Phaseware Self Service Center

End User Manual

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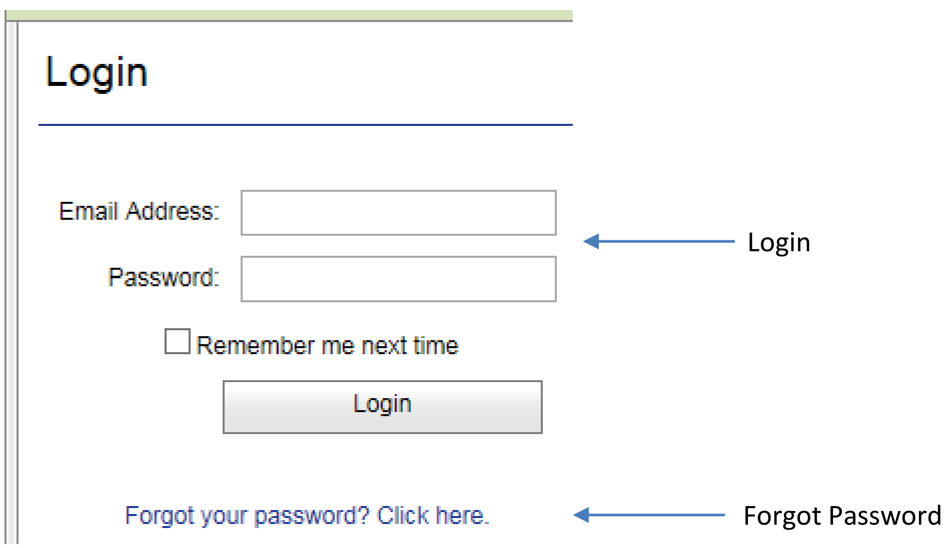
Self Service Center:

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

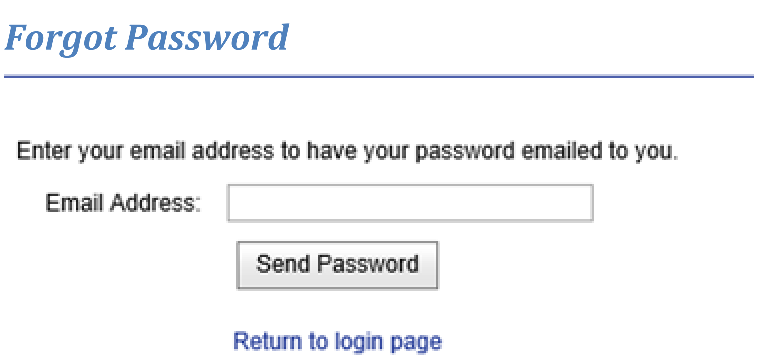
Registration:

A few staff members from each provider are already registered to access the Self-Service Center. Agency staff usernames are the email address provided on the SHARES User Account Request Form. The initial temporary password assigned to agency staff is either **Password1** or **3CHotline**.

Login

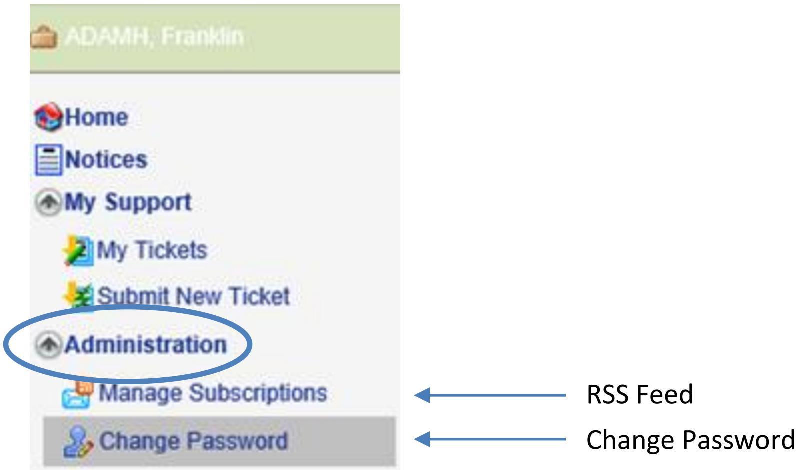


Users need to login to the Self Service Center with their login information.



