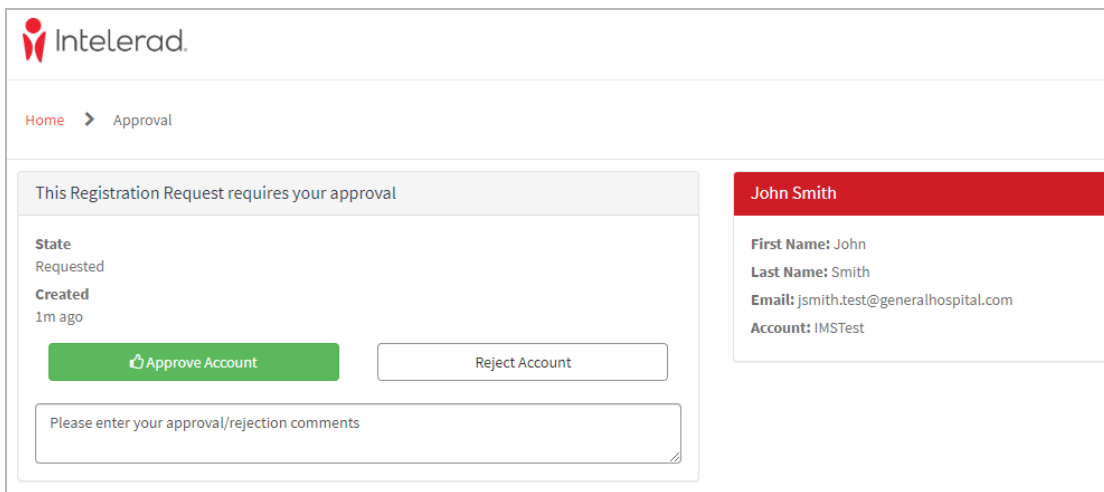


5. Your pending registration notifies users associated with a Level A clearance.

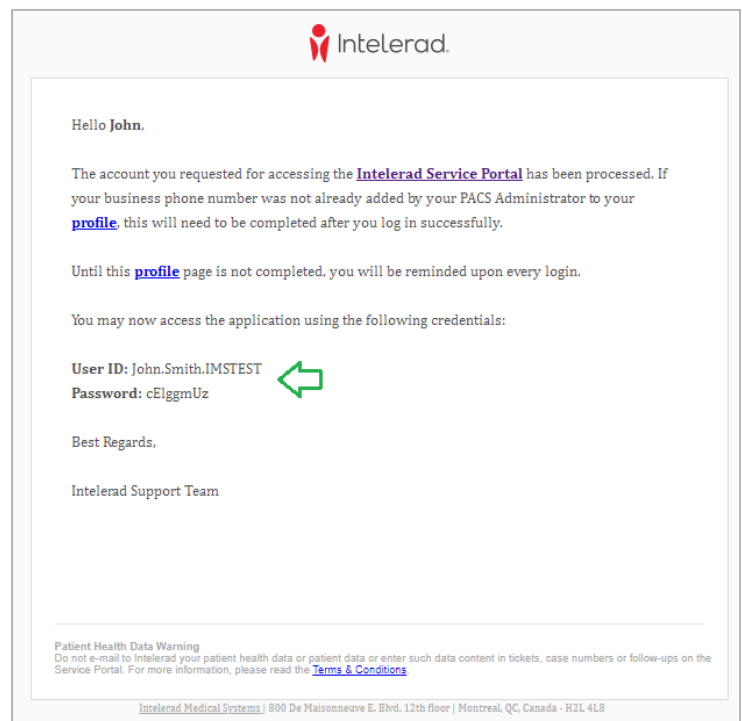
- a. Registration request notification is visible from the Service Portal toolbar of Level A users's profiles (not to other clearance level users).



