

## QualityNet | CCSQ ServiceNow

servicenow.

April 19, 2024

# CCSQ ServiceNow: Case-Centric Support Process Implementation

Affected Customers: CCSQ ServiceNow Platform Customers

On April 25, 2024, at 8:30 PM ET, CCSQ ServiceNow will implement the Case-Centric Support Process.

This update will improve the coordination between Service Center agents and ADOs as well as the overall customer experience as it relates to creating and resolving customer Cases and Incidents. This is being accomplished by automating status updates and creating transparency of work notes and comments made on both the Case and Incident.

Customers can expect new functionality with this process improvement, including:

#### **Improved Customer Experience**

After the update on April 25, 2024, at 8:30 PM ET, CCSQ Support Central customers will only receive email notifications on their Cases. This will eliminate the customer confusion caused by receiving multiple email notifications when their Cases and Incidents for the same issue were opened and closed.

#### Create an Incident from a Case

When a customer calls the CCSQ ServiceNow Service Center, the Service Center Agent will be able to create an incident directly from the case.

- The Case will be updated automatically to reflect:
  - 'Awaiting info' as the State.
  - o 'Awaiting Internal/System Info' as the Awaiting Info Reason.

Case CS2181918 View: Agent*			0 +		Follow	Close Case	Update	Save	Copy Case	Reopen Case	Repor	t Knowledg	e Gap 👌 🔶
Timeline - Began 2 minutes ago - Updated	1 minute ago												1 minute With Agent
•	•											-	1 minute With Customer
Number ③	C52181918				Opened (MM	/dd/yyyyy hh:mm:	ss a) 03	3/29/2024	02:42:46 PM				
* Contact ③	Ann Smith Q	6				Opene	d by A	nn Smith				>	- 1
Outreach Opt In Program(s)	A					Cha	nnel P	hone			~		- 1
Outreach Opt-Out				*	Knowledge/1	fechnical Ability L	evel Ir	ntermediat	e		•		- 1
New Contact						Role Rel							
* Primary Line of Business (LOB) ③	HIDS Internal					s	itate Av	waiting Inf	2				
* Program	DEL				* Aw	aiting Info Reaso	n 🗇 🛛 A	waiting In	ernal/System I	nfo	~		
* Contact Type ③	Hospitals Staff 🗸 🗸					* Priorit	y 🗇 🛛 4	- Low			~		
* Participation Options ③	IPFQR ¥				*	Assignment group	p 🗇 🛛 SC	C HQR Inb	ound	0	2		
* Account ③	ARA Ludlow Dialysi	0				Assigned to	0 🔿 🗛	nn Smith		(	14		
								~					

• Service Center SLAs for the Case will pause automatically while the assigned ADO is working on the incident.

#### **Incident and Case Resolution**

Incident and Case resolution updates require the Agent's review and intervention.

- Once the assigned ADO resolves the Incident, the 'State' on the Case will be updated automatically to Open. Additionally, the Action Status will reflect 'Needs attention' to alert the assigned Service Center Agent that action is required to resolve the Case (and follow up with the customer if needed).
  - o SLAs will resume once the Case moves back to an 'Open' State.

Case CS2181918 View: Agent*	@ * Z	Follow	Close Case	Update Save	Copy Case	Propose Solution	Report Knowledge Gap	Request Info	Resolve As SPAM
Timeline - Began 27 minutes ago - Update	d 21 minutes ago								24 minutes
• • •									With Agent 4 minutes
						Ann Smith; moved C 3 minutes ago	ase to Open		With Customer
Number ③	CS2181918			Opened (MM/dd/		US/ZY/ZUZ4 UZ:4	2:40 PM		I
* Contact 💿	Ann.Smith Q	60			Opened by	Ann Smith		0	I
Outreach Opt In Program(s)	A				Channel	Phone		~	
Outreach Opt-Out				* Knowledge/Tech	nical Ability Level	Intermediate		~	
New Contact					Role Related				
* Primary Line of Business (LOB) 💿	HIDS Internal				State	Open			
* Program	DEL				* Priority 🕖	4 - Low		~	
* Contact Type ⊘	Hospitals Staff 🗸 🗸			* Ass	gnment group 💿	SC HQR Inbound		20	
* Participation Options ③	IPFQR ¥				Assigned to ③	Ann Smith		2 80	
* Account ③	ARA Ludlow Dialysi Q				Subject	- A			

• There will be direct linkage in the Case form 'Related Records' tab to show the relationship between the Case and Incident.

Case CS2181918 View: Agent*		0 * =	Follow	Close Case L	Jpdate Sav	e Copy Case	Reopen Case	Report Knowledge Gap
* Category 🔊	HQR 🗸							I
* Subcategory ②	Add							
Resolved by								
* Short description(customer visible)	Testing short desc							
$\star$ Description(customer visible) $\odot$	testing full desc							
Notes Related Records Closure Info	ormation							
Notes Related Records Closure Info Outside Incident Number				Change Request	0			٩
				Change Request				۵ ۵
Outside Incident Number	INC0220803 Q 0							
Outside Incident Number Incident ③	(mc0220803 Q) (0)							
Outside Incident Number Incident ③ Problem ③	(mc0220803 Q) (0)							

• There will be direct linkage in the Incident form 'Closure Information' tab to show the relationship between the Incident and Case.

