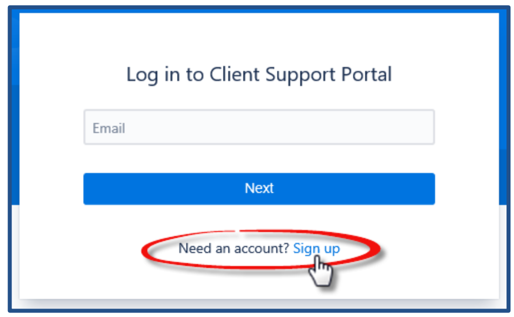
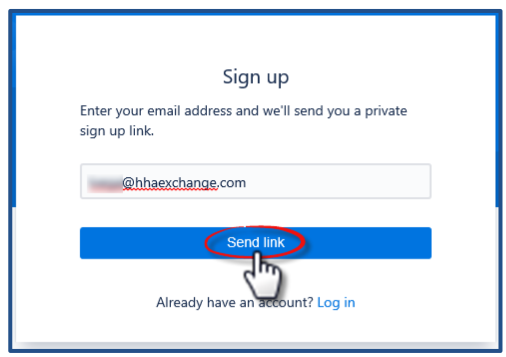
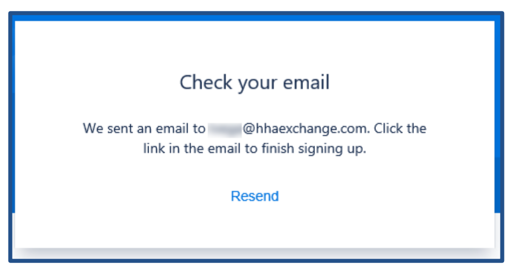
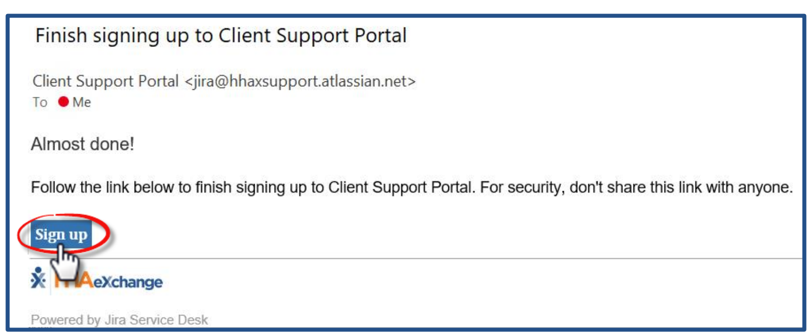
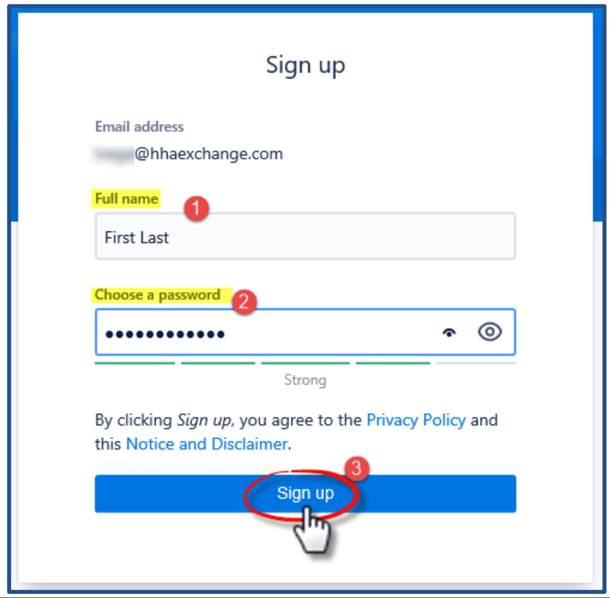
Client Support Portal Job Aid

The **Client Support Portal** is designed for clients to submit questions and system issues to the Client Support Team. This job aid provides instructions on how to register for the application and how to submit a service ticket/order.