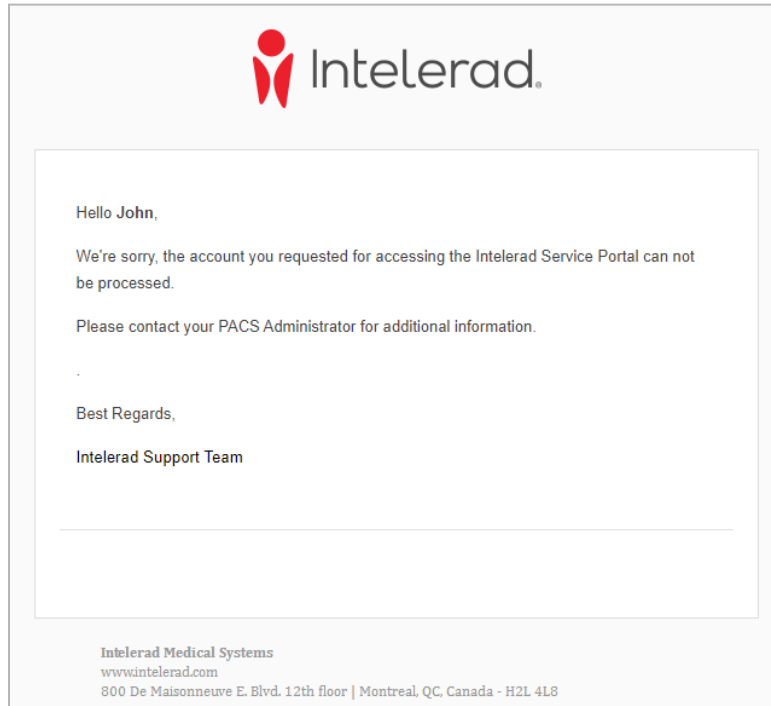
6. A Level A user can accept the request to grant portal access to this user, or reject if it is an unknown person or access should be restricted for example.



- a. If the registration is approved, the contact is created in the system and the new user receives an email confirming the request was processed with the username (UserID) and temporary password to use to log in.

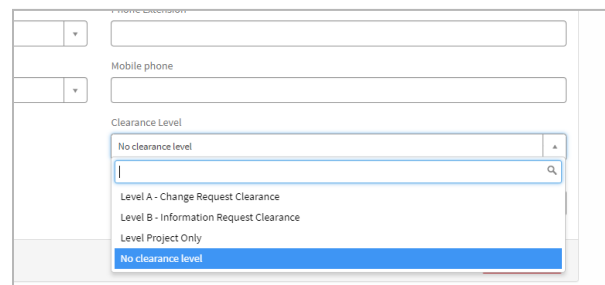


- b. If the registration is rejected, the user receives an email sharing the access request can't be processed.



7. The new contact is now listed in **My Site Contacts** page, and you need to assign a clearance level to the user profile:

1. Select your profile menu
2. Select **My Site Contacts**
3. Open the user profile
4. Select the appropriate clearance level



Home > Contacts

Contacts					
Name	Title	Account	User ID	Email	Business phone
John Smith		IMSTest	John.Smith.IMSTEST	jsmith.test@generalhospital.com	
Genevieve Test		IMSTest	Genevieve.Test	genevieve.lenage1@gmail.com	

Failed login attempts

The system allows a maximum of 6 failed attempts, i.e. your user profile will get locked after 6 wrong passwords in the ISP login screen. The message below indicates that your contact can possibly be locked, and that a Level A user for your organization can unlock it for you:

Log in

User name

Password

User name or password invalid


Please first verify your user name and password are correct.
If you feel they are, it is possible your account is locked out.
Please contact your local PACS administrator to verify if your account has been locked out. He or she will be able to unlock it if it is.
Otherwise, you can use the [Forgot password](#) link below to reset your password.

To get your profile unlocked, a Level A user can view locked out users from the list of contacts and follow these steps

1. Select your profile menu
2. Select **My Site Contacts**
3. Open the user profile

keyword Se				
ance Level	Is QMS Contact	Locked out	Out of office	Upd
rance level	false	false	No	2022
- Change Request Clearance	false	false	No	2022
- Change Request Clearance	false	false	Yes	2022
rance level	false	false	No	2022
- Change Request Clearance	false	true	No	2022
rance level	false	false	No	2022
rance level	false	false	No	2022

