ePAY Portal Ticket Type: ePAY Account Information /Maintenance Request

March 30, 2020 | v2.2

Contents

ePAY Account Information/Maintenance Request

This Ticket Type and its Subtypes are meant to address various inquiries, as well as address maintenance for individuals that access Dashboard or the ePAY Portal.

Ticket Subtypes

Password Reset

Description
This Subtype is used if a user of the Dashboard or the ePAY Portal needs their password reset for either entity.

SLO (Business Hours)
<48

Closed By
NCR, Chicago Light House

Workflow
***The following information may also be found in the document Password Reset: ePAY Portal and Dashboard.

Dashboard
If this Ticket Type/Subtype is submitted, there are two paths to resolution that may be taken.

Direct User to Self-Service Option
A user may simply click on "I forgot my password" on the screen they would normally enter their username and password. After clicking, the user will be directed to enter their username and then they will receive an email with directions to reset their Dashboard password.
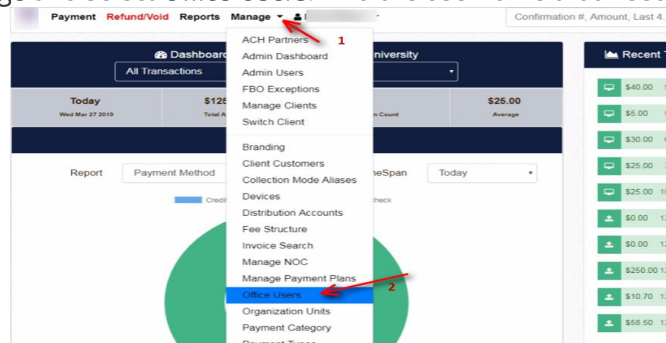

If the user is directed to the self-service option, the ticket should be noted accordingly and closed as Resolved.

Administrative User Reset
Any Administrative User may reset the password for the user in need.
In Dashboard, hover over **Manage** and select **Office Users**. Find the username that needs the password updated.

Once the username is identified, click **Change Password**. You will enter a new password and then be asked to re-enter the password before saving.

					Last Modified	+ Create a New User		Total Results: 44
Display Name	Login Name	Status	Role	Organization Unit				
Seehafer	aseehafer	Active	Customer Service Representative	Confer	3/11/2019	✎ Edit User	🔍 Change Password	⊘ Deactivate
Weglarczyk	aweglarczyk	Active	Customer Service Representative	Confer	3/11/2019	✎ Edit User	🔍 Change Password	⊘ Deactivate
Hartman	ahartman	Active	Client Administrator		1/11/2019	✎ Edit User	🔍 Change Password	⊘ Deactivate

Once the user logs in with the new password, they will be prompted to change it.

If a NCR, ePAY, or Chicago Light House (CLH) Administrative User changes the password via the steps previously described:

- NCR/ePAY/CLH team member changes the password.
- NCR/ePAY/CLH team member notifies user of new password.
- NCR/ePAY/CLH team member notes the ticket accordingly and closes the ticket.

ePAY Portal

Direct User to Self-Service Option
For an ePAY Portal password reset request, the password may **only** be reset by the user clicking "Forgot Password?" from the login screen.
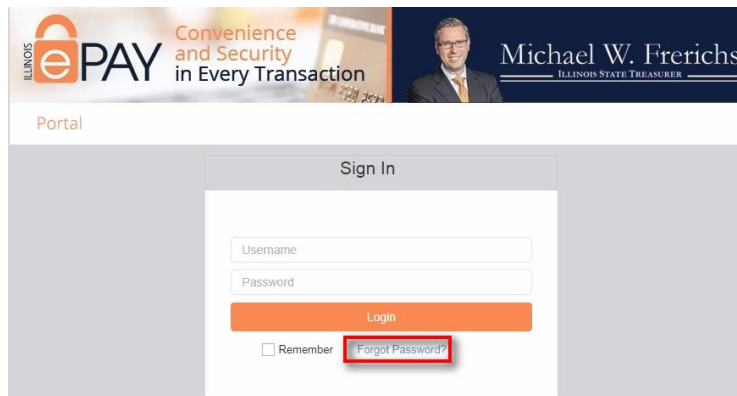
If NCR/ePAY/CLH team receives this Ticket Type/Subtype and the request is for an ePAY Portal password reset, then:

- NCR/ePAY/CLH contacts user and provides self-service instructions.
- NCR/ePAY/CLH notes ticket accordingly and closes.

