

# Welcome to Helper 9 Installation Instructions

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**Netsmart**  
Helper

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## How to Install the Helper Software

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

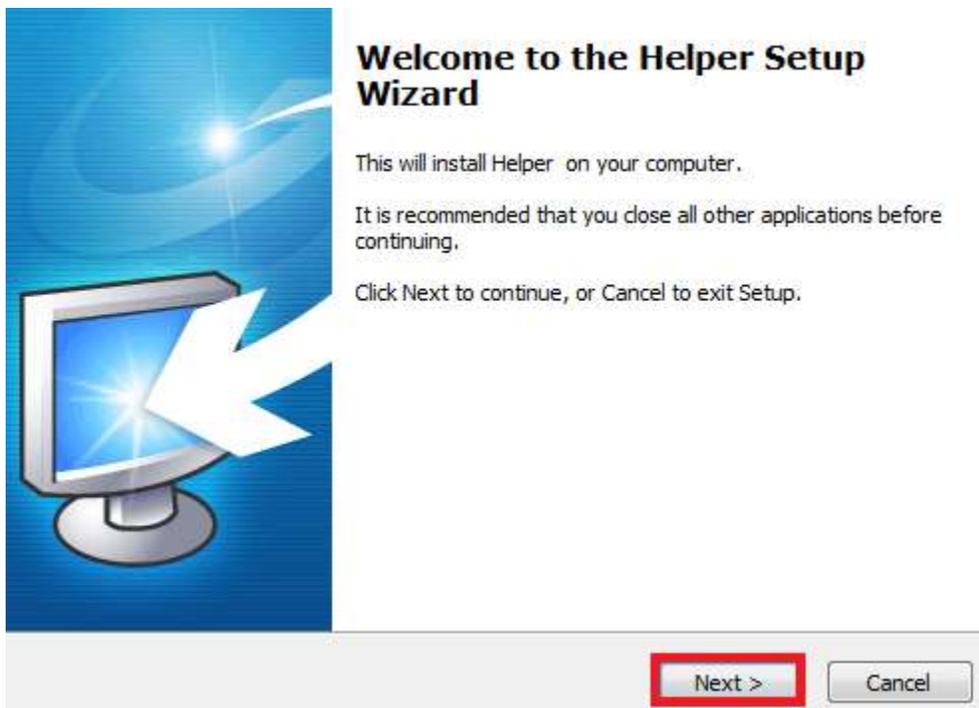
For a networked installation use this link for both the server computer and the workstations that are connecting to the server.

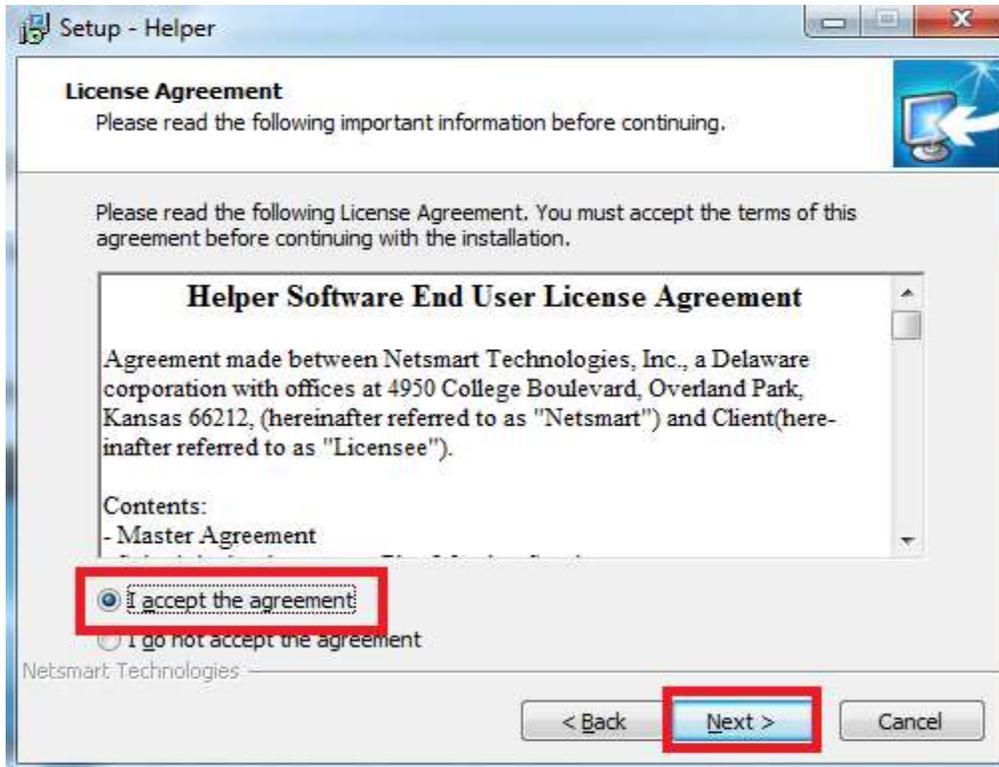
### [Helper Networked](#)

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

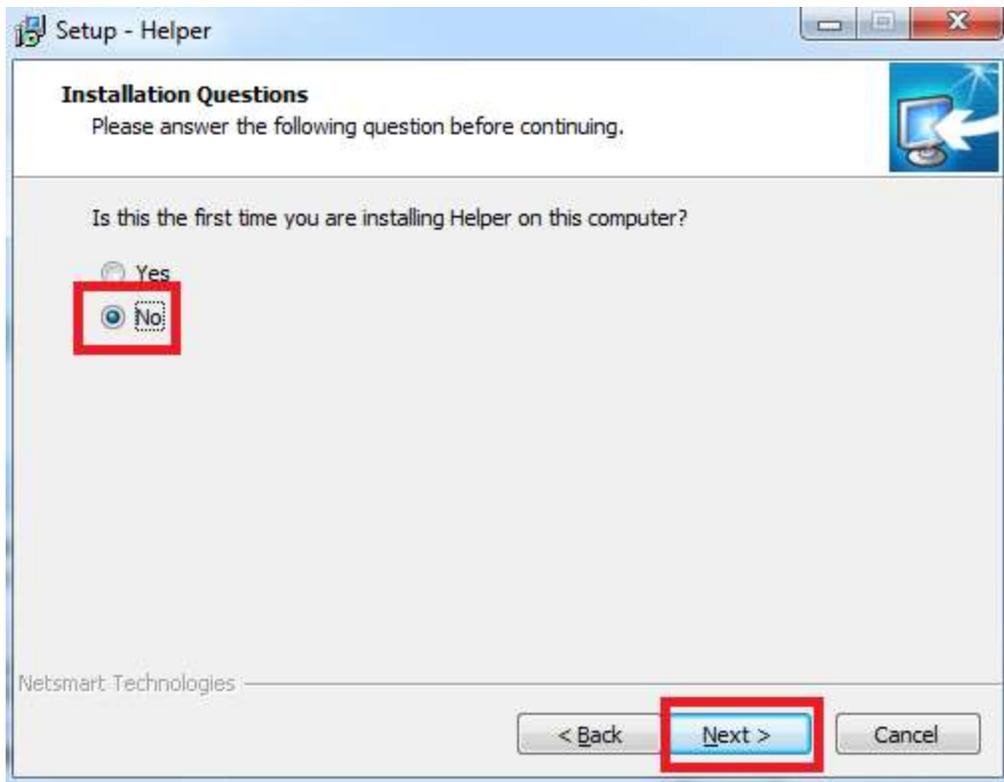
### [Helper Standalone](#)

Click on the link and follow the installation instructions.



