

How to Create a general Client Services Ticket

Two ways to create a ticket

1. Quick Links>>Client Services Request
 - a. Click Create Ticket Button

A screenshot of a web application interface. On the left is a sidebar menu with 'Client Services Request' highlighted in a red box. The main area shows a form for a patient named 'Zztest, Baby11'. A modal dialog titled 'Client Services Request' is open, containing buttons for 'Request Supplies', 'Create Ticket' (pointed to by a red arrow), 'My Past Requests', and 'Cancel'. Below the modal are 'Save Patient' and 'Create Ticket' buttons.

2. From a specific order:
 - a. Search for an existing order, right click on the order and select Review Order.

A screenshot of an order list. The order ID '4044-HL-20205' is highlighted. A 'Review Order' button is shown with a mouse cursor hovering over it. Below the order ID is a 'Show 20 Samples' button.

 - b. On the order screen click the Create Ticket button. (The order must be saved before this button is enabled.)

A screenshot of the 'Order Details' page for patient 'Zztest, Baby11'. The order ID is '42254-on-22363' and the status is 'NO RESULTS'. The 'Create Ticket' button at the bottom is highlighted with a red box. The page includes a sidebar, a header with patient information, and a main form area with various fields for order details and demographics.

Examples of why you would submit a general ticket

1. You have a question or an issue.
2. You discover an issue with an order that needs investigation/resolution (something that needs immediate attention still needs to be handled with a phone call).
3. You needed a demographic change on an order (this needs linked documents to verify the change).
4. You have a billing issue or inquiry.
5. You need to request a report.

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Ticket Screen from Client Service Request

Zztest, Cougar
10m F
PID: C202204169787 Patient

Create Ticket

Order ID: NEW ORDER

A signed physician's order is required.

Patient: Zztest
Collection Location: ..Test
Collection Date: 12
Ordering Location: ..Test
Order Date: 12
Ordering Provider: ..Labo
Submitter SID:

Newborn Screening Only: NBS, NBS, NICD

Order Choices

Order Choice Search: Type
or s
Filter by List: All

Order Choice IC

[Newborn Screening Panel 1](#) No
[Newborn Screening Panel 2](#) No

Documentation and Action

Print Labels
Clinical Info

Req
Lin

Item ID: -

Client: ..Test Location

Reason:

Summary:

Description:

Create New [Link](#)

Relationship	Type	Name	Link Date (MST)	Edit	Release Held Results	Add Comments
No matching records found						

Save Cancel

Ticket Screens from Creating Ticket from Review Order

The screenshot shows a web application window titled "Create Ticket". The form contains the following fields and options:

- Item ID: -
- Client*: ..Test Location
- Reason*: Correction - Pending Order
- Summary*: [Empty text area]
- Description (No PHI): [Empty text area]
- Status: New
- Priority: Routine

A "Quick Comments" modal window is open in the center, displaying a list of comment options:

- Access Authorization/User Attestations
- Demographic Change
- Failed Run
- Lab Manual Update Request
- Lab Manual Updated
- New Provider
- No Order

At the bottom of the modal, there are two dropdown menus: "Postpend" and "Separate Comments with: Comma". Below these are "Save" and "Close Window" buttons. At the bottom right of the main window, there are "Save" and "Close" buttons.

This is the screen you will see when creating tickets from review order screen. The quick comments are in the "...".

Create Ticket

Item ID -

Client* ..Test Location

Reason*

Summary* **Name**

Description (No PHI) [Add-on or Cancellation](#)

[Billing Issue or Inquiry](#)

[Contact Info Update](#)

[Correction - Completed Order/Report](#)

[Correction - Pending Order](#)

[Order/Sample Inquiry](#)

[Report Request](#)

[Supply Issue or Inquiry](#)

Status: [System Issue or Inquiry](#)

Priority: [Undesignated/Other](#)

1

The “reason” is required and based on what you are trying to do. If opening a ticket from an order you will probably be using Add-on or Cancellation, Correction-Completed Order/Report, Correction-Pending Order, Order/Sample Inquiry, or Report Request. Please Choose the most appropriate for your ticket.

