Welcome to Helper 9 Installation Instructions

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4950 College Boulevard Overland Park, KS 66211 800.343.5737 | Fax: 888.965.4021 myaccount@helper.com

How to Install the Helper Software

First you will need to install the proper version of Helper. Below are the links you need.

For a networked installation use this link for both the server computer and the workstations that are connecting to the server.

Helper Networked

If you are using Helper on just a single computer use the link below.

Helper Standalone

Click on the link and follow the installation instructions.



J Setup - Helper	
License Agreement Please read the following important information before continui	ing.
Please read the following License Agreement. You must accept agreement before continuing with the installation.	the terms of this
Helper Software End User License Age Agreement made between Netsmart Technologies, Inc., corporation with offices at 4950 College Boulevard, Over Kansas 66212, (hereinafter referred to as "Netsmart") and inafter referred to as "Licensee"). Contents:	a Delaware rland Park,
- Master Agreement	T
I accept the agreement	
stsmart Technologies	
< Back	Next > Cancel

Click 'I accept the agreement'. Then click 'Next'. If this you are installing Helper on a new Computer, click YES. If you ae upgrading an existing version click No.

弱 Setup - Helper	
Installation Questions Please answer the following question before continuing.	S
Is this the first time you are installing Helper on this computer?	
Netsmart Technologies	Next > Cancel

Click Next

You will not see this option if you are installing a standalone system.

Installation Questions			
Please answer the followin	g question before continu	uing.	
Is this computer going to b	e used as the Helper Ser	ver?	
• Yes			
© No			
smart Technologies			

Click on 'Yes' and then click on 'Next'. (Note: If this is not the server PC click on 'No')

Select Destination Location Where should Helper be installed?		R
Setup will install Helper into the foll	owing folder.	
To continue, click Next. If you would like to	select a different folder,	dick Browse.
C:\Program Files (x86)\Netsmart\Helper		Browse
At least 120.8 MB of free disk space is requi Netsmart Technologies —		
	< <u>B</u> ack Next	: > Cancel
Click Next		
Select Start Menu Folder Where should Setup place the program's sh	ortcuts?	S
Setup will create the program's sho	ortcuts in the following St	art Menu folder.
To continue, click Next. If you would like to	select a different folder,	click Browse.
Helper Software		Browse
Netsmart Technologies		
	< <u>B</u> ack Next	t > Cancel

Click Next

Select Additional Tasks Which additional tasks should be performed?	
Select the additional tasks you would like Setup to perform while installing Helper, then dick Next. Additional icons: Create a desktop icon Create a Quick Launch icon	
etsmart Technologies	

Select the checkbox beside **Create a desktop icon**. If you'd like you can also select **Create a Quick Launch icon**. Then click '**Next**'

R	eady to Install Setup is now ready to begin installing Helper on your computer.	R.
	Click Install to continue with the installation, or click Back if you want to review or change any settings.	
	Destination location: C:\Program Files (x86)\Netsmart\Helper Start Menu folder:	*
	Helper Software Additional tasks: Additional icons:	
	Create a desktop icon	Ŧ
	4	
Vetsm	art Technologies	ancel

Click on '**Install'.** The program will now be installed. Depending on your computer's security settings, you may see the screen below. If you do not see the screen below, skip to page 9.



Click on '**Finish**'. Once the computer restarts, you will need to run the Helper Transfer utility. The next steps will explain that process.

How to Run the Helper Transfer Utility.

Go to the Windows start button, this is typically the ICON on the bottom left of the screen. After clicking on it, go to either All Apps or All Programs. Find Helper Software and click on Helper Transfer.

()	We highly recommend that all other applications be closed prior to running the transfer.
	OK

Click 'OK' on the first screen.