4. Select **Enable Login**

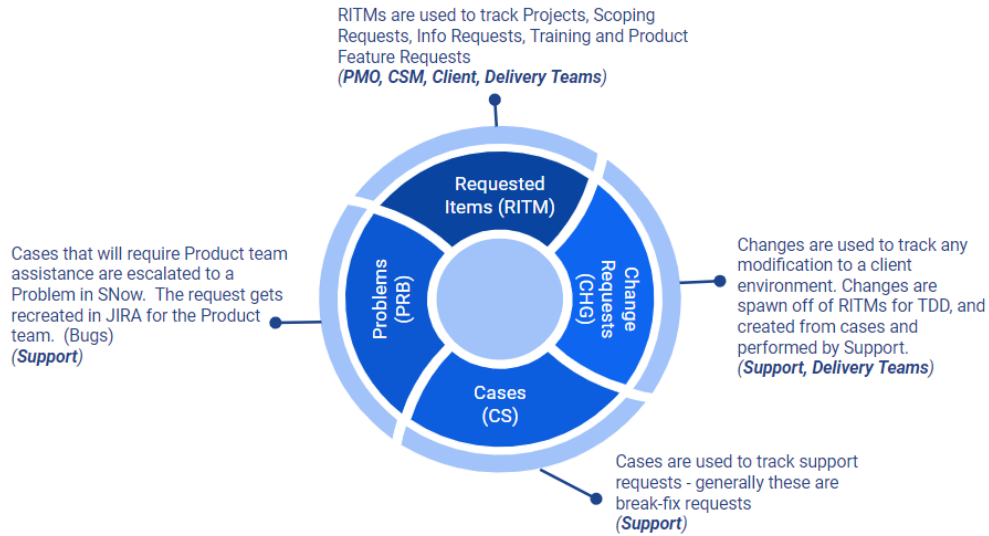
<input type="checkbox"/> Be a limited (open and close) account-wide subscriber	Clearance Level
<input type="checkbox"/> Be an account-wide subscriber	Level A - Change Request Clearance
<input type="checkbox"/> Is QMS Contact	Out of office
	No
Save (Ctrl + s)	
Actions - Block the user	
• Enable Login 	

If you don't know who is a Level A user for your organization, please contact Intelrad Support and we can unlock your profile.

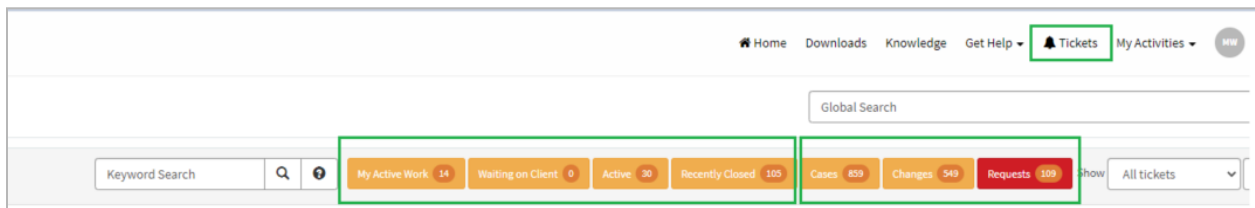
How To Access Support Cases, Change and Service Requests

Inteleraad Service Portal proposes multiple types of form based on the purpose and their utilizations by departments:

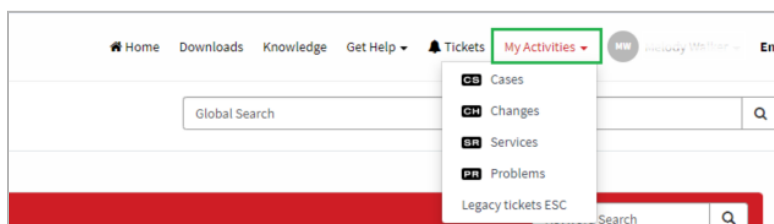
1. Cases (CS)
2. Change requests (CHG)
3. Requested Items (RITM)
4. Problems (PRB)



The **Tickets** option opens a list view collecting all forms of the same status, bringing visibility on active and pending action items. This view also provides additional worklists gathering forms of the same type (CS, CHG and RITM).

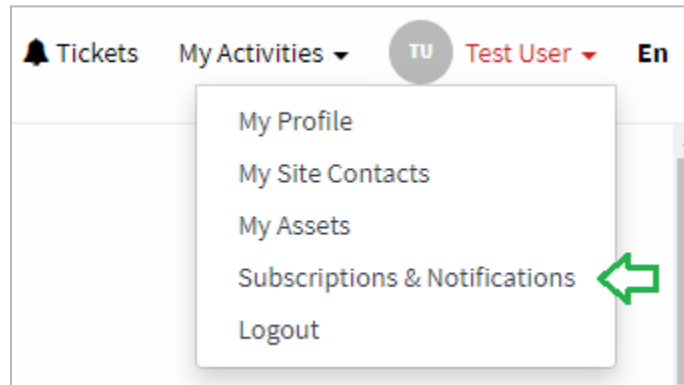


The **My Activities** menu provides access to all forms of the same type, grouping them by statuses such as My Cases, Waiting for the client, Active Cases (excluding states Resolved, Closed, Problems)



Subscription and Notifications

User profiles can be configured to turn on or off notifications triggered by the following event for cases, change requests and services.



