



# Phaseware Self Service Center End User Manual

## **Table of Contents**

Self Service Center: .....	2
Registration:.....	2
Login.....	2
Forgot Password .....	2
Administration: .....	3
Change Password .....	3
Notices .....	3
Navigation Bar:.....	4
Home.....	4
My Support: .....	4
My tickets.....	5
Submit New Ticket .....	7
Setting up Common SHARES Tickets.....	10
Password Resets .....	10
Void Requests .....	11
Protected Health Information.....	11

## 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

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.



## Administration:

- ADAMH, Franklin
- Home
- Notices
- My Support
  - My Tickets
  - Submit New Ticket
- Administration**
- Manage Subscriptions ← RSS Feed
- Change Password ← Change Password

The administration section allows users to manage their account.

## 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

### 3C Recovery & Health Care Network

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.

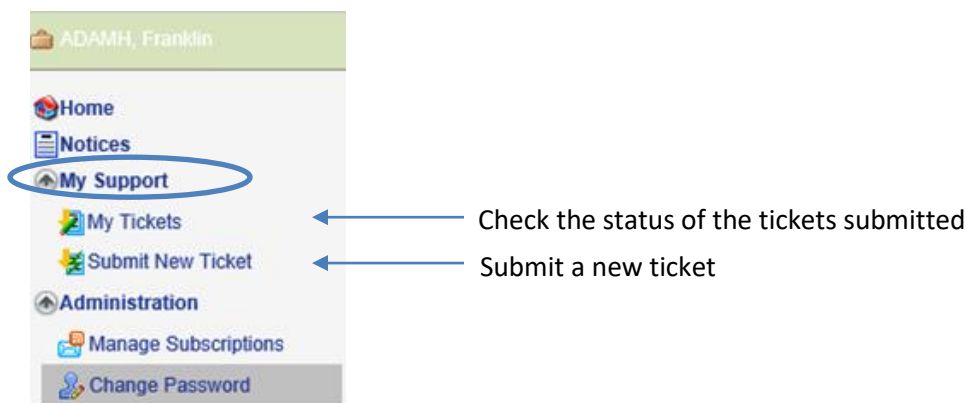
### Navigation Bar:

#### 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

My Tickets >> TEST - COG

Save Close Refresh Print

<b>Ticket #</b>	15		
<b>Description</b>	<input type="text" value="TEST"/>		
<b>Severity</b>	<input type="text" value="2-Medium"/> ▾ X	<b>Classification</b>	
<b>Status</b>	Research In Process	<b>Billing Status</b>	Against Plan
<b>Product</b>		<b>Closed</b>	
<b>Customer</b>	ADAMH, Franklin	<b>Closed By</b>	
<b>Contact</b>	<input type="text" value="xxx xxxx"/> ▾ X	<b>Resolution</b>	
<b>Assigned Agent</b>		<b>Department</b>	COG
<b>Full Description</b>	<input type="text" value="TEST - COG"/>		

Journal Log

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**:

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.

My Tickets >> test

Save Close Refresh Print

Ticket has been updated.

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

Customer: Journal Entry  
Contact: [Dropdown]  
Assign: [Dropdown]  
Full Description: 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

[Save] [Close] [Refresh] [Print]  
Please provide a reason for closing:  
Ticket # [Text Area]  
Description [Text Area]  
Severity [Text Area]  
Status [Text Area]  
[Save] [Cancel]

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 screenshot shows a web form titled "Submit New Ticket". At the top left is a "Submit" button. The form fields are: "Description" (text input), "Classification" (dropdown menu), "Severity" (dropdown menu with "2-Medium" selected), "Customer" (dropdown menu with "ADAMH Franklin" selected), and "Contact" (dropdown menu with "SDuderstadt Test" selected). Below these is a "Full Description" text area. Underneath is an "Attachments" section with five rows, each containing a text input field and "Select" and "Clear" buttons. At the bottom left is a "Screenshots" section with a "Capture Screenshot" link.

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.***

The screenshot shows a dropdown menu with the following options: Claim/Enrollment, Client Rights Complaints & Grievances, External Affairs, Fiscal, IT Services, Outcomes, and Treatment/Prevention/Clinical.





## Sub-Options:

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

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

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

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

The screenshot shows a web form with the following fields and options:

- Classification:** A dropdown menu with the selected value "Treatment/Prevention/Clinical".
- Severity:** A dropdown menu with a list of options: "Hospital Services", "Housing Services", "Other", "Prevention Services", "Probate/Civil Commitment", "Reportable Incidents", and "Request for Proposal/Results/Information".
- Customer:** A field that is greyed out, indicating it is pre-populated and not editable.
- Contact:** A field that is greyed out, indicating it is pre-populated and not editable.

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

The screenshot shows a dropdown menu for severity with the following options:

- 2-Medium (selected)
- 1-High
- 2-Medium
- 3-Low

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.

**Ticket Submitted**

---

Ticket # 16 has been successfully submitted.

[Go to My Tickets](#)

[Go to Ticket # 16](#)

Fri 8/18/2017 5:01 PM

**Do Not Reply** <helpdesk@3cnet.org>

**New Ticket #11750 has been received**

To: Amy Johnson

---

A new Ticket #11750 has been received.

To view the Ticket and respond, please log in to Self Service Center at the following link:  
<https://tracker.phaseware.com/3CHelpdesk/>

**DO NOT REPLY TO THIS EMAIL**

## 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.

Description	<input type="text" value="HAMI Password Reset ipc1601ajohnson"/>	Required Ticket Description for Password Resets
Classification	<input type="text" value="System Support"/>	
Severity	<input type="text" value="3C Connect"/>	
Customer	<input type="text" value="FIAT"/>	
Contact	<input type="text" value="User Account Request"/>	

**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.

The screenshot shows a form with the following fields:

- Description:** HAMI 1601 VOID CLAIMS REQUEST
- Classification:** Claim/Enrollment
- Sub Classification:** VOID Claims
- Severity:** 3-Medium

A red-bordered callout box points to the 'Description' field and contains the text: "Required Ticket Description for VOIDS".

## 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\*\*\***.