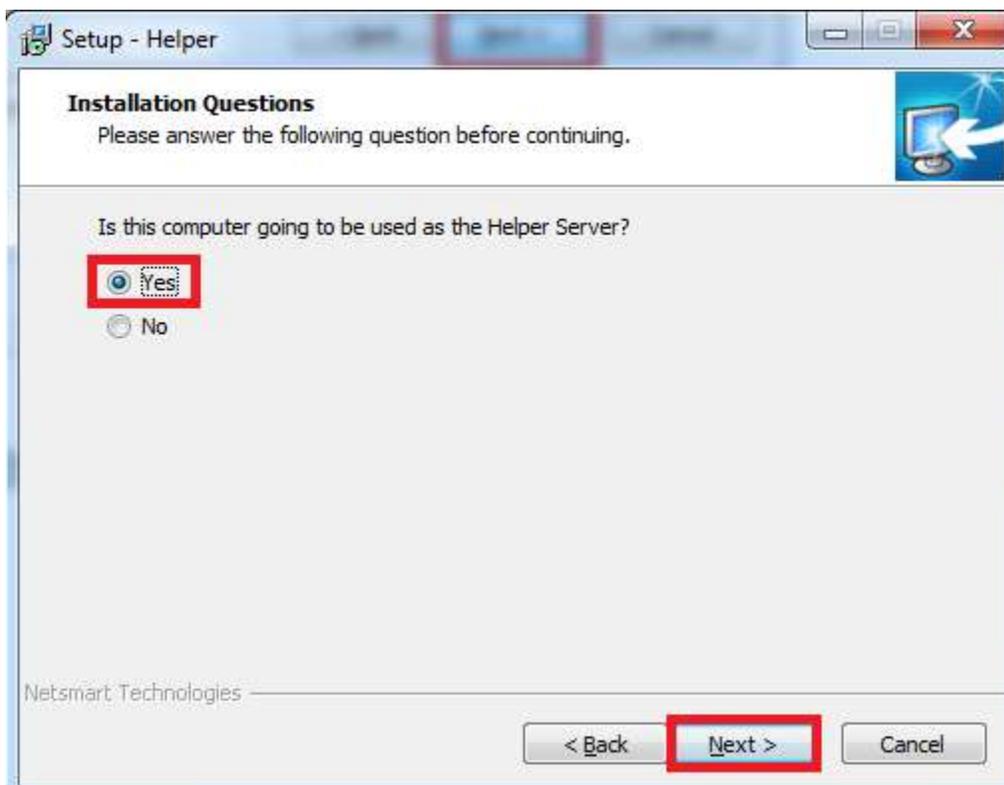


Click **'I accept the agreement'**. Then click **'Next'**.  
If this you are installing Helper on a new Computer, click YES. If you ae upgrading an existing version click No.

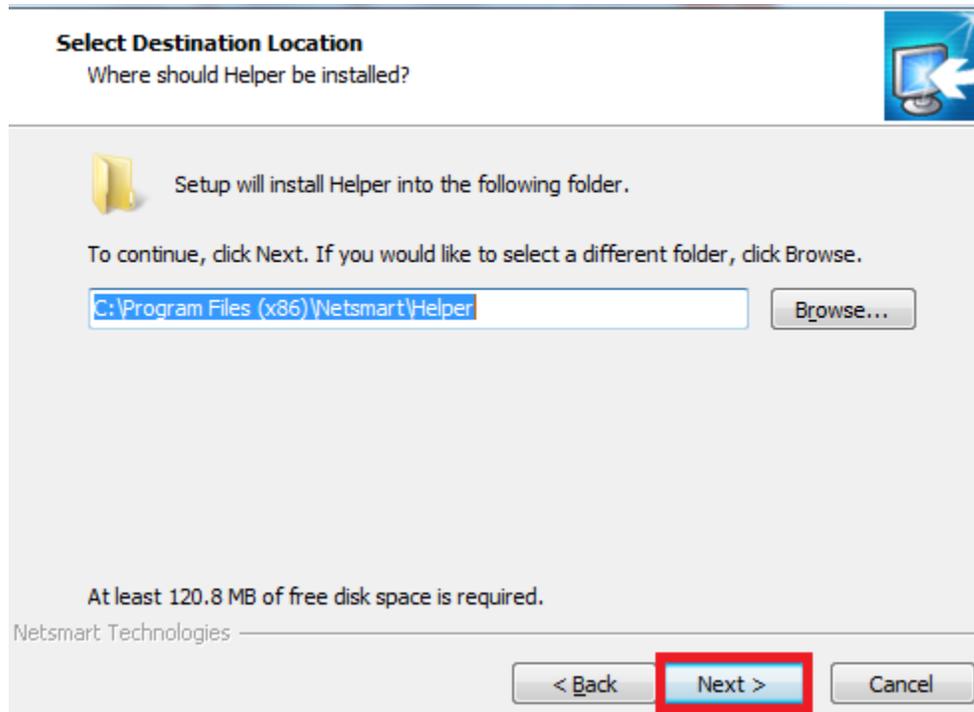


Click **Next**

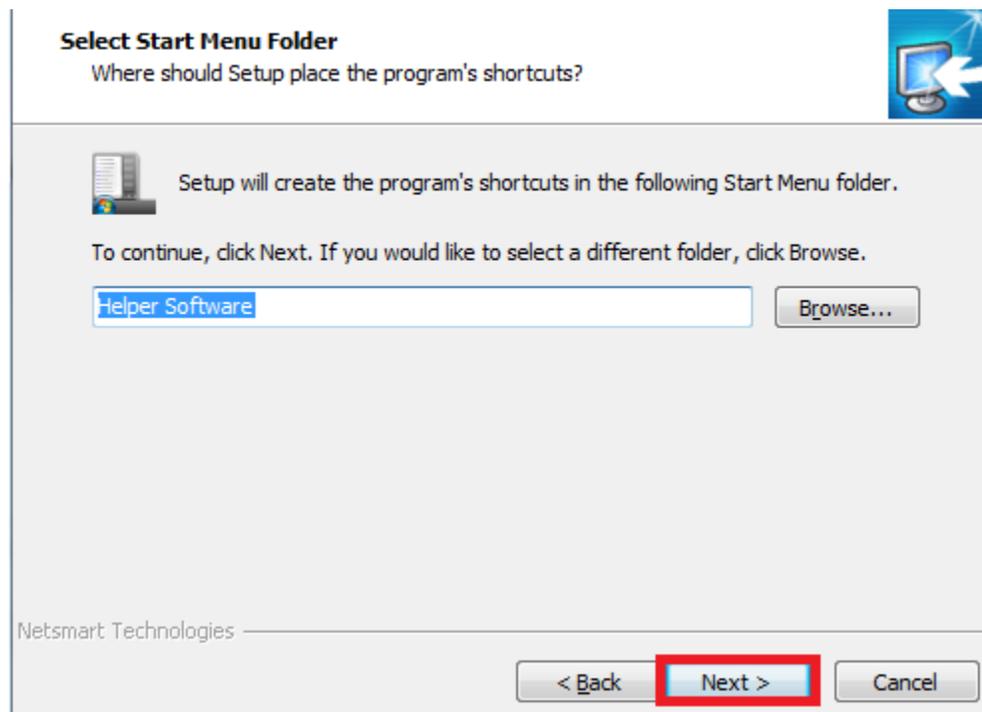
You will not see this option if you are installing a standalone system.



