

NC HealthConnex

SMARTSHEET

QUICK REFERENCE GUIDE



NORTH CAROLINA
HEALTH INFORMATION EXCHANGE AUTHORITY
(NC HIEA)

Table of Contents

- I. Introduction 3
- II. Smartsheet Account..... 3
- III. Smartsheet Collaboration 3
- IV. Smartsheet Navigation..... 4
 - Highlighted Columns 4
 - Comment Icon..... 5
 - Assigned Resource..... 5
 - Issue Description..... 5
 - Latest Comment..... 5
 - Comments..... 6
 - How to View All Comments..... 6
 - How to Add a Comment 7
- V. Periodic Reminders 8
 - Acknowledging a Reminder 9
- VI. How to Favorite a Smartsheet..... 9

I. Introduction

NC HIEA utilizes Smartsheet as a collaboration tool on data connections and data quality initiatives. It allows the creation of a dynamic online spreadsheet which eliminates the need for sharing spreadsheets via email. Smartsheet allows NC HIEA, Participant, SAS/J2, and EHR vendor collaboration to interactively track progress of requested changes. No PHI or PII is shared within Smartsheet.

The Smartsheet Quick Reference Guide was developed to walk users through creating a Smartsheet account, navigating the sheet, accessing assigned tasks, and finding and adding comments.

II. Smartsheet Account

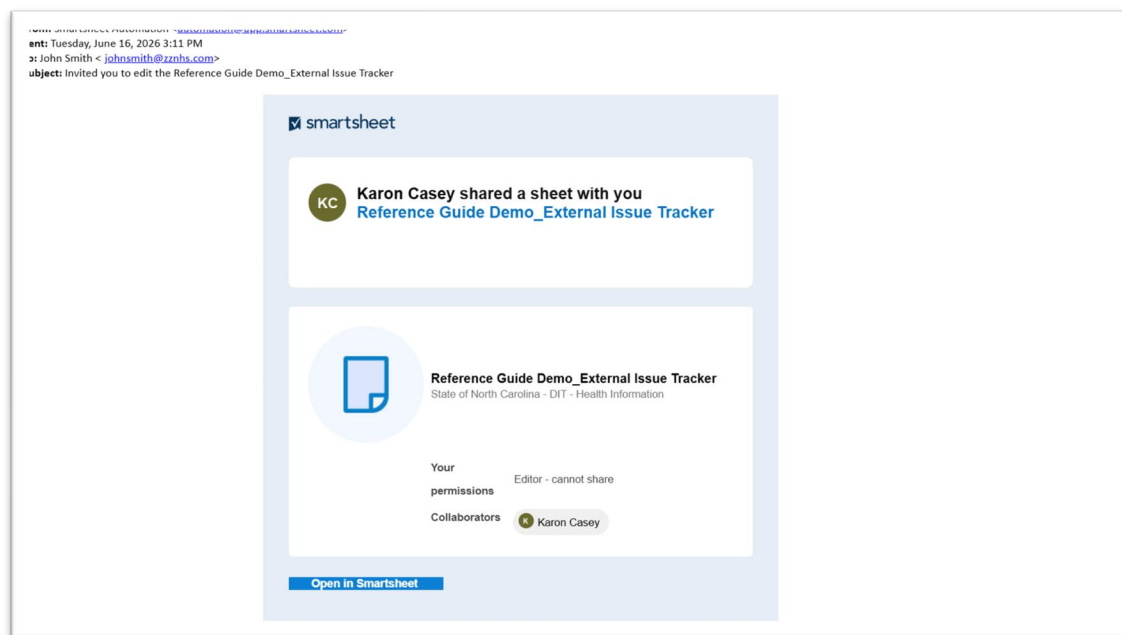
If they are not already using Smartsheet, the Participant contact(s) and EHR vendor contact(s) should sign up for a free [Smartsheet](https://smartsheet.com) account to be able to access the NC HIEA Smartsheet workspace. If you do not already have an account, you may be given a 30-day trial of a full license when you sign up, which gives you access to create your own workspace and sheets during the trial. You do not need a full license to collaborate with the NC HIEA. When the 30-day trial ends, your Smartsheet account will remain active for collaboration in the NC HIEA licensed workspace.

1. Create a free Smartsheet account by clicking here: [Smartsheet.com](https://smartsheet.com).
2. Steps may include:
 - a) Navigating to the Smartsheet signup page
 - b) Entering your email address (use the same one that NC HIEA staff use to contact you).
 - c) Setting up your password
 - d) Completing your profile

III. Smartsheet Collaboration

NC HIEA will send an email granting you access to a shared Smartsheet. (See example on next page.) This email contains:

- A link directing you to the shared Smartsheet
- Instructions to create or log into your password-protected account



Note: The access granted by NC HIEA does not give collaborators the ability to edit the formatting of the sheet or to share with additional users.