WARNING - READ BEFORE PROCEEDING
This procedure will update your current database to the new format needed to run Helper. If this procedure does not succeed, your database will be inoperable. In this situation, you will need to restore your database from a backup.
You MUST backup your database before proceeding. We recommend you backup to your hard drive and name the backup 'Before Transfer'.
If for some reason this transfer is not successful then you will use the backup to restore your database.
BACKUP YOUR DATA !!!
OK

If you haven't already made a backup of your Helper data, close this Transfer utility and make a backup. Once the backup is completed restart the Transfer utility. Click '**OK**' on this Warning Screen.

To series and the series of th	Welcome to Helper's Transfer Utility This procedure will transfer your v6.1 or later data to the current format. It is recommended that you backup your data prior to continuing.
	ntly using data in C:\ProgramData\Netsmart\Helper\Data\ . If this is not correct d run the Helper Data Setup utility to configure Helper to use a different location.
Begin T	Progress ncel Finished - Exit the transfer and run Helper.
	Help Exit

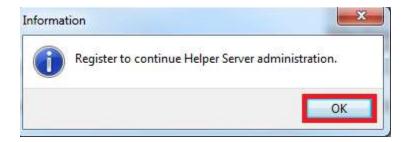
Click on Begin Transfer. When it is complete, click on **'Exit'**. You will now be on the Windows Desktop.

Setting up the Helper Server Software.

(Note: This section is only for a new installation and the Server PC or on a Standalone installation. Workstation computer will not have to do this step.)



Click on the desktop icon to start the Helper Server Admin program.



Click on **OK**.

Database Server	Registration
Registration	This server is registered for
	0 Workstations
	Update this server's registration information
	You have the option of using an existing internet connection to automatically complete this step or, if the Server computer does not have an internet connection, you may call a Netsmart representative to complete the registration.
	Register online

Click on Register Online.

?	Register Products Online This process will use an existing internet connection to automatically register the correct amount of workstations.
To register	products online, fill in the required information and click the Register button.
	Customer Id Zip Code

Enter your 6-digit Helper Customer Id/Account number and 5-digit Zip Code and then click '**Register**'



You have successfully registered the Helper Server for 2 workstations.

To complete the installation, you need to register Helper on one workstation.



You should now see the above screen and click **OK**. If you do not get the above screen after clicking on Register, please email Helper Support at support@helper.com with a Subject Line of 9.1 Registration.

(Note: You will not need to Register Helper on a Workstation)

You will now be at the Helper Server Administrator screen.

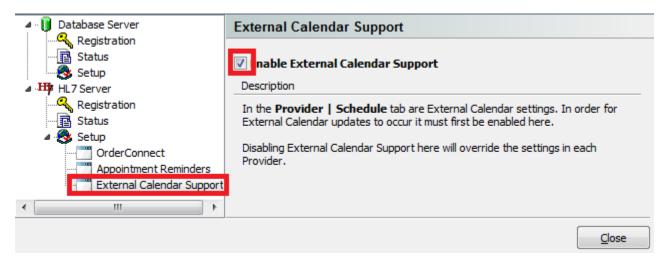


If you are going to be using the Appointment Reminder feature,



Click on 'Appointment Reminders' on the left. Then click on the checkbox beside Enable E-Mail Appointment Reminders.

If you are going to be using Calendar Synchronizing feature,



Click on 'External Calendar Support' on the left. Then click on the checkbox next to Enable External Calendar Support.

Click on 'Close'.

You are now ready to start the Helper setup section.

Setting up the Helper Program to Synchronize an External Calendar

On the main Helper screen, click on 'Setup'. Select 'Libraries' from the drop down menu.

Preferences ClaimsConner Multi-User Set Change Passw	tup arch Hid vord 🔽 Acco	CC Ledger Medicatio	ns Billing	ERA Reports
Force columns to		arch, click in any column	and begin typing	Edit Faceshee
Account #	Last Name Bbbbb	First Name Bbbbb	Active	Progress Note

Once the list of Libraries is displayed, click on '**Therapists**'. On the Therapists screen, select the name Therapist for which you wish to use Calendar Syncing. Then click on '**Edit**' on the bottom of the Window.