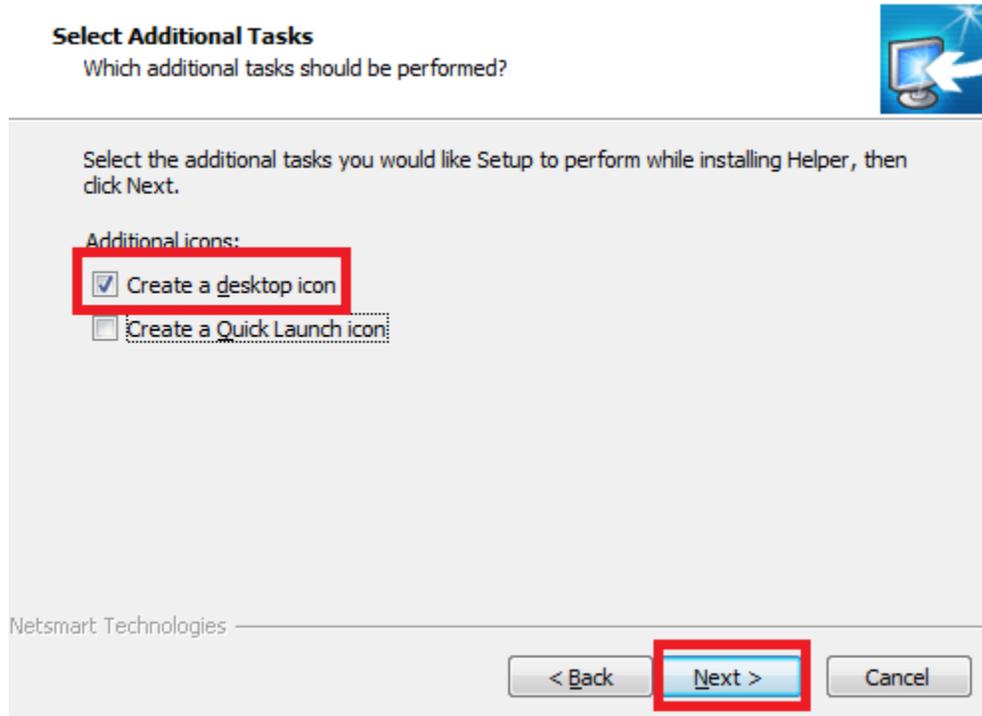
Click on 'Yes' and then click on 'Next'.  
**(Note: If this is not the server PC click on 'No')**



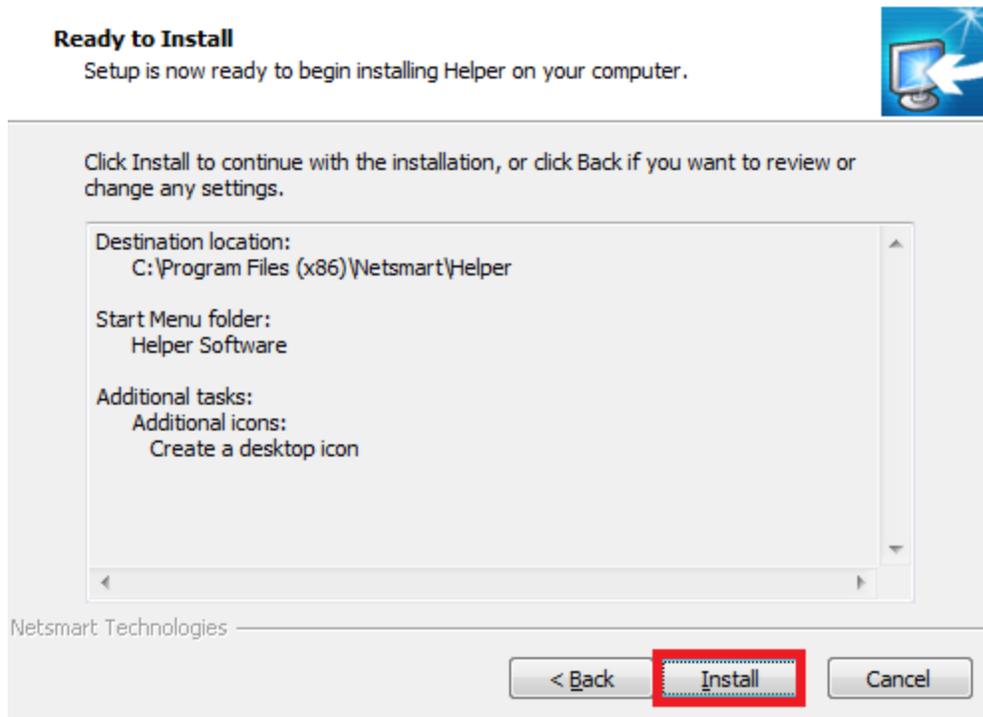
Click **Next**



Click **Next**



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



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.



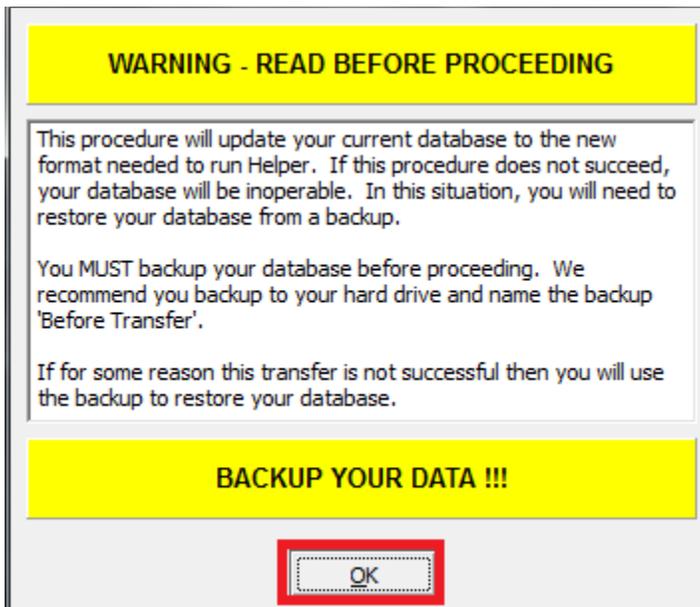
Click on **'Finish'**. Once the computer restarts, you will need to run the Helper Transfer utility. The next steps will explain that process.

## How to Run the Helper Transfer Utility.

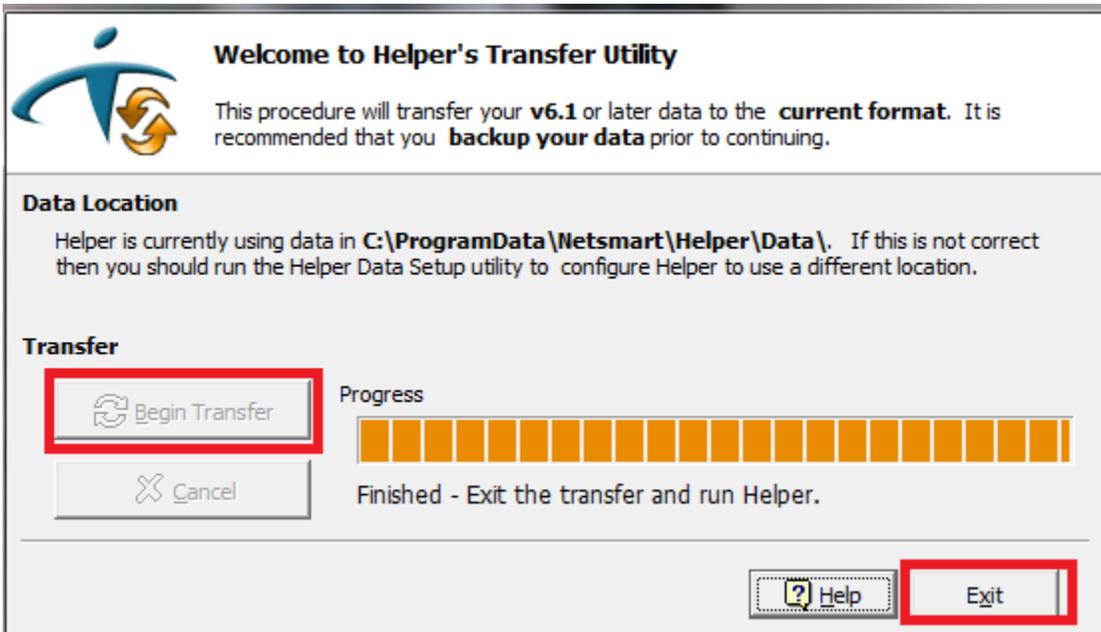
Go to the Windows start button, this is typically the ICON on the bottom left of the screen. After clicking on it, go to either All Apps or All Programs. Find Helper Software and click on Helper Transfer.



