# Client Support Portal Job Aid

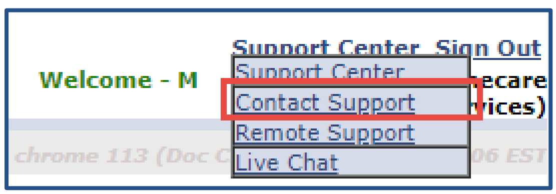
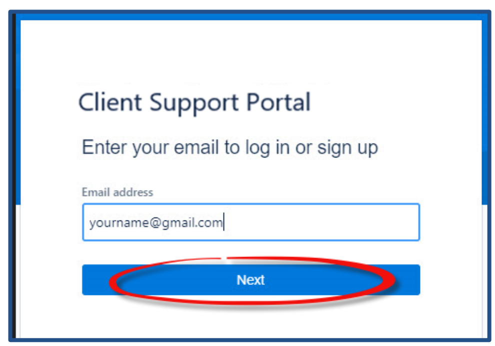
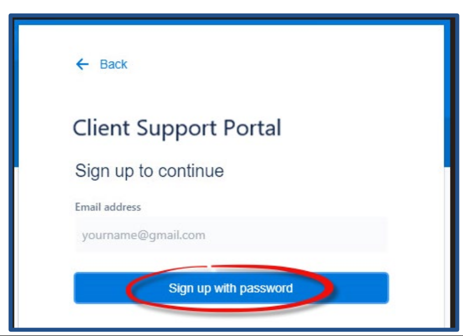
Use the **Client Support Portal** to submit requests to the Client Support Team. This job aid provides instructions on how to register for the application, how to submit a support request, and how to manage existing requests.

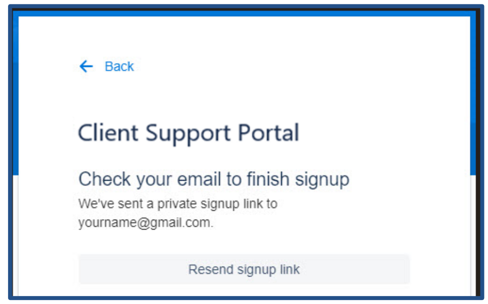
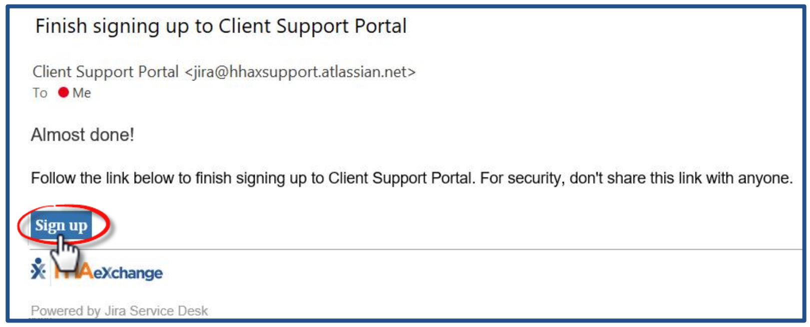
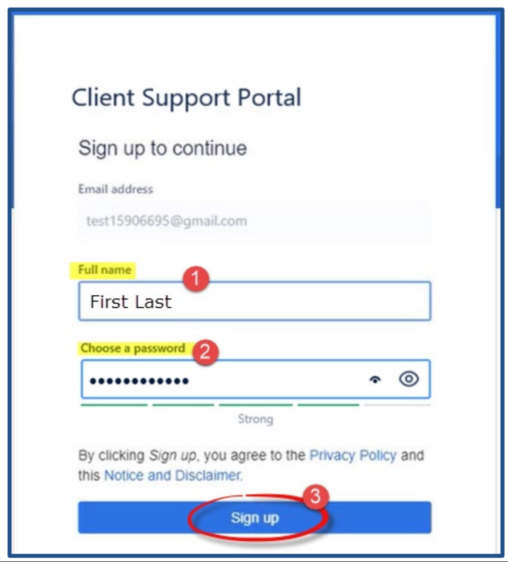
Short supplemental videos are available. Click on the respective link below to watch:

- How to Register for a Client Support Portal Account
- How to Submit a Support Request
- How to Manage Existing Requests

