ePAY Portal Ticket Management Overview

January 15, 2020 | v2.2

Contents

Any support or requests should result in a ticket being created in the ePAY Portal. These tickets can be created and by a Participant, Chicago Light House, ePAY, or NCR and will be tracked through completion.

Ticket Tiers

There are three different tiers of tickets submitted via the ePAY Portal:

Tier 1

- General and "How To" Support

Tier 2

- Aged tickets, maintenance requested, merchant down from processing.
- Sent to an escalation queue for priority handling.
- Worked by a Subject Matter Expert (SME).

Tier 3

- Immediate action required, usually related to a system outage.
- If outage is confirmed, then the Outage Communication plan is initiated.

Opening a Ticket

When opening a ticket for a participant, the following items must be included:

- Who is making a request
- What is being requested
- If reporting an error or issue
- Examples/screenshots (if available)
- When error(s) occurred
- Contact info for follow up

Once a ticket has been opened for a participant, the guidelines for any escalation or resolution are as follows:

- Any efforts or research that is done to resolve the ticket should be added to the ticket notes.
- Any contact/follow up with clients should be documented.
- Any documentation or file regarding research conducted should be attached in the ticket.
- Every person making a note should add their initials to the notes before saving them.

Ticket Notifications

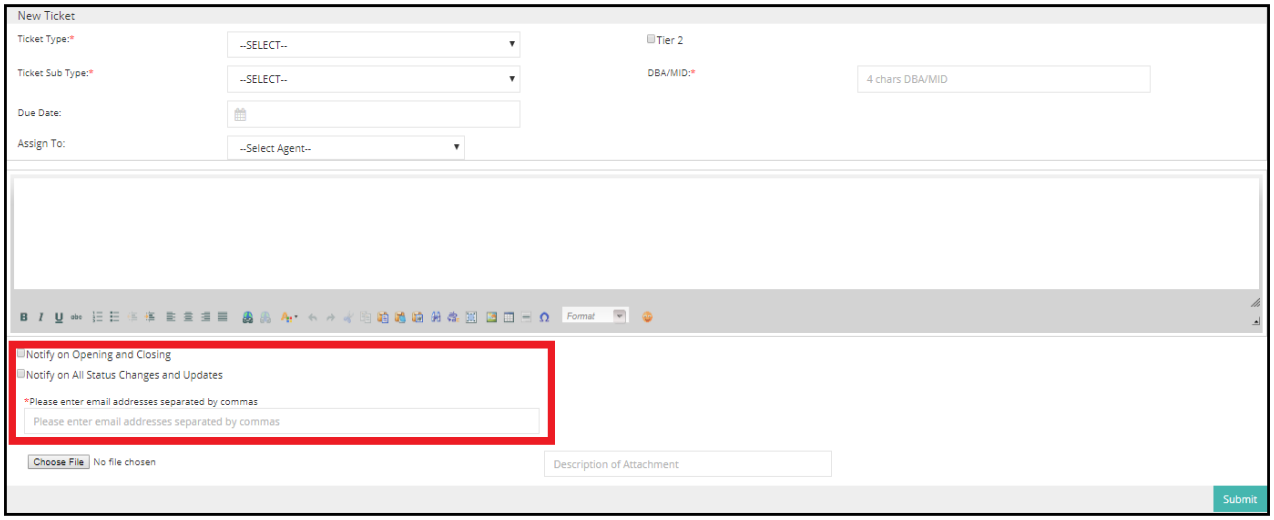
When creating a ticket, the submitter may elect 1 of 3 options for receiving notifications regarding the ticket. A user may change their notification election as well as add or remove email addresses of recipients at any time

Notification Types

- No Notifications
  If no notifications are desired, then no selection will need to be made regarding the email notification options.

- Notify on Opening and Closing
  This selection will send an email notification to all specified email addresses upon the ticket being created and when the ticket is closed with one of the applicable resolution statuses.

- Notify on All Status Changes and Updates
  This selection will send an email notification to all specified email addresses upon the ticket being created, any status change, any notations added, and when the ticket is [closed with of the applicable resolution statuses].



Ticket Notification Email Addresses

If either of the email notification options is selected, the ticket submitter will not be able to successfully generate the ticket without at least one valid email address being entered. If Submit is clicked, one of the two email notification options is selected, and a valid email address is not entered, the submitter will receive an error either stating to enter and email address or that the address entered is not in a valid format.

Notification Contents

Depending on the notification election, the email addresses entered could receive 2 or all the notification types below. All Notifications contain the ticket ID, DBA/MID, and status in the subject line.

