

# CaIMHSA Helpdesk Overview


## Wifi Password: mhsa2023

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**PRESENTED BY**

Kevin Sullivan  
Manager, Support

**People matter.  
Customers matter.  
Principles matter.  
Community matters.  
Every interaction matters.**



# Topics

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- **Issues**
- Status of the Helpdesk
- Future State
- Team Introductions
- Best Practices

■ Humble

Pie



# Level 1 Agent Issues

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- Issues

- Level 1 Agent responds with scripted reply that only address half of the problem
- Level 1 Agent reply reveals a lack of understanding of the actual issue (slide 6)

- CalMHSA Action Plan

- Level 1 Agent skills assessment testing through a “secret shopper” script to test the agent’s knowledge. Skills assessment results will be factored into the Level 1 agent’s performance review.
- Buchanan to reward staff in achieving knowledge goals

# Level 1 Agent Issues

**County** 1:36 PM  
 is there a section in smartcare where we can capture client disabilities?

**L1 Agent** 1:38 PM  
 Yes  
 You can go to the assessment and diagnosis

**County** 1:41 PM  
 sorry, I'm talking about disabilities that are not the diagnosis. as in a demographic field

**L1 Agent** 1:41 PM  
 Other general diagnosis medical conditions

**County** 1:42 PM  
 where would that be?

**L1 Agent** 1:44 PM  
 in the client chart, then go to assessment and diagnosis then go to general diagnosis medical conditions

**County** 1:44 PM  
 when you say "go to assessment" I don't know what htat means  
 is there something more specific you can provide that would tell me what to type in? Some feedback - helpful if you can be very specific to what is in SmartCare

**L1 Agent** 1:45 PM  
 Are you in the client chart?

**County** 1:45 PM  
 yes

# Level 1 Agent Issues

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- **Issues**

- Level 1 Agent asks for irrelevant additional information
- Level 1 Agent copy/paste a list of questions in their response

- **CaIMHSA Action Plan**

- CaIMHSA has asked our Level 1 Agents to stop copy/pasting questions in their response
- CaIMHSA asks that the county provides key data to our Level 1 Agents to expedite support, See following slide:

# Level 1 Agent Issues

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- **List of questions**

- County:
- Username (of the user that is having the reported issue):
- Specific form/document/screen/listpage:
- Client ID (ID only):
- Program:
- Procedure code (if applicable):
- Error message (if applicable):



# Level 1 Agent Issues

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- **Issues**
  - Level 1 Agent tries to answer questions that require a Level 2 agent to answer – (Example: Only CalMHSA can configure)
- **CalMHSA Action Plan**
  - CalMHSA now has a “forward ticket directly to Level 2 agent” policy in place

# Level 2 Agent Issues

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- Issues

- You closed my ticket without asking / before it was fixed

- CaIMHSA Action Plan

- We are routinely holding on to tickets until they are loaded into your production environment

# Level 2 Agent Issues

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- Issues

- Why does it take so long to get back to us?

- CaIMHSA Action Plan

- We work to follow up on tickets as quickly as we can
- Often tickets are assigned to developers to fix, and that takes time to code and deployment must be integrated with other fixes and downtime
- We just hired not 1, not 2, but '3' yes 3 new Level 2 helpdesk agents.

# Difficulty with ticket follow-up

## ■ Issues

- Daily reports are helpful but lack critical detail
- Daily reports lack closed ticket information
- Updates have only the most recent interaction, lack history, and are not actionable
- Self service portal provides detail in what is best described as ‘word salad’ that simply not decipherable.
  - Thus, when questions arise about tickets, you have no idea what the back story is so are not able to respond

## ■ CalMHSA Action Plan

- CalMHSA will be enhancing the self-service portal, giving counties direct access into their county’s helpdesk tickets
- To be discussed on the “Future State” slides

# Topics

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- Issues
- **Status of the Helpdesk**
- Future State
- Team Introductions
- Best Practices

# Status of the Helpdesk

- Metrics
  - Workable Tickets
    - L1 averages 35 open tickets open at a time
    - L2 averages 80 workable tickets open at a time
      - $80/23 = 3.5$  per county
      - Workable – tickets that in a state that our Level 2 staff can work on them.

# Status of the Helpdesk

- Metrics
  - Pending Tickets
    - Averages about 375 tickets
      - Waiting for **Streamline** for a Break/Fix
      - Waiting for **CaIMHSA** for a Break/Fix or a configuration change
      - Waiting on you, **“The county”**

# Status of the Helpdesk

- Resolved Tickets Metrics
  - We resolve tickets after
    - 1 - You tell us to set to resolved (this is preferred)
    - 2 - 30 days no reply and 3 contact attempts
  - 'Resolved' tickets are not closed tickets
    - Counties have expressed concern about this.
      - If a ticket is not done and we set it to resolved, please just reply back and we will change it back to open



