

**3C** *Recovery & Health Care Network*



# Phaseware Self Service Center End User Manual

## Contents

|                            |   |
|----------------------------|---|
| Self Service Center: ..... | 2 |
| Registration: .....        | 2 |
| Login .....                | 2 |
| Forgot Password .....      | 2 |
| Navigation Bar: .....      | 3 |
| Home .....                 | 3 |
| My Support: .....          | 3 |
| My tickets .....           | 3 |
| Submit New Ticket .....    | 5 |
| Administration: .....      | 7 |
| Manage Subscriptions ..... | 7 |
| Change Password .....      | 7 |
| Notices .....              | 8 |

## Self Service Center:

The Self Service Center can be accessed at <https://tracker.phaseware.com/3CHelpdesk/>.

## Registration:

Few staff members from each provider are already registered to access the Self Service Center. The agencies are provided with a list of these members and their passwords. If the users are not already registered, the user should request one be registered.

## Login

Login

Email Address:

Password:

Remember me next time

Login

[Forgot your password? Click here.](#)

*Users need to login to the Self Service Center with their login information.*

## Forgot Password

Enter your email address to have your password emailed to you.

Email Address:

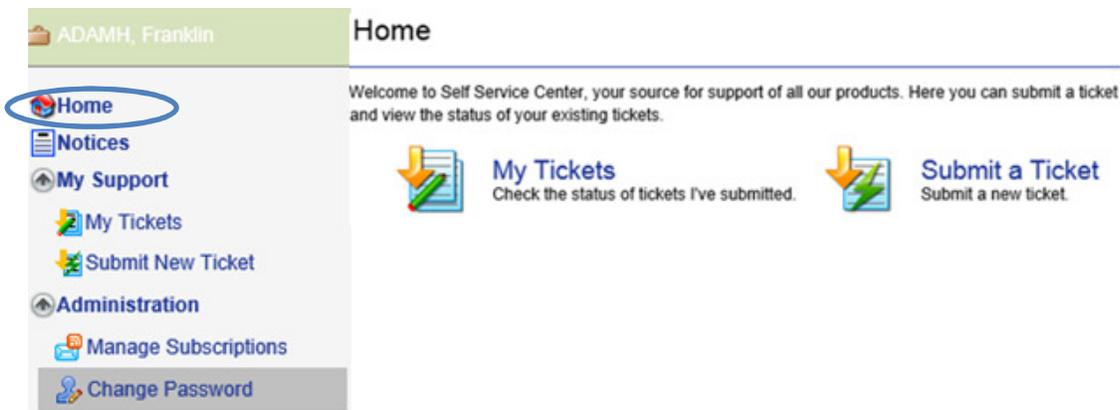
Send Password

[Return to login page](#)

This option is to help the user reset the password in case of a problem with the login. The user will receive an email to the email address registered with Self Service Center, with the instructions to reset the password.

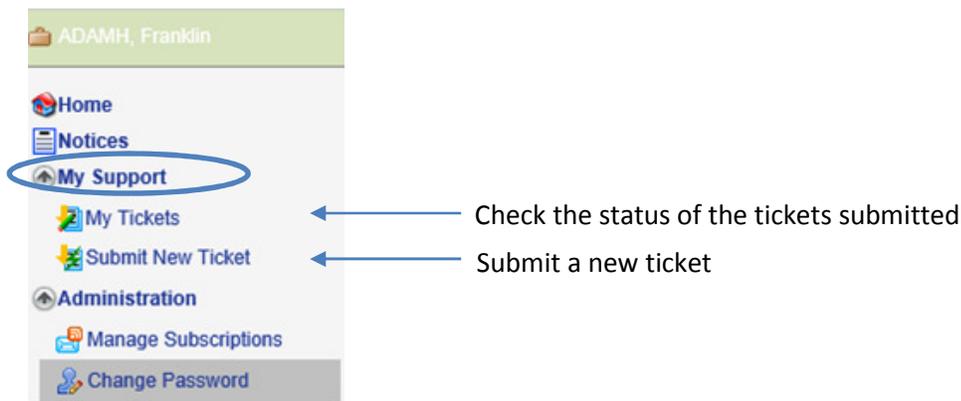
## Navigation Bar:

### Home



From the Home page, the user can select to check the status of the tickets submitted or submit a new ticket. The same action can be taken by the menu options listed under My Support.

