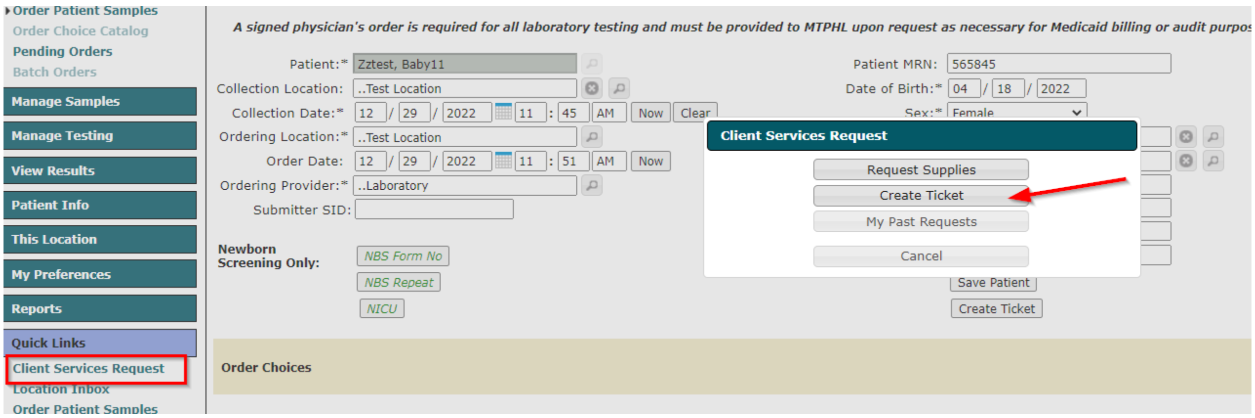
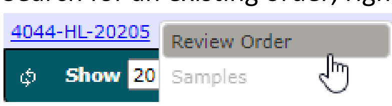
How to Create a general Client Services Ticket

Two ways to create a ticket

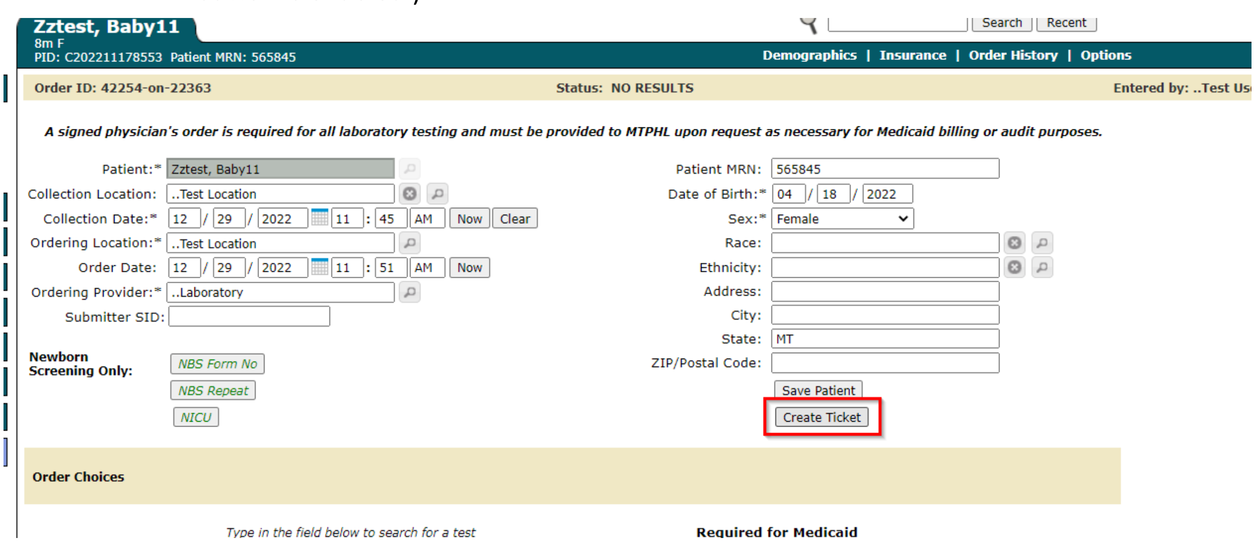
1. Quick Links>>Client Services Request
   a. Click Create Ticket Button



