


CaIMHSA Helpdesk Overview

PRESENTED BY

Kevin Sullivan
Manager, Support

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



Topics

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

■ Humble

Pie



Level 1 Agent Issues

- 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

- **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

- **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

- **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

- Issues

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

- CalMHSA Action Plan

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

Level 2 Agent Issues

- 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

■ CaIMHSA Action Plan

- CaIMHSA 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

- 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

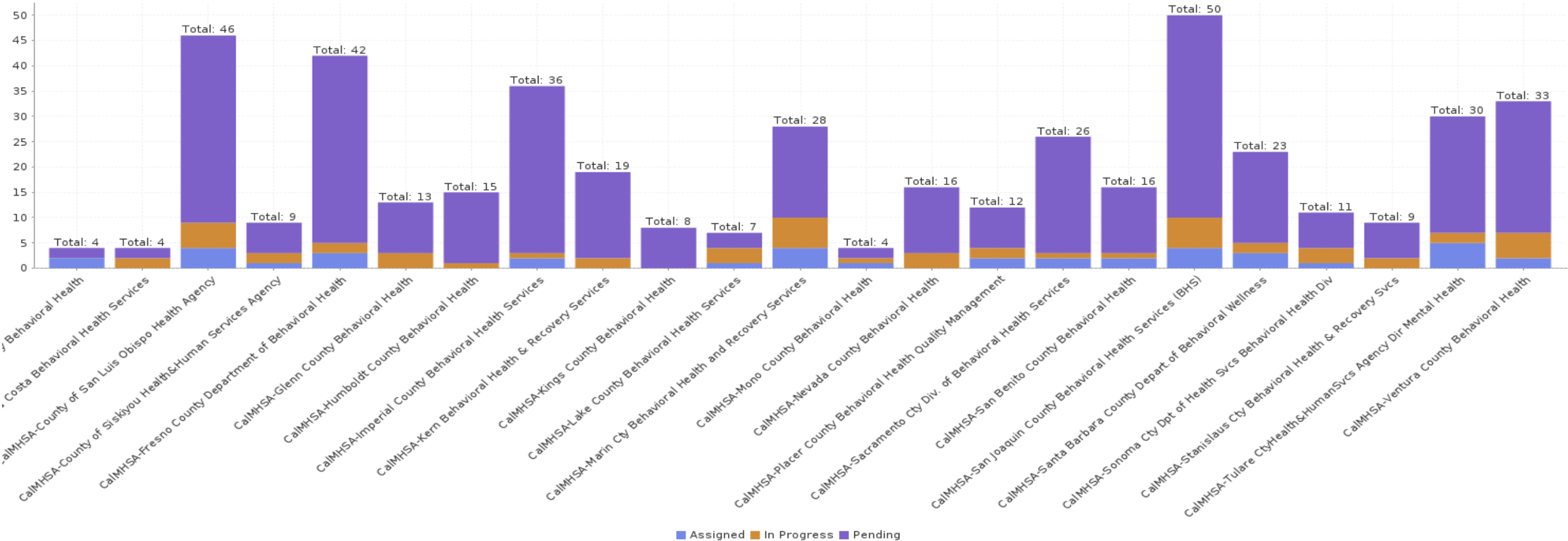
- Ticket Status Reports
 - Report of total open tickets
 - Report of the pending ticket breakdown
 - Aging of open tickets
 - Customer satisfaction Survey summaries