To submit a new ticket

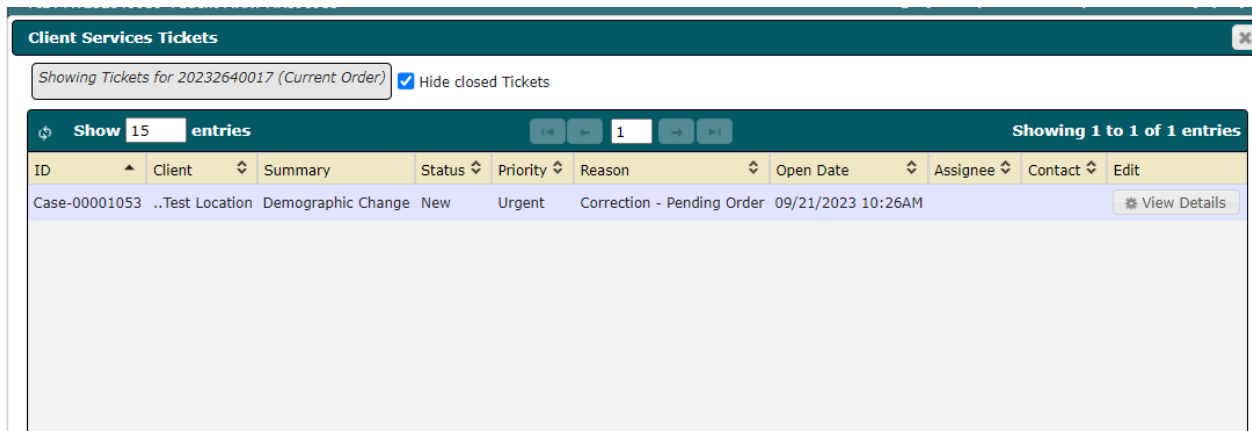
1. The client field should automatically be filled in for the location you are signed in as.
2. Select the appropriate **reason** for the ticket from the dropdown list.
3. Enter a title for the ticket in the **summary** field.
4. Enter details in the **description** field (put necessary contact information in the description if a specific person needs follow up). Please do not put PHI in this field.
5. Save the ticket using the **save** button (you must save prior to adding a link).
6. Optional: to create a link, click the link button. Select the type of link you would like to create.
 - a. To link a location, order, patient, or provider- search for the item you want to link, select it and click save. (The client attached to the ticket is automatically linked. If the ticket is opened from an order, the order and patient will automatically be linked.)
 - b. To link a document, when the screen pops up, click “Switch to Browser Upload.”

How to Link a Document for a Ticket Opened from Review Order

Create Ticket

View Tickets

View Tickets from the Review order screen. (If there is not an available ticket on this order the “View Tickets” button will not be available to click.)



The screenshot shows the 'Client Services Tickets' interface. At the top, there is a header 'Client Services Tickets' with a close button. Below the header, there is a search bar containing 'Showing Tickets for 20232640017 (Current Order)' and a checkbox for 'Hide closed Tickets' which is checked. The main area displays a table with the following columns: ID, Client, Summary, Status, Priority, Reason, Open Date, Assignee, Contact, and Edit. The table contains one entry with the following details: ID: Case-00001053, Client: ..Test Location, Summary: Demographic Change, Status: New, Priority: Urgent, Reason: Correction - Pending Order, Open Date: 09/21/2023 10:26AM. A 'View Details' button is located to the right of the entry.

ID	Client	Summary	Status	Priority	Reason	Open Date	Assignee	Contact	Edit
Case-00001053	..Test Location	Demographic Change	New	Urgent	Correction - Pending Order	09/21/2023 10:26AM			View Details

Select “View Details”.

Edit Ticket

Item ID: Case-00001053

Client*: ..Test Location

Reason*: Correction - Pending Order

Summary*: Demographic Change

Description (No PHI): typo during name entry should be Zztests.

Status: New

Priority: Urgent

Create New: Ticket Pickup STAT Pickup Supply Shipment Link

Notes Links + Add

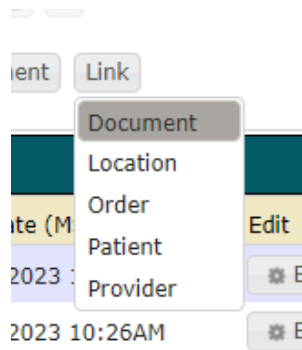
Entered By	Entered Date (MST)	Modified Date (MST)	Note Text	Edit
No matching records found				

You can add notes to this ticket or view notes from MTPHL on this ticket.