# Status of the Helpdesk

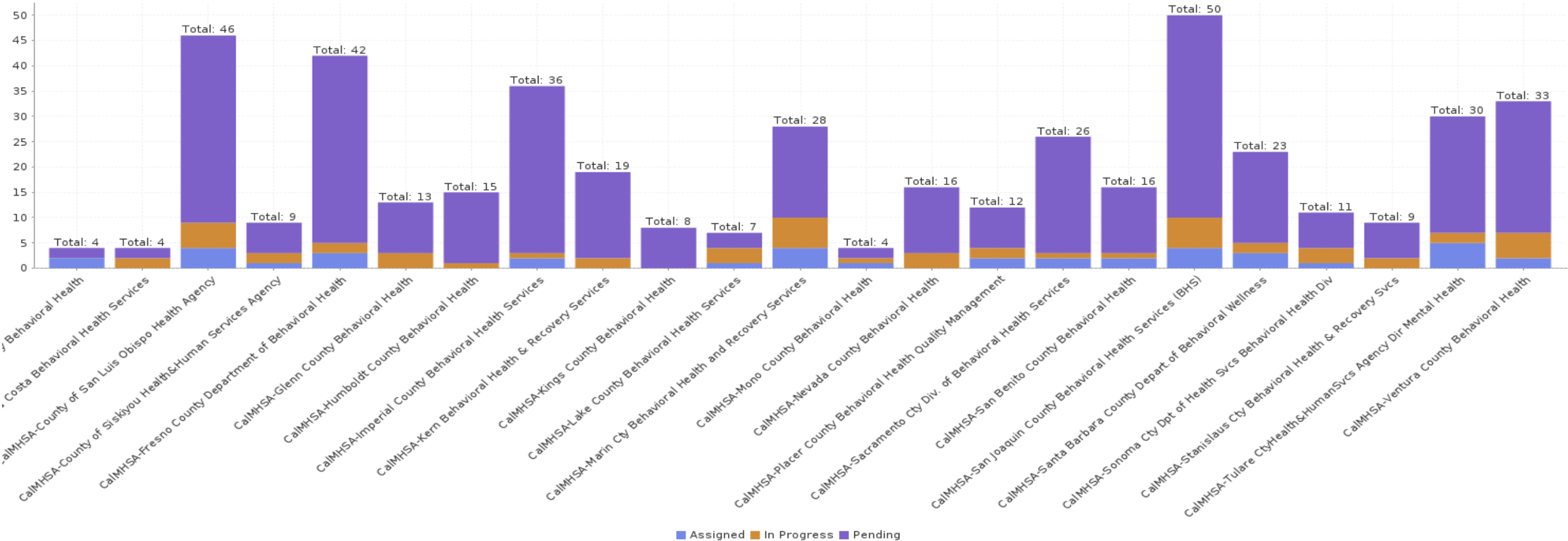
- Ticket Status Reports
  - Report of total open tickets
  - Report of the pending ticket breakdown
  - Aging of open tickets
  - Customer satisfaction Survey summaries

# Status of the Helpdesk

CalMHSA Active Tickets by County for salesforce  
 CSV report for export to salesforce