Cases (CS)

1. Receive a notification when a Case is closed.
2. Receive a notification when a comment is added to a Case.
3. Receive a notification when a new Case is opened.
4. Receive a notification when a proposed solution for a Case is rejected.
5. Receive a notification when a Case is resolved.

Changes (CHG)

1. Receive a notification when a Change Request is closed.
2. Receive a notification when a comment is added to a Change Request.
3. Receive a notification when a Change Request is opened.
4. Notify client watchlist subscribers when a scope or schedule approval is rejected
5. Notify Internal watchlist subscribers when a scope or schedule approval is rejected

Services (RITM)

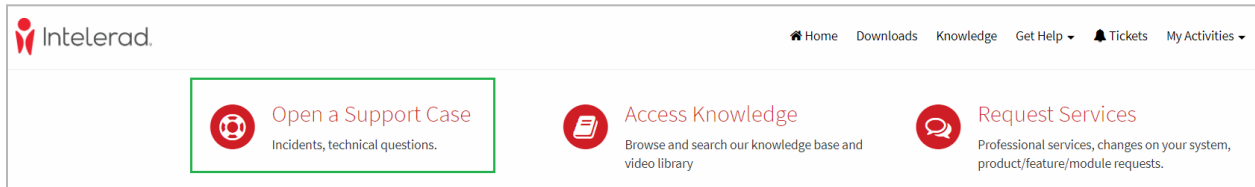
1. Receive a notification when a Requested Item is closed.
2. Receive a notification when a comment is added to a Requested Item.
3. Receive a notification when a Request Item has been opened.

Beyond your subscription settings, you will receive other notifications for various activities and processes (for example, approval requests, or awaiting for input or actions, and others not shown above). Some notifications are mandatory and you cannot turn them off.

How To Open and Work a Support Case

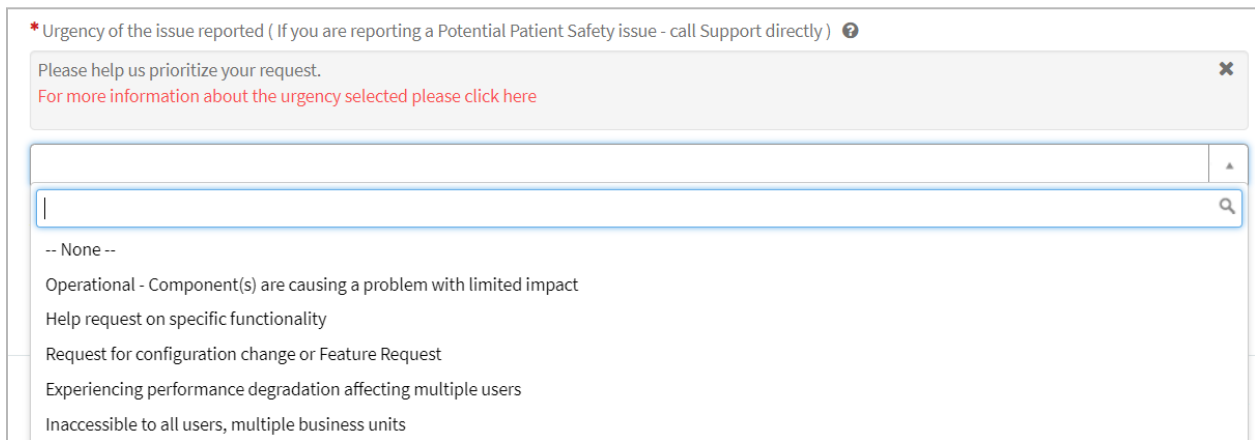
You can login to the Service Portal at <https://serviceportal.intelerad.com>

1. From the Homepage, select Open a Support Case:



2. Fill out the form with details and clarity about the issue:

- a. **Short Description** | Summarize the issue (max 80 characters)
- b. **Product** | Select the appropriate product corresponding to the issue
- c. **Category** | Select the most appropriate category for the given product
- d. **When was this problem detected?** | Select a date/time the issue started or was raised
- e. **Urgency of the issue reported** | Select the most appropriate severity:



The screenshot shows a dropdown menu for 'Urgency of the issue reported'. The menu is open, showing a search bar and a list of options. The options are: -- None --, Operational - Component(s) are causing a problem with limited impact, Help request on specific functionality, Request for configuration change or Feature Request, Experiencing performance degradation affecting multiple users, and Inaccessible to all users, multiple business units.