Status of the Helpdesk

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

Total

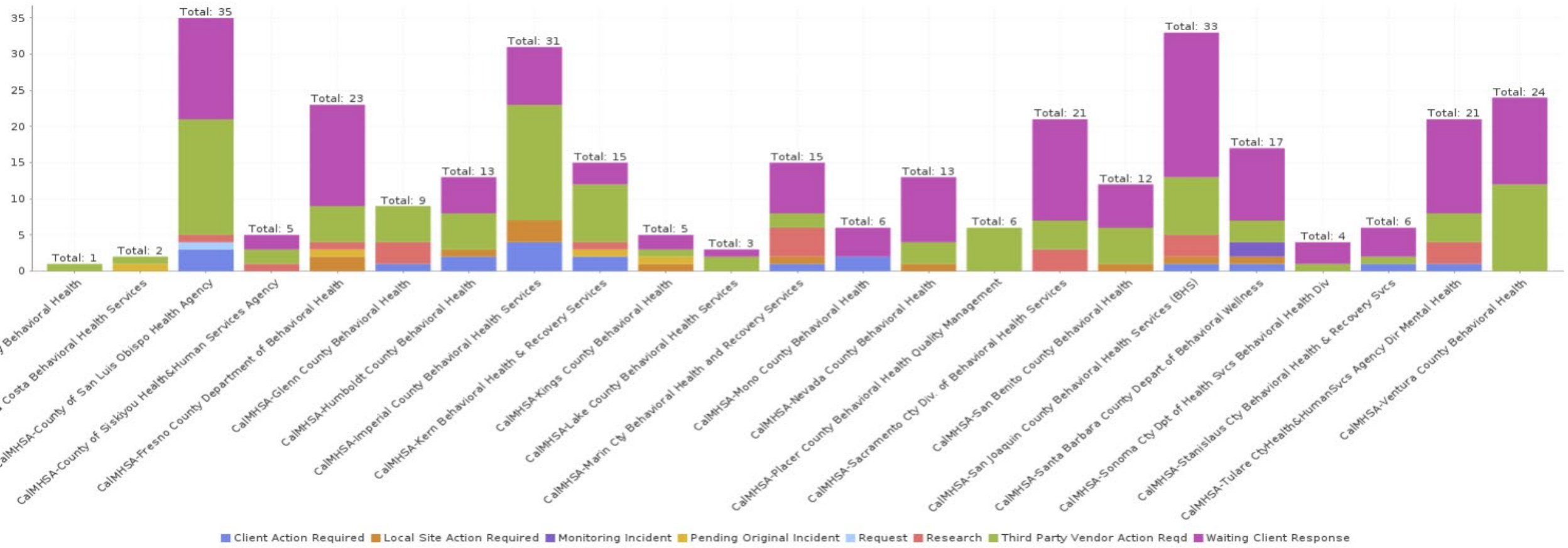
461
Sum



Status of the Helpdesk

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

Total