Total

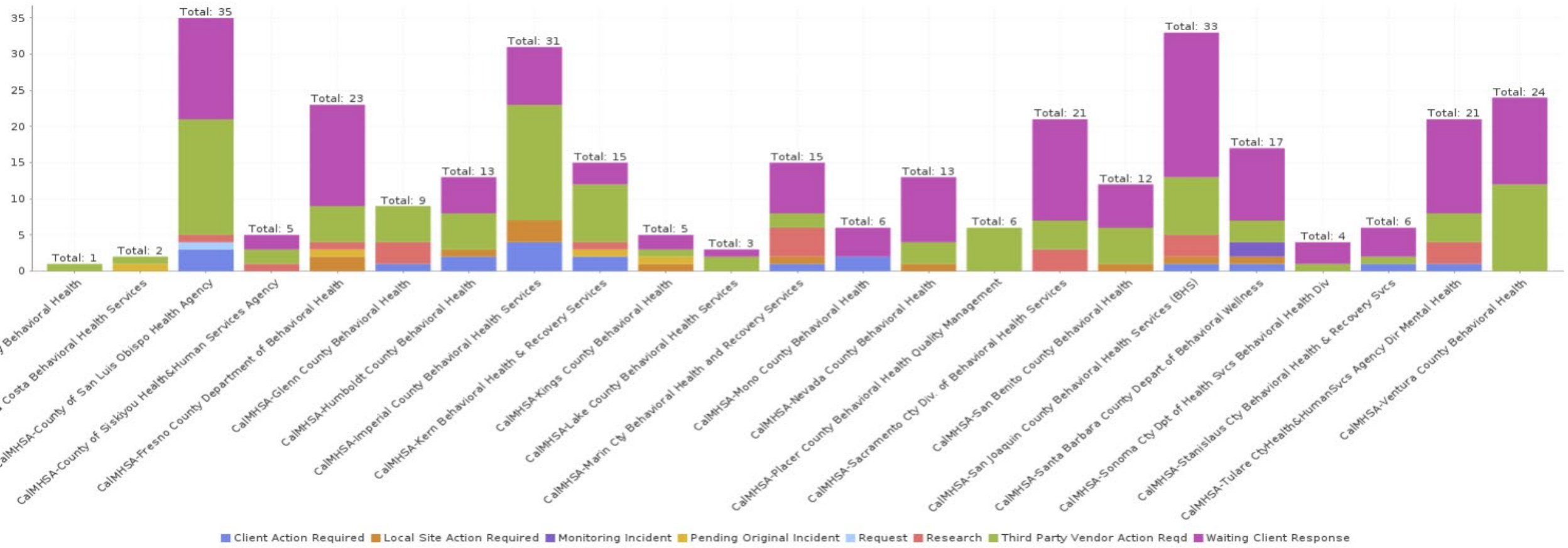
**461**  
Sum



# Status of the Helpdesk

Pending Tickets by County, Assignee, and Category  
Dashboard Widget Report

Total  
**320**  
Sum



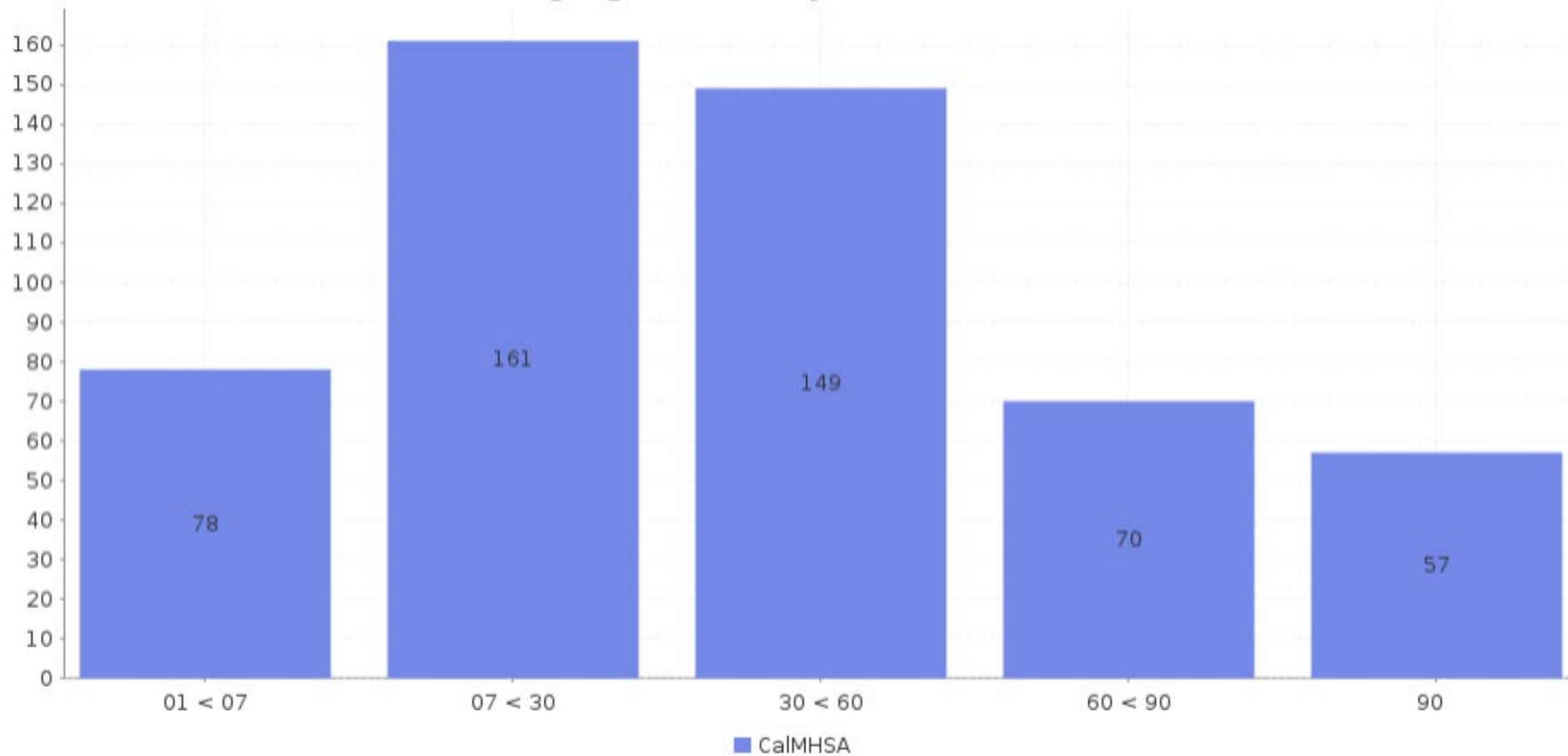
Client Action Required Local Site Action Required Monitoring Incident Pending Original Incident Request Research Third Party Vendor Action Req Waiting Client Response