## Registration

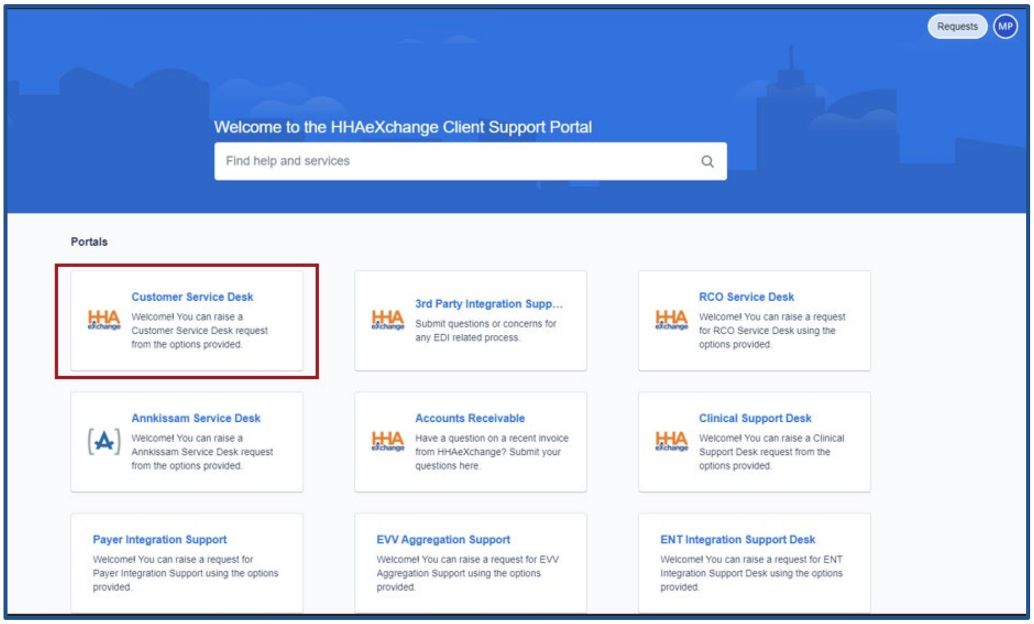
Registration is a one-time process initiated to establish a Client Support Portal account. Once finalized, users are routed directly into the Client Support Portal when creating requests.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>There are two options to initiate registration.<br>1. Navigate to the Contact Support option from the Support Center menu, accessed on the top-right of the application screen, as seen in the following image.<br>
<br>2. Enter the URL hhaexchange.com/supportrequest to access the Sign Up page.</td></tr>
<tr><td>2</td><td>Enter the email address to associate with the account and click on Next.<br>
</td></tr>
<tr><td>3</td><td>On the next window, the email address field is populated with the entered address. Click on the Sign up with password button to continue.<br>
</td></tr>
</table>

| Step | Action | |
|---|---|---|
| **4** | The system issues a message to check your email to complete registration. |  |
| **5** | On the email, click the **Sign up** button to continue. |  |
| **6** | On the *Sign up* window, enter your **Full Name**, a **Password**, and click on the ***Sign up*** button. |  |
| **7** | The **Client Support Portal** opens and registration is complete. | |

## Submitting a Request

The Client Support Poral has various topics to select from depending on a specific area (such as *Integration*, *Accounts Receivable*, and *Revenue Cycle Operations (RCO)*). For general support requests, select the **Customer Service Desk** option, as seen in the following image.

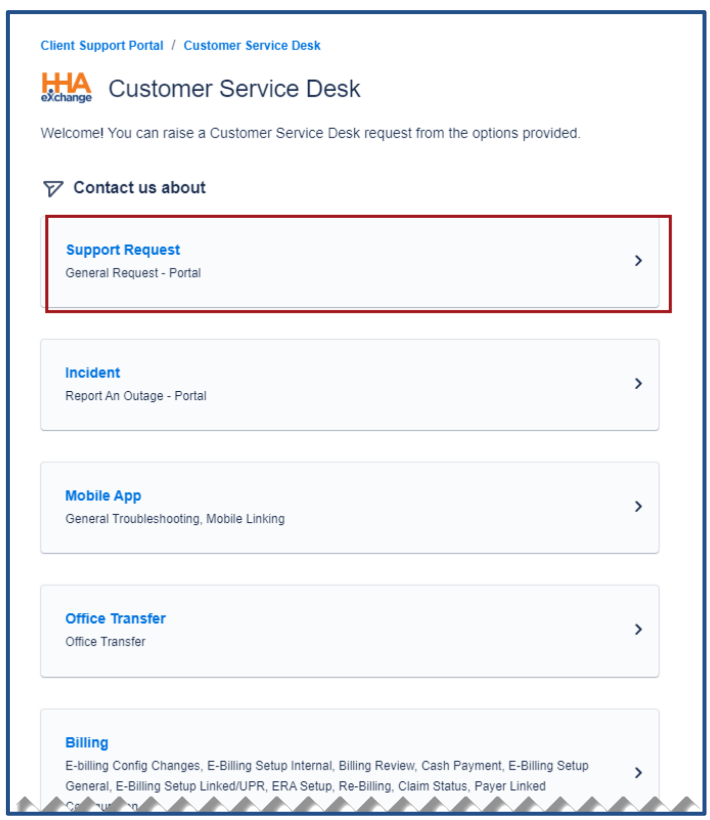



**Client Support Portal – Customer Service Desk**

The **Customer Service Desk** window opens. Create and submit support requests by first selecting the applicable category.

