

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.

Step	Action
1	 There are two options to initiate registration. 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. Welcome - M Support Center Sign Out Center Support Center Center Contact Support Center Center Contact Support Center Center Contact Support Center Center Contact Support Center Center Center Center Center Center Center Contact Support Center Center Center Contact Support Center Centec
2	Enter the email address to associate with the account and click on <i>Next</i> .
3	Client Support Portal Sign up with password button to continue. Sign up with password button to continue.

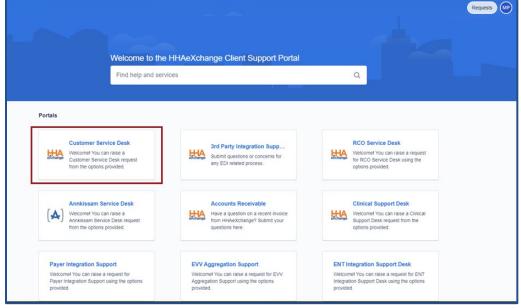


Step		Action	
4	The system issues a message to complete registration.	e to check your email	← Back Client Support Portal Check your email to finish signup We've sent a private signup link to yourname@gmail.com. Resend signup link
5	On the email, click the Sign up button to continue.	Finish signing up to Client Sup Client Support Portal <jira@hhaxsuppor To ● Me Almost done! Follow the link below to finish signing up Sign up Sign u</jira@hhaxsuppor 	
6	On the <i>Sign up</i> window, ent Password , and click on the S		Client Support Portal Sign up to continue Email address test159066959@gmail.com
7	The Client Support Portal op	ens and registration is con	nplete.



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.

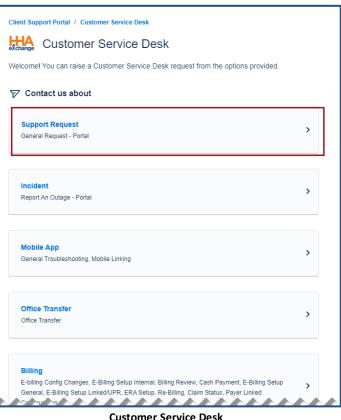


Client Support Portal – Customer Service Desk

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

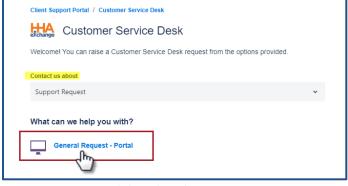
Categories include the following:

- 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.

Client Suppo	rt Portal / Customer Service Desk
eXchange (Customer Service Desk
Welcome! Y	ou can raise a Customer Service Desk request from the options provided.
Contact us al	bout A
Support Re	equest 🗸 🗸
What can we	help you with? 2
	General Request - Portal
Summary *	3
Description*	4
Norma	Itext • B I … A • ∷≣ i≣ & @ © B <> 6 59 + •
Attachment	6
	Drag and drop files, paste screenshots, or browse
	Browse
6	Cancel

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.

Type Reference : Summary Status Service project Requester : Created date : HHA-346784 WAITING FOR SUP Customer Service Desk 29/Jun/22 44	Client Support Portal Requests Request contains	Q. Status: Open reques	sts v Created by me v	Request type v			reated by me
HA-346784 WATING FOR SUP Customer Service Desk 29/Jun/22	ype Reference :	Summary			Requester	7	
HHA-346776 WAITING FOR SUP Customer Service Desk 29/Jun/22	-					*	



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

Client Support Portal / Customer Service Desk / HHA-346776 Password Reset Request	
Image: Traised this on Today 11:55 AM Hide details Description Password Reset Request	Status WAITING FOR SUPPORT
Activity Today 12:13 PM Test for documentation purposes.	Cancel request Request type G G G G G G G C C C C C C
Today 12:25 PM Enter additional notes.	Shared with Creator
Save 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, <i>Waiting for Support, Waiting for Customer, Resolved</i>)
5	Actions	 This section contains a list of options or actions to take with the request to include: Notifications on (or off) Notifications are via email indicating the progress of the request and/or action needed from the requester. It is recommended to leave this setting <u>on</u>. Resolve this issue Link used to resolve the issue/request. Cancel request 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.