- f. **Any additional info you may provide** | Describe the issue with as much details as possible, provide examples, screenshots, logs files, user(s) affected, product versions, software environments, etc
- g. Add attachments or files

The *Required information* banner provides any mandatory fields that remain uncompleted. Once all fields are completed, select **Submit!**

Create Case

Create Case

Please provide the following details to help us provide you assistance et the earliest.
Do not provide any PHI private information (MRN or Patient name).

Requested By
[Redacted]

Requested For
[Redacted]

* Short Description ⓘ
The Short description should answer the question: what is the problem you're experiencing?
[Redacted]

* Product
[Redacted]

* Category ⓘ
Best guess of which component of your system is effected by this issue.
[Redacted]

When was this problem detected? ⓘ
When did this problem start happening? After an FRU, after a 3rd party product upgrade, etc.
YYYY-MM-DD HH:mm:ss [Redacted]

* Urgency of the issue reported (If you are reporting a Potential Patient Safety issue - call Support directly) ⓘ
Please help us prioritize your request.
For more information about the urgency selected please click here
[Redacted]

Any additional info you may provide
[Redacted]

Submit Add attachments

Required information: [Short Description](#) [Product](#) [Category](#) [Urgency of the issue reported \(If you are reporting a Potential Patient Safety issue - call Support directly \)](#)

Do not include any Patient Health Information (PHI)

- Examples of PHI are: MRN (Patient ID), Patient Names, Patient Identifiers
- PHI needs to be communicated over the phone

Note: The **Client code** field is only visible for accounts deemed *Partner*, can manage case and services for other associated accounts, and allow the selection of the client code for the given account cases and services are submitted for.

Working with your case(s)

The case form has the following components:

- Subject and description
- Communication/conversation area
- Case details panel:
 - a. Status
 - b. Severity
 - c. Assignment information
 - d. Provided information on case submission
- Subscription (or watchers/subscribers getting notifications of case activities)
- Attachments - PHI free!

Home > Case form details

Global Search

Test case only
Short Description

Description
▼

What is the Problem?

When was this problem detected ?

Is this a new issue or has this been reported in the past?

Did anything recently change on your system?

Example(s) ACC# / AE title / username (no PHI):

What IV version is used (WIN or MAC):

How is this issue affecting your current work flow (is this critical)?:

Additional info:

RC Richard Charron - 2022-04-08 06:22:32
Communications

ID: SNF3184261

Date: Time: StuInsUID: SerInsUID: Count: Size: [Bytes/s, KB/s, MB/s]:

--

RC Richard Charron - 2022-04-09 22:47:05

Ticket Closed

Proposed Solution:
Action Required Widget

Case details

Number CS0795813	Client code IMSTest
Opened by Richard Charron	Contact IMS Test No Level
Assigned to Richard Charron	State(state) Closed
Severity 4 - Low	Product IntelePACS
Category Other	Customer asset IMS:Demo:NotAvailable
Opened 2021-12-27 05:25:31	Updated 2022-04-22 17:35:50