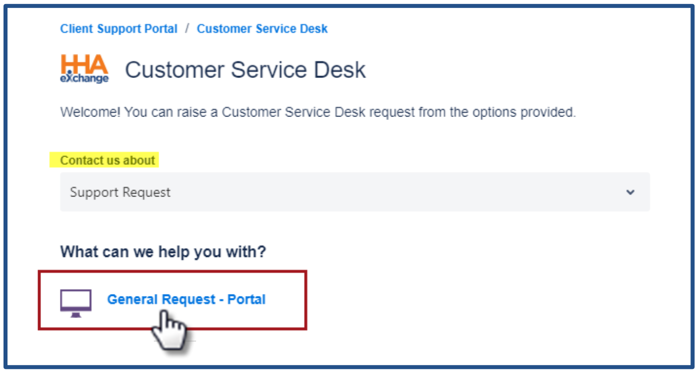
Categories include the following:

- Support Request
- Incident
- Mobile App
- Office Transfer
- Billing
- Linked Contract Inquiries
- Scheduling Issues
- Reports
- Unlock/Reset Password
- EVV Configurations
- Finance Inquiries
- Portal Status Inquiries
- Data Update Requests




**Customer Service Desk**

On the next screen the category appears in the **Contact us about** field (as the selected value). Click on the applicable sub-category; in this case, the **General Request – Portal** link, in the *What can we help you with?* section to continue.

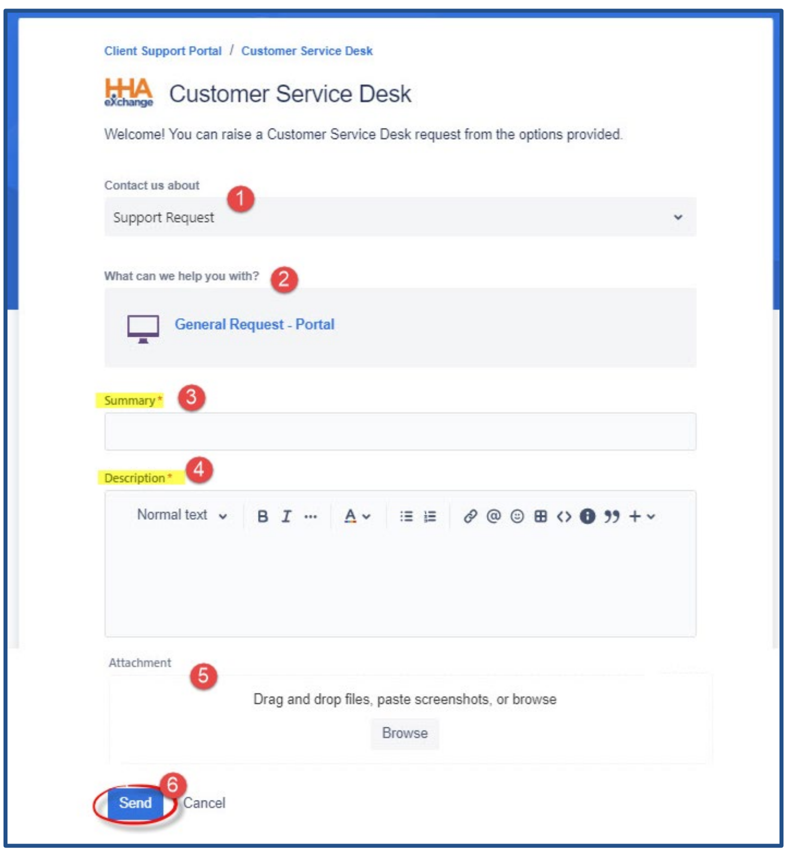



**Click on the Sub-Category**

On the following screen, the selected category and sub-category appear (1 and 2). Enter a **Summary** (3) and **Description** (4) of the issue; required fields are denoted with a red asterisk.

Use the **Attachment** field (5) to attach supporting images and/or documentation. Follow the prompts to either “drag and drop” or “browse” for the file to attach.

Click ***Send*** (6) to submit the request.