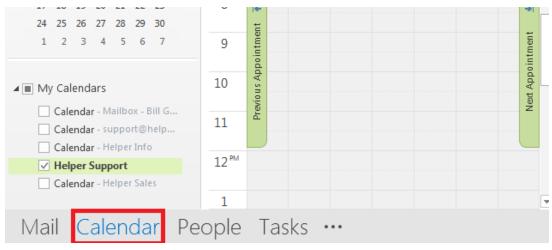
Primary	^ T	her	apist	is i								
Accounts Facilities	Т	o sea	arch, di	ick in any c	column and	begin	typing					
- Insurance Companies - Lawyers		Drag	a colur	nn header	here to gro	oup by	/ that column					
Medications	Ģ	ID	Status	Last Name	e First Nam	e MI	Address 1	Address 2	City	St	Zip Code	Phone
- Programs		A		Johnson	Thomas		4950 College Blvd.		Overlan	KS	6621116	
Therapists		C		Ryan	Lack 🖌		4950 College Blvd.		Overlan	KS	6621116	
· Scheduler Categories												
Priorities Other Adjustment Categories Billing Messages Methods of Payment Outcome Measures				-	<u>E</u> dit		Print	-				

On the Therapist screen, click on the '**Schedule**' tab. Click on the checkbox to the left of **Enable external calendar support**. Finally, click on the link "**Copy URL to Clipboard**" button. You can now save this screen and proceed to set up your specific calendar to synchronize.

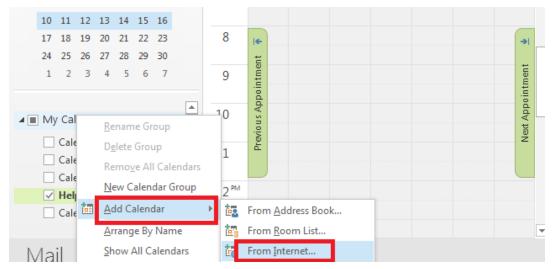
eneral Claim Settings	Supervisor Sche	edule Credit Card Info.	
The following info	rmation is used i	in the scheduler to identify working hours	xtra Info
for this Therapist.			e Sc <u>h</u> edule
	Beginning of day	/: 09:00 AM	
	End of day	7: 5:00 PM	
external calendar	using the standa	o provide schedule information to an rd iCal format. When enabled, one week	
external calendar prior to the currer to date in your ext instructions in imp	using the standa It date and two n ernal calendar. F	rd iCal format. When enabled, one week nonths after the current date will be kept up Refer to your calendar application for	
external calendar prior to the currer to date in your ext instructions in imp	using the standa It date and two n ernal calendar. F orting an iCal ca calendar support	rd iCal format. When enabled, one week nonths after the current date will be kept up Refer to your calendar application for	Save
external calendar prior to the curren to date in your ext instructions in imp Enable external URL: https://calsyn	using the standa it date and two n iernal calendar. F orting an iCal ca calendar support nc.netsmartcloud.co	rd iCal format. When enabled, one week nonths after the current date will be kept up Refer to your calendar application for lendar.	Save ave & <u>A</u> dd

How to Synchronize with Outlook Calendar

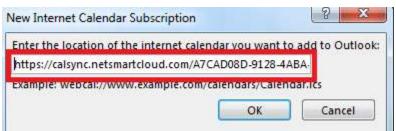
Open your Outlook program and click the Calendar option at the bottom of the page.



Go to 'Add Calendar' and select From Internet from the submenu



On the following screen, right-click and paste the URL (this was copied from Helper) into the text box displayed below. Finally click on '**OK**'.