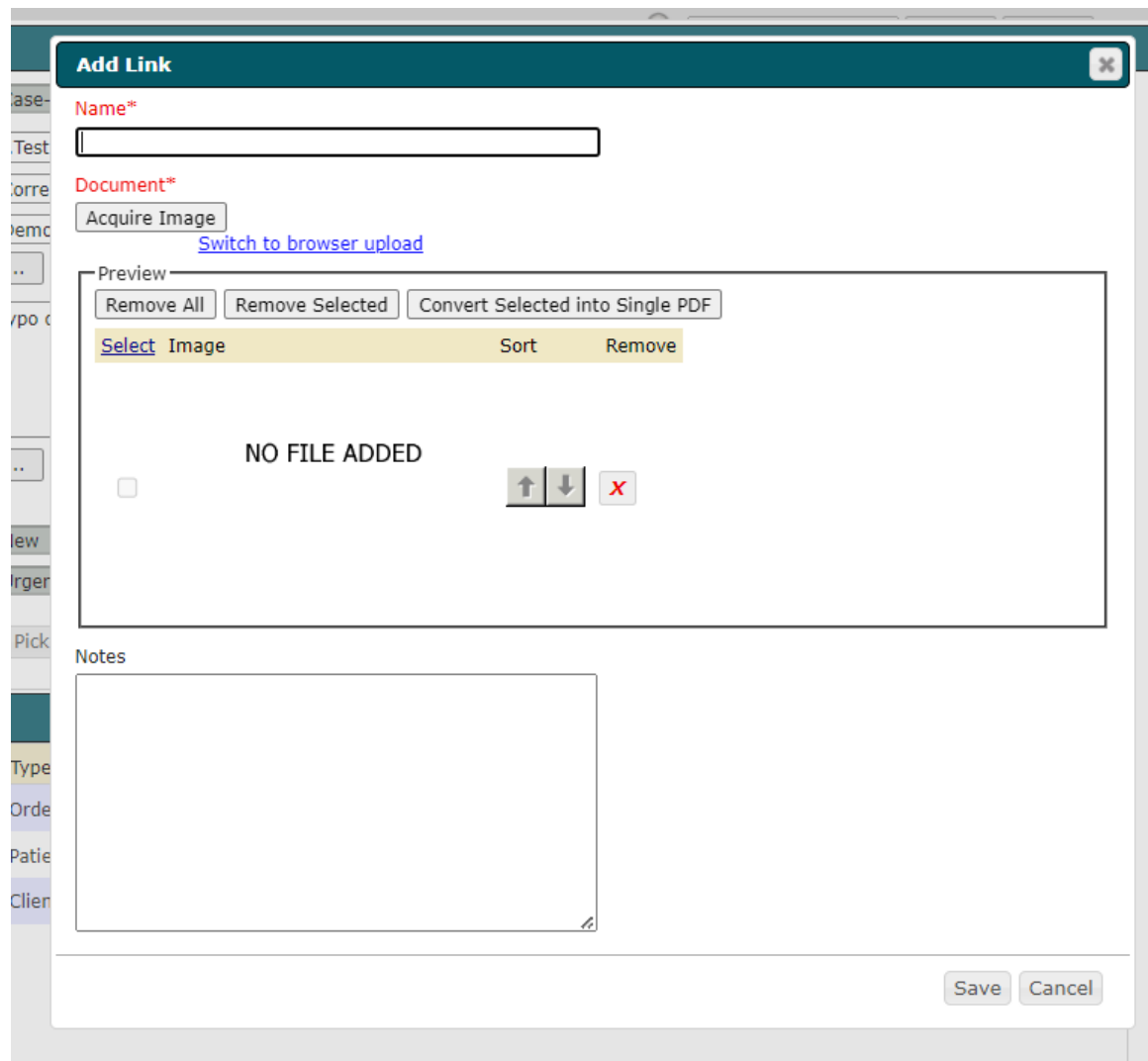
Notes Links

Relationship	Type	Name	Link Date (MST)	Edit	Release Held Results	Add Comments
Manually Linked	Order	20232640017	09/21/2023 10:26AM	Edit		
Manually Linked	Patient	Zztest_Std	09/21/2023 10:26AM	Edit		
Created By	Client	..Test Location	09/21/2023 10:26AM	Edit		

You can also view all linked items to this ticket.



By clicking link you will have several different options to link to this ticket. Most used would be Patient, Order, or Document.



Make sure you switch to browser upload when linking a document.