### My Support:



### My tickets

Show Search Panel    Ticket ID     Go

| ID | Description         | Contact     | Closed | Submitted              | Department Name |
|----|---------------------|-------------|--------|------------------------|-----------------|
| 20 | High priority alert | xxx    xxxx |        | 06/26/2014 10:52:42 AM | COG             |
| 21 | Fiscal alert        | xxx    xxxx |        | 06/26/2014 10:57:23 AM | FRAN Fiscal     |

Page 3 of 3 (22 items)    < 1 2 [3] >

The **My tickets** section displays all the tickets that the user can view, if the user is the contact for the ticket or if the user is the party to that ticket. If the user is a customer admin, the user can view the tickets of their fellow contacts from their organization.

My Tickets >> TEST - COG



Ticket # 15

Description TEST

Severity 2-Medium [X] Classification

Status Research In Process Billing Status Against Plan

Product Closed

Customer ADAMH, Franklin Closed By

Contact XXX XXXX [X] Resolution

Assigned Agent Department COG

Full Description TEST - COG

Journal Log [Add Journal Entry](#)

| Journal Entry | Entered By | Entered              | Attachment                           |
|---------------|------------|----------------------|--------------------------------------|
| attachment    | XXX XXXX   | 2/13/2014 1:43:54 AM | <a href="#">ADAMH_logo_small.jpg</a> |

The user can take the following actions on the tickets listed under **My Tickets**:

- Save:** The user can make changes to the ticket before it is closed. The user can change the description, severity or full description of the ticket.

My Tickets >> test



Ticket has been updated.

The user can also add a journal entry with attachment if needed.

Journal Entry

Attachment

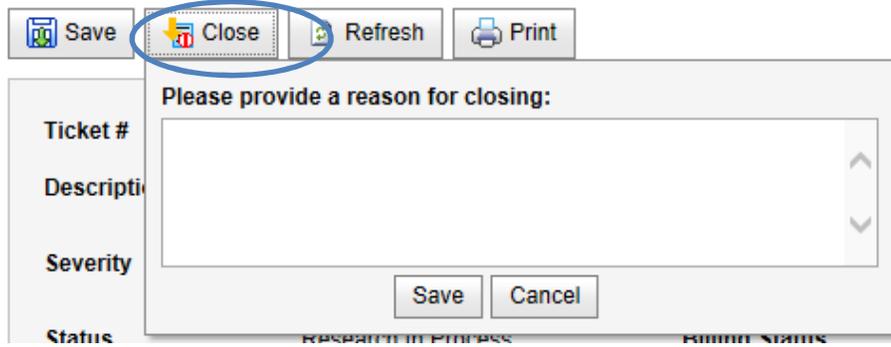
Select Clear

Save Cancel

Journal Log [Add Journal Entry](#)

- 2. **Close:** The user can choose to close the ticket if the issue has been already resolved before any action being taken by the ADAMH boards or COG.

[My Tickets](#) >> test



- 3. **Refresh:** The user can refresh the ticket to cancel any changes that need not be saved.
- 4. **Print:** The user can print the ticket.

## Submit New Ticket

Description

Classification

Severity

Customer

Contact

Full Description

Attachments

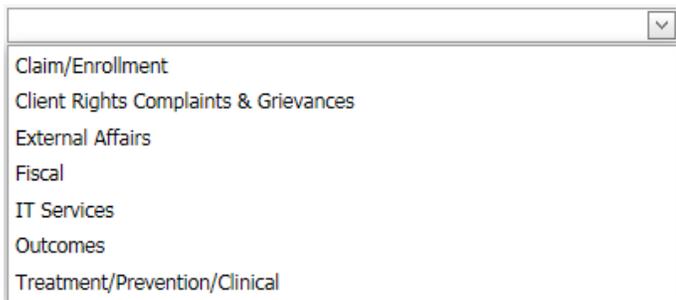
|                      |        |       |
|----------------------|--------|-------|
| <input type="text"/> | Select | Clear |

Screenshots [Capture Screenshot](#)