320
Sum



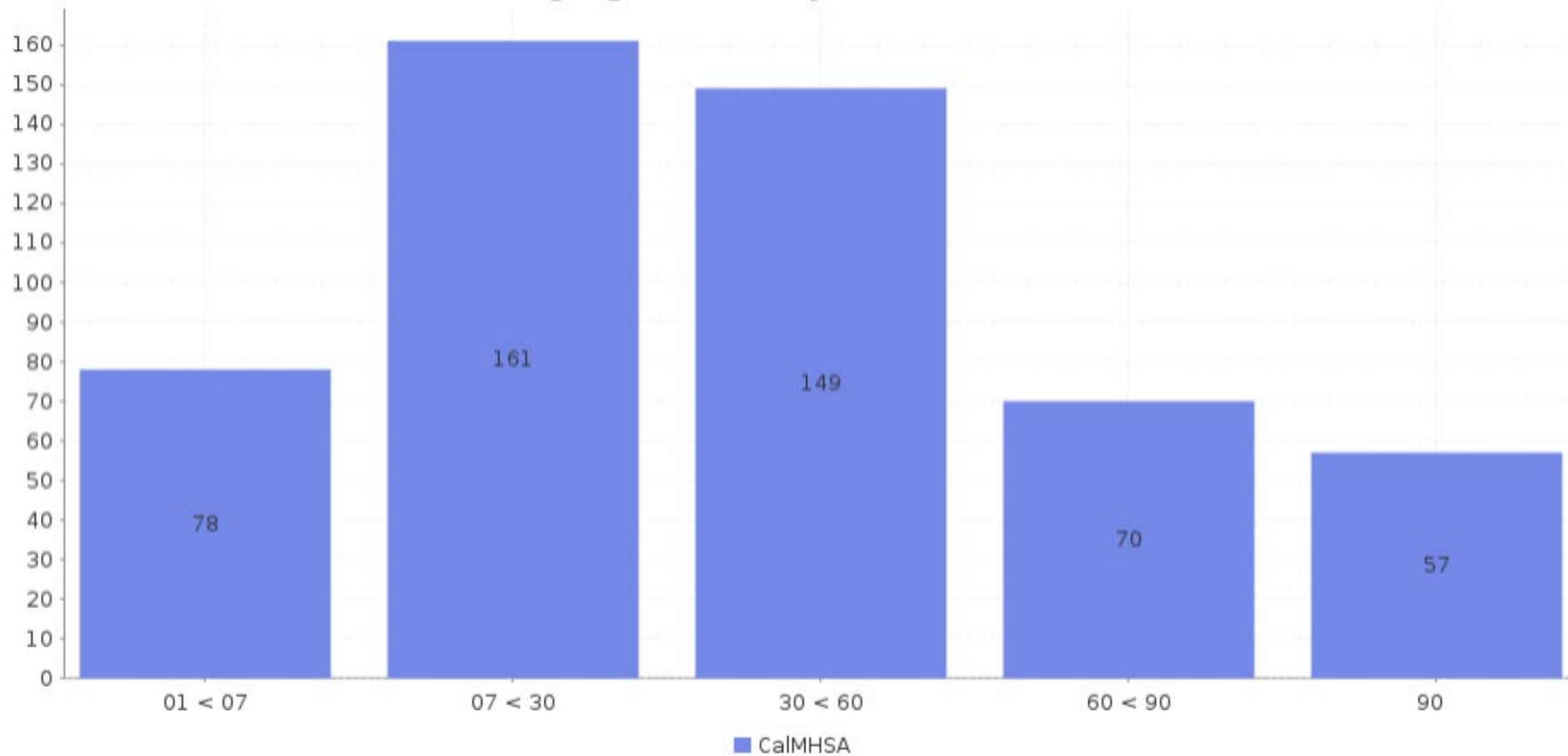
Client Action Required Local Site Action Required Monitoring Incident Pending Original Incident Request Research Third Party Vendor Action Req Waiting Client Response