IV. Smartsheet Navigation

Highlighted Columns

When you click on the Smartsheet link from the email invitation, your Smartsheet will look like the screenshot below. The highlighted columns will be your primary focus. The remaining columns provide additional information for the issue identified in that row.

Reference Guide Demo_External Issue Tracker											
	Participant Name	Status	Assigned Resource	Assigned Group	Issue ID	Issue Description	Latest Comment	Message Type	HL7 Segment	HL7 Field Component	
1	NC Hospital	Initial Review	johnsmith@zznhs.com	Participant	[ORGCOD]	In the PID.13.2 we get the value of 1,7 and NE	Karon Casey - With the development team. ETA 2 weeks.	ADT	PID	PID-1	
2	NC Hospital	Initial Review	johnsmith@zznhs.com	Participant	[ORGCOD]	Only 32% of A03 (IP discharge) messages contain		ADT	PV2	PV1-3	
3	NC Hospital	Development	Sara Fletcher	HIE Development	[ORGCOD]	A03 (IP discharge) messages contain a discharge	Karon Casey - Update made by participant. Reassigning to HIEA Development.	ADT	PV1	PV1-3	
4	NC Hospital	Initial Review	johnsmith@zznhs.com	Participant	[ORGCOD]	Medication code is "Null" for 31% of entries. Pr		CCD			
5	NC Hospital	Initial Review	johnsmith@zznhs.com	Participant	[ORGCOD]	EncounterCodedType contains a CPT code but	Jayde Harlow - Request for code insertion made. Awaiting Response.	CCD			
6											

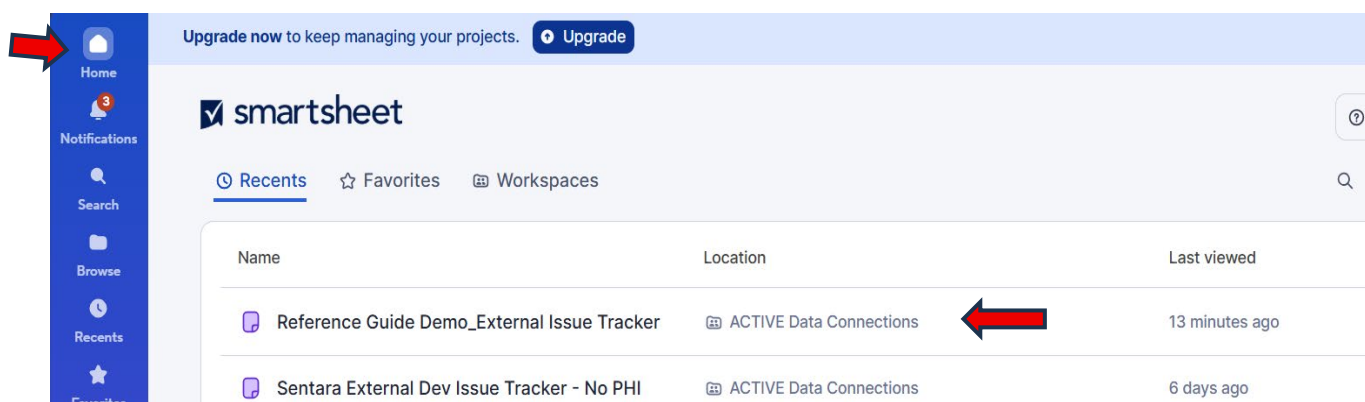
Comment Icon ①

This column contains a clickable comment icon that will open the conversation panel for the selected row, allowing you to view and respond to comments related to that issue.

Assigned Resource ②

This section helps you locate the entries or tasks that have been assigned to you. Your name will appear in the “Assignee” column for any row where you are responsible. There are two ways to access your assigned items:

- 1) From the invitation email:
 - a) When NC HIEA shares a Smartsheet with you, you will receive an automated email invitation.
 - b) Selecting the link in the email opens the sheet directly, where you can view rows assigned to you in the “Assignee” column.
- 2) From Smartsheet.com:
 - a) Go to Smartsheet.com and log in to your account.
 - b) Open the Home tab.



- c) Select the Smartsheet shared with you.
- d) Look for your name in the Assignee column to identify which tasks are assigned to you.

Issue Description ③

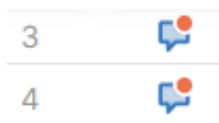
This column provides a description of the issue identified during analysis.

