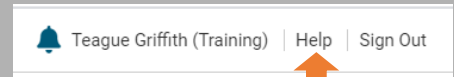


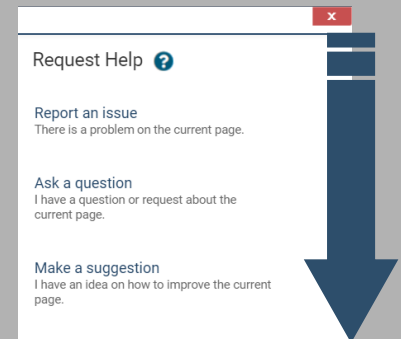
## Entering a Support Ticket In CMIS

The CMIS Support Ticket system allows users to request assistance and ask questions of the CMIS Team. It is important to remember that this is a two way system. There are times that the CMIS Team will ask clarifying questions or need a confirmation from you.

Entering a ticket is easy. Simply click the **“Help”** button. It is found next to your name, either in the upper right hand corner or at the bottom of the page. That opens the option dialogue box, you have a couple of ticket options.



- **Report an Issue:** This is the most common option. It is for any time you need CMIS Team assistance. That could include an anonymous or merge request, system error, and data quality assistance.
- **Ask A Question:** This is if you have a clarifying question about the system. Why is a question/data element required?
- **Make A Suggestion:** This is if you have a recommendation for the system. Perhaps there is a question/data element that is important and it isn't required to be answered, so it is being left blank.



There are a variety of reasons to enter a Support Ticket in the CMIS Database. Here are a few of the more common with recommendations for best practices.

### Anonymous/De-Identified Clients

- Include all client IDs, especially if it is a family.
- If a family member needs to be removed, note that in the ticket.  
**NOTE:** Dependent minor children can't be removed from the family.
- You can note why the anonymous action needs to be made, whether they decline to have their PII in CMIS, are HIV positive, or Currently Fleeing DV/IPV.

### Duplicate/Merging Clients

- Include all client IDs that are involved.
- Give a client ID to client ID match up. "Merge Client ID 123 into Client ID 456." This is very important if you are working with anonymous clients.  
**NOTE:** You can request a specific client ID to be the final one, but other factors may require us to choose another. Those factors may include active enrollments, anonymous status, and which is the more recent.

### Enrolling Client In the Wrong Project

- Include the client ID.
- Use the full CMIS Project name. If your agency has a different name for the project, we won't know. We have to be specific when making adjustments to the data.

### Data Quality Issues

- Include the report parameters that you used to find the errors.
  - Which report did you use?
  - What was the date range?
  - Which project(s) did you include?

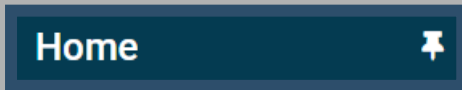
### System Error

- Include what you were trying to do.
- Add the Client ID.
- Tell us what assessment page were you on.
- If there was a specific task you were trying to accomplish, include that.
- **Attach a screen cap of error message you received to the ticket.**