# Status of the Helpdesk

CalMHSA Standard Aging Ticket Report

Bucketed Ticket Aging by Location and Service Group - Multi-Select

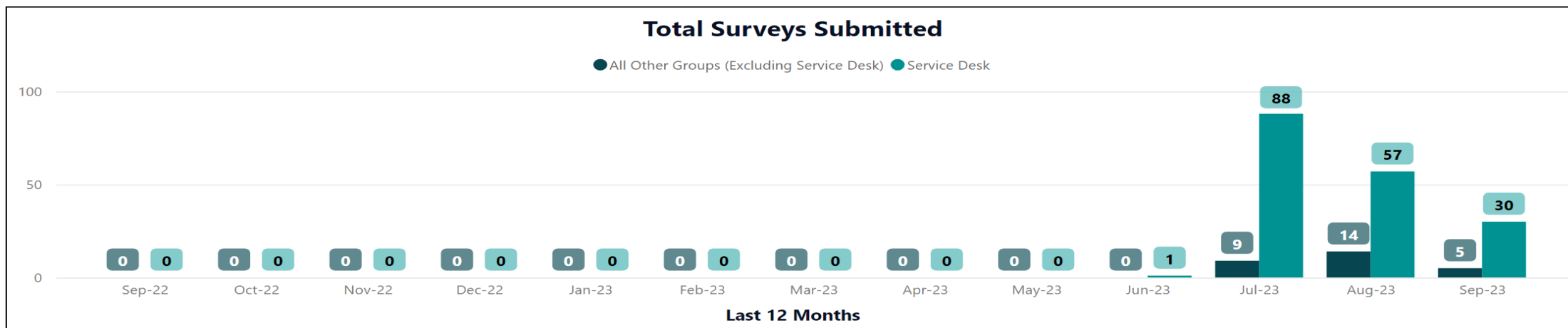
Aging Tickets by Time Frame



Total	78	161	149	70	57	515
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# Status of the Helpdesk

## → Customer Satisfaction



# Topics

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- Issues
- Status of the Helpdesk
- **Future State**
- Team Introductions
- Best Practices

# Future State - Reconfigure the Helix Ticket System

- Current State – All 23 counties are in 1 tenant
  - Counties cannot access this tenant as they would be able to see all county tickets
  - County must access self-help portal which has limited functionality
- Future State – Reorganize into 23 individual county tenants
  - Counties will have their own licenses to access the Helix ticket system
  - Counties will only be able to view their county's tickets
  - Expanded helpdesk functionality; counties will be able to enter tickets, review and generate custom reporting

# Future State - Reconfigure the Helix Ticket System

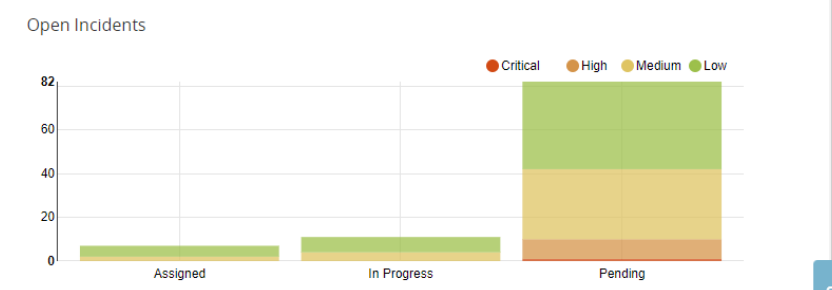
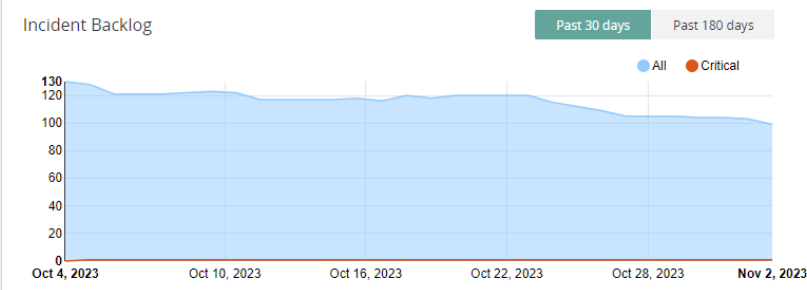
- Updates Following 440 items