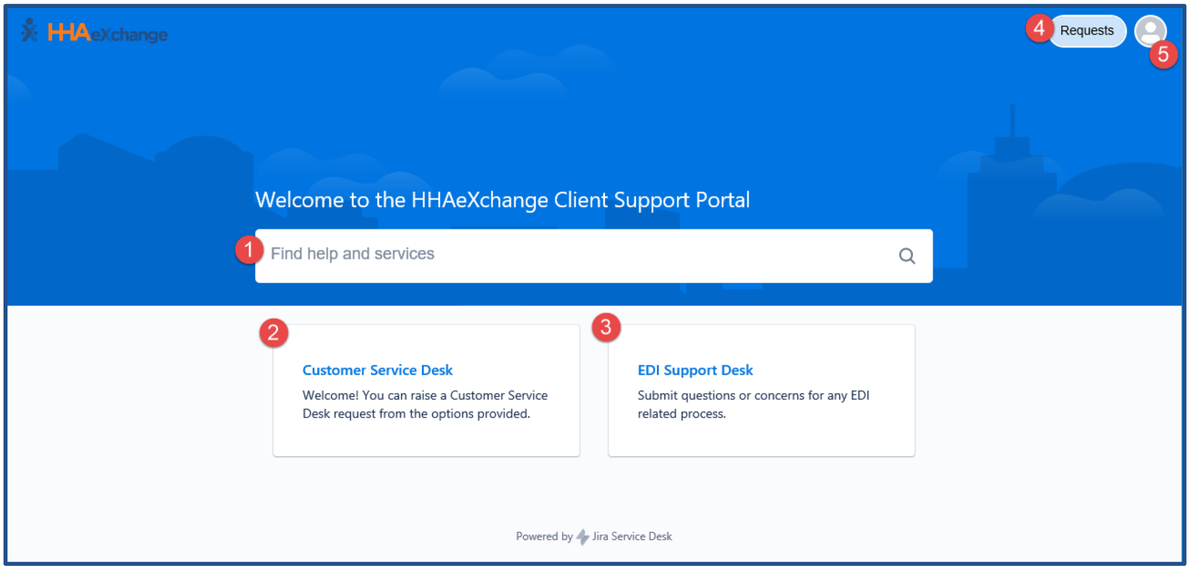
Registration

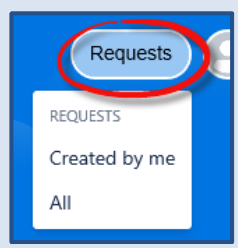
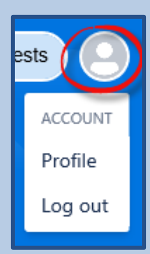
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click on https://hhaxsupport.atlassian.net/servicedesk/customer/portals to access the login page.</td></tr>
<tr><td>2</td><td>Click on the Sign up (link) to register a new account.

</td></tr>
<tr><td>3</td><td>In the Sign up window, enter your email address and click on the Send link button.

</td></tr>
<tr><td>4</td><td>The system issues a message to check your email to complete registration.

</td></tr>
<tr><td>5</td><td>On the email, click the Sign up button to continue.

</td></tr>
</table>

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>6</td><td>On the Sign up window, enter your Full Name, a Password, and click on the Sign up button.</td><td>
</td></tr>
<tr><td>7</td><td colspan="2">The Client Support Portal page opens and registration is complete.</td></tr>
</table>

