Utah Ryan White Part B Program

ClientTrack

Help Ticketing System User Guide

Division of Disease Control & Prevention

Bureau of Epidemiology

Ryan White Part B Program

May 2021

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1. ABOUT THIS USER GUIDE

The purpose of this document is to provide ClientTrack users the information they need to enter, respond, verify and close Help Tickets.

2. TICKETING SYSTEM

1. ClientTrack provides a Help Center which includes an Integrated Ticketing System. This system enables users to ask questions, make suggestions, or report issues from within the software.
2. Issues are initially submitted to UDOH local administrators, Summer and Becky. If they are unable to resolve the issue, it will be escalated to the ClientTrack Support Team.
3. If you are experiencing problems with ClientTrack, please submit a "Ticket."
4. The ClientTrack Support Team can work to fix the issue, but they can't process the rest of the workflow or make changes to the client, client's eligibility, enrollment, services, etc.
5. The Ticketing System is secure. PII is needed and requested to be added to the ticket to be able to resolve the issue.
6. The Ticketing System is similar to email within ClientTrack where communication between the user, local administrators, and the ClientTrack support team takes place.

   a. The **Summary** line is the same as the **Subject** line of email.
   b. The **Description** of the issue is the same as the **Body** of the email.
   c. **Notify additional people** is the same as adding more people in the **To: or CC:** of an email.
   d. **Attachments** are the same as **Attachments** in email.
   e. **New Note** is the same as **Reply All** in the email.

3. ENTER HELP TICKETS

I. REQUEST HELP

1. On the page you are experiencing an issue with, select *Help* in the top right-hand corner of your screen.
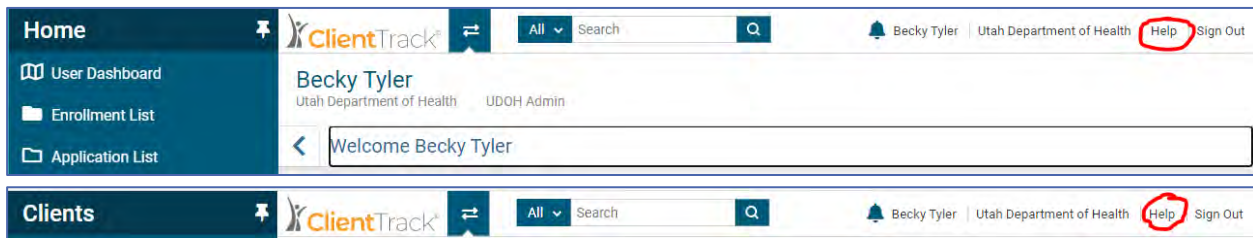
2. The Help Center pop-up box opens to guide your request for help. The Help Center is split between resources and requesting help.

   a. The left column has resources you can view to help with navigating the ClientTrack System and helpful hints and tips.
   b. The right column is the Request Help section. When select from this menu, a Help Ticket is created.
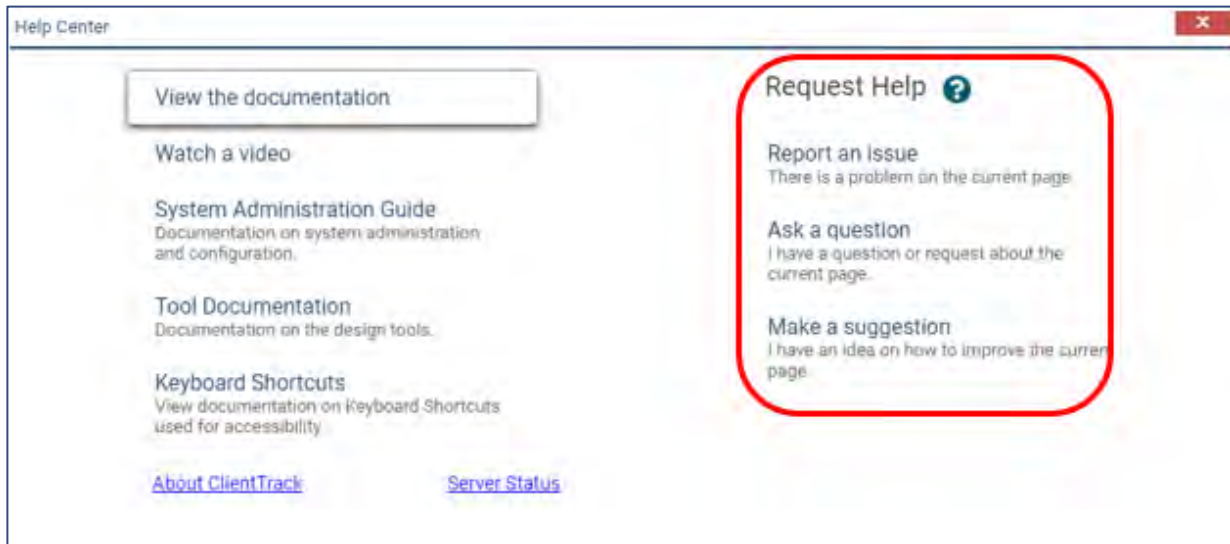
3. Select the type of ticket that best fits the issue you are requesting help with.