Click '**OK**' on the first screen.



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.



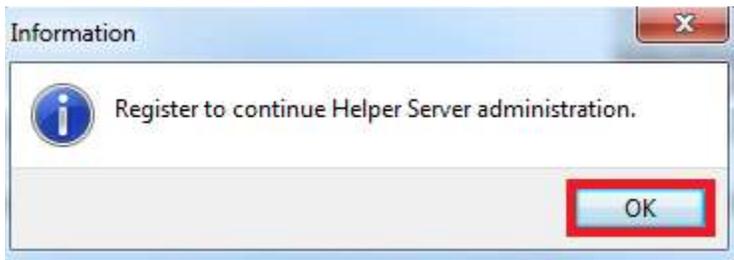
Click on Begin Transfer. When it is complete, click on **'Exit'**. You will now be on the Windows Desktop.

## 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**.



Click on **Register Online**.



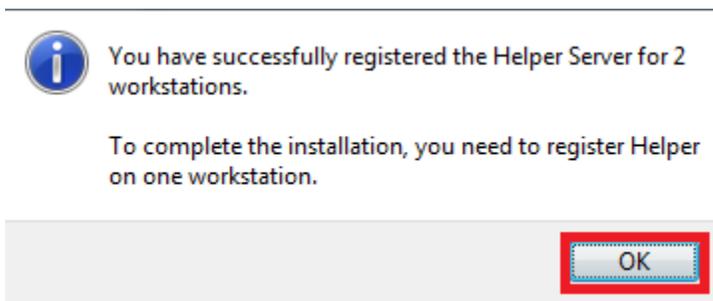
**Register Products Online**  
 This process will use an existing internet connection to automatically register the correct amount of workstations.

To register products online, fill in the required information and click the **Register** button.

Customer Id   
 Zip Code

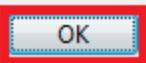
 

Enter your 6-digit Helper Customer Id/Account number and 5-digit Zip Code and then click 'Register'



 You have successfully registered the Helper Server for 2 workstations.

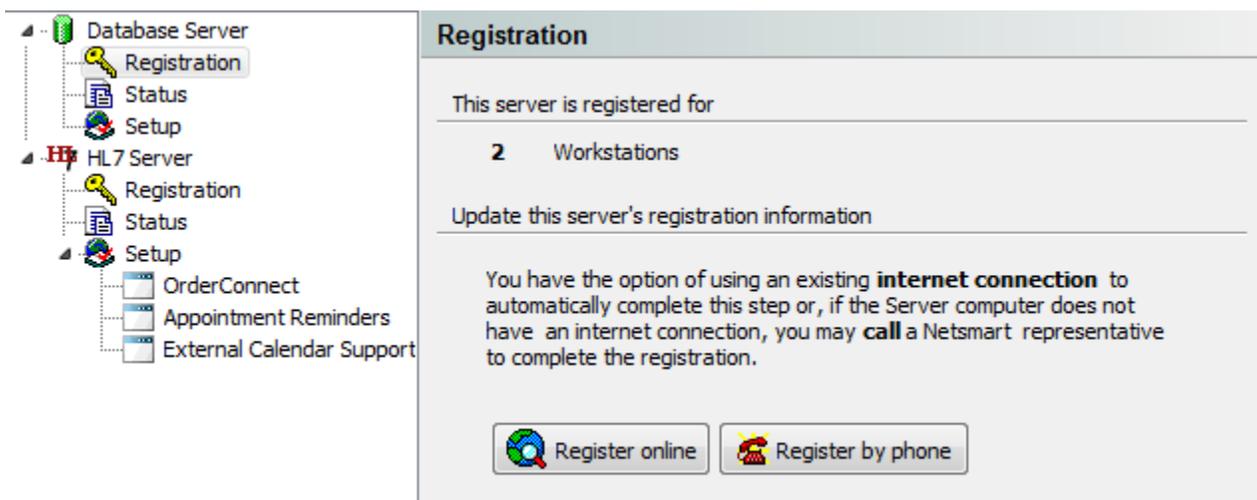
To complete the installation, you need to register Helper on one workstation.



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.



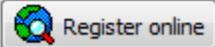
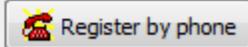
**Registration**

This server is registered for

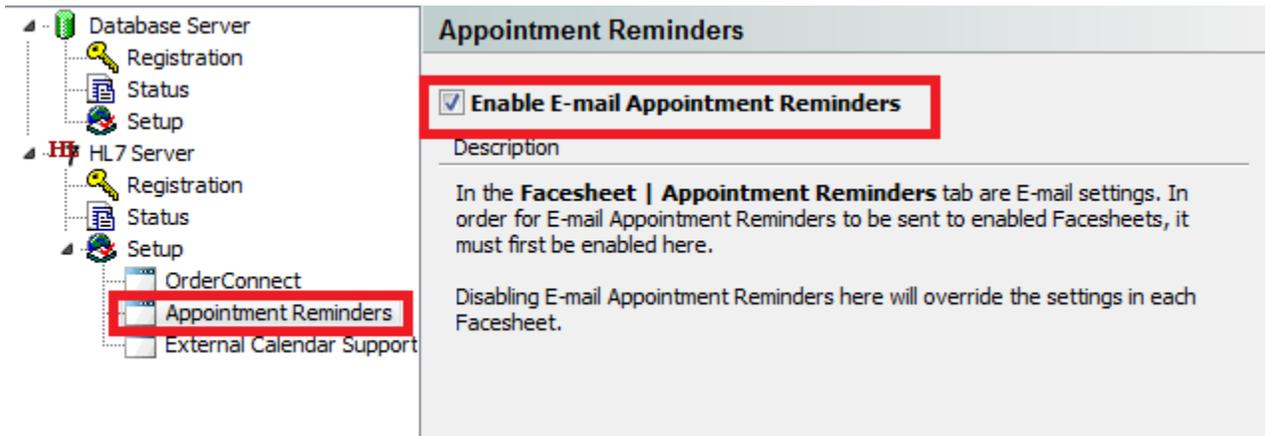
**2** Workstations

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.