Status of the Helpdesk

CalMHSA Standard Aging Ticket Report

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

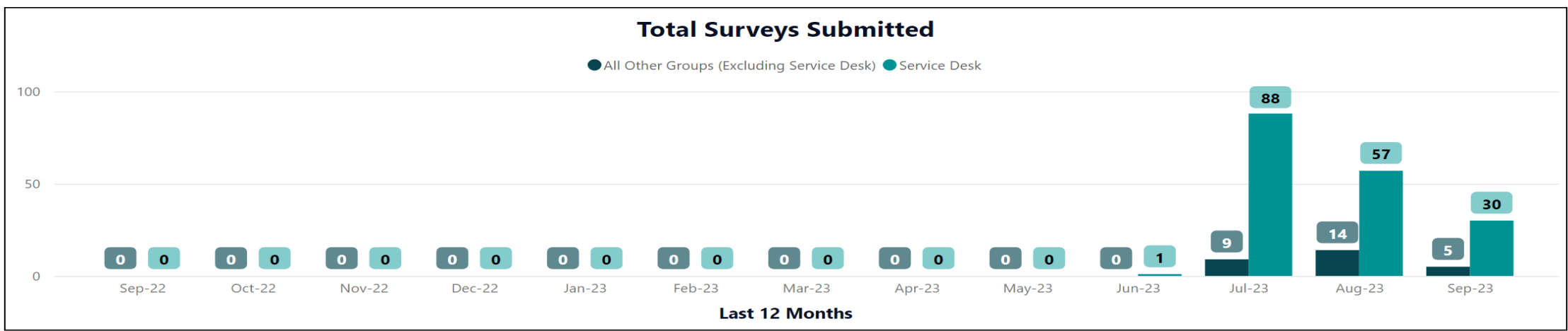
Aging Tickets by Time Frame



| | | | | | | |
|-------|----|-----|-----|----|----|-----|
| Total | 78 | 161 | 149 | 70 | 57 | 515 |
|-------|----|-----|-----|----|----|-----|

Status of the Helpdesk

→ Customer Satisfaction



Topics

- 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

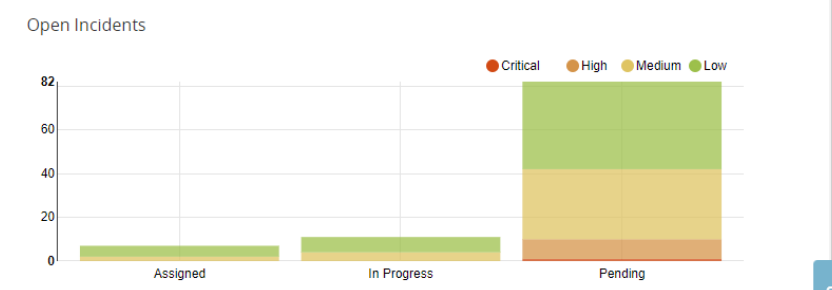
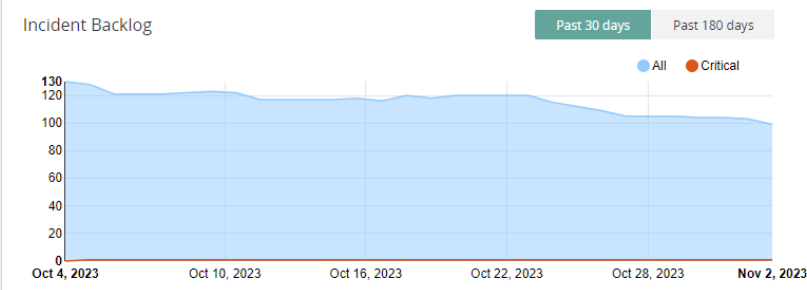
- Updates Following 440 items

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

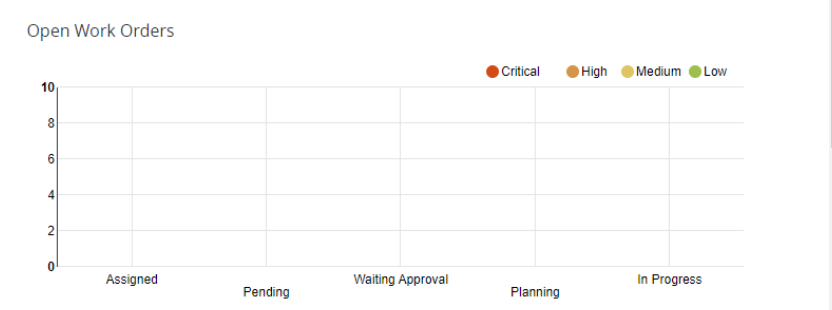
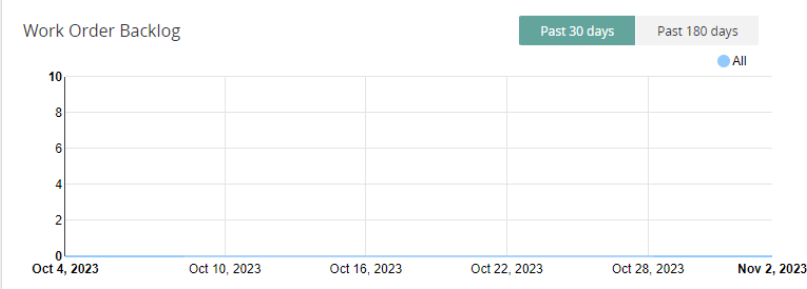
Incident Perspective: CalMHSA - Level 2