Opening

This is sent once the ticket has been successfully submitted and created. This notification includes:

- Ticket ID
- DBA/MID
- Ticket Type
- Ticket Subtype
- Description (This is what is written in the body of the ticket by the submitter)

Updates

This type of notification is sent when a user clicks submit after the ticket is created. This means that the specified email addresses will be sent a notification if the status of the ticket is changed, a note is added, or both. Contents included are:

- Ticket ID
- Status
- Update (This is what is written in the body of the ticket after a ticket has been created)

Closing

This notification 's contents are the same as the Updates notification and is sent when the status is changed to one of the following statuses:

- Resolved
- Duplicate
- Closed_No_Response
- Closed_Opened_In_Error
- Completed_No_Action_Required

Ticket Transitions

Ensuring that Participant requests and support are addressed timely and effectively requires coordination and cooperation between multiple teams. What follows is the typical transition of ownership for a Tier 1 ticket.

- A ticket is created by the Participant, Chicago Light House (CLH), ePAY, or NCR.
- NCR Customer Service Representative (CSR) will examine the ticket queue for tickets with a status of Open, Pending Internal, and Assigned (with no owner).
    - This means it is presumed that tickets with statuses other than what is specified above will not be examined by NCR CSR.
- NCR CSR will assign tickets without an owner and the owner will be responsible for next steps or resolution.
- A ticket may be transitioned to multiple parties throughout its life as multiple parties may be needed to address/execute aspects that contribute to completion of the ticket.

Escalation to Tier 2

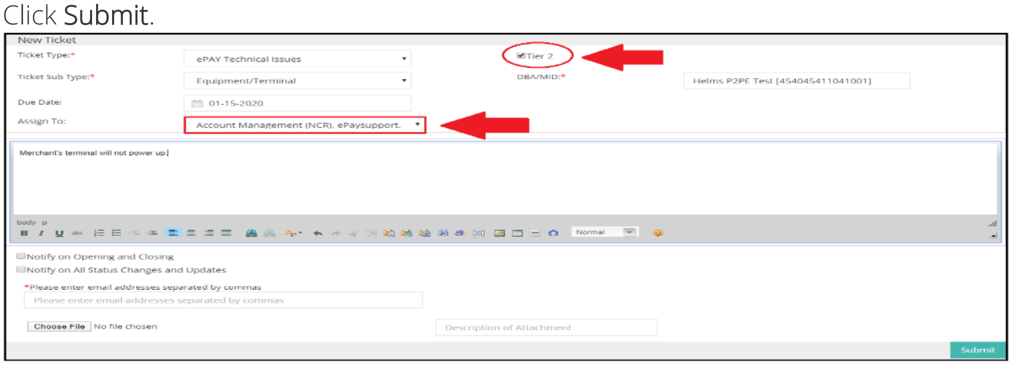
A Tier 1 ticket may be escalated to a Tier 2 when:

- A manager is requested for support.
- Customer Service Representative (CSR) is unable to complete/resolve request.
- Ticket age exceeds 5 days.

How to Escalate to Tier 2

Should a ticket qualify for Tier 2 escalation:

- ePAY PSS team member will escalate to ePAY Management for evaluation of the ticket.
- If ePAY Management determines that Tier 2 escalation is required for the ticket:
    - Enter the ePAY Portal and select Ticketing.
    - Find and access the ticket needing escalation.
        - If escalating and the ticket has yet to be created, please follow the same steps when creating to ensure Tier 2 escalation is successful.
    - Click the box next to "Tier 2" to check.
    - Select the Account Management (NCR) user for "Assign To".
    - Click Submit.



- Automated email notifications will be sent to applicable NCR teams, including Account Management.
- Account Management will assess the needs of the ticket and either address or assign to applicable group or person.

Closing a Ticket

- Ensure all notes pertaining to resolution are included in the ticket
- Ensure Setup Tab is updated (if applicable).
- Tickets should be marked pending confirmation until the client confirms the issue is resolved or 3 days from when the ticket was updated as pending confirmation.
  - Ticket owner should email or call the client at least twice during the 3 days wait time requesting confirmation. Emails and calls should be noted on the ticket.
- Receive/document confirmation on user acceptance prior to updating the ticket to resolve.
  - If there is no response after 3 days, the ticket will be marked closed/no response.

Version Control Table

Version Number	Date Issued	Author	Updated Information
2.1	10/02/19	George, Randy	First published version.
2.2	01/15/20	George, Randy	Added **Escalation to Tier 2** section.
			Added **How to Escalate to Tier 2** process.
			Added **Closing a Ticket** section.