Subscription to this Case

Subscribers

IMS Test No Level

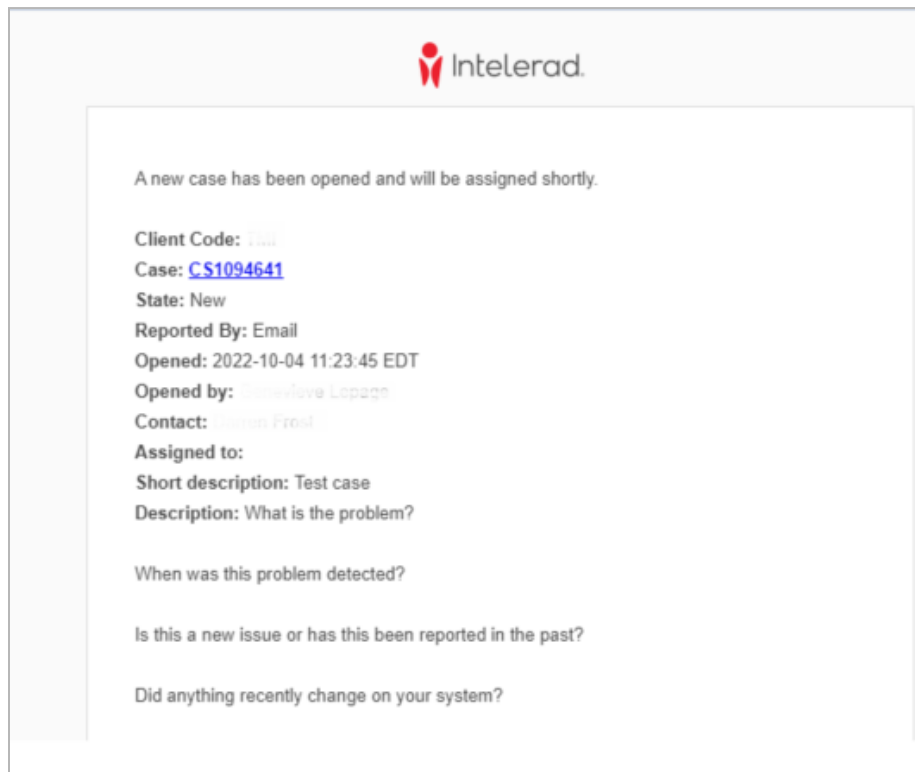
testtt test

Notifications

ServiceNow sends canned email notifications that includes the case information (Case#, State, Assignment, Short description, etc) and relevant information that are to be communicated. Here are events triggering these notifications and the appropriate header:

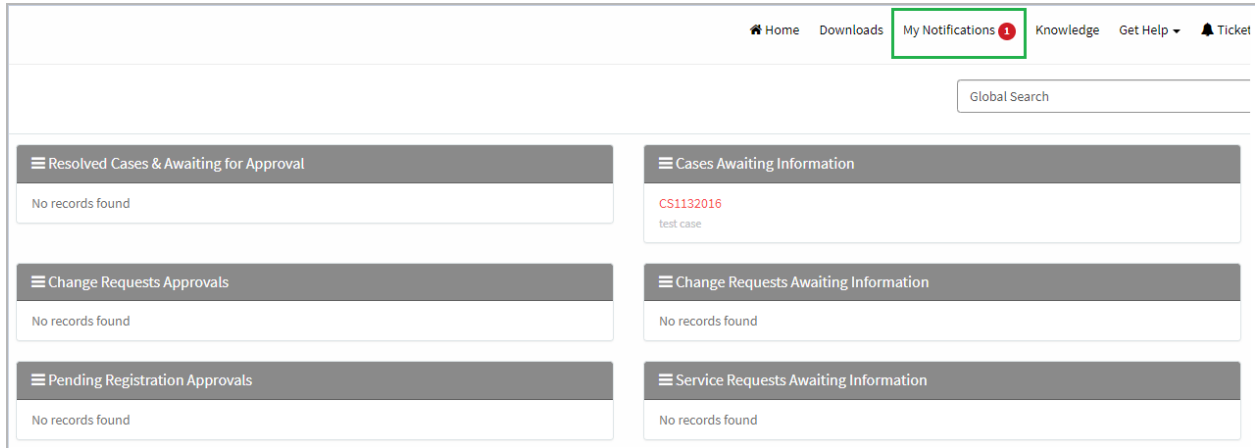
- Creation an unassigned case
 - Title: A new case has been opened and will be assigned shortly.
- New public communication
 - Title: A new comment was added to this case
- Case awaiting information
 - Title: This case has been put into **Awaiting Client info** pending your input on the comment below.
- Proposed solution
 - Title: A proposed solution has been offered by Intelrad Support Team for this Case

Below is a preview of a canned email notification:



My Notifications -> All Notifications panel, accessible from the toolbar, provides a view of all recent notifications, categorized by types:

- Approvals
- Awaiting information on your behalf



The screenshot shows the Intelerad user interface. At the top, there is a navigation bar with the following items: Home, Downloads, My Notifications (highlighted with a green box and a red notification icon), Knowledge, Get Help, and Ticket. Below the navigation bar is a Global Search input field. The main content area is divided into two columns of filters, each with a header and a list of records:

- Resolved Cases & Awaiting for Approval:** No records found.
- Cases Awaiting Information:** CS1132016 test case.
- Change Requests Approvals:** No records found.
- Change Requests Awaiting Information:** No records found.
- Pending Registration Approvals:** No records found.
- Service Requests Awaiting Information:** No records found.