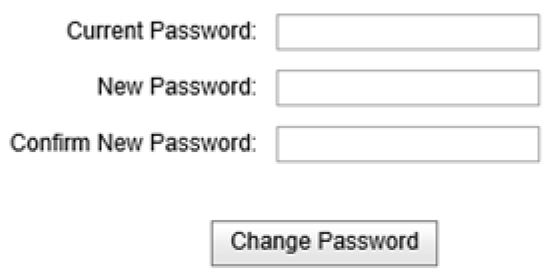
This option is to help the user reset the password in case of a problem with the login. The user will receive an email to the email address registered with Self Service Center, with the instructions to reset the password.

Administration:



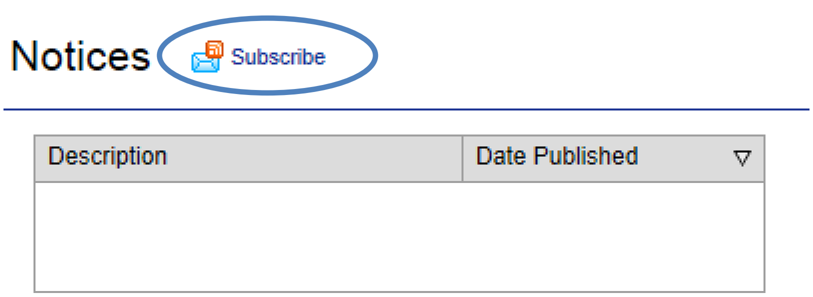
The administration section allows users to manage their account.

Change Password

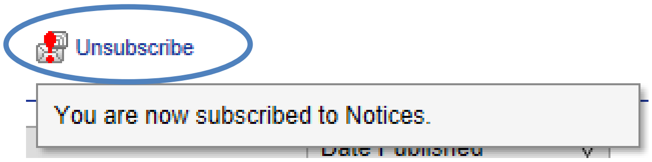


After logging in for the first time, the user should change their password.

Notices



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.



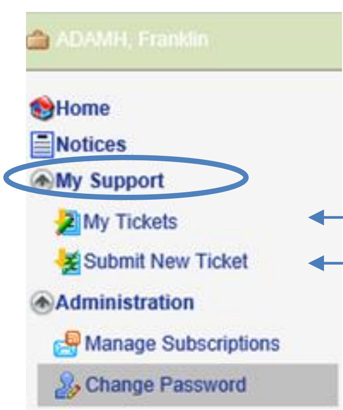
Once subscribed to the notices, the users have an option to unsubscribe if they no longer need to receive the alert.

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.

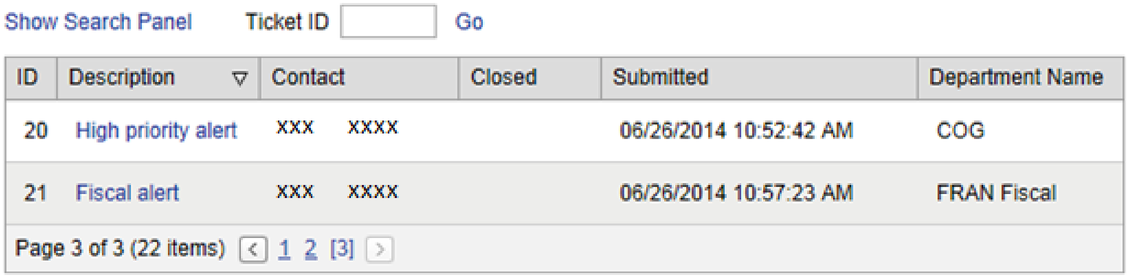
My Support:



