



Rollout guidance and FAQs

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Customer Portal

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Next Gen Customer Portal rollout guidance and FAQs

WellSky is excited to move towards a new and improved solution for our Customer Portal. As we have recently seen, our legacy portal infrastructure and architecture has been outpaced by new technology. The new portal runs on updated infrastructure and an architecture that provides improved performance and reliability. Please review the following FAQs for further information.

How do I access the Next Gen WellSky Customer Portal?

Clients can access the new WellSky portal by logging into <https://cusportal.harmonyis.net> with their existing username and password.

I am an IT/Network/Help Desk team member, what should I do to prepare?

Please share the following with your internal helpdesk team:

- Update firewalls or VPN to allow access to the new URL and IP address.
 - URL: <https://cusportal.harmonyis.net>
 - IP Address: 207.10.132.61
- Remove old browser bookmark and PC shortcuts, and update to the new WellSky Customer Portal site.

What browsers are compatible with the Next Gen Customer Portal?

All browsers are supported, however, solutions launched from the WellSky Customer Portal have their own system requirements. Currently, Aging and Disability requires Silverlight and Internet Explorer 11.

When can I start using the next generation portal?

Anytime! This site will soon be replacing the old WellSky Customer Portal that is currently available at <https://login.harmonyis.net>. In a few weeks we will put a redirect in place to force traffic to the new URL and portal.

What else should I know?

We are on an ongoing project to move data centers. This means in a couple of weeks, we plan on moving to another URL and a more permanent IP address for our Wellsky.com domain.

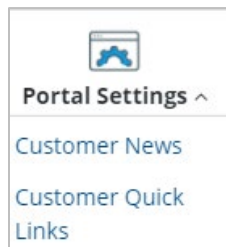
In the Next Gen Customer Portal, the Manage User functionality does not exist yet. For portal administrators that need access this function, please continue to use the legacy portal. In the near future, we will implement a redirect to the new site. We will provide more guidance when that occurs.

What's the timeline?

URL	End Users	Administrators
https://login.harmonyis.net	End users should no longer access this solution starting 1/15/2021	Administrators will still need to use this site for the manage user's functionality
https://cusportal.harmonyis.net	End users should begin to use this site as soon as possible.	Available: 1/15/2021
https://portal.wellsky.com	We are in the process of moving our infrastructure to a Microsoft Azure environment. More information will become available.	Available: Future, CY2021 Q1

Where are My Customer Quick Links and My Customer News?

This new technology did not allow a migration of items from the legacy portal to the new portal. To add customer quick links and customer news, administrator can log into the Next Generation Portal and click **Portal Settings** to add new items.



Is there a new Customer Portal User Guide available?

Yes. A new guide is available in the application support resources section *Customer Portal - Next Gen User Guide Jan 2021*.

Is there a new training video available on the new portal?

We do not currently have a new video available showcasing the new portal User Interface. The good news is that most functionality has been streamlined and simplified, and users should not see any change in functionality.

What functionality is currently in development?

We are actively working on building the following functionality:

- **Manage Users:** Please continue to use the <https://login.harmonyis.net> site for this functionality.
- **Manage Licenses:** The ability to manage child organization licenses.
- **Customer News and Quick Links:** The ability to deploy them to child organizations.

In addition to updating our WellSky Customer Portal, a parallel project is in development to move the solution to a cloud environment. In the upcoming weeks, the same process for moving to <https://cusportal.harmonyis.net>, will also be required for a new URL (<https://portal.wellsky.com>) as we migrate to the cloud. This will require the same exercise to be completed on the new URL. We are moving towards the Microsoft Azure environment and this will provide new opportunities for us to continue to provide innovative solutions.

At some point soon, we will implement URL redirects to our production customer portals. Communication will be provided as we approach the completion of those changes.

Why are we asking this be completed in two phases? Our <https://cusportal.harmonyis.net> has been in production and used by clients for five months. With the latest string of performance issues reported on <https://login.harmonyis.net>, we feel that it's the best option to provide to our

clients today. We do not feel that waiting for the new environment to be set up is providing the value that we can offer today.

For real time status updates on these environments, please visit <https://adtrust.wellsky.com> and subscribe.

Adtrust Component Name	URL	Notes
WellSky Portal (Legacy)	https://login.harmonyis.net	Legacy
WellSky Portal Next Gen	https://cusportal.harmonyis.net	Next Generation
WellSky Portal	https://portal.wellsky.com	Next Generation in the Microsoft Azure environment

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