Case states

Below are all case states that can be attributed and their signification:

States	Description
New	Case is submitted and created, not assigned to a support analyst yet
Open	Case is assigned, and owned by a support analyst
Awaiting Client Input	Support analysts requires additional information from the customer to progress with the case
Awaiting Internal Input	Support analyst requires internal consultation to progress with the case
Follow-up Requested	Customer requested a follow-up in a case for lack of communication or increase of the urgency
Resolved	Support analyst proposes a resolution to an issue
Closed	<ul style="list-style-type: none"> Customer accepts the resolution provided by the support analysts Customer does not accept or reject the proposed solution within 7 days

As described in the previous table of status, a customer is engaged in the case workflow when a support analyst requires additional details on an issue and when a solution or question is proposed to resolved the issue.

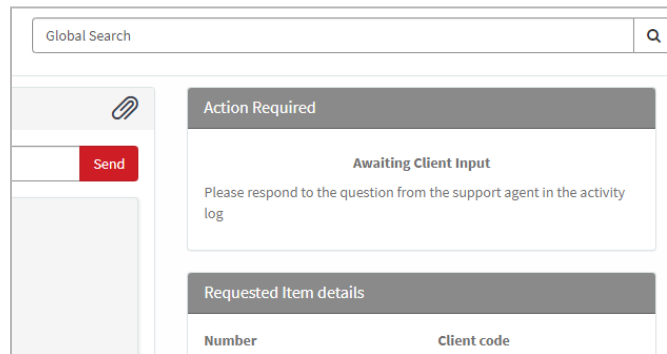
Awaiting Client Input

Once a support analyst requires additional information, such as screenshots, log files, test results, etc, the state of the case will be promoted to Awaiting Client Input. The system alerts you with:

- An email notification
- A portal notification from My Notifications in the toolbar
- An action required widget in a case

This **Awaiting Client Input** action required widget is displayed on the right of the case page.

You can find all cases in this state in the **Waiting For Client** worklist from My Activities -> Cases.



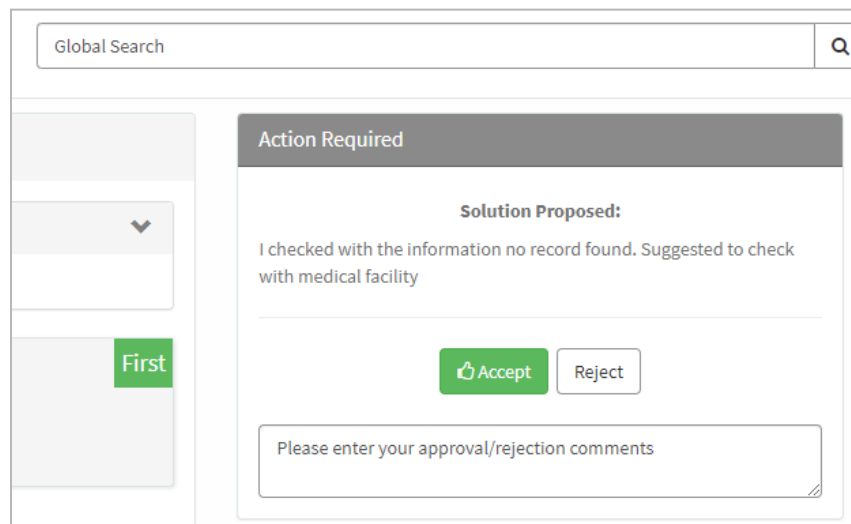
- Sending a comment in the conversation area of a case or replying to the email notification from your inbox will promote the case state back to Open.

Solution Proposed

Once a support analyst proposes a resolution to an issue, the case state is **Resolved** and the system alerts you with:

- An email notification
- A portal notification from My Notifications in the toolbar
- An action required widget in a case

This **Solution Proposed** action required widget is displayed on the right of the case page.