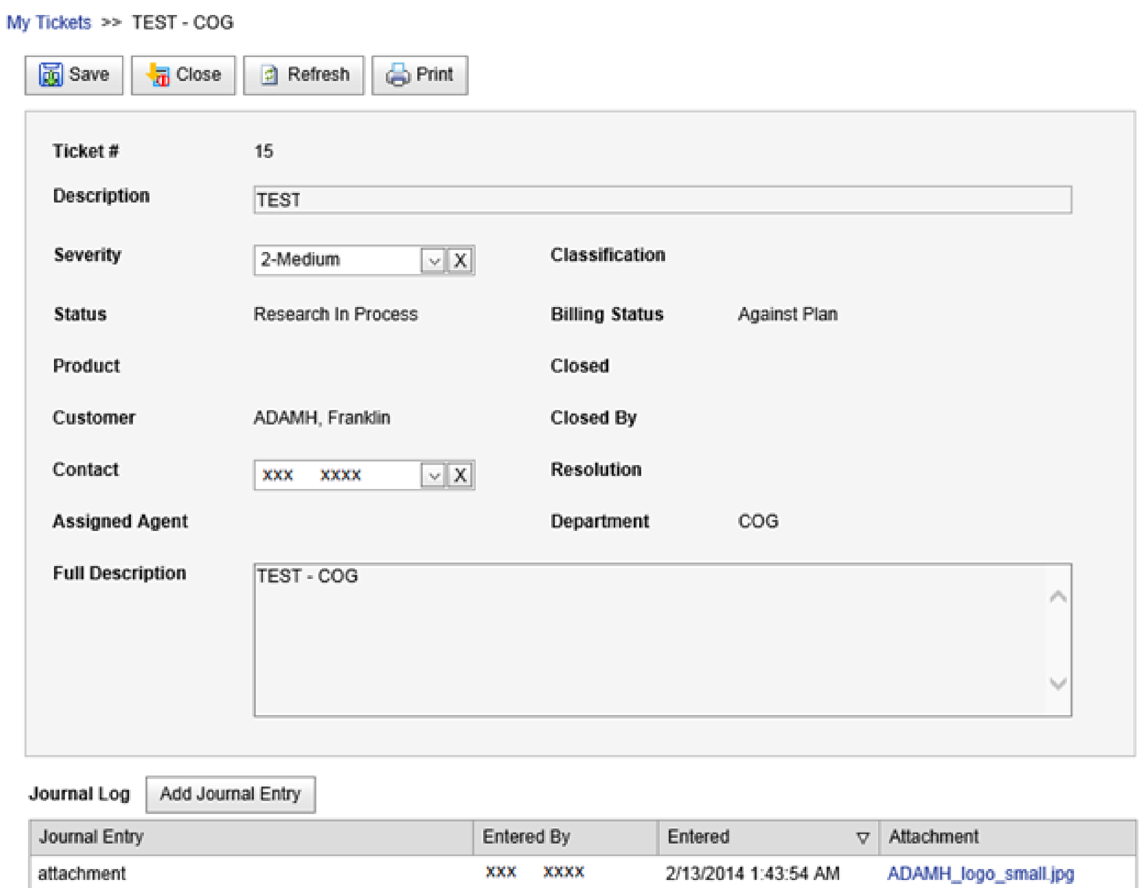
Check the status of the tickets submitted

Submit a new ticket

My tickets

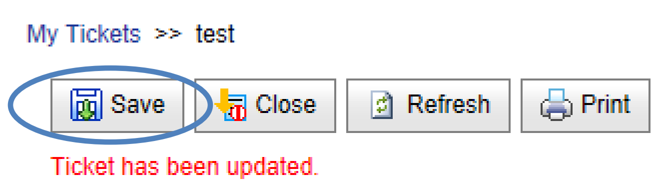


The **My tickets** section displays all the tickets that the user can view, if the user is the contact for the ticket or if the user is the party to that ticket

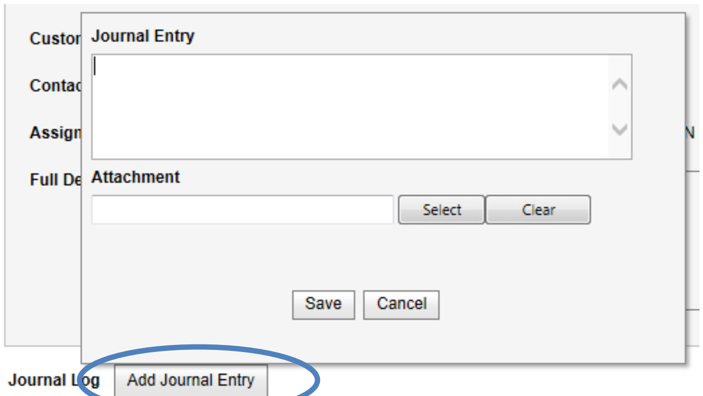


The user can take the following actions on the tickets listed under **My Tickets**:

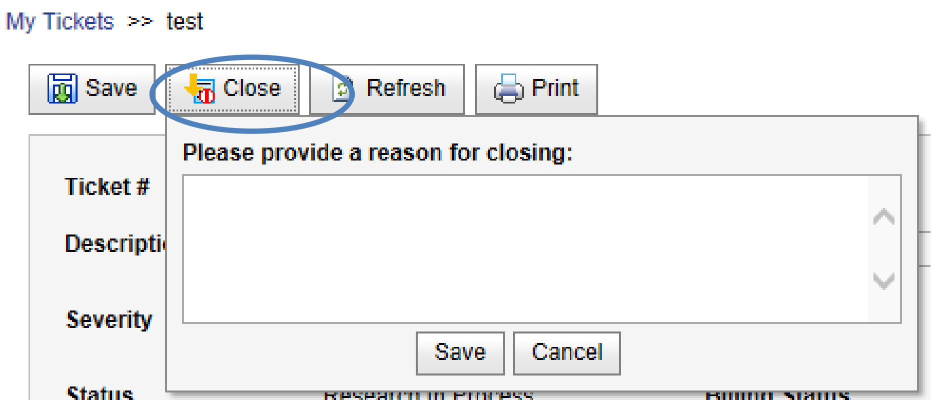
1. **Save**: The user can make changes to the ticket before it is closed. The user can change the description, severity or full description of the ticket.



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



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.

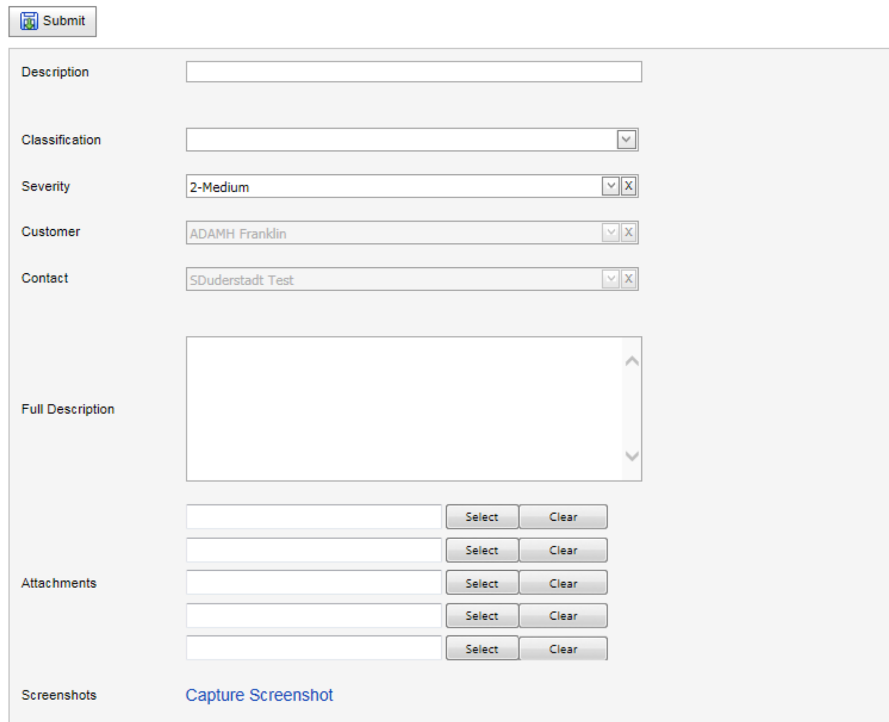


3. **Refresh**: The user can refresh the ticket to cancel any changes that need not be saved.

4. **Print**: The user can print the ticket.