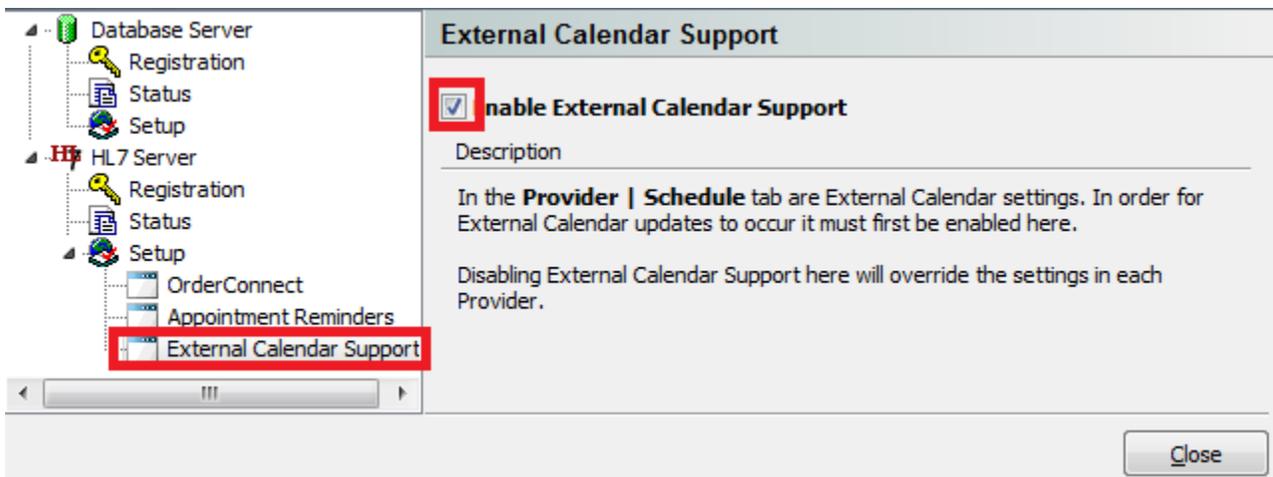
 

If you are going to be using the Appointment Reminder feature,



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,



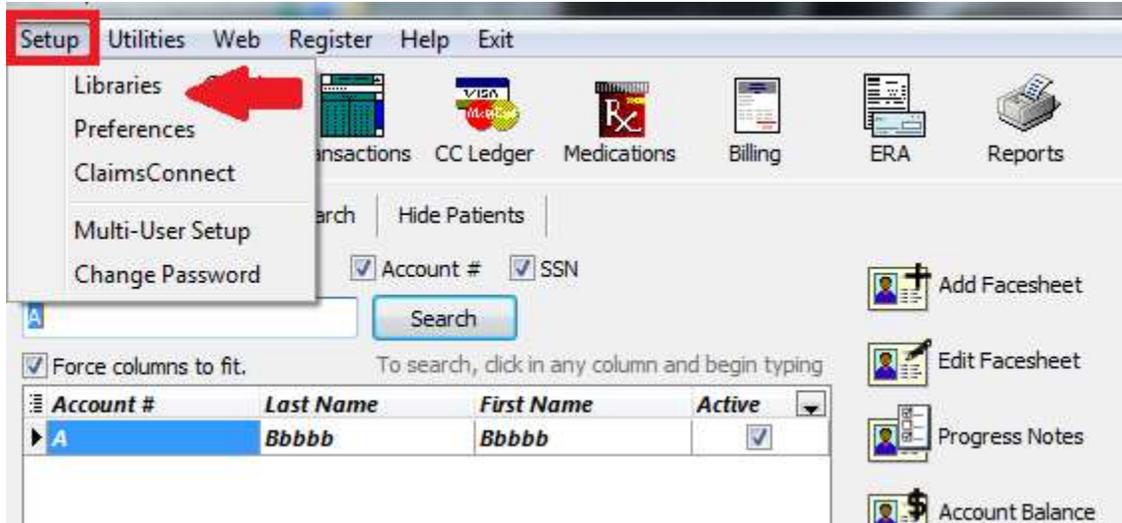
Click on '**External Calendar Support**' on the left. Then click on the checkbox next to **Enable External Calendar Support**.

Click on '**Close**'.

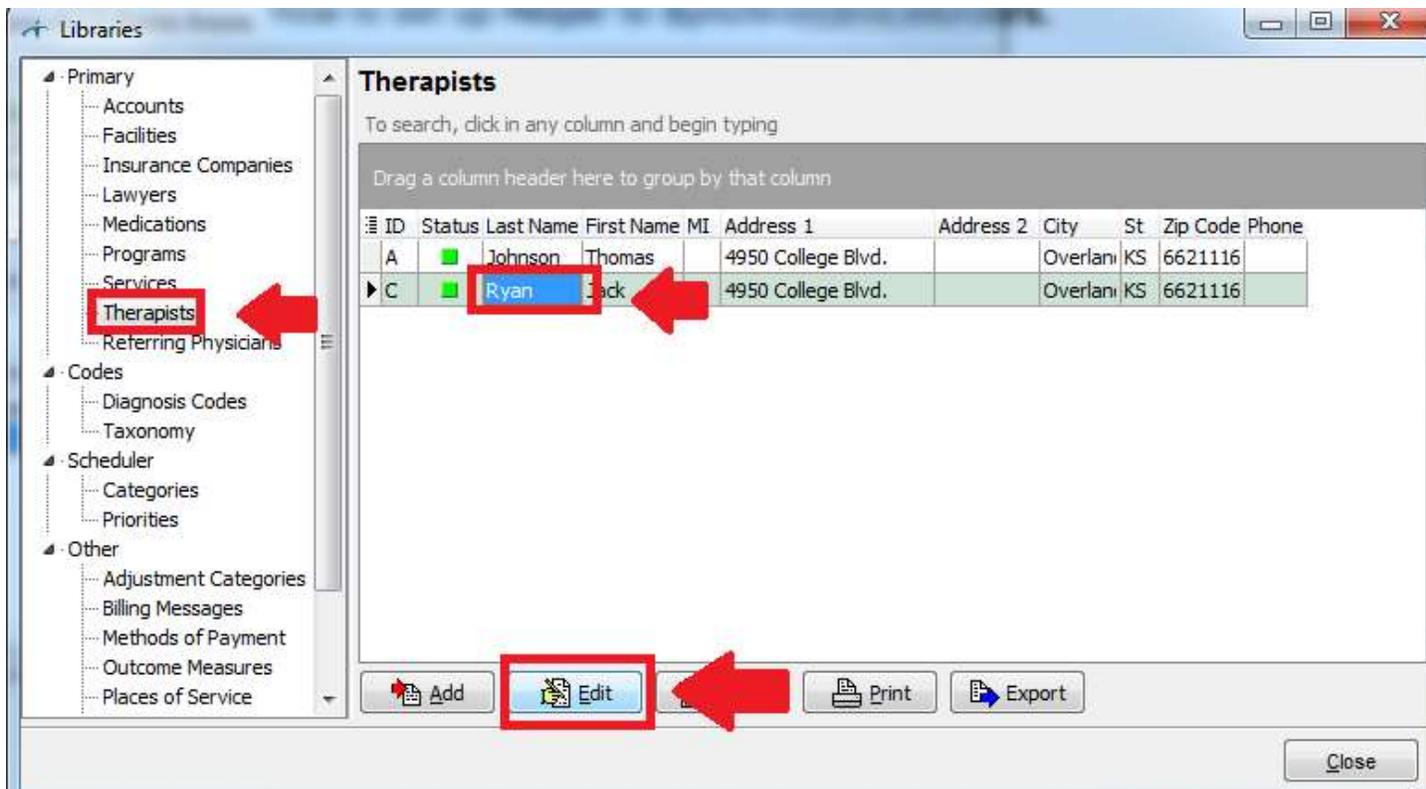
You are now ready to start the Helper setup section.

# 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.



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.



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.

Therapist: Jack Ryan, PhD

General | Claim Settings | Supervisor | **Schedule** | Credit Card Info.

The following information is used in the scheduler to identify **working hours** for this Therapist.

Beginning of day: 09:00 AM  
End of day: 5:00 PM

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.

Enable external calendar support

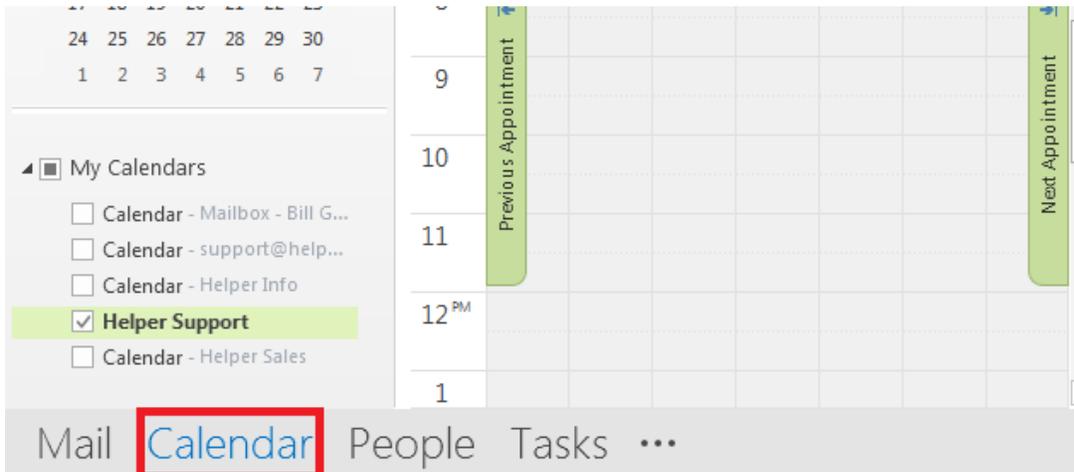
URL: <https://calsync.netSMARTcloud.com/A7CAD08D-9128-4ABA-A1E0-E99D81FFB202/cal>  
Copy and paste the above URL into your external Calendar application