Navigating the Client Support Portal Homepage

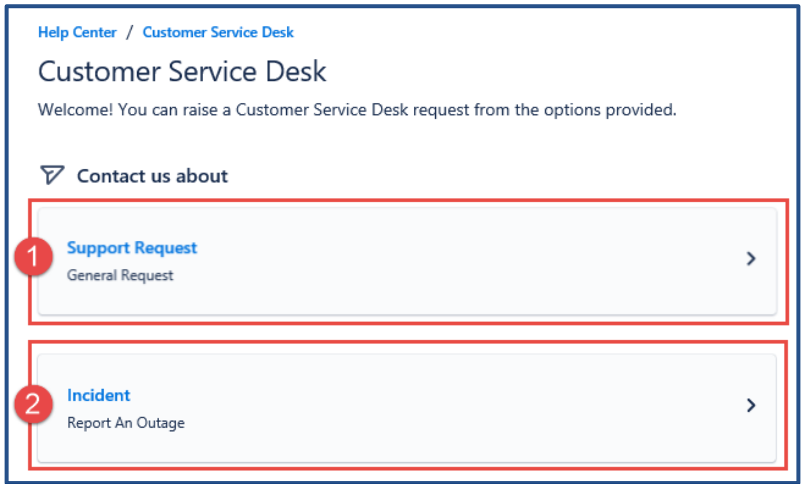
The **Client Support Portal** homepage is comprised of 5 sections, as illustrated below and described in the table underneath.



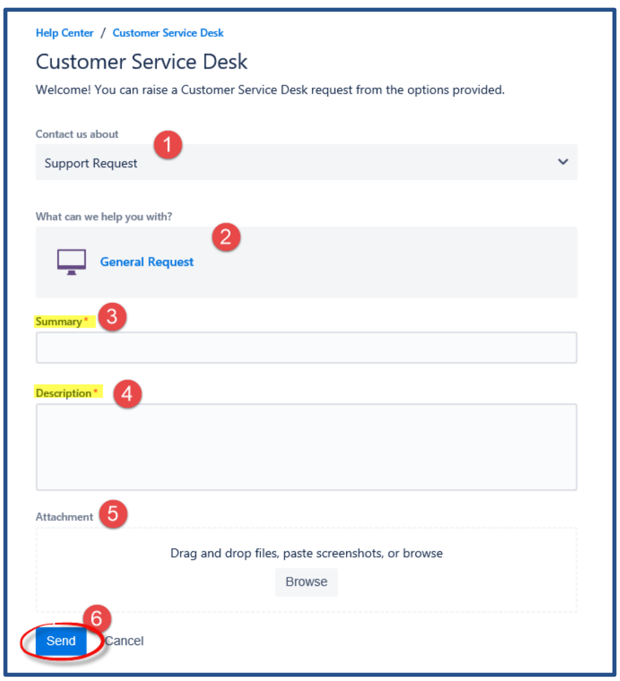
	Section	Description
1	Search Window	Enter a key word(s) to search the entire site.
2	Customer Service Desk	Select to create a Service Desk request (create a service ticket) for a **General Request** or to report an **Incident** (such as a system outage). Refer to the Customer Service Desk section below for further details.
3	EDI Support Desk	Select to create a service ticket specifically for EDI issues. Refer to the EDI Support Desk section below for further details.
4	Requests	Click to view/access previously submitted **Requests**: • Select ***Created by me*** to access tickets created by the user; or • Select ***All*** to access tickets entered by others in the Agency Refer to the Managing Requests section below for further details. 
5	User Account	Click the User icon to view the user Profile details or to Log out of the portal. 