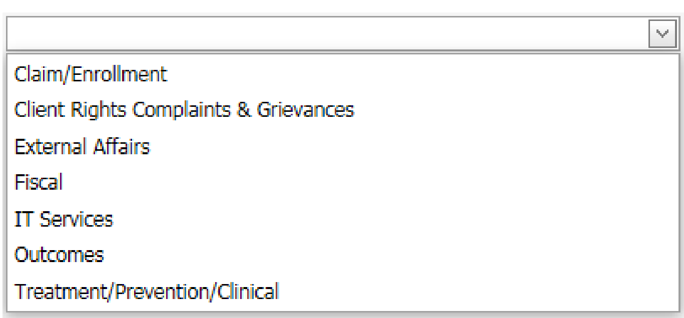
Submit New Ticket

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

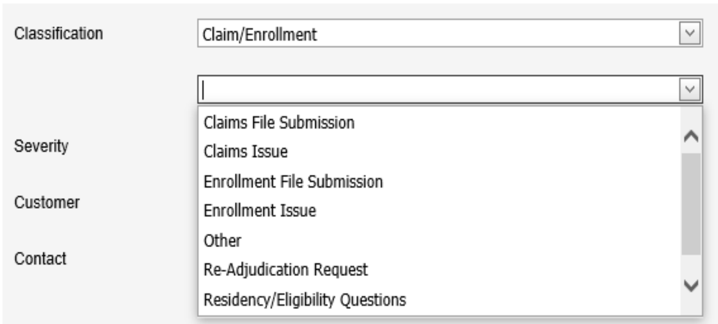


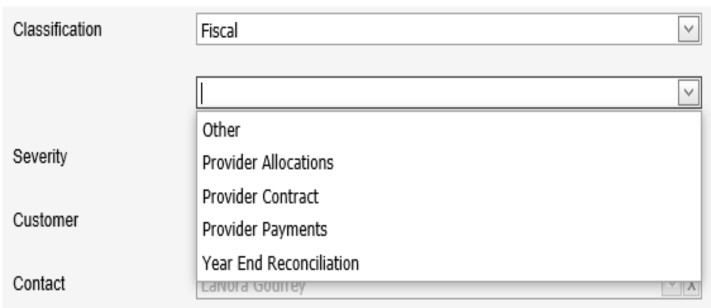
The form has the following fields:

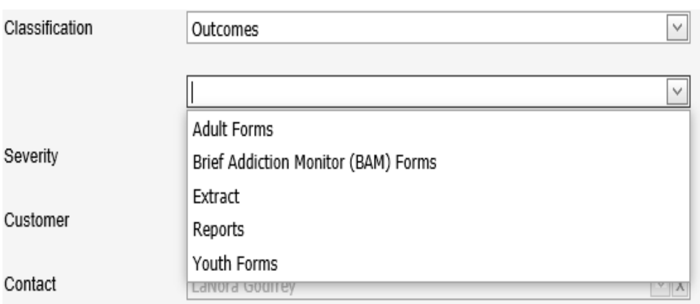
1. **Description**: A brief description of the issue is needed in order to submit a ticket. This field is required.
2. **Classification**: The user needs to choose one of the following classifications based on the nature of the query from the dropdown menu. If a classification has sub-options, you will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

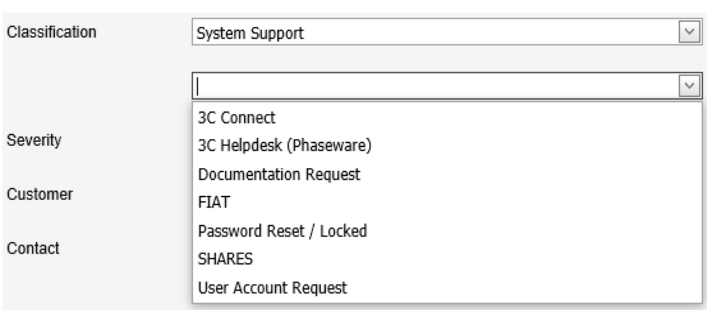


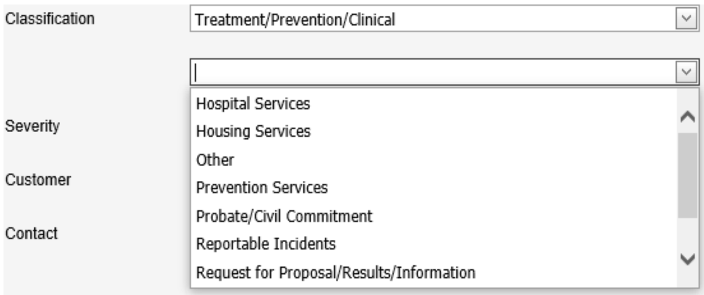
Sub-Options:


Classification
Claim/Enrollment
Severity
Customer
Contact
Claims File Submission
Claims Issue
Enrollment File Submission
Enrollment Issue
Other
Re-Adjudication Request
Residency/Eligibility Questions

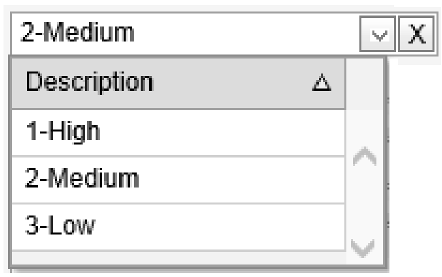

Classification
Fiscal
Severity
Customer
Contact
Other
Provider Allocations
Provider Contract
Provider Payments
Year End Reconciliation


Classification
Outcomes
Severity
Customer
Contact
Adult Forms
Brief Addiction Monitor (BAM) Forms
Extract
Reports
Youth Forms


Classification
System Support
Severity
Customer
Contact
3C Connect
3C Helpdesk (Phaseware)
Documentation Request
FIAT
Password Reset / Locked
SHARES
User Account Request

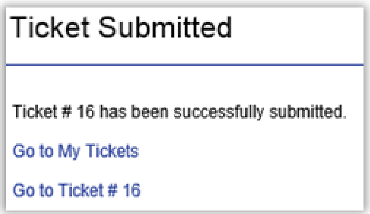


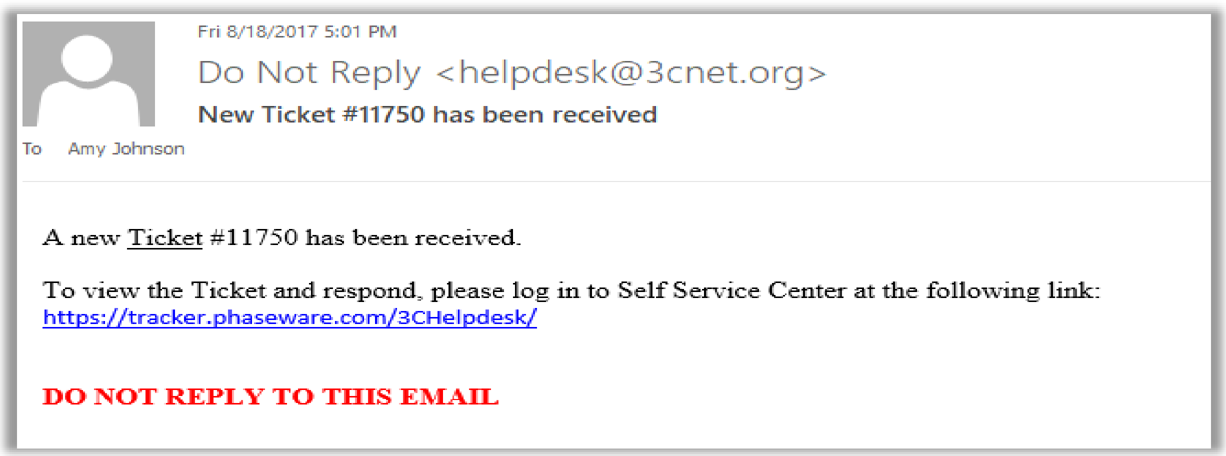
3. **Severity**: The user can choose severity from the dropdown menu as shown here. The default severity is set to be 2-Medium.



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.
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 as well as a no-reply email. The user then gets an option to open the ticket just submitted or go to My Tickets.