    a. **Report An Issue:** There is a problem on the current page.
    b. **Ask A Question:** I have a question or request about the current page.
    c. **Make A Suggestion:** I have an idea on how to improve the current page.

II. COMPLETE TICKET

Fill in the ticket with the information to describe the issue.

A. Enter Summary

The Summary helps to quickly identify your issue, and makes it easy to search by subject or client. This also helps the ClientTrack administrators group together similar issues to pinpoint the problem and find the root cause of the error. The Summary should include the following:

1. Subject of the issue.
2. Ryan White Client ID, if the issue is for a certain client you are working on. (For University of Utah ID Clinic, when we get the ability to search by MRN, you may enter MRN instead of Client ID.)

    a. Good examples:
        i. Need Org changed AAAA111111
        ii. Can't add client to caseload AAAA111111
        iii. Unable to view enrollment and eligibility dates AAAA111111
        iv. How do I …?
        v. Exit date question
    b. Bad examples:
        i. Something's wrong
        ii. It won't work

B. Describe

Please describe the issue. Enter details that will help describe the issue or might help in solving it.

1. This is like the "body" of an email. Give details of what you did before the issue happened, what you were expecting to happen, what is not being displayed or the missing information, more client identifying information, what you were trying to do, etc.
2. Copy and paste sections of the page that created the issue, such as the error message received.

C. Attach Screenshot or File

It helps to attach a screenshot or paste a snipit to the body of the ticket. This shows us exactly what is going on and helps describe the issue. This is also where you would add a file, report, or other documentation you would like the ClientTrack administrators to view.

1. Take a screenshot or snip of the page you were on that created the issue.
2. Attach a file.

   a. Click on "Click here to attach a file or drag-and-drop" located under that body of the email.
   b. Choose the file you want to upload.
   c. If a file was uploaded in error, click the X to remove the file before submitting the ticket.

3. Drag-and-drop a file into the body of the email.
4. Snip it

   a. Use a Snipping Tool or other apps to copy all or a portion of the page you are on. (I use *Snipping Tool* and after I select the portion I want, there is a write function that I use to highlight or write a note of the exact issue.)
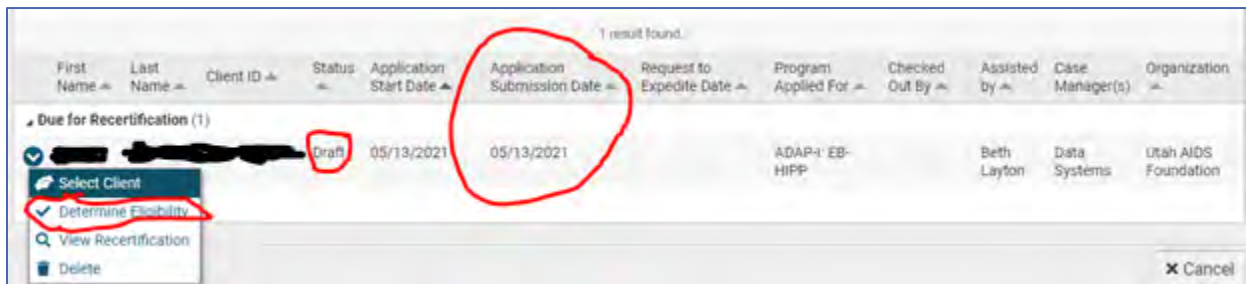
D. Notify Additional People

Use this to add other people (cc an email) if you want other people to be notified of the issue, updates, resolution, and be able to add notes to the ticket.