**Submit New Ticket** takes the users to a form where they can submit a ticket online.

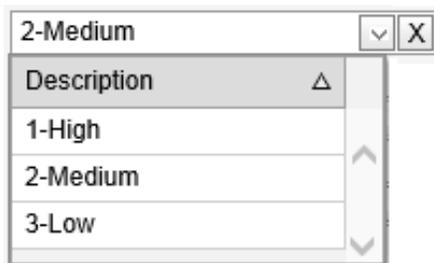
The form has following fields:

1. **Description:** A brief description of the issue is needed in order to submit a ticket. This field is required.
2. **Classification:** The user needs to choose one of the following classifications based on the nature of the query from the drop down menu. If a classification has sub-options, you will be presented with another dropdown to select from.



A screenshot of a dropdown menu with a downward arrow icon in the top right corner. The menu is open and displays the following options: Claim/Enrollment, Client Rights Complaints & Grievances, External Affairs, Fiscal, IT Services, Outcomes, and Treatment/Prevention/Clinical.

3. **Severity:** The user can choose severity from the drop down menu as shown here. The default severity is set to be 2-Medium.



A screenshot of a severity dropdown menu. The current selection is '2-Medium'. The dropdown is open, showing a list of options: 1-High, 2-Medium, and 3-Low. The 'Description' header is visible at the top of the dropdown list.

4. **Customer:** The 'Company Name' from your registration will be automatically populated in grey. The user cannot alter the customer.
5. **Contact:** Your name from your registration will be automatically populated in grey. The user cannot alter the contact name, unless the user is the customer admin for your organization.
6. **Full Description:** The user should explain the issue in as much detail as the user can, which would help the technician to resolve the issue.
7. **Attachments:** The user can attach up to 5 documents that would help the user explain the issue.
8. **Screenshots:** The user also has the option to capture a screenshot and attach it to the ticket.

Once the ticket is submitted, the user gets a confirmation and then the user gets an option to open the ticket just submitted or go to My Tickets.

## Ticket Submitted

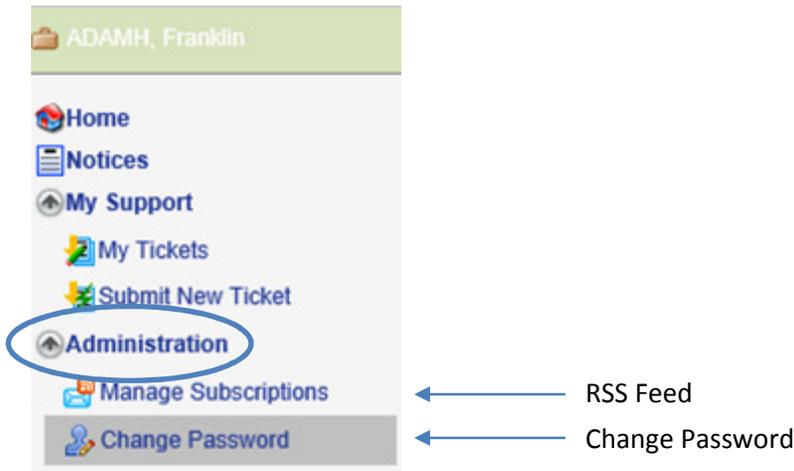
---

Ticket # 16 has been successfully submitted.

[Go to My Tickets](#)

[Go to Ticket # 16](#)

## Administration:



The administration section allows users to manage their account.

## Manage Subscriptions



You have no subscriptions.

Your personal RSS URL is: <https://tracker.phaseware.com/3CHelpdesk/Rss.aspx?>

[Subscribe to All Posts to Forum Topics I Create](#)

[Subscribe to All Replies to my Forum Posts](#)

The users can subscribe to the posts from the Forum Topics or the replies to their forum posts.

## Change Password

Current Password:

New Password:

Confirm New Password:

After logging in for the first time, the user should change their password.



## Notices

### Notices



| Description | Date Published |  |
|-------------|----------------|--|
|             |                |  |

The users can view any notices posted by the ADAMH Board or COG. The user can choose to subscribe to the Notices, which will create an alert to be sent to the email address from the registration.



You are now subscribed to Notices.

Once subscribed to the notices, the users have an option to unsubscribe if they no longer need to receive the alert.