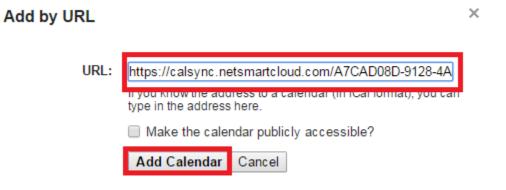
You should now have access to your Helper Calendar.

How to Synchronize with Google Calendar

Open your Google Calendar. On the left of the page go to '**Other calendars**'. Click on the drop down arrow to the right and select '**Add by URL**' from the list.

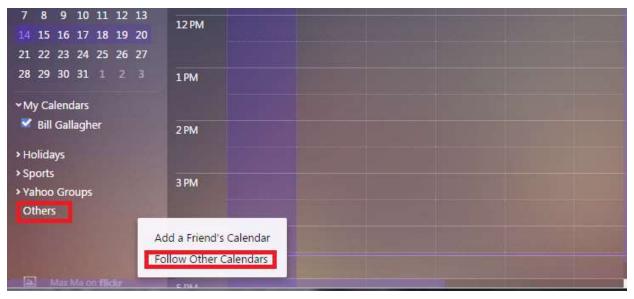
Calendar	Today	< >	Day	Veek Month	4 Days	Agenda	More • 🗘 •
CREATE	Sun	Mon	Tue	Wed	Thu	Fri	Sat
March 2016 〈 〉 SMTWTFS	28	29	Mar 1	2	3	4	5
28 29 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26	6	7	8	9	10	11	12
27 28 29 30 31 1 3 4 5 6 7 8 My calendars	Browse I	end's calenda			17	18	19
Bill Gallagher Birthdays Tasks	Add by U Import ca Settings	100 C			24	25	26
Other calendars Add a friend's calendar Holidays in United St	21	28	29	30	31	Apr 1	2

On the following screen, paste the URL from Helper into the text box labeled **URL:** Then click on 'Add Calendar'.



How to Synchronize with Yahoo Calendar

Open your Yahoo Calendar. On the left side of the page, click on '**Others'** and select '**Follow Other Calendars'**.



From the Following screen, paste in the URL from Helper next to the text box labeled '**iCal Address'**. Then click on 'Continue'

Helper	
iCal Addres:	https://calsync.netsmartcloud.com/2BA2A6CE-77C
Color	
Refresh	Automatically T
Remind	30 minutes before
and	No Reminder
	 Mail Yahoo Messenger
	Mobile/Desktop
Continue	Cancel

How to Synchronize with iPhone Calendar

First you need to copy the URL from the Therapist Library.

General Claim Settings Supervisor Schedule Credit Card Info.	1.02
The following information is used in the scheduler to identify working hours	Extra Info
for this Provider.	Fee Schedule
Beginning of day: 09:00 AM	
End of day: 5:00 PM	
The following information is used to provide schedule information to an	
The following information is used to provide schedule information to an external calendar using the standard iCal format. When enabled, one week prior to the current date and two months after the current date will be kept up to date in your external calendar. Refer to your calendar application for instructions in importing an iCal calendar.	Save
external calendar using the standard iCal format. When enabled, one week prior to the current date and two months after the current date will be kept up to date in your external calendar. Refer to your calendar application for instructions in importing an iCal calendar.	

Edit the Therapist name and go the '**Schedule'** tab. Then click on '**Copy URL to Clipboard'**.

Now click 'Save'.

Next, create an email and paste the URL into it. Send it to an email address that you can get to on the iPhone.

From the iPhone, open the email you sent. Use the iPhone copy feature to copy the URL. Go to Settings, and select **Mail, Contacts, Calendars**. From the list, select Add Account and select **Other**. Now go to **Add Subscribed Calendar**. Paste the URL in for the server location. You may see a warning regarding "Cannot Connect Using SSL". Click **Continue**. Enter a description for the calendar. Click **Next** in the upper right then save the entry.

Now, if you open the iPhone Calendar it will display your appointments. This may take a while for the initial synchronizing.