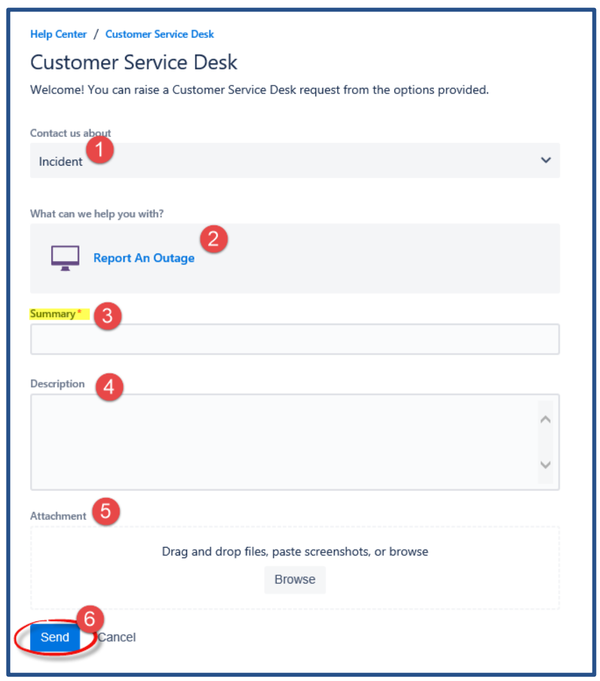
Customer Service Desk

Use the **Customer Service Desk** option to create and submit Support Requests (1) or to create an Incident ticket (2) to report a system outage to the Customer Support Team.



Support Request	Incident





Both screens look similar. From each, select the applicable request category and enter a **Summary** and **Description** of the issue; required fields are denoted with a red asterisk.

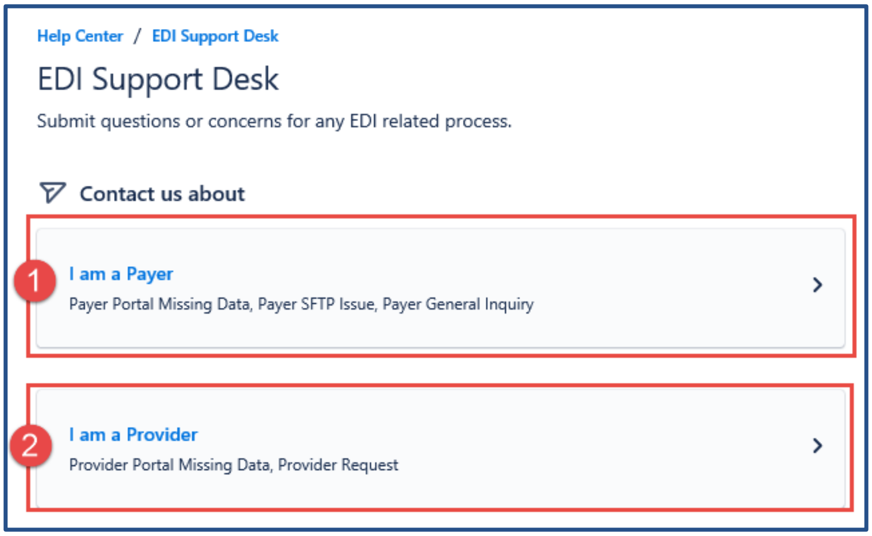
Use the **Attachment** field to attach supporting images and/or documentation. Follow the prompts to either “drag and drop” or “browse” for the file to attach.

Click ***Send*** to submit the request.