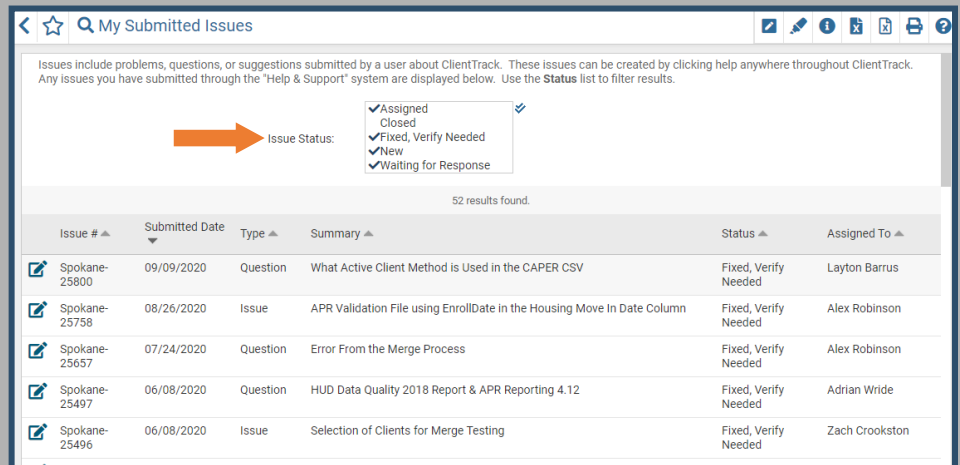
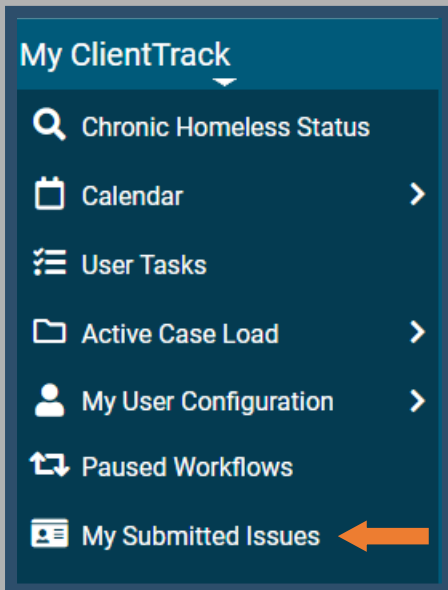
## Responding and Closing CMIS Support Tickets

There are times the CMIS Team needs your help to fix the support tickets. Be on the look out for e-mails from the system.

Start on the **Home** Screen, open the **“My ClientTrack”** menu.



Click the **“My Submitted Issues”**.



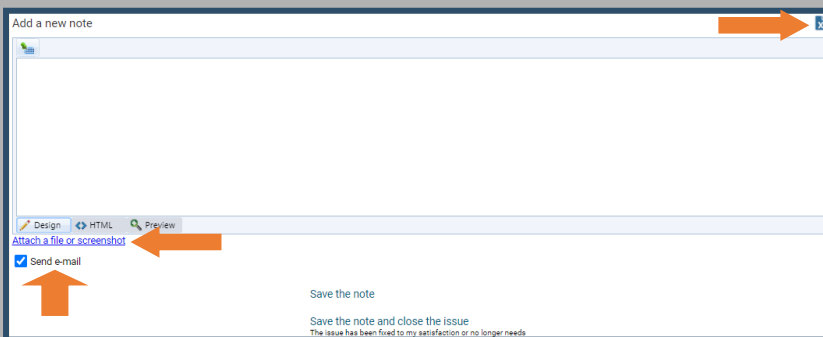
On the **“My Submitted Issues”** page you will see a list of your tickets filtered by the **“Issue Status”** box at the top. You can filter by the different statuses.

- If you have been notified a new note has been entered in your ticket, you can sort by **“Assigned”**. This would be if the CMIS Team has a question about your ticket and they need your feedback.
- If you have been notified the ticket has been fixed, you can filter by **“Fixed, Verify Needed”**. This means the request has been completed to the CMIS Team standards. There may be additional information for you to follow up on, so it is a good idea to read the ticket.
- If you have been notified the ticket has been **“Closed”**, this may mean that your request hasn't been completed. You will want to check to see if there are any additional directions from the CMIS Team to follow up on.

When you find the right ticket, click the Edit button.



Then click **“New Note”** to enter a response.



A new dialogue box will open and you can type your response in the note field. You can attach a screenshot by clicking **“Attach a file or screenshot”**. This is always helpful, especially if you don't want to type out all the information or can't remember what the error said. If you make a mistake, you can delete the note before you send it, just click the **delete button** at the top right.

To send the note and attachment, just click the **“Save the note”** button and the message will be saved. If the **“Send E-mail”** isn't checked, the CMIS Team won't get notification that you added a note. So, make sure it is checked.



If you are just confirming that the ticket is fixed, you can enter a comment in the note field and then click **“Save the note and close the issue”**. This will note that the ticket has been completed to your satisfaction.