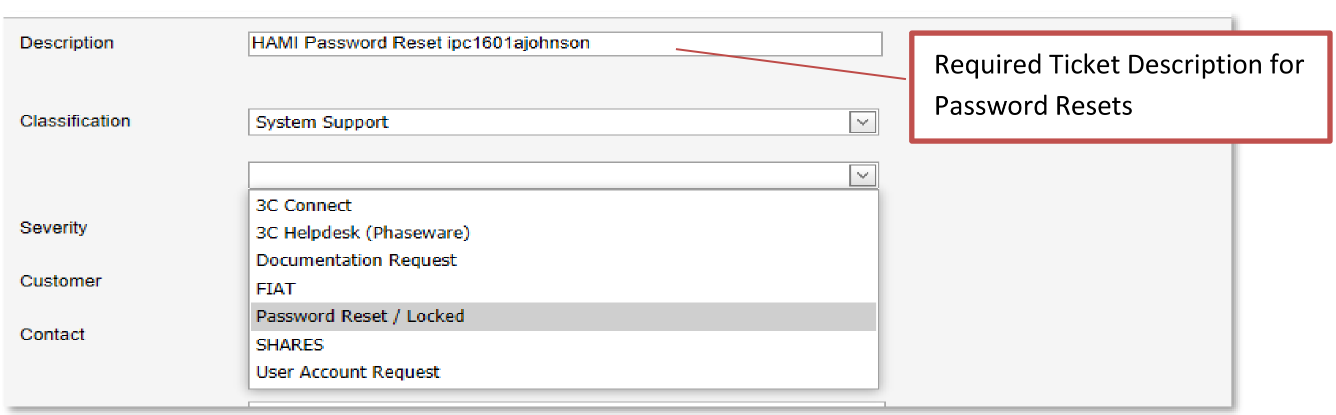




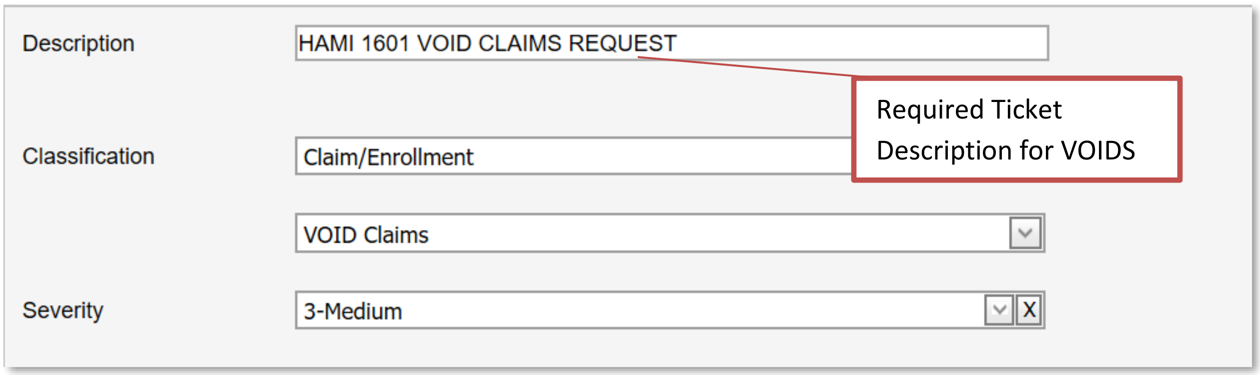
Setting up Common SHARES Tickets

Password Resets – Select the **System Support** classification along with **Password Reset / Locked** sub-classification. The sub-classification dropdown will appear when selecting certain values in the main classification dropdown. In the **Description** field enter HAMI Password Reset (ipc username).

Tickets created with the following classification and description will follow a quicker route to the vendor and reduce processing time.



Void Requests – Select the **Claims/Enrollment** classification along with **VOID Claims** sub classification. In the **Description** field enter your agency AID number along with Void Claims Request as seen below. In addition to these steps follow the steps outlined in the COG_VOID_Process.pdf document to prevent any delays in void processing.



Protected Health Information

Please limit Protected Health Information (PHI) to a client's SHARES ID. While the Self-Service Center is PHI secure attachments and journal entries may need to be transmitted to the software product vendor. Please omit or shade out name, Medicaid ID/Policy Number, birthdates and social security numbers within journal entries and attachments. If it is not possible to convey an issue without disclosing PHI please make a note in the ticket description or journal such as ***PHI Enclosed***.