Enabling the Email Reminders Option.

Setting up the Preferences Library.

On the main Helper Screen,							
Setup Utilities Web	Register Help	Exit					
Libraries Ctrl+	L 📑	/150	=		Æ.		
Preferences		See 19 19 19 19 19 19 19 19 19 19 19 19 19					
ClaimsConnect	insactions CCI	Ledger Medications	Billing	ERA	Reports		
Multi-User Setup	arch Hide Pa	tients					
Change Password	Account :	# 📝 SSN			Facesheet		
A	Search	1			rocencer		
Force columns to fit.	To search	, click in any column and	d begin typing	Edit	t Facesheet		
Account #	Last Name	First Name	Active 🖵				
A	Bbbbb	Bbbbb	V	Pro	gress Notes		

Click on 'Setup' the select 'Preferences'.

General Features Screens & Sounds	Facesheet Use the following default	s when adding a new Facesheet		
Libraries Defaults	Facility:	E. A. P. Boston BSI Psychological Jonathan Barrister, JD		
Session Payment Adjustment Insurance Library Scheduler Managed Care Credit Card Processing ClaimsConnect		Derry School District		
	Referring Physician:			
		Johnson, Thomas		
	Discount Amount: State: Area Code:	\$0.00 Zip Code:		
	Appointment Reminders:	2 days prior to their next appointme	ent	

Click on '**Facesheet**' on the left. On the bottom right, enter the number of days you'd like the reminder sent prior to the appointment reminder go out. Click '**Save**'.

Setting up the patient Facesheet

<u>Setup</u> <u>U</u> tilities <u>W</u> eb	Register <u>H</u> elp	E <u>x</u> it				
Scheduler MC Auth.	Transactions CC	Ledger Me	dications	Eilling		Reports
Basic Search Advance	d Search Hide P	atients				
Last Name First N	lame 🔽 Account				Add	d Facesheet
Force columns to fit.	To searc	h, click in any	column and b	egin typing	💶 🖬 Edi	t Facesheet
	36666	Bbbbb	A	ctive 🖵	Pro	gress Notes
					Acc	count Balance
					Add	d Sessions

From the main Helper screen select a Patient and click on 'Edit Facesheet'.

Patient Information: Ccccc Ccccc	×
Patient Library Links Appointment Reminders	Facesheet
If you want to send appointment reminders by email, PLEASE READ THE FOLLOWING TO THE CONSUMER	 Patient Info. Additional Resp. Parties
We can send you an appointment reminder by email. The appointment reminder will include only the date and time of your appointment and your service provider name. We will not encrypt the messages. Health care information sent by regular e-mail could be lost, delayed, intercepted, delivered to the wrong address, or arrive incomplete or corrupted. If you understand these risks and would like to receive an appointment reminder by email, I need you to confirm you accept responsibility for these risks, and will not hold us responsible for any event that occurs after we send the message. By checking the box below that enables E-mail reminders and entering an E-Mail address, you acknowledge that you have received consent from the patient.	 Attachments Insurance Info Claim Info. Insurance Co. Billing Setup Defaults Billing Access Time & Outcomes
Enable E-mail Reminders for this patient Send reminder 2 days prior to their next appointment Recipient E-mail: name@hotmai.com	Save & Add
<u>E</u> xtra Info	Cancel

Click the tab at the top '**Appointment Reminders'**. At the bottom of the page, check the checkbox next to **Enable E-mail Reminders**. Enter the number of days prior to the appointment to send the reminder. (It will auto-fill with the setting entered in Preferences.) Enter the email address to send the reminder and click '**Save**'.

You have set up a reminder to be sent to this patient.

How to remove all the preselected favorites from the Diagnosis Library



On the following screen, click in 'Libraries'. On the right, click on 'Remove All Favorites'. This will remove the all the favorites set up in the diagnosis library for all users. Then save the Preferences.