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



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



Examples of why you would summit 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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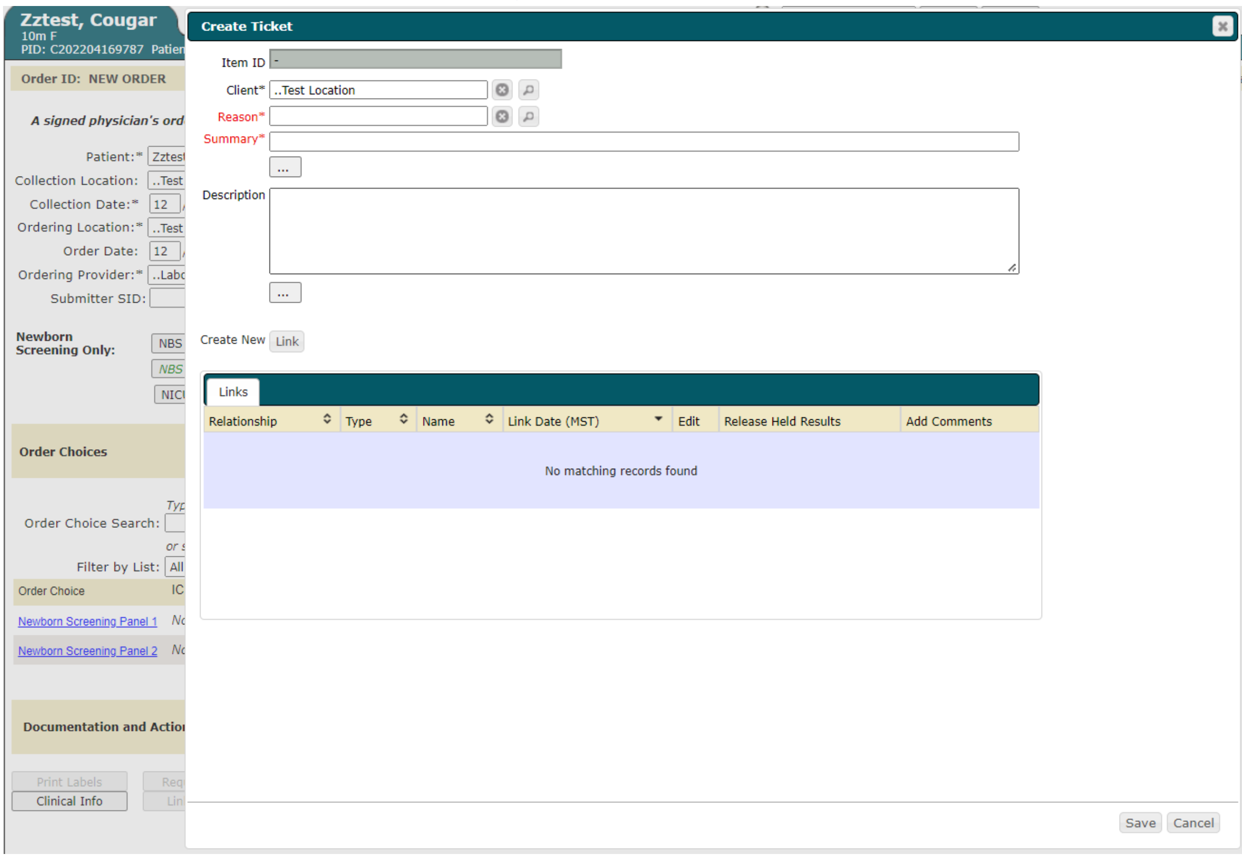
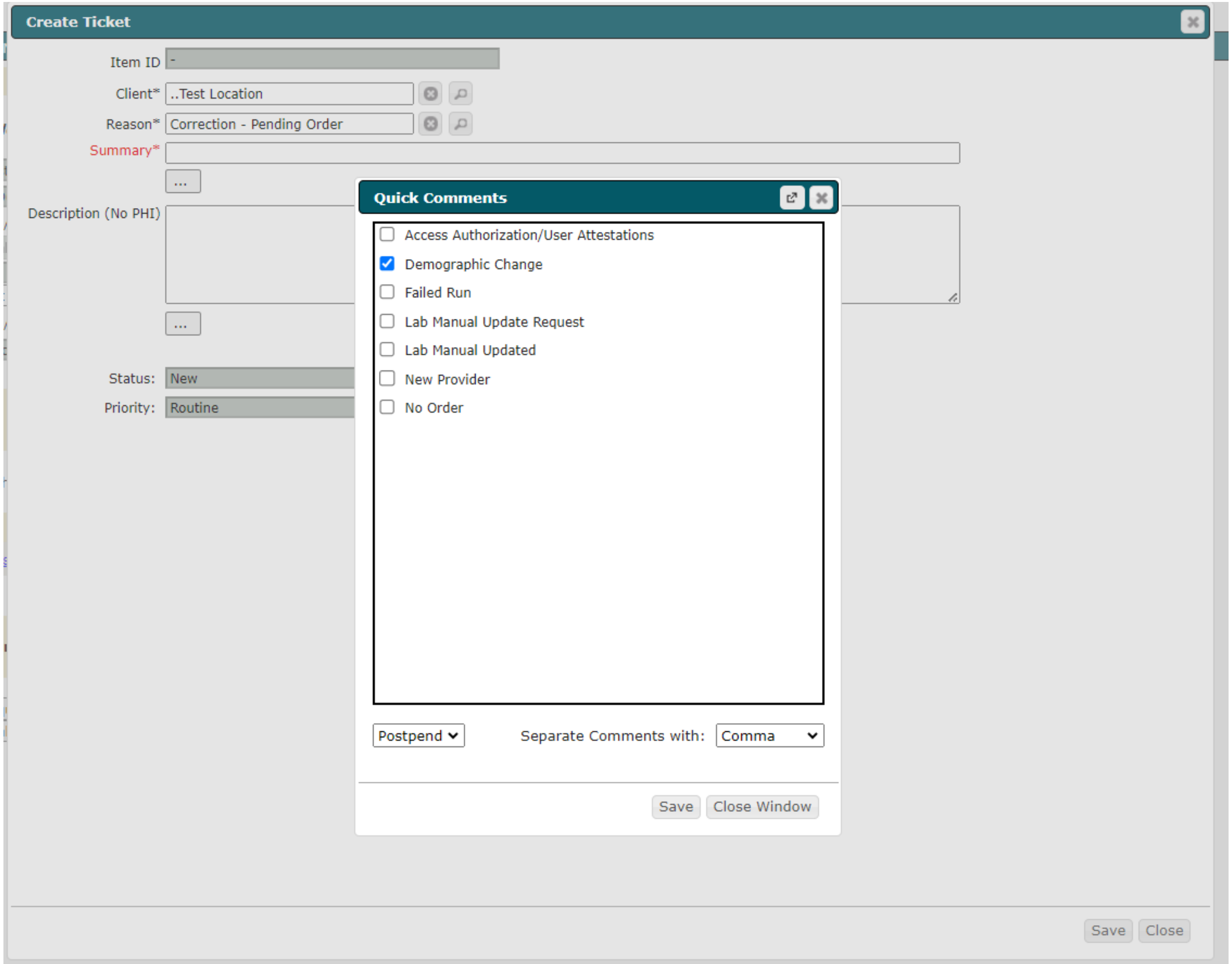
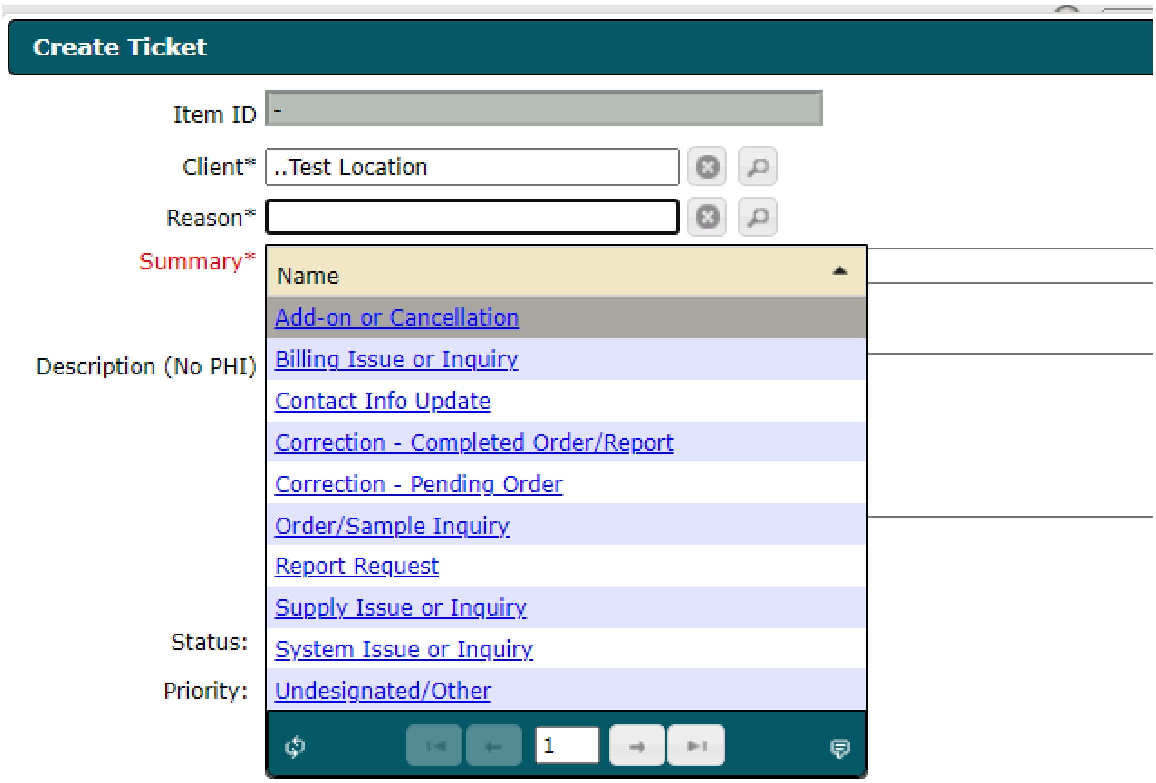
Ticket Screen from Client Service Request



Ticket Screens from Creating Ticket from Review Order



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

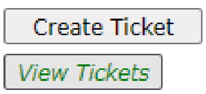


The “reason” is required and based on what you are trying to do. If opening a ticket from an order you will probably be using Add-on or Cancellation, Correction-Completed Order/Report, Correction-Pending Order, Order/Sample Inquiry, or Report Request. Please Choose the most appropriate for your ticket.