Update Users

Description
A user might need to be added, have their information updated, or be deactivated in Dashboard, the ePAY Portal, or both.
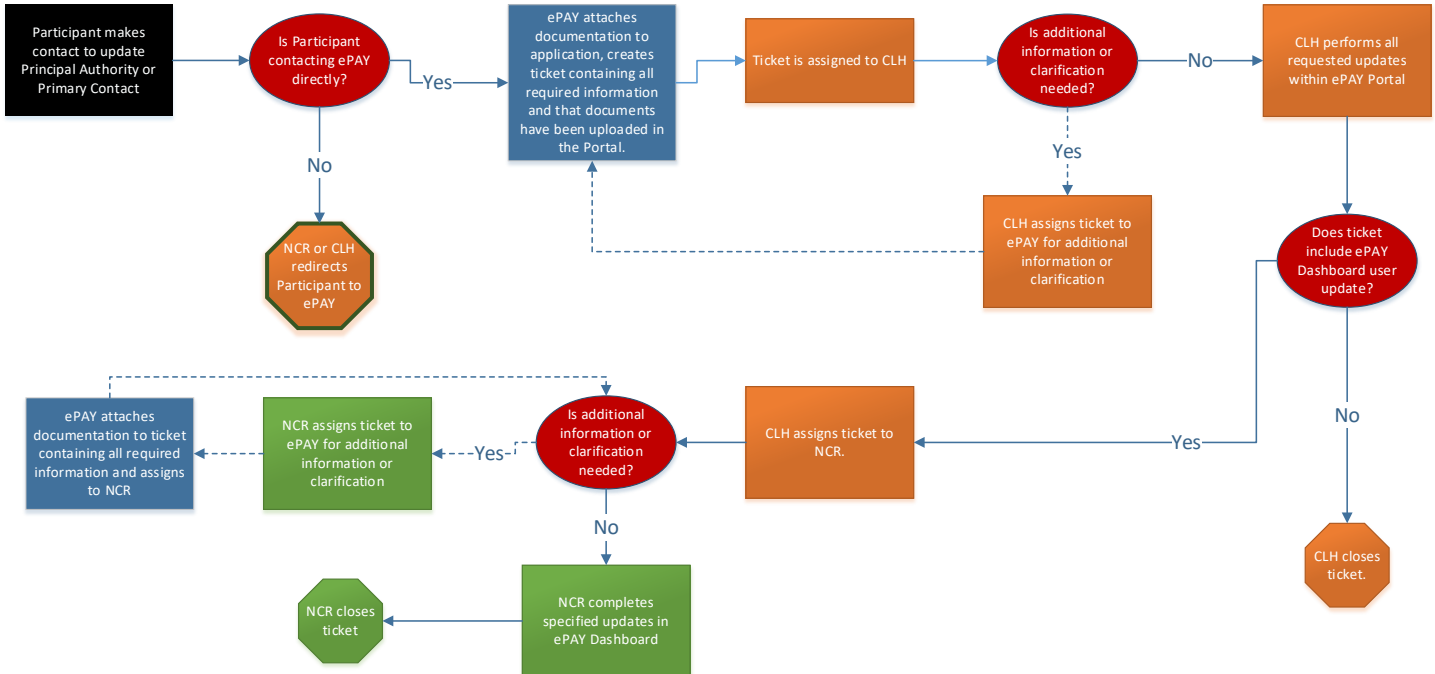
SLO (Business Hours)
<48