1. This can be done before or after you submit the ticket.

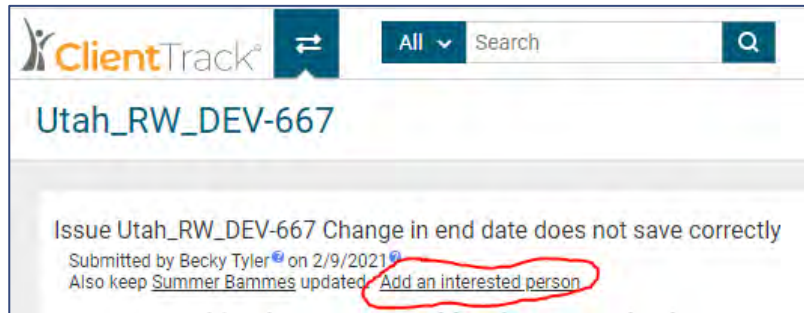   a. **Before:** Select the Notify Additional People link under your Email Address and Phone Number.

   b. **After:** At the top of the ticket, under the Submitted by and date, select "Add an interested person"

2. A form will populate to add the additional person's Name, Email Address, and Phone Number.

   a. **Before:** The additional fields populate at the bottom of the current ticket.
   b. **After:** A pop-up form " will be displayed.

3. You can add as many people as you would like, by repeating steps 1 and 2 above for each person.
4. You can remove or edit any additional people.

   a. Click on the person's name and a pop-up form "Edit Details of [Name]".
   b. Edit information, or
   c. Remove by clicking "Stop updating this person".

E. Submit
   1. When you have completed all sections and you are ready to sent the issue to be looked at, click the Submit button.
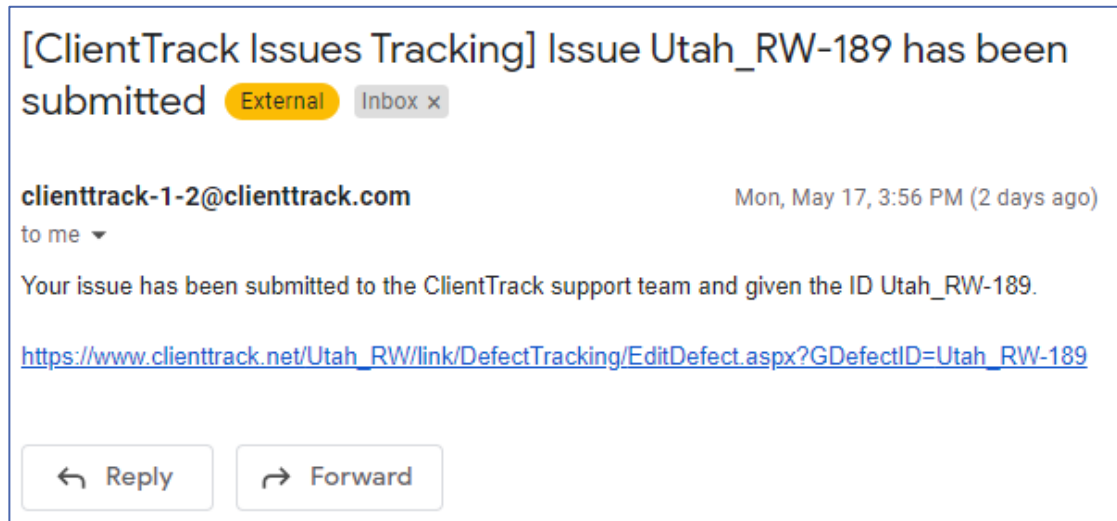
4. TICKET TRACKING

When your ticket is received by ClientTrack it is assigned a ticket number and added to the Ticketing System. The upper right-hand corner displays an icon depending on what stage the ticket is in. There is also a paperclip icon for you to view attached files, or attach another file if you need to upload more documentation for the ticket.