First Call Resolve	d ··· None ···	~		F	Resolved by Ann	Smith	0	
* Resolve code 0	Workaround	~	Res			5/2024 09:10:12 AN	1	
* Resolve Note (Customer visible) 🔇	resolved				_			
adate Save Close Incident ated Links wSLATimeline fected Cls Child Incidents Incide	nt Tasks Oustomer Cases (1)	Task SLås (11) Time W	nried					
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ated Links vSLA Timeline fected Cls Child Incidents Incide = V for text - Sea cident = INC0220803		Task SLAs (11) Time W		Product	Priority	Assigned to	- Actions on selected rows Major case state	V New Edit_

• The close code 'Resolved (Escalated to Incident)' on the Case form will be removed as a selection since the Case will no longer close immediately when Incidents are created.

#### **Colored Case 'Action Status' Indicators**

New color case indicators are related to the 'Action Status' for easier visual identification.

- **Blue** indicator (Needs attention) means action is needed by an Agent. When the incident is resolved by the assigned ADO, the related Case 'Action Status' automatically changes to 'Needs attention' and are waiting for Service Center input or review.
- **Red** indicator means the Case is blocked. A red indicator highlights Cases that are blocked, such as Cases that have open related task records or are waiting for customer feedback. Blocked Cases can have the following status:
  - o Blocked internally
  - Blocked by customer
  - Blocked internally and by customer

#### **Case Action Status Platform List**

Number	Short description	Action status	State
CS0001094	Router connection not stable	Needs attention	○ New
CS0001003	Dashboard page not loading post upgrade	Needs attention	Open
CS0001097	Loud noise from router	<ul> <li>Blocked internally</li> </ul>	Open
CS0001014	Analytics Suite Blackout	Needs attention	<ul> <li>Awaiting</li> </ul>

**Case Action Status Workspace List** 

Number	Short description	Action status	State
CS0001094	Router connection not stable	Needs attention	New
CS0001003	Dashboard page not loading post upgrade	Needs attention	Open
CS0001097	Loud noise from router	Blocked internally	Open
CS0001014	Analytics Suite Blackout	Needs attention	Awaiting Info

#### Comment and Work Notes Visibility in ServiceNow and Jira

The 'Additional Comments (Customer visible)' field and 'Work notes' field (visible internally only) will be shared between the Case and Incident (bi-directional).

Case CS2181918 View: Agent*	🖌 🗸 🕫 🚥 Follow Close Case Update Save Copy Case Propose Solution Report Knowledge Gap Request Info Resolve As SPAM	
Additional comments (Customer visible)	Additional comments (Customer visible)	4
Work notes	Work notes	
	Post	ļ
Activities: 10	AS Ann Smith Additional comments • 03/29/2024 02:50:27 Pr4	
	AS Ahn Smith Work notes • 03/29/2024 02:50:27 PH Work notes • 03/29/2024 02:50:27 PH Work notes • 03/29/2024 02:50:27 PH	l
	Adj Ann Smith Additional comments + 03/29/2024 02:49:10 PM Testing additional comment	ŀ
	As An Smith Worknotes • 03/29/2024 02:49:10 PM Testing Work notes	L.
		-

< = Incident INC0220803	-	🖉 🌾 🙃 🔽 Follow	date Sa	Resolve As SPAM
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		As Ann Smith Worknotes • 03/29/2024 02:50:27 PM Work note from Inc		
		Additional comments • 05/25/2024 02.49.11 PM Testing additional comment		
		As Ann Smith Worknotes • 03/29/2024 02:49:11 PM Testing Work notes		
		AS Ann Smith Field durges + 03/29/2024 02.45.36 PM Category Hotwork Subcategory Monitoring		

### IMPORTANT NOTES

- (Only applies to ADOs with Jira Integration) Any comments entered in the 'ServiceNow INC Customer Visible Notes' field in JIRA will flow to the Additional Comments section of the Incident and Case in ServiceNow and will trigger an email notification to the customer containing those notes.
- WorkNotes from Jira will also be sent to the Incident and Case in ServiceNow but will remain internal use only.

ServiceNow INC WorkNotes	ServiceNow INC WorkNotes *Required Field	
ServiceNow INC Customer Visible Notes	ServiceNow INC Customer Visible Notes	

If you need additional information, contact us:

Phone: 1-866-288-8914 Slack: <u>#help-service-center-sos</u> Save time. Submit and Track your ticket!

Email: <u>ServiceCenterSOS@cms.hhs.gov</u>

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