Closed By

NCR

Workflow

***The following information may also be found in the document ePAY Portal Users and Contact Types.

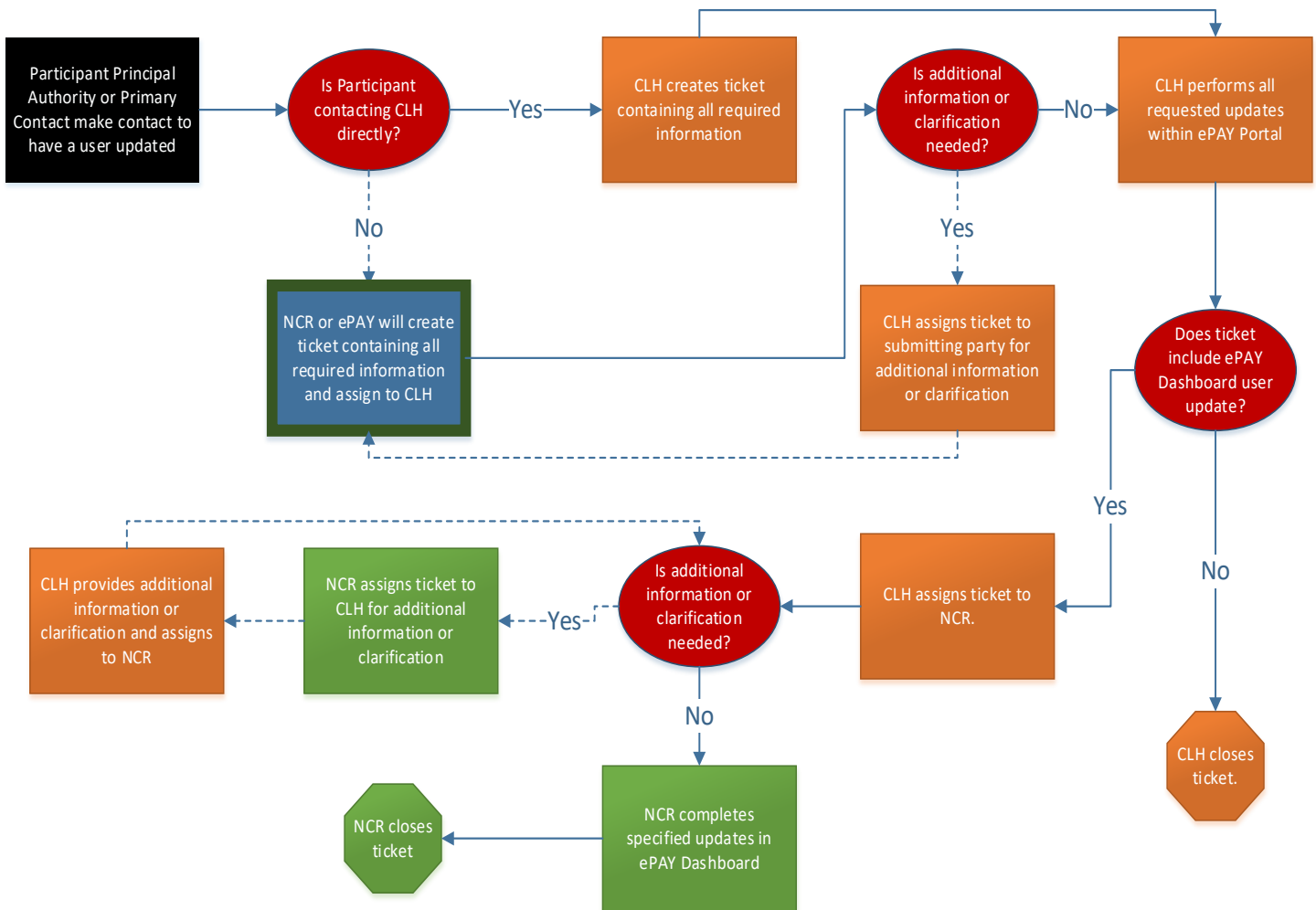### Updating Principal Authority or Primary Contact

Participant makes contact to add/update/deactivate a Principal Authority or Primary Contact.