**Test ticket - This is what the ticket is about**  
 INC001209931560  
 New INC001209931560 by Kevin Sullivan  
 Nov 3, 2023 4:29 PM
- [Z] Issue Completing CalOMS Standalone Update/Discharge Document**  
 INC001209896698  
 Status marked: "Pending" by Jesus Cruz with reason: "Third Party Vendor Action Reqd"  
 Nov 3, 2023 4:25 PM
- [Z] Issue Completing CalOMS Standalone Update/Discharge Document**  
 INC001209896698  
 Jesus Cruz sent an email to 1 recipient(s)  
 Hello Annette,  
 Streamline is currently working on a solution for this issue under Zen Desk ticket #35210. We will keep you update...  
 show more  
 Nov 3, 2023 4:23 PM
- Fresno - Billing dashboard widget 'Accounts Receivable' timeout**  
 INC001209926432  
 Kevin Sullivan added a note to the ticket activity  
 Lam, can you write up the zen desk ticket for this, thanks  
 Nov 3, 2023 4:12 PM
- Fresno - Billing dashboard widget 'Accounts Receivable' timeout**  
 INC001209926432  
 Assigned to Lam Ngo by Kevin Sullivan  
 Nov 3, 2023 4:12 PM
- Setting up users in multiple systems of care without creating multiple SmartCare log ins**  
 INC001209838390  
 Ariel Diaz-Nanasca added a note to the ticket activity  
 No updates from Khristy on this topic as of today.  
 Nov 3, 2023 4:12 PM
- A user is having issue with a duplicate number that needs to be merged but they cannot merge them.**  
 INC001209930320  
 Assigned to Chris Watson by Kevin Sullivan  
 Nov 3, 2023 4:01 PM
- A user is having issue with a duplicate number that needs to be merged but they cannot merge them.**  
 INC001209930320  
 Kevin Sullivan sent an email to 1 recipient(s)  
 Nov 3, 2023 4:01 PM

## Service Delivery Company: CalMHSA

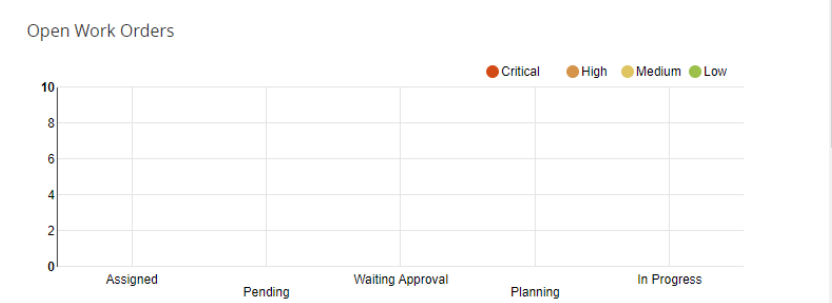
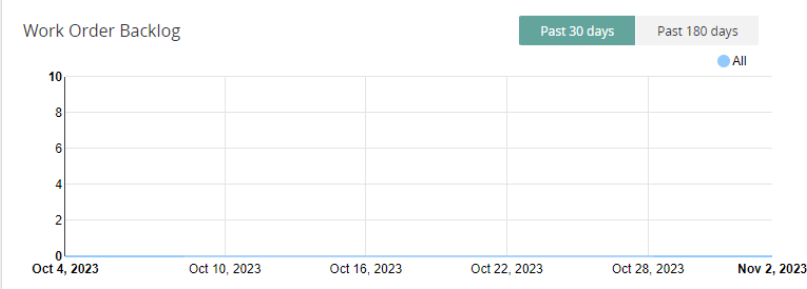
Incident Perspective: CalMHSA - Level 2

100% On-Time Completions
98.21% Resolutions Accepted
17.46% First-Call Resolutions



## Work Order

0% On-Time Completions
0% Scheduled Work Orders



## Service Request

0%
0%



# Future State - Reconfigure the Helix Ticket System

bmchelix
Home
Dashboard
Console
Calendar
Smart Recorder
Create New
Workspaces
Reports
Search
Profile

