# **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.

•

🜲 Teagu	e Griffith (Training)   Help   Sign Out
	×
l	Request Help 💡
	Report an issue There is a problem on the current page.
e is	Ask a question I have a question or request about the current page.
ng	Make a suggestion I have an idea on how to improve the current page.

Report an Issu	Je	>						
Enter a sum	mary of your issue*							
	helps to quickly identify your issue w	/hen you're						
Make Clie	nt/Family Anonymous or Duplicate	e Client, etc						
Please desc	ribe the issue							
Please enter a might help in s	ny details that might help describe th colving it.	he issue or						
1								
Client ID for CMIS.	123 needs to be anonymous. They c	Jeclined PII						
	Client ID 456 and family need to be anonymous. Remove Client ID 457.							
Merge Cl	Merge Client ID 123 into 456.							
	nge Client ID 456's enrollment from DEFRRHRRH ake Clients to ABCRRHRapid Rehousing for Test nts.							
Monthly	e with Income at Start for Client ID 1 CMIS DQ report from 1/1/2021 to 1/2 RRHRapid Rehousing for Test Clien	31/2021						
Receiving error in Universal Data Assessment, "Client Location is Required" but not field on page to enter it for Client ID 123. See attached screen shot.								
🖉 Design	HTML Q Preview							
Click here t	o attach a file or drag- <u>View Debug I</u>	nformation						
and-drop How can we	e reach you?							
Email Address*	tgriffith@spokanecity.org							
Phone Number*	509-625-6009							
Notify add	itional people							

Then click Submit and we will receive your ticket.

Cancel

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 <u>full</u> 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.

Home	Ŧ
Click the "My Submitted Issues".	
My ClientTrack	
<b>Q</b> Chronic Homeless Status	
📋 Calendar 💦	
若 User Tasks	
Active Case Load	
Arr My User Configuration	
✿ Paused Workflows	
💵 My Submitted Issues 🔶	

< {	<b>ር ע</b> My Si	ubmitted Issu	les						 0	x D	9 8	0
Issues include problems, questions, or suggestions submitted by a user about ClientTrack. These issues can be created by clicking help anywhere throughout ClientTrack. Any issues you have submitted through the 'Help & Support' system are displayed below. Use the <b>Status</b> list to filter results.												
			Issue	Status:	<ul> <li>✓Assigned Closed</li> <li>✓Fixed, Verify Needed</li> <li>✓New</li> <li>✓Waiting for Response</li> </ul>	*						
					52 results	found.						
	Issue # 🛋	Submitted Date	Туре 🛋	Summary	( <b>A</b>		Status	s 🛋	Assi	gned T	0 🔺	
ľ	Spokane- 25800	09/09/2020	Question	What Act	ive Client Method is Used in	the CAPER CSV	Fixed, Neede		Layt	on Barr	rus	
Ø	Spokane- 25758	08/26/2020	Issue	APR Valio	lation File using EnrollDate i	n the Housing Move In Date Colum	n Fixed, Neede		Alex	Robins	son	
Ø	Spokane- 25657	07/24/2020	Question	Error From	n the Merge Process		Fixed, Neede		Alex	Robins	son	
Ø	Spokane- 25497	06/08/2020	Question	HUD Data	a Quality 2018 Report & APR	Reporting 4.12	Fixed, Neede		Adria	an Wric	ie	
ľ	Spokane- 25496	06/08/2020	Issue	Selection	of Clients for Merge Testing	1	Fixed, Neede		Zach	Crook	ston	
	On always	05/06/0000				- l' - A	et and		 	-		

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.

Then click "New Note" to enter a response.

New Note

Add a new note		
<b>1</b>		
🖌 Design 🚯 HTML 🔍 Preview		
Attach a file or screenshot		
Send e-mail		
	Save the note	
	Save the note and close the issue The issue has been fixed to my satisfaction or no longer needs	

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

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.

Save the note

Save the note and close the issue The issue has been fixed to my satisfaction or no longer needs