- Is Participant contacting ePAY team directly?
  - o No – This means that the Participant is contacting NCR or The Chicago Light House (CLH). NCR or CLH should redirect the Participant to ePAY team.
  - o Yes – ePAY team will acquire required documentation, attach documents to the application in the Portal, and create a ticket stating changes needed and that the required documentation is saved in the Attachment tab. The ticket will be assigned to CLH.
    - ▪ ePAY team will update the Principal/Primary in Salesforce at the account level.
    - ▪ ePAY team will also update ePAY Salesforce by linking any old/previous contact to the Salesforce **Generic Account**.
- CLH will perform all updates requested within the ePAY Portal.
  - o Is a user to be added or updated in ePAY Dashboard?
    - ▪ No – CLH closes ticket
    - ▪ Yes – CLH will assign ticket to NCR for completion of the ePAY Dashboard user update.
      - • NCR will update ePAY Dashboard as requested and close ticket.

***NOTE: If CLH or NCR have inquiries, need additional information, or clarification regarding the request, then CLH or NCR will reassign ticket back to ePAY team until request is complete and clear.

Updating Contact Types (Not Principal Authority or Primary Contact)

Participant Principal Authority or Primary Contact makes contact to add/update/deactivate a user.

- Is Participant contacting CLH directly?
  - o No – Contacted parties from NCR or CLH to create a ticket containing all required information and assign to CLH.
  - o Yes – CLH to create ticket containing all required information.
- CLH will perform all updates requested within the ePAY Portal.
  - o Is a user to be added to ePAY Dashboard?
    - ▪ No – CLH closes ticket.
    - ▪ Yes – CLH will assign ticket to NCR for completion of the ePAY Dashboard user update.
      - • NCR will update ePAY Dashboard as requested and close ticket.

***NOTE:** If CLH or NCR have inquiries, need additional information, or clarification regarding the request, then CLH or NCR will reassign ticket back to submitter until request is complete and clear.

Return Check Questions

Description
Participant has questions pertaining to a returned check.

SLO (Business Hours)
<48

Closed By
NCR

Workflow
Participant initiates contact regarding a returned check.
- How did the Participant initiate contact?
  - Submitted ticket directly through the ePAY Portal – that ticket type is directly routed to NCR.
  - Contacted ePAY, Chicago Light House, or NCR – Contacted party gathers all inquiry information, Participant contact information, and then submits ticket that is routed to NCR.
- NCR analyzes inquiry to determine actions that would result in satisfying the Participant. This includes but is not limited to researching in varying system entities, contacting parties internally and externally, and utilizing all available resources.
- NCR provides Participant with information resulting in satisfying the inquiry.
- NCR closes ticket.

General Inquiries

Description
Participant has inquiry regarding anything pertaining to their ePAY account.

SLO (Business Hours)
N/A

Closed By
CLH, NCR

Workflow
Participant initiates contact with general inquiry
- How did the Participant initiate contact?
  - Submitted ticket directly through the ePAY Portal – that ticket type is directly routed to CLH.
  - Contacted ePAY, Chicago Light House, or NCR – Contacted party gathers all inquiry information, Participant contact information, and then submits ticket that is routed to CLH.
- CLH attempts to address inquiry.
  - Does the Participant's inquiry need to be escalated to be addressed fully?
    - No – CLH addresses inquiries with Participant and closes ticket.
    - Yes – CLH escalates ticket to either NCR or ePAY.
      - NCR or ePAY addresses inquiries with Participant and closes ticket.

Other

Description

This Subtype is utilized when no other Subtype accurately reflects the Participant request.

SLO (Business Hours)

N/A

Closed By

NCR, ePAY, or CLH

Workflow

Since this Ticket Type/Subtype could be submitted by a Participant or internal team member for any number of reasons, there is no specific workflow for this Ticket Type/Subtype. If submitting party determines that this Ticket Type/Subtype is the most appropriate selection, then the resulting ticket should be analyzed by the receiving party and act accordingly.