**Ticket Console**
All Items (filtered)
10 My Tickets
8 Critical Tickets
1 New Ticket
1 Open Ticket
428 All Tickets

**Filter**
My Site
Incident
+ 1 more

Clear Filters
Save as Preset

Create Date	Display Id	Site	Customer Full Na...	Assignee	Summary	Status	Status Reason	Last Modified Date	Last Modified By	Assignee Group	Vendor Ticket Number
May 25, 2023 5:2...	INC001209579153	CalMHSA-Headqu...	Kevin Sullivan		Testing - No action needed	Cancelled	Test Ticket	Jul 28, 2023 12:03...	jstevens	CalMHSA - Level 2	
Oct 3, 2023 2:52:5...	INC001209871098	CalMHSA-Headqu...	ABenedict Test Ac...		This is a test	Cancelled	Test Ticket	Oct 3, 2023 2:54:5...	jmollhagen	Service Desk	
Oct 3, 2023 2:49:3...	INC001209871257	CalMHSA-Headqu...	JMollhagen Test A...		This is a test	Cancelled	Test Ticket	Oct 3, 2023 2:54:2...	jmollhagen	Service Desk	
Nov 3, 2023 4:29:...	INC001209931560	CalMHSA-Headqu...	Kevin Sullivan		Test ticket - This is what the ticket is about	Assigned		Nov 3, 2023 4:30:...	kevin.sullivan@cal...	CalMHSA - Level 2	
Jun 23, 2023 1:27:...	INC001209637758	CalMHSA-Headqu...	Luke Skywalker	Abner Orozco	URL issue	Closed	Automated Resolution Reported	Jul 28, 2023 11:06...	AR_ESCALATOR	Service Desk	
Jun 27, 2023 1:49:...	INC001209643786	CalMHSA-Headqu...	Luke Skywalker	Abner Orozco	CDAG	Closed	Account Permission	Jul 28, 2023 11:49...	vhowell	Service Desk	
Jun 29, 2023 10:1...	INC001209647994	CalMHSA-Headqu...	Luke Skywalker	Abner Orozco	client address	Closed	Automated Resolution Reported	Jul 28, 2023 11:06...	AR_ESCALATOR	Service Desk	
Jun 29, 2023 12:3...	INC001209648474	CalMHSA-Headqu...	Luke Skywalker	Abner Orozco	Request to have SmartCare Password reset	Closed	Training	Jul 28, 2023 11:49...	vhowell	Service Desk	
Jun 29, 2023 12:4...	INC001209648481	CalMHSA-Headqu...	Luke Skywalker	Abner Orozco	Request to have SmartCare Password reset	Closed	Training	Jul 28, 2023 11:49...	vhowell	Service Desk	
Jun 30, 2023 12:0...	INC001209650192	CalMHSA-Headqu...	Luke Skywalker	Abner Orozco	appointment reschedule	Closed	Automated Resolution Reported	Jul 28, 2023 11:06...	AR_ESCALATOR	Service Desk	
Jun 30, 2023 12:4...	INC001209650205	CalMHSA-Headqu...	Kevin Sullivan	Amie Miller	TESTING 6.30.23	Cancelled	Test Ticket	Jul 1, 2023 8:03:5...	charla.rove@cal...	CalMHSA - Level 2	
Jun 30, 2023 10:0...	INC001209649652	CalMHSA-Headqu...	Luke Skywalker	Ammar Akif	smartcare - can't login	Closed	Automated Resolution Reported	Jul 28, 2023 11:06...	AR_ESCALATOR	Service Desk	
Jun 23, 2023 2:15:...	INC001209637221	CalMHSA-Headqu...	Luke Skywalker	Andrew T Huynh	Password Reset	Closed	Account Unlock	Jul 28, 2023 11:50...	vhowell	Service Desk	
Jun 23, 2023 1:27:...	INC001209637681	CalMHSA-Headqu...	Luke Skywalker	Andrew T Huynh	Security Question	Closed	Account Unlock	Jul 28, 2023 11:50...	vhowell	Service Desk	
Jun 26, 2023 1:20:...	INC001209641043	CalMHSA-Headqu...	Luke Skywalker	Andrew T Huynh	Password Reset	Closed	Automated Resolution Reported	Jul 28, 2023 11:06...	AR_ESCALATOR	Service Desk	
Jun 28, 2023 9:32:...	INC001209645209	CalMHSA-Headqu...	Luke Skywalker	Andrew T Huynh	Knowledge Question	Closed	Automated Resolution Reported	Jul 28, 2023 11:06...	AR_ESCALATOR	Service Desk	
Jun 28, 2023 10:1...	INC001209645614	CalMHSA-Headqu...	Luke Skywalker	Andrew T Huynh	Password Reset	Closed	Automated Resolution Reported	Jul 28, 2023 11:06...	AR_ESCALATOR	Service Desk	
Jul 10, 2023 10:15...	INC001209669487	CalMHSA-Headqu...	Kevin Sullivan	Andrew Wagner	Test routing to L2 queue	Resolved	No Further Action Required	Jul 11, 2023 4:21:...	andrew.wagner@...	CalMHSA - Level 2	
Oct 4, 2023 2:24:5...	INC001209873454	CalMHSA-Headqu...	Kevin Sullivan	Angel De La Cruz	Peer Support Certification	Closed	Automated Resolution Reported	Oct 30, 2023 11:3...	jstevens	Service Desk	
Apr 21, 2023 7:05:...	EHR-193	CalMHSA-Headqu...	Jose Nunez	Armando Bastida	Diagnosis is not updating	Resolved	No Further Action Required	Jul 12, 2023 10:43...	ahockett	CalMHSA - Level 2	20182
May 8, 2023 11:5...	EHR-220	CalMHSA-Headqu...	Jose Nunez	Armando Bastida	Targeted Case Management procedure code Error	Resolved	No Further Action Required	Jul 12, 2023 2:07:...	ltwoodbury	CalMHSA - Level 2	21236

Self-help

# Future State - Reconfigure the Helix Ticket System

bmc helix | [Dashboard](#) | [Console](#) | [Calendar](#) | [Smart Recorder](#) | [Create New](#) | [Workspaces](#) | [Reports](#)

## Create Incident Complete fields and "Save" to open incident

**Customer (required)**

**Company (required)**

**Contact**

**Incident Template**

**Summary (required)**

0 / 100

**Impact (required)**

**Status (required)**

**Description**

**Urgency (required)**

**Calculated Priority**

Low

**Incident Type (required)**

**Affected Asset**

**Operational Category**

**Affected Service**

**Product Category (required)**

**Resolution Category**

**Reported Source (required)**

**Resolution Product Category**

**Target Date**

**Assigned To**

None Set

[Assign to me](#)


**Support Group**

None Set

⚠ 5 more required field(s).