Latest Comment ④

This column displays the most recent comment. We will explore comments in more detail on the next page.

Comments

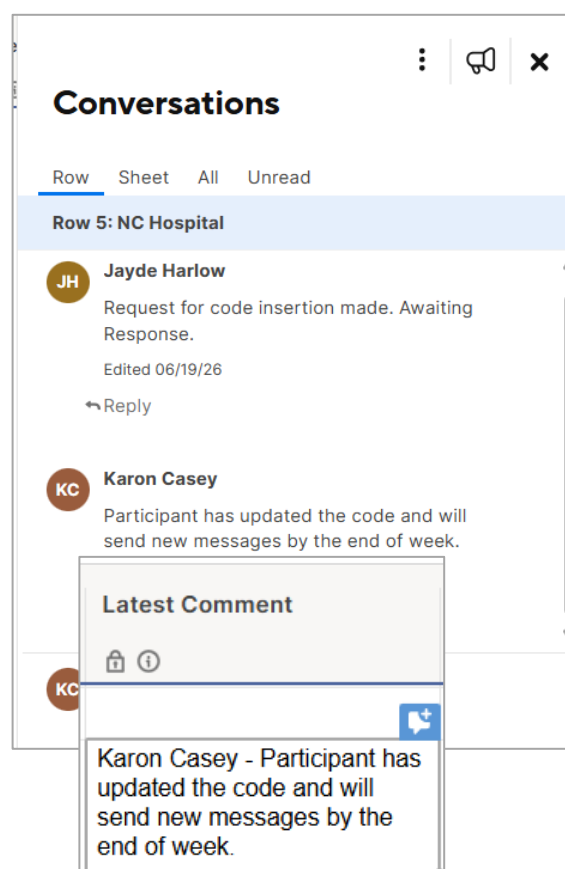
Comments are used to provide updates for the issue on the row. When a new comment is added to a row, a red dot appears on the comment icon (in the first column of the sheet) to indicate there is unread activity.



How to View All Comments

There are two ways to view all comments.

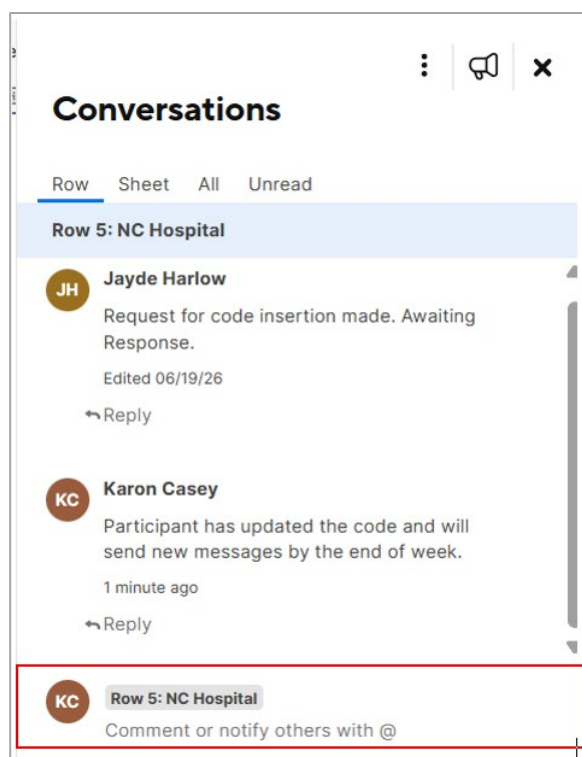
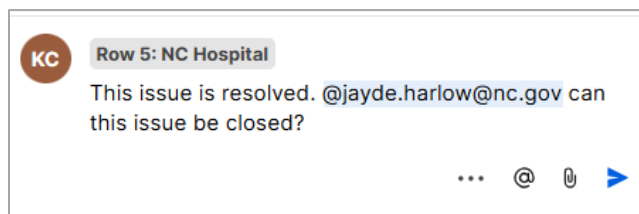
1. From the first column in the row:
 - a. Click on the Conversations/Comments icon. 
 - b. This window displays all comments, including the history and latest comments, which can be viewed at the sheet, row, or workspace level. You will be asked to focus on the row level comments.
2. From the Latest Comment field:
 - a. Click on the Latest Comment field in a row.
 - b. Click on the blue Conversations/Comments icon that appears when you click on the Latest Comment field.



How to Add a Comment

You can add comments at the row, sheet, or workspace level. For most of our collaborations, you will generally use row level comments.