Create a new URL | **Copy URL to Clipboard**

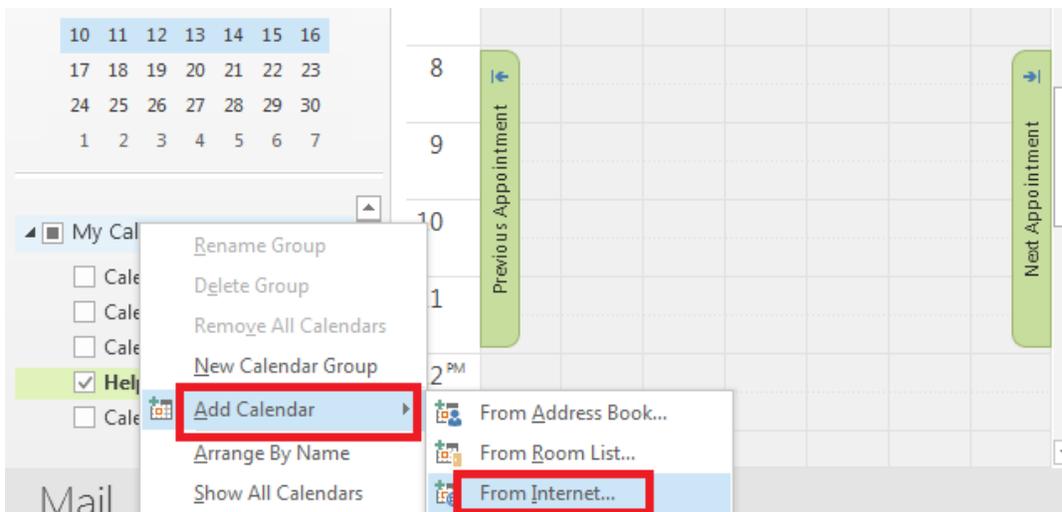
Extra Info  
Fee Schedule  
Save  
Save & Add  
Cancel

## How to Synchronize with Outlook Calendar

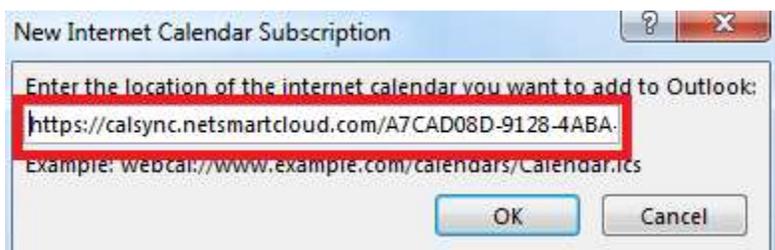
Open your Outlook program and click the **Calendar** option at the bottom of the page.



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



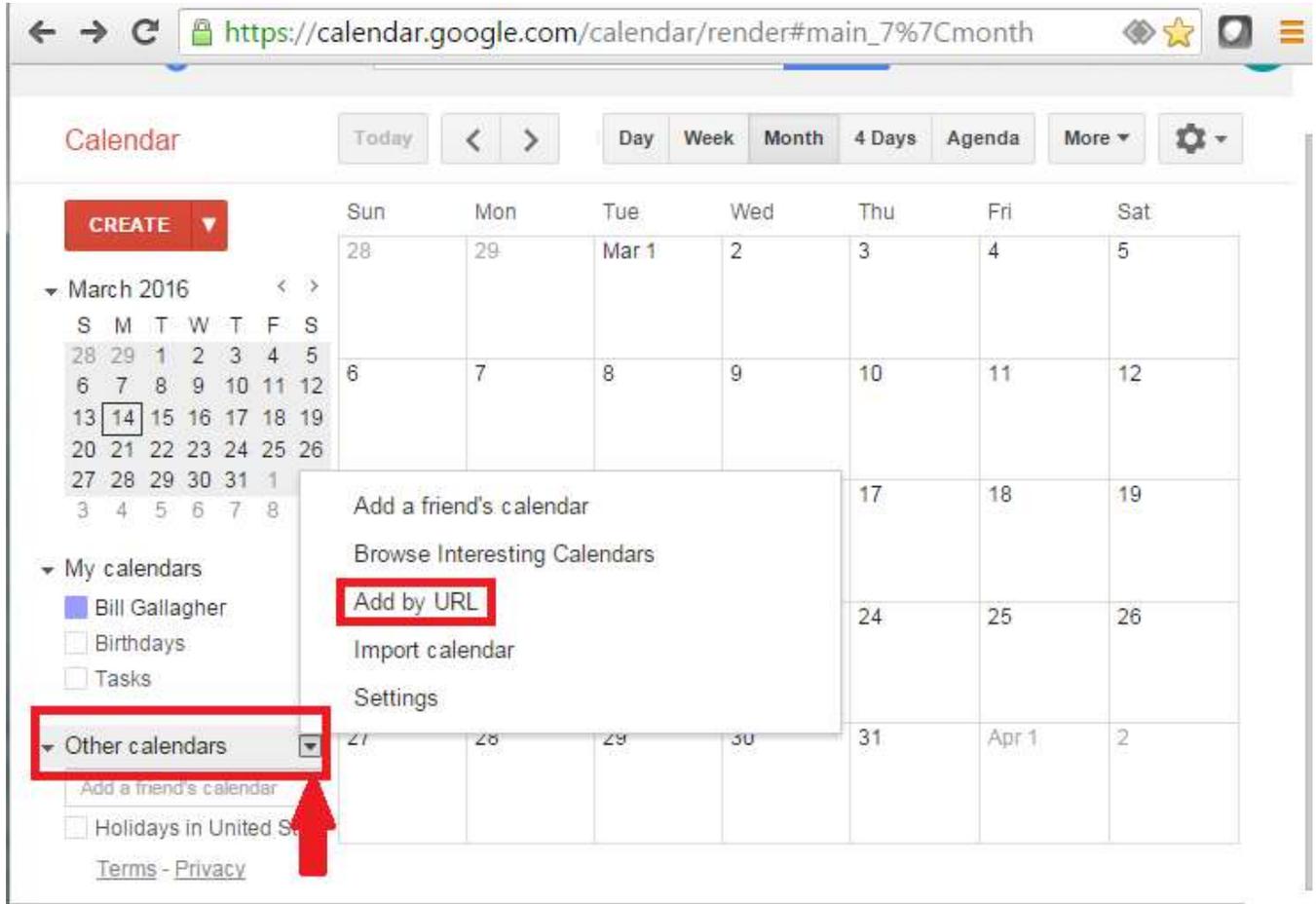
On the following screen, right-click and paste the URL (this was copied from Helper) into the text box displayed below. Finally click on '**OK**'.



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.