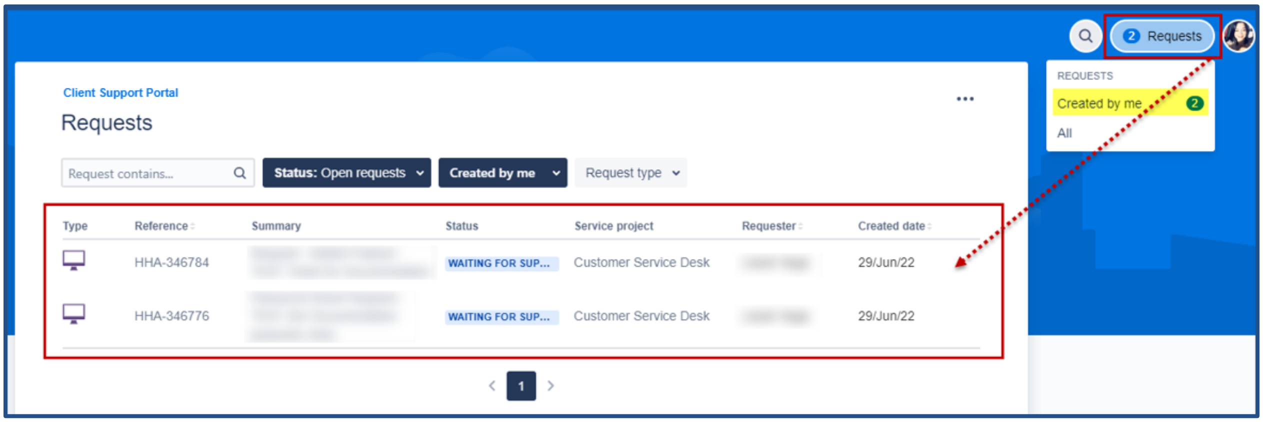



**Complete and Submit the Request**

## Managing Requests

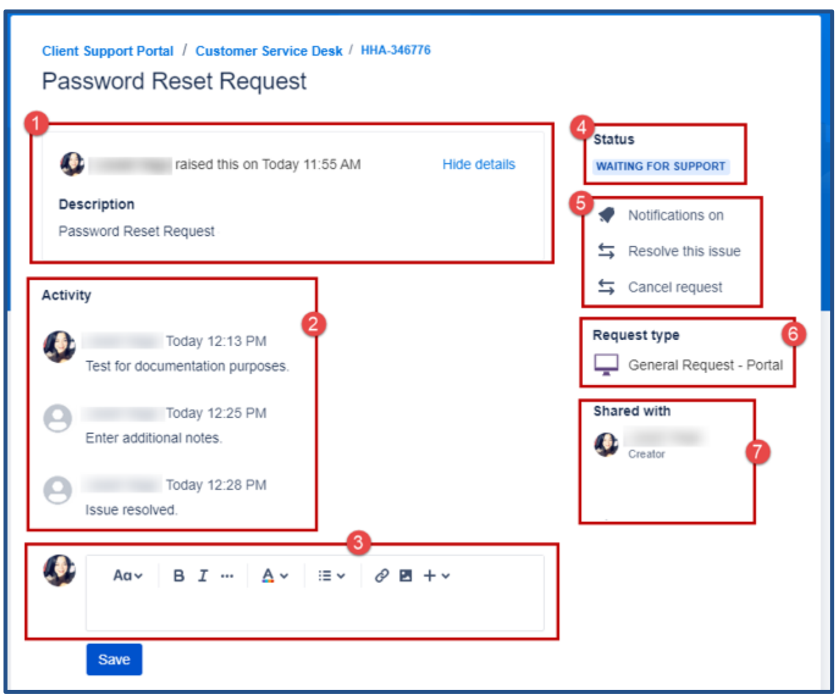
Once a request is submitted to Client Support, the ***Requests*** button illustrates the number of requests submitted; the count also appears in the dropdown menu according to the creator. The example below illustrates requests submitted by the user (*Created by me*). Click the option to see a list of requests. Each line item offers a high-level view of the request (such as the request *Type*, *Reference* (request number), *Summary*, *Status*, *Service Project*, *Requester* and *Created Date*).

To view the full details, click on the **Reference** number or **Summary** to open the support request.




**Client Support Requests**

There are several components in every request as seen in the following image and described in the table underneath.




**Support Request**

| Section | | Description |
|---|---|---|
| 1 | **Description** | View the description of the request to include the original title and the initiation time. |
| 2 | **Activity Log** | View the log of exchanged notes with all involved parties to include the Requester, support representative and any other individual the Requester has shared the request with. |
| 3 | **Notes** | Enter notes to support/track the request. |
| 4 | **Status** | View the Status of the request (for example, *Waiting for Support*, *Waiting for Customer*, *Resolved*) |
| 5 | **Actions** | This section contains a list of options or actions to take with the request to include:<br>• Notifications on (or off)<br>    ○ Notifications are via email indicating the progress of the request and/or action needed from the requester. It is recommended to leave this setting ***on***.<br>• Resolve this issue<br>    ○ Link used to resolve the issue/request.<br>• Cancel request<br>    ○ Link used to cancel a submitted request. |
| 6 | **Request Type** | Static label indicating the type of request submitted. |
| 7 | **Shared with** | Indicates the request creator. |