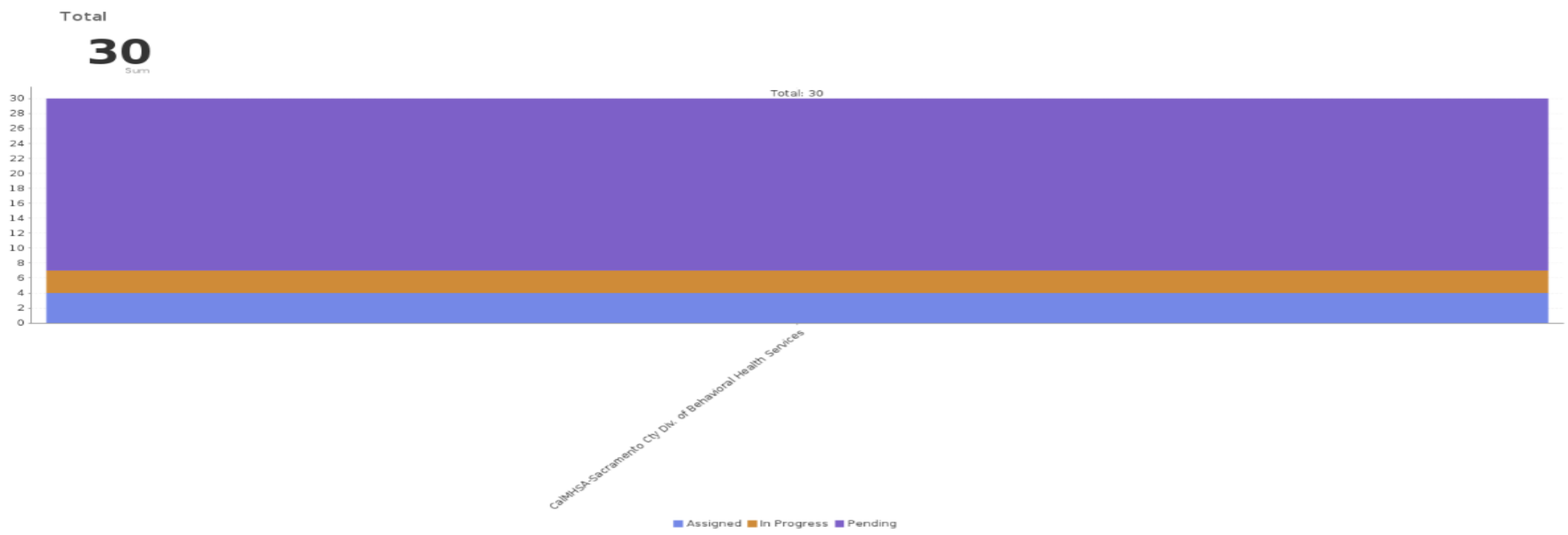
Self-help

# Future State - Reconfigure the Helix Ticket System

 This report is currently being edited and you are viewing the active version. [Click here](#) to access the draft version.

CalMHSA Active Tickets by County for salesforce Active Tickets with No Assignee

CalMHSA Active Tickets by County for salesforce  
 CSV report for export to salesforce