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

### Add by URL

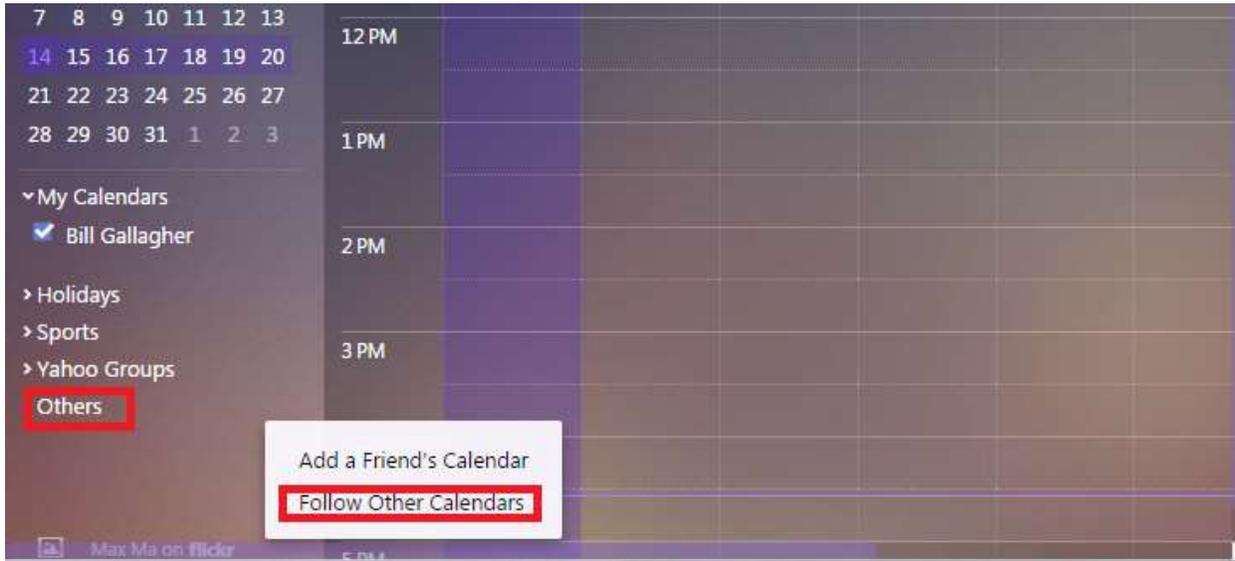
URL:

If you know the address to a calendar (in iCal format), you can type in the address here.

Make the calendar publicly accessible?

## 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'**

A screenshot of the 'Add a Friend's Calendar' dialog box. At the top, there is a text input field labeled 'Helper' containing the text 'Helper'. Below it is the 'iCal Address' field, which contains the URL 'https://calsync.netsmartcloud.com/2BA2A6CE-77C' and is highlighted with a red rectangular box. Underneath the 'iCal Address' field is a 'Color' selection area with several colored squares (purple, green, blue, yellow, orange, red, pink, grey). Below the color selection are three dropdown menus: 'Refresh' set to 'Automatically', 'Remind' set to '30 minutes before', and 'and' set to 'No Reminder'. At the bottom, there are three checkboxes: 'Mail' (checked), 'Yahoo Messenger' (unchecked), and 'Mobile/Desktop' (unchecked). At the very bottom, there are two buttons: 'Continue' (highlighted with a red rectangular box) and 'Cancel'.

## How to Synchronize with iPhone Calendar

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

Provider: Jack Ryan, PhD

General Claim Settings Supervisor **Schedule** Credit Card Info.

The following information is used in the scheduler to identify **working hours** for this Provider.

Beginning of day: 09:00 AM  
End of day: 5:00 PM

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.

Enable external calendar support

URL: <https://calsync.netsmartcloud.com/E087AE1E-0D79-4D4A-8D7B-C3A68E6F4D95/cal>  
Copy and paste the above URL into your external Calendar application

Create a Copy URL to Clipboard

Extra Info  
Fee Schedule  
Save  
Save & Add  
Cancel

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.

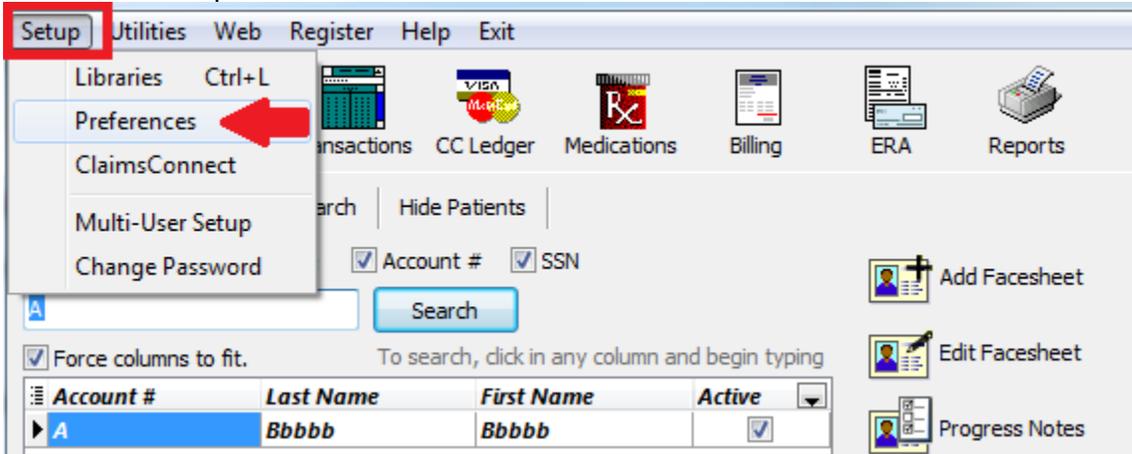
From the iPhone, open the email you sent. Use the iPhone copy feature to copy the URL. Go to Settings, and select **Mail, Contacts, Calendars**. From the list, select Add Account and select **Other**. Now go to **Add Subscribed Calendar**. Paste the URL in for the server location. You may see a warning 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.

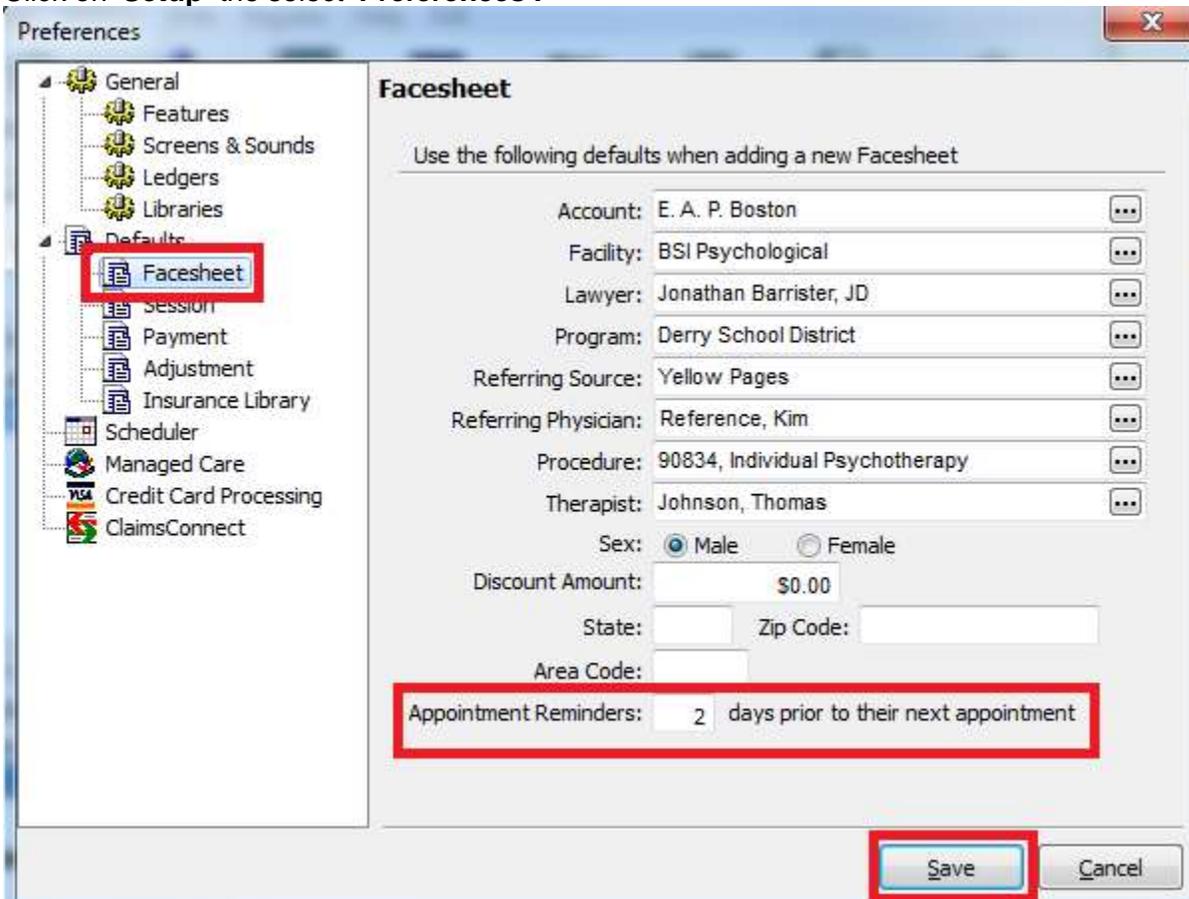
# Enabling the Email Reminders Option.