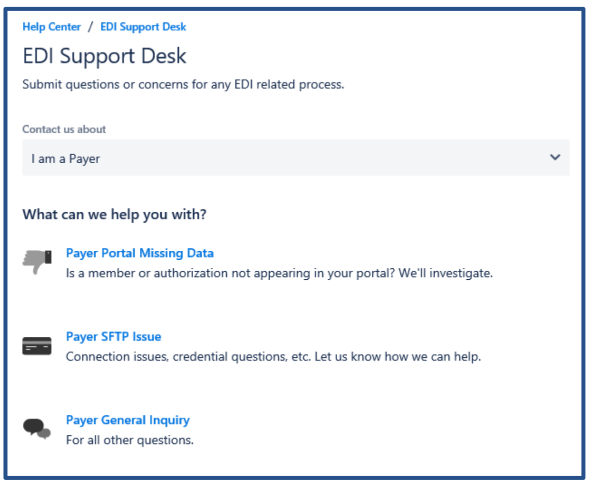
EDI Support Desk

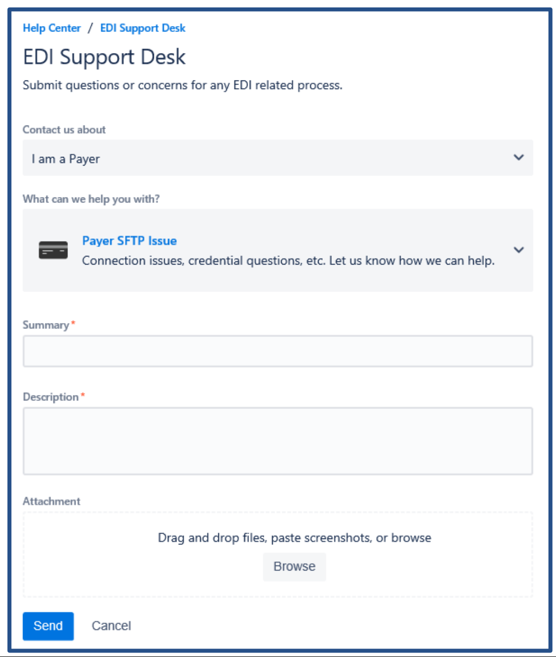
Use the **EDI Support Desk** option to create and submit Support Requests to the EDI Support Team.

Select the **Payer** or **Provider** option to route to specific request types.



Payer

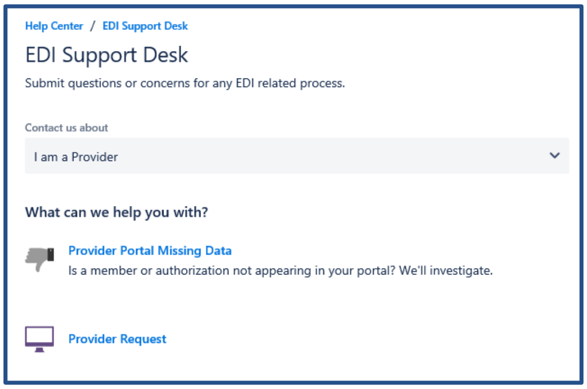


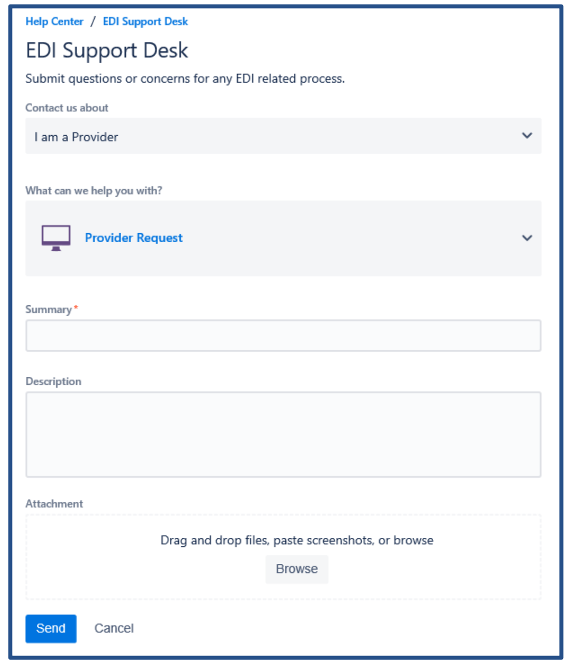


Select the type of issue or concern from the *EDI Support Desk* options (such as *Payer Portal Missing Data*, *Payer SFTP Issues*, or a *Payer General Inquiry*), as seen on the image on the top left).

The image to on the top right illustrates a selected option (*Payer SFTP Issue*). Complete the **Summary** and **Description** fields (required), add an **Attachment** (optional), and click on the ***Send*** button to submit.