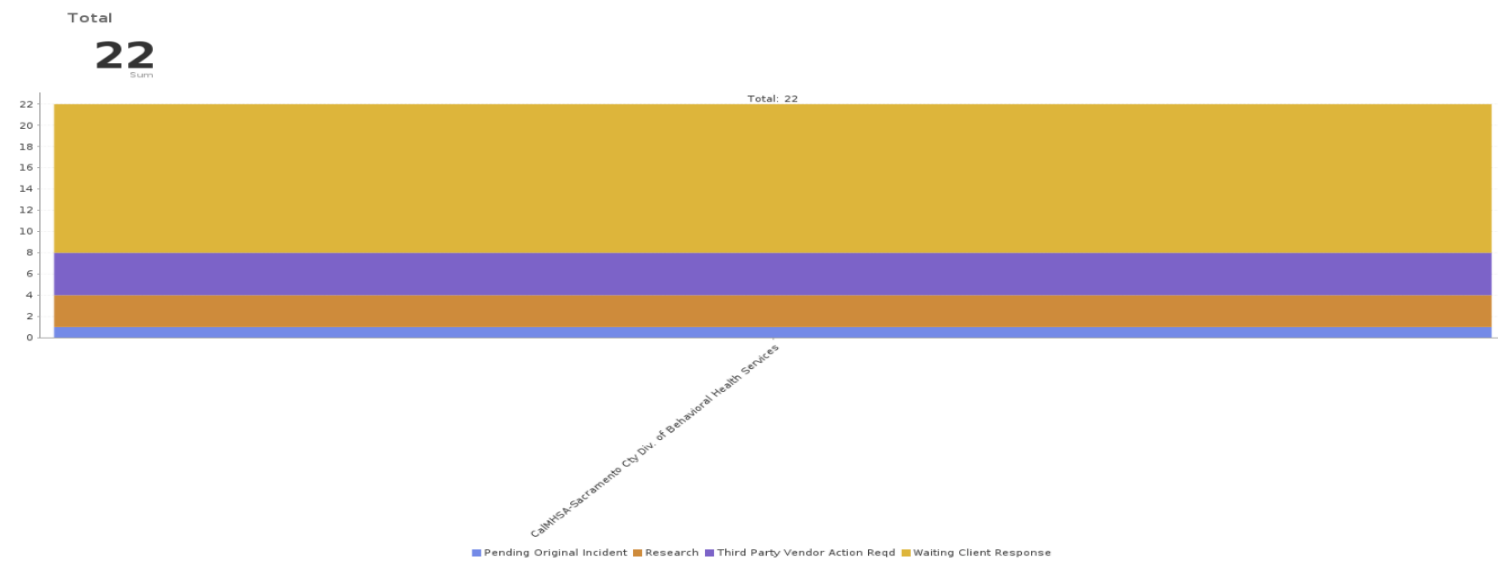


Number of Incidents Site	Status		
	Assigned	In Progress	Pending
CalMHSA-Sacramento Cty Div. of Behavioral Health Services	4	3	23

# Future State - Reconfigure the Helix Ticket System

Pending Tickets by County, Assignee, and Category | Active Tickets with No Assignee

Pending Tickets by County, Assignee, and Category  
Dashboard Widget Report



Site	Assigned Group	Assignee	Status Reason			
			Pending Original Incident	Research	Third Party Vendor Action Req	Waiting Client Response
Billing		Jesus Cruz	0	2	1	0
		Armando Bastida	0	1	0	0
CalMHSA - Level 2		Chris Watson	0	0	0	1
		Kevin Sullivan	0	0	2	0
		Sabrina Caraveo	1	0	0	1
		Chris Watson	0	0	1	0

# Future State - Survey's

- How to stay connected with counties' experience?
  - Working on creating overall helpdesk experience survey
    - We will work to get one out by mid December
    - Then one near Q1 end
  - It is our hope that the new measures we are putting in place will lead to a better overall helpdesk experience

# Topics

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- Issues
- Status of the Helpdesk
- Future State
- **Team Introductions**
- Best Practices

# Team Introductions



- Name: Sabrina Caraveo
- Where you are located: Humboldt, CA
- Job specialty: Supporting the Clinical or Inpatient / Residential category
- Favorite activity: I enjoy volunteering, with my 4-year-old daughter, at our local discovery museum

# Team Introductions



- Name: Chris Watson
- Location: Sacramento, CA
- Job specialty: Rx/Prescribers
- Favorite Activity: Adventurous Walks



# Team Introductions



- Name: Armando Bastida
- Location: Elk Grove, California
- Job specialty: Providing technical troubleshooting, guidance and solutions
- Favorite activity: I love tinkering with cars, there is no better feeling then fixing a problem to an issue I caused

# Team Introductions



- Name: Nereyda Alonso
- Location: Santa Ana, CA
- Job specialty: Systems application Support
- Favorite activity: Dancing, I LOVE to dance!

# Team Introductions



- Name: Andy Henry
- Location: Auburn Hills, Michigan
- Job specialty: Customer Experience and Operations
- Favorite activity: National Parks and local parks with my Greyhound and watching the other dogs try to keep up with him!

# Team Introductions



- Name: Nam Ngo
- Location: Humboldt, CA
- Job specialty: Covering more reporting side of things
- Favorite activity: I love a good story. Whether it is in a book, movie, podcast

# Team Introductions



- Name: LaQuita Williams
- Location: Paramount, Ca
- Job specialty: Implementation Specialist in the Billing department
- Favorite activity: I enjoy playing dominoes, shooting pool, and learning new challenging words that's not used daily.

# Team Introductions



- Name: Ricky Cruz
- Location: Riverside, CA
- Job specialty: State Reporting/ Medical Billing Specialist
- Favorite activity: I like to exercise and cook

# Topics

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- Issues
- Status of the Helpdesk
- Future State
- Team Introductions
- **Best Practices**

# Best Practices

- More Information is better
  - Please provide all needed information to the Level 1 agents
    - It happens for all client's – so I don't need to provide an example – Incorrect
    - If you're the admin, don't forget to provide the info for the actual user
    - Please provide a call back number
      - The sync from SmartCare will draw from your default
  - Reproducibility is critical, any information is good information



# Best Practices

- Please report issues of slowness
  - More information is better – Who, when, screen, client
- Make a good title
  - It helps process / triage tickets
- Don't say its an enhancement unless it is
  - Enhancements are processed over a longer period of time and need vetting
- Be kind to the helpdesk staff
  - Remember they're really trying to help

# Best Practices

- Patience is a virtue
  - We work as quickly as we can
  - Once tickets are with the developers, it will take time
  - Regardless, always feel free to ask for an update
- Resolved tickets
  - You tell us it is resolved
  - After 30 days ‘&’ no reply to 3 contact attempts
    - Note -> ‘Resolved’ tickets are not closed tickets
      - Counties have expressed concern about this

# Thank You

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PRESENTED BY

Kevin Sullivan