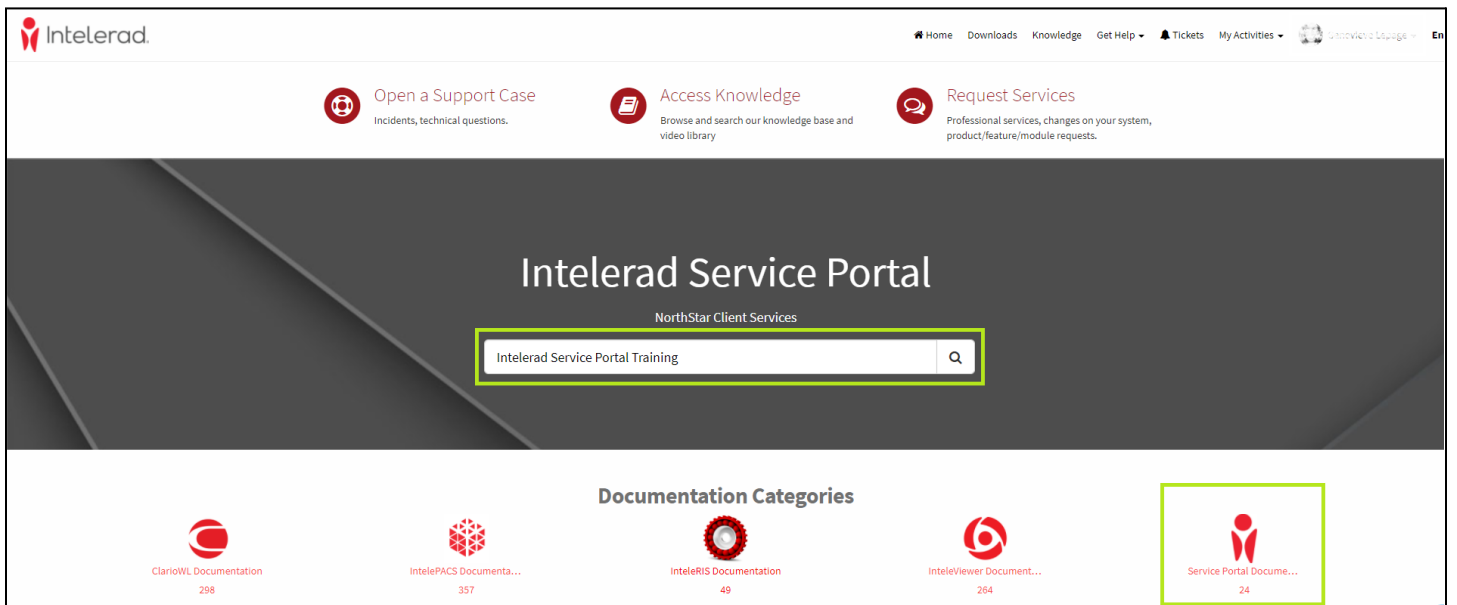


- Upon acceptance of the solution, the case state is promoted to Closed and you will be requested to complete a survey.
- Upon the rejection of the solution, the case state is promoted back to Open

How To Access the Intelrad Service Portal Knowledge Base

Once you have logged into the Intelrad Service Portal, we encourage you to watch this series of short videos to help you get started. These videos show how to quickly find answers through our comprehensive knowledge base.

1. Select Access Knowledge from the homepage
2. Type **Intelrad Service Portal Training** in the search bar
3. Select and watch available videos to learn more!



The screenshot displays the Intelrad Service Portal interface. At the top left is the Intelrad logo. The top right navigation bar includes links for Home, Downloads, Knowledge, Get Help, Tickets, My Activities, and a user profile icon. Below the navigation bar are three main action buttons: "Open a Support Case" (Incidents, technical questions), "Access Knowledge" (Browse and search our knowledge base and video library), and "Request Services" (Professional services, changes on your system, product/feature/module requests). The main content area features the "Intelrad Service Portal" title and "NorthStar Client Services" subtitle. A search bar is highlighted with a green box, containing the text "Intelrad Service Portal Training". Below the search bar is a "Documentation Categories" section with five items: ClarioWL Documentation (298), IntelPACS Documenta... (357), IntelRIS Documentation (49), IntelViewer Document... (264), and Service Portal Docume... (24). The "Service Portal Docume..." category is highlighted with a green box.