I. EMAIL CONFIRMATION

ClientTrack sends an email to you (and any other additional people added to the ticket) when action has been taken on your ticket. The email is sent from clienttrack-1-(a number 1-4)@clienttrack.com. The subject will always start with "[ClientTrack Issues Tracking] Issue Utah_RW-(ticket number)" followed by action taken.

A. Link to the ticket

1. In the body of the email, there is a link that when clicked will open a new tab in your web browser with the ticket an all action taken.
2. You must be signed into ClientTrack for the ticket to open. If you are not signed in, the new tab will take you to the ClientTrack sign in page. After signing in, you can find your ticket by clicking the "My Submitted Issues", or go back to your email and click on the link again.
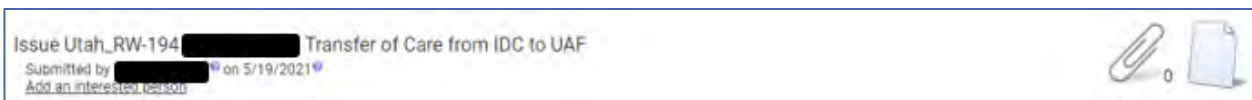

B. Ticket Submitted

[ClientTrack Issues Tracking] Issue Utah_RW-(ticket number) has been submitted

Your issue has been submitted to the ClientTrack support team and given the ID Utah_RW-(ticket number)

1. Your ticket was received.
2. Your ticket was given a ticket number.
3. The icon in the upper right-hand corner of the ticket is now a piece of paper. When hover over it, the information text displays "The issue has not yet been assigned". There is the option to click the text "Mark the issue as fixed".

C. Ticket Assigned

[ClientTrack Issues Tracking] Issue Utah_RW-(ticket number) has been assigned

This email is to inform you that issue Utah_RW-(ticket number) has been assigned to (person assigned to).

1. This lets you know that your ticket now has someone from your local ClientTrack Administrator working on the ticket.
2. If your local ClientTrack Administrator is unable to fix it, they will escalate it to the ClientTrack Support Team.

3. The icon in the upper right-hand corner of the ticket is now a person sitting at a desk. When hover over it, you can mark the issue as fixed.

D. New Note

[ClientTrack Issues Tracking] Issue Utah_RW-(ticket number) New Note

A new note has been entered regarding issue Utah_RW-180, by (person who entered the note).

1. There has been a note added to your ticket.
2. Anytime a user takes action or needs more information, they may add a note to the ticket which helps to identify the issue, give direction on needed action, asks a question, request additional information, etc.
3. This note acts like an email chain where the people who are working on the ticket and the sender can communicate about the ticket so that the issue can be fixed.
4. Read the note and reply, as needed. The ticket may not be able to be worked on further if the questions are not answered. The ClientTrack Support Team will move on to other tickets until they hear back from you.
5. You can also add a note at anytime to give more information about the ticket.
6. The icon in the upper right-hand corner of the ticket is still a person sitting at a desk. When hover over it, you can mark the issue as fixed.

E. Fixed, Verify Needed

[ClientTrack Issues Tracking] Issue Utah_RW-(ticket number) has been fixed

Your ticket has been fixed. Please verify that the issue has been resolved to your satisfaction.

1. The ClientTrack Support Team has worked on the ticket and has found a solution to the issue.
2. You will need to look at the ticket and verify the issue was complete by testing or taking the action noted in the notes.
3. You can verify this issue in one of two ways: (1) Add a New Note, or (2) Hover over the check icon in the upper right-hand corner and select one of the following:

   a. **Mark the issue as not fixed:** After you have tested or applied the fix requested, and you are still having the issue, mark it as not fixed. You will be prompted to enter a note to let the ClientTrack Support Team know what is still wrong.
   b. **Edit fix details:** After you have tested or applied the fix and some of the ticket was fixed, but there are still some other problems, mark Edit fix details. You will be prompted to enter a note as to what worked and what didn't.

c. **Mark the issue as verified:** You have tested and applied the fix requested and the issue has been resolved to your satisfaction.

F. Ticket Verified

[ClientTrack Issues Tracking] Issue Utah_RW-(ticket number) has been verified

Issue Utah_RW-(ticket number) has been verified as fixed in your production environment.