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) <input type="text" value="Enter customer name, email, login ID or corporate ID"/> | Company (required) <input type="text" value="Start typing Company name"/> | Contact <input type="text" value="Enter contact name, email, login ID or corporate ID"/> |
| Incident Template <input type="text" value="Start typing the name of a common issue"/> <input type="button" value="Browse All Templates"/> | | |
| Summary (required) <input type="text" value=""/> 0 / 100 | Impact (required) <input type="text" value="4-Minor/Localized"/> | Status (required) <input type="text" value="New"/> |
| Description <input type="text" value=""/> | Urgency (required) <input type="text" value="4-Low"/> | Calculated Priority Low |
| Incident Type (required) <input type="text" value="User Service Restoration"/> | Affected Asset <input type="text" value="Start typing the name of an asset"/> | Operational Category <input type="text" value="Start typing to see matching categories"/> |
| Affected Service <input type="text" value="Start typing the name of a service"/> | Product Category (required) <input type="text" value="Start typing to see matching categories"/> | Resolution Category <input type="text" value="Start typing to see matching categories"/> |
| Reported Source (required) <input type="text" value="Select one"/> | Resolution Product Category <input type="text" value="Start typing to see matching categories"/> | |
| Target Date <input type="text" value=""/> | | |
| Assigned To None Set <input type="button" value="Assign to me"/> | Support Group None Set | |

⚠ 5 more required field(s).