## Setting up the Preferences Library.

On the main Helper Screen,

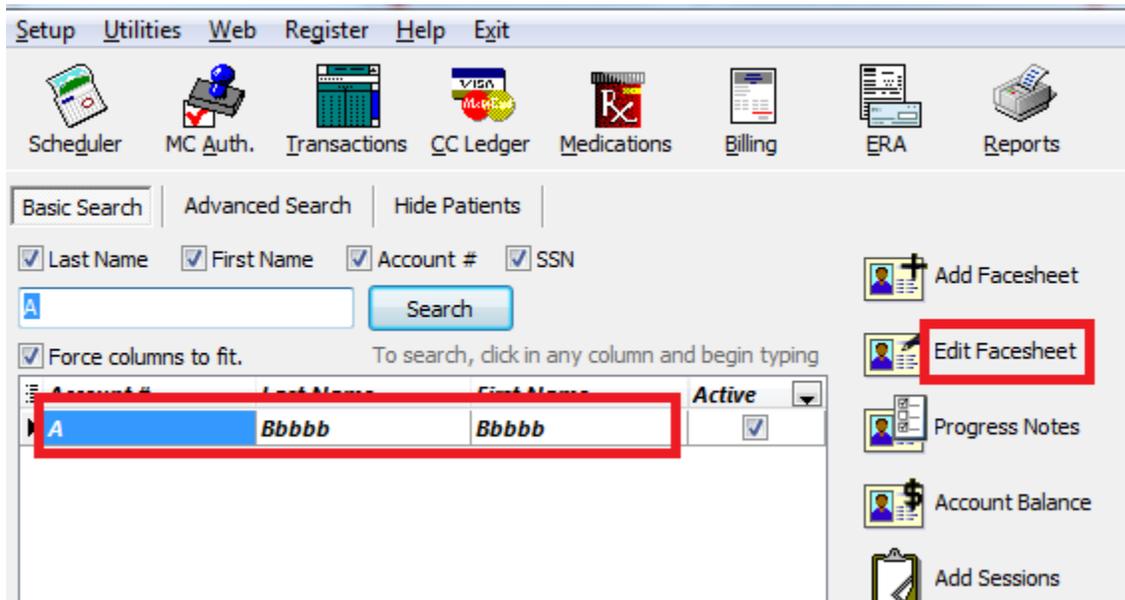


Click on 'Setup' then select 'Preferences'.

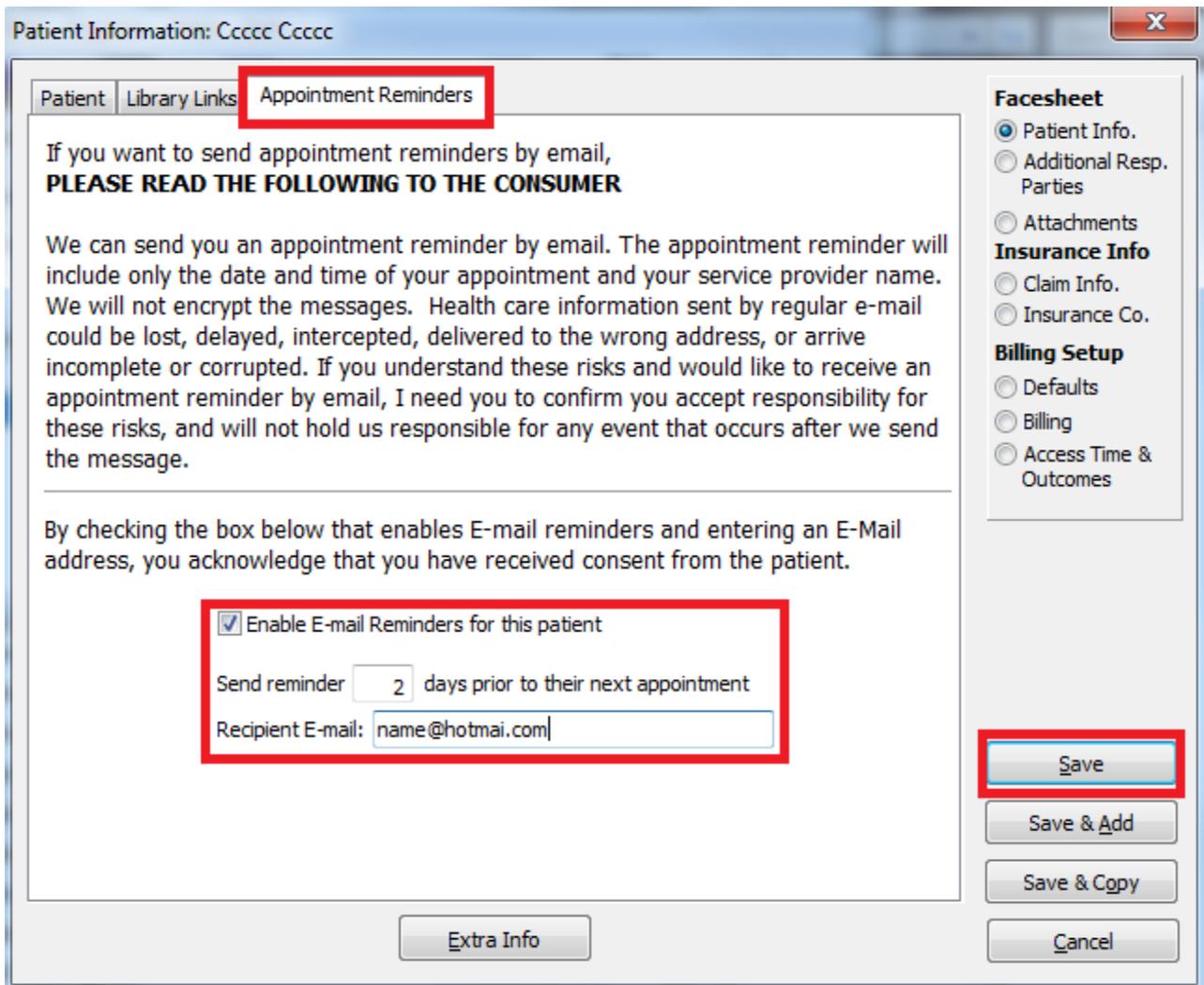


Click on 'Facesheet' on the left. On the bottom right, enter the number of days you'd like the reminder sent prior to the appointment reminder go out. Click 'Save'.

## Setting up the patient Facesheet



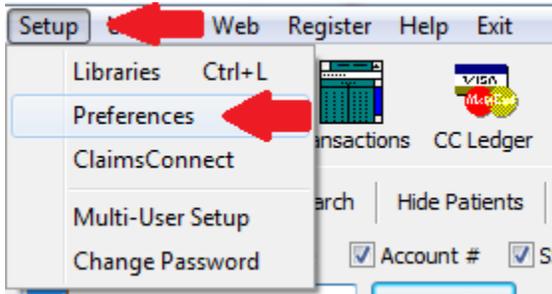
From the main Helper screen select a Patient and click on '**Edit Facesheet**'.



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.

