

Knowledge Center

The CollaborateMD Knowledge Center delivers a layout of core features organized into categories and sub-categories. These features include articles, tips, frequently asked questions, videos & webinars, tools, guides, and a variety of other resources to provide our customers with the knowledge and training experience needed to achieve their business needs.

1. Click the  icon located in the top right corner of the screen.
2. Select **Knowledge Center** to open help.collaboratemd.com.

Show "Tips"

The CollaborateMD Show "Tips" option gives you a general overview of the screen you are in, what is done in that section, and a link to the help article associated with the section.

1. Click the  icon located in the top right corner of the screen.
2. Select **Show "Tips."**
3. Review the tip based on the screen you are currently in.

Show Support PIN

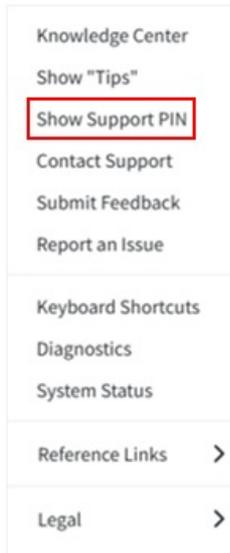
Show Support PIN provides a user-level dynamic PIN, which is auto-generated within the application. When contacting support via phone or live chat, you will be required to provide this PIN to validate your identity. This PIN will be different each time a user contacts support.

Important: Sharing your Support PIN, even with co-workers, violates our User Agreement. A CollaborateMD Representative will verify your Support PIN on every call and live chat to authorize discussion and review of your account information. No account information will be discussed until verified.

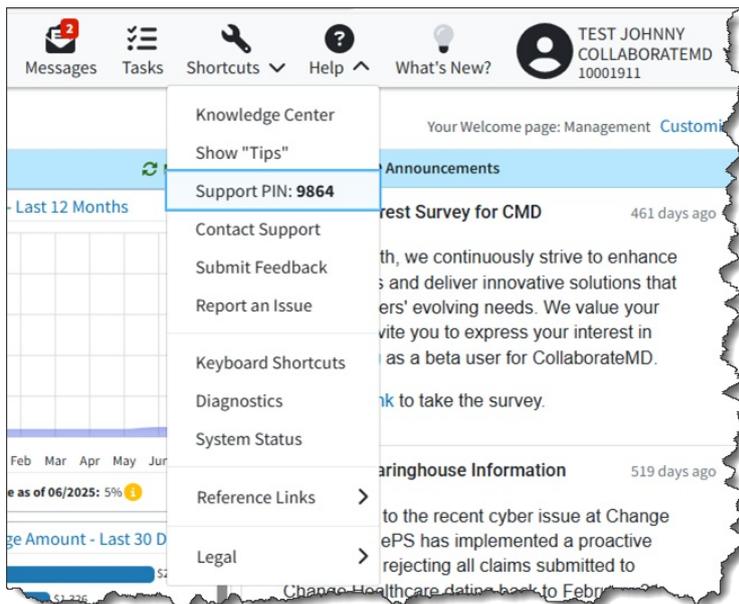
To generate a Support PIN:

1. Click on the  icon located in the top right corner of the screen.

2. Select **Show Support PIN**.



3. The screen will show the current 4-digit "Support PIN" (generated by the system).



4. Provide the PIN to the support representative when requested.

The system will generate a new Support PIN every 30 days or upon its validation by support, whichever occurs first.

Contact Support

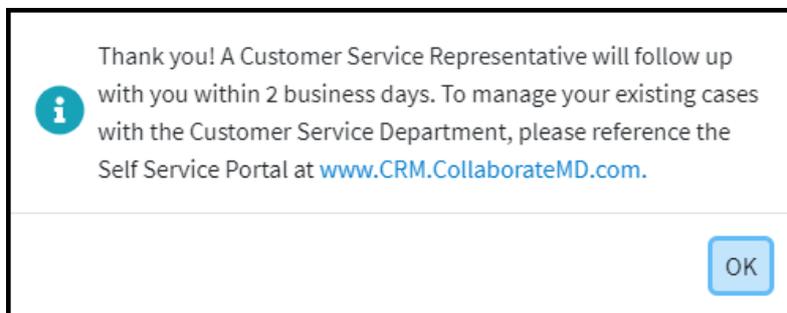
Contact Support is a simple and easy to use tool that allows clients to resolve their inquiries by providing options on contacting a Client Services Representative. This portal will allow you to easily and securely submit cases online, or Live chat with a support specialist.

1. Click the  icon located in the top right corner of the screen.
2. Select **Contact Support**.
3. Select your option:
 1. [Create a Case](#).
 2. [Chat Now](#)
 3. [Call Us](#).

Report an Issue

Report an Issue provides a quick and easy way to create a Support Case. Once created, Our World Class support Team will respond to your case within 24 - 48 business hours.

1. Click on the  icon located in the top right corner of the screen.
2. Select **Report an Issue**.
3. Enter the best **Email & Phone** to contact you along with a **detailed description** of the problem
4. Click **Submit**, then click **OK**.



Already have a case with support? Manage any existing cases through our [Self-Service Portal](#).

Keyboard Shortcuts

The CollaborateMD Keyboard Shortcuts option gives you an overview of the series of keyboard shortcuts that can be used throughout the application in order to save you valuable mouse clicks.

1. Click the  icon located in the top right corner of the screen.
2. Select **Keyboard Shortcuts**.
3. Review the [Global](#) and [GoTo](#) shortcuts based on the action you want to perform.

Diagnostics

The CollaborateMD Diagnostics option gives you a standard process for collecting user log files as well as viewing other information important for troubleshooting including the browser, OS, window size, time zone, and more.

1. Click the  icon located in the top right corner of the screen.
2. Select **Diagnostics**.
3. Review the diagnostic information or retrieve logs for up to thirty (30) days.

Diagnostics

Diagnostic Information for CollaborateMD CMD_10.15.0_3113254e41

Browser/OS: Mozilla/5.0 (Windows NT 10.0; Win64; x64)
AppleWebKit/537.36 (KHTML, like Gecko)
Chrome/76.0.3809.100 Safari/537.36

Window size: 1920 x 937

Time zone: America/New_York (UTC-04:00)

Application status: ✔ OK

Logs are kept for 30 days.

Log Date

 [Retrieve Logs](#)

[Close](#)

Reference Links

Reference Links give you direct access to 4 of our great tools by linking you to them directly from the help con.

1. Click the  icon located in the top right corner of the screen.
2. Select **Reference Links**.
3. Select your option:
 1. [Idea Exchange](#) - Submit your own ideas for improvement or enhancements to our software and/or vote on other user's ideas.
 2. [Payment Portal](#) - Link to the Patient Payment Portal that patients can use to make payments, see their statements, set up autopay, and much more.

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The Legal Link give you direct access to our End User License Agreement, our Privacy Policy, and our Terms of Use. These are available on our website but can be accessed directly from the Help Icon within the application.

1. Click the  icon located in the top right corner of the screen.
 2. Select **Legal**.
 3. Select your option:
 1. [End User License](#).
 2. [Privacy Policy](#).
 3. [Terms of Use](#).
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