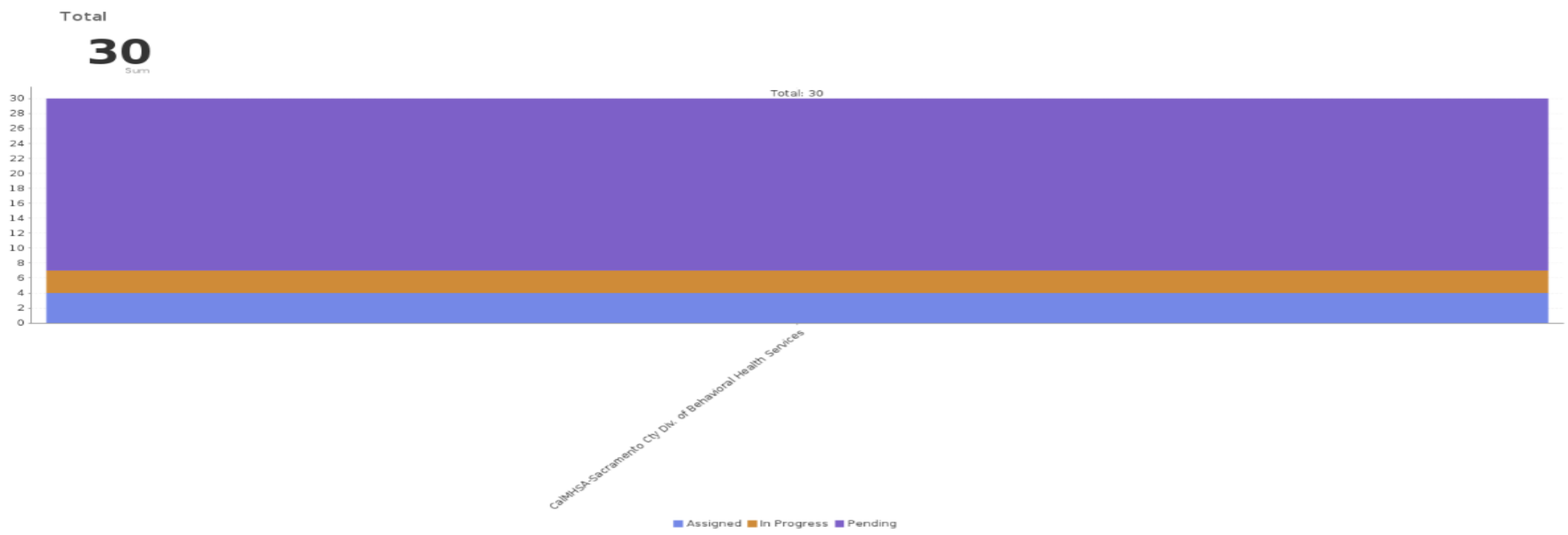
Self-help

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

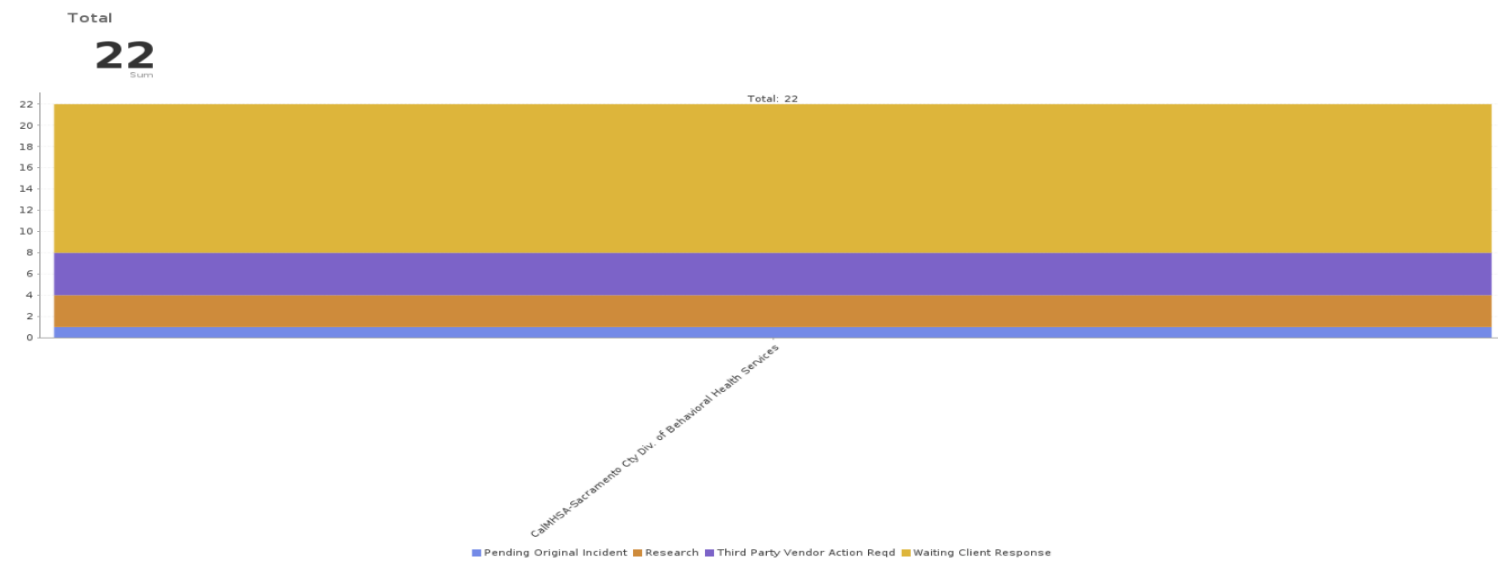


| Number of Incidents Site | Status | | |
|---|----------|-------------|---------|
| | Assigned | In Progress | Pending |
| CalMHSA-Sacramento Cty Div. of Behavioral Health Services | 4 | 3 | 23 |

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 |
| CaIMHSA - 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

- 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

- 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

PRESENTED BY

Kevin Sullivan