1. Follow the same steps from the “How to View All Comments” section above.
2. The Conversations pane displays all comments. The prompt for a new comment is located at the bottom of the pane. See red outline in the picture to the right.
3. Type your comment.
4. If you want to direct your comment to a specific person, type @ followed by the person’s name or email address. See picture below.



5. After entering the comment, click on the Post icon to save the comment. See picture below.



6. Your new comment is added to the Conversations pane and viewed in the Latest Comment. If you used the @ functionality, the named person will receive an email alert to let them know that they have a comment mentioning them.

Conversations

Row
Sheet
All
Unread

Row 5: NC Hospital

KC

Karon Casey
Participant has updated the code and will send new messages by the end of week.
34 minutes ago
Reply

KC

Karon Casey
This issue is resolved. @jayde.harlow@nc.gov can this issue be closed?
2 minutes ago
Reply

Latest Comment

Karon Casey - This issue is resolved.
@jayde.harlow@nc.gov can this issue be closed?

V.Periodic Reminders

Smartsheet may automatically send reminder emails for tasks still assigned to you. This reminder asks you to update or acknowledge the task. You will receive a reminder until the task is updated, reassigned, or closed. Click the link to open the Smartsheet, as shown in the example below. A response, acknowledgement, or timeline estimation is expected within 5 days of the initial notification of issues.

From: Smartsheet Automation <automation@app.smartsheet.com>
Sent: Wednesday, June 17, 2026 11:05 AM
To: John Smith <johnsmith@zznhs.com>
Subject: Please update the Reference Guide Demo_External Issue Tracker

☒ smartsheet

Please update this task.

Open request

Details

Issue	Medication code is "Null" for 31% of entries. Provide valid code.
Issue ID	[ORGCODE]DevDQ4

[Go to the sheet](#)

Sent by automation@smartsheet.com through the magic of [Smartsheet](#)
[Unsubscribe](#) from "Medium Priority Reminder" (workflow id: 8817570124982148)

Acknowledging a Reminder

We encourage you to acknowledge a reminder by responding with a new comment in the sheet. Providing an estimated time and details for resolution is ideal. Comment recommendations are listed below:

- An estimated time to completion
- A confirming comment, such as “under review,” “resolution in progress,” or a list of blockers.

VI. How to Favorite a Smartsheet

To add an item to favorites, click on the star next to the title of the sheet in the upper right-hand corner.

Upgrade now to keep managing your projects. [Upgrade](#)

File Automation Forms Connections

Reference Guide Demo_External Issue Tracker ☆

Grid Filter Arial 10 B I U S A

	Participant Name	Status	Assigned Resource	Assigned Group	Issue ID	Issue Description	Latest Comment	Message Type
1	NC Hospital	Initial Review	johnsmith@zznhs.c	Participant	[ORGCOC	In the PID.13.2 we get the value of 1,7 and NET	Karon Casey - With the development team. ETA 2 weeks.	ADT
2	NC Hospital	Initial Review	johnsmith@zznhs.c	Participant	[ORGCOC	Only 32% of A03 (IP discharge) messages cont		ADT
		lopment	Sara Fletcher	HIE Development	[ORGCOC	A03 (IP discharge) messages contain a dischar	Karon Casey - Update made by participant. Reassigning to HIEA Development.	ADT
		Review	johnsmith@zznhs.c	Participant	[ORGCOC	Medication code is "Null" for 31% of entries. Pro		CCD
		Review	johnsmith@zznhs.c	Participant	[ORGCOC	EncounterCodedType contains a CPT code but	Jayde Harlow - Request for code insertion made. Awaiting Response.	CCD
14								
15								
16					[ORGCOC			
17								
18								

To add an item to favorites, click on the star next to its title.

Reference Guide Demo_External Issue Tracker ☆

Arial 10 B I U S A

	Assigned Resource	Assigned Group	Issue ID	Issue Description	Latest Comment	Message Type
N	johnsmith@zznhs.c	Participant	[ORGCOC	In the PID.13.2 we get the value of 1,7 and NET	Karon Casey - With the development team. ETA 2 weeks.	ADT
N	johnsmith@zznhs.c	Participant	[ORGCOC	Only 32% of A03 (IP discharge) messages cont		ADT
it	Sara Fletcher	HIE Development	[ORGCOC	A03 (IP discharge) messages contain a dischar	Karon Casey - Update made by participant. Reassigning to HIEA Development.	ADT
N	johnsmith@zznhs.c	Participant	[ORGCOC	Medication code is "Null" for 31% of entries. Pro		CCD

Your favorite Smartsheets will be available in the “Favorites” section of the left-hand panel.

We look forward to collaborating with you!