Provider



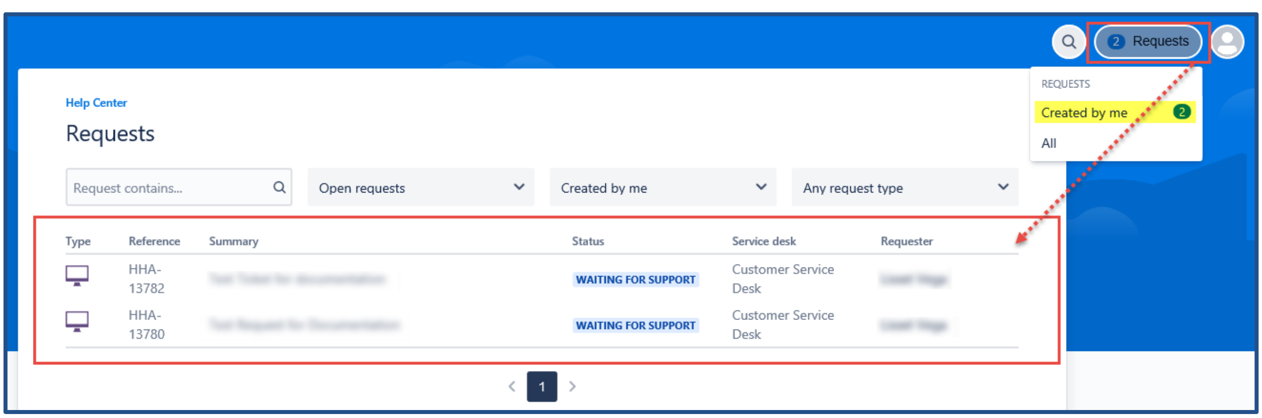


Select the type of issue or concern from the *EDI Support Desk* options (such as *Provider Portal Missing Data* or a *Provider Request*), as seen on the image on the top left).

The image to on the top right illustrates a selected option (*Provider Request*). Complete the **Summary** (required) and **Description** fields (optional), add an **Attachment** (optional), and click on the ***Send*** button to submit.

Managing Requests

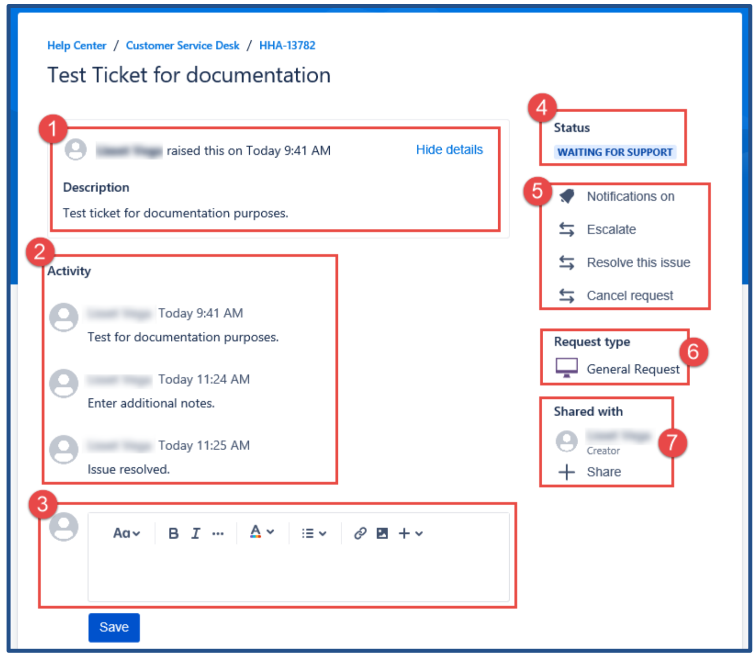
Once a request is submitted to Client Support, the ***Requests*** button illustrates the number of requests submitted; the count also appears in the dropdown menu according to the reporter. The example below illustrates requests submitted by the user (*Created by me*). Click the option to see a list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



Help Center Requests

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

There are several components in every ticket as seen in the image below and described in the table underneath.



Request Ticket

Section		Description
1	**Description**	View the description of the ticket to include the original title and the initiation time.
2	**Activity Log**	View the log of exchanged notes with all involved parties.
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 actions to take with the request to include: • Notifications on (or off), • Escalate, • Resolve this issue, and • Cancel request
6	**Request Type**	Static label indicating the type of request submitted.
7	**Shared with**	Indicates the request originator and any other user in the organization with whom the request is shared. Click the “+” to share the request with others.