1. Your ticket has been verified as fixed, the ticket is closed, and no more action is needed.
2. If the ticket is not fixed and you still need more work done on it, you can hover over the check mark and select "Mark the issue as not fixed". You will be prompted to enter a note to let the ClientTrack Support Team know what is still wrong.
3. The icon in the upper right-hand corner is now a check mark with VERIFIED over it.

5. FIND AND MAINTAIN YOUR SUBMITTED TICKETS

The tickets you submit are stored in one location to view and update the status. You should keep your tickets up to date, verify, and close them when they have been resolved.

I. FIND YOUR SUBMITTED TICKETS

You can find your submitted tickets in two ways:

1. Click the link on the email that was sent to you with the ticket status.
2. From your Home page menu under My ClientTrack menu, click "My Submitted Issues".

    a. A list will display all the tickets you submitted with the: Issue Number, Submitted Date, Type, Summary, Status, and Assigned to.
    b. You can filter the list by status by checking the status you wish to filter by: Assigned, Closed, Fixed Verify Needed, and New.

    c.   To edit, view, or update the status on the ticket, click the pencil icon on the left of the ticket.

II.   MAINTAIN YOUR SUBMITTED TICKETS

It is important to keep track of your submitted tickets and the status of them. You have the responsibility to maintain your submitted tickets, follow up on requests, verify tickets that have been fixed, and close tickets when fixed or no longer needed.

A. Update Tickets

If you are waiting on a fix for a particular client(s), the ClientTrack Support Team can work to fix the issue, but they can't process the rest of the workflow or make changes to the client, client's eligibility, enrollment, or services.

1. Read the notes and respond, if requested.
2. Take action on tickets that are in "Fixed, Verify Needed" status. The ClientTrack Support Team will not know if there is a problem that was not fixed if the ticket isn't closed or responded to.
3. If an outstanding ticket has not been addressed, or you have been waiting for a reasonable amount of time on the fix without an update, add a New Note to the ticket and ask for an update on the status.

B. Respond To Tickets

To respond to a ticket, complete the following steps:

1. Open the ticket from the email link, or My Submitted Issues by clicking on the Edit/View Issue button.
2. The ticket is divided into two sections, the initial ticket request and details. Each section has separate scroll bars to read through the full ticket.

3. Read the notes.
4. Click New Note at the bottom of the ticket.
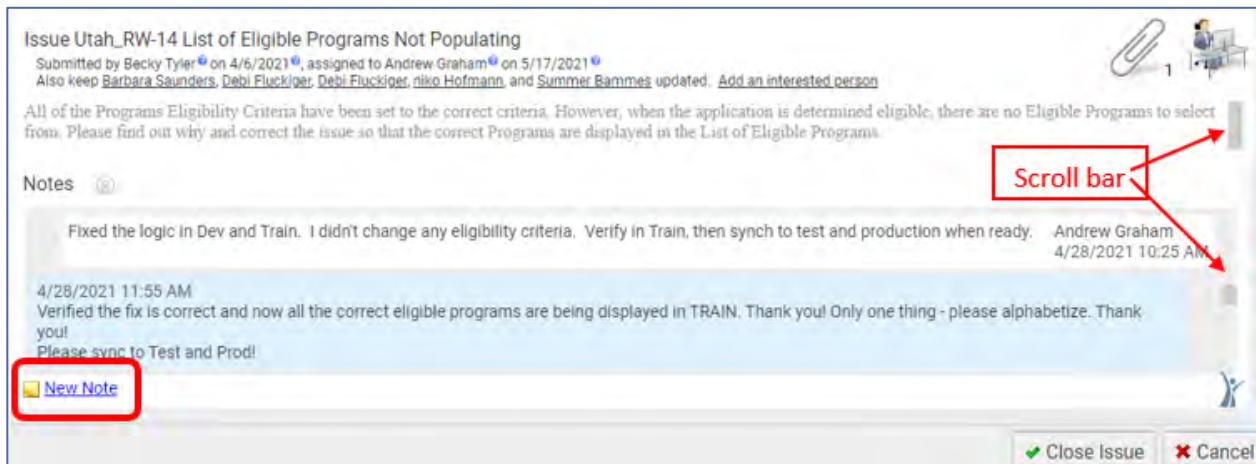
5. "Add a new note" text box is displayed. Add notes. If you need to attach documents or screenshots, copy and paste in the notes or upload a file.


6. Scroll down to the bottom.
7. Save the note by selecting how you would like to save the note.

   a. **Save the note:** Saves the note. This does not change the status of the ticket, but notifies the person assigned to the ticket and others of the new note.
   b. **Save the note and mark the issue as fixed:** Saves the note and sets the status of the ticket to Fixed, Verify needed.

    c. **Save the note and close the issue:** Saves the note and sets the status of the ticket to Closed.
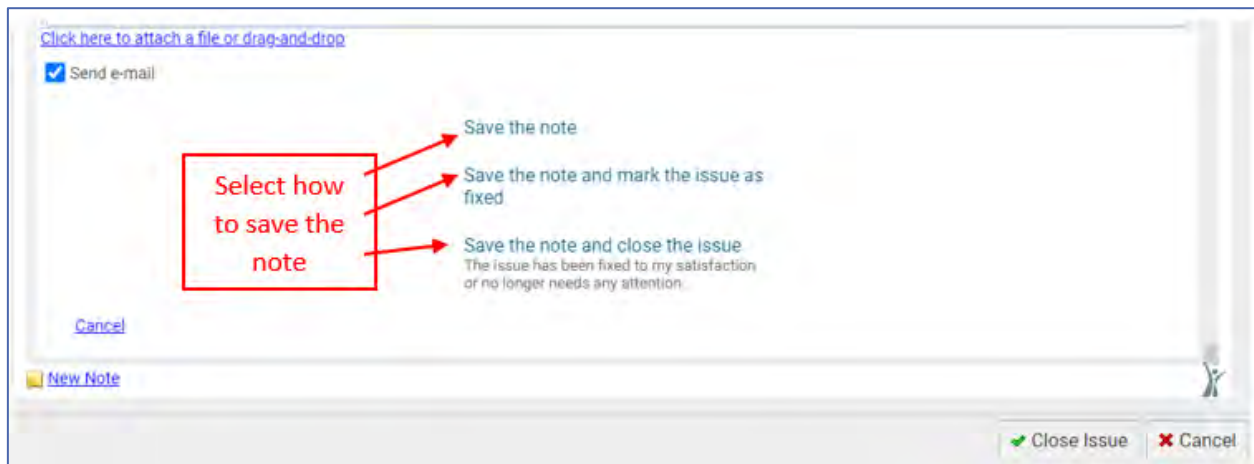
    d. **Save the note and mark the issue as not fixed:** This option will only appear when you have marked an issue as not fixed.
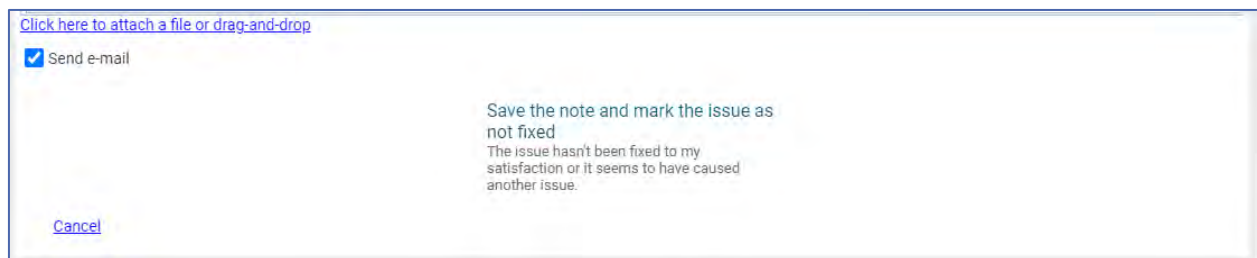
III. ClientTrack Support Team Responsibilities

The ClientTrack Support Team has the responsibility to view, respond to, and work each ticket submitted. They work the tickets submitted by all users. The Support Team aims to fix all tickets submitted. They do the following:

1. Respond to new tickets submitted and assign them to the appropriate support team member best fitted for the type of issue as soon as possible after the ticket is received.
2. Prioritize tickets depending on the urgency of the ticket. Tickets that are holding up clients from receiving benefits get the highest priority.
3. Work to fix all tickets submitted. The team maintains the tickets assigned to them. They need to close out all tickets. If a ticket is left waiting for the User to respond to verify a fix, or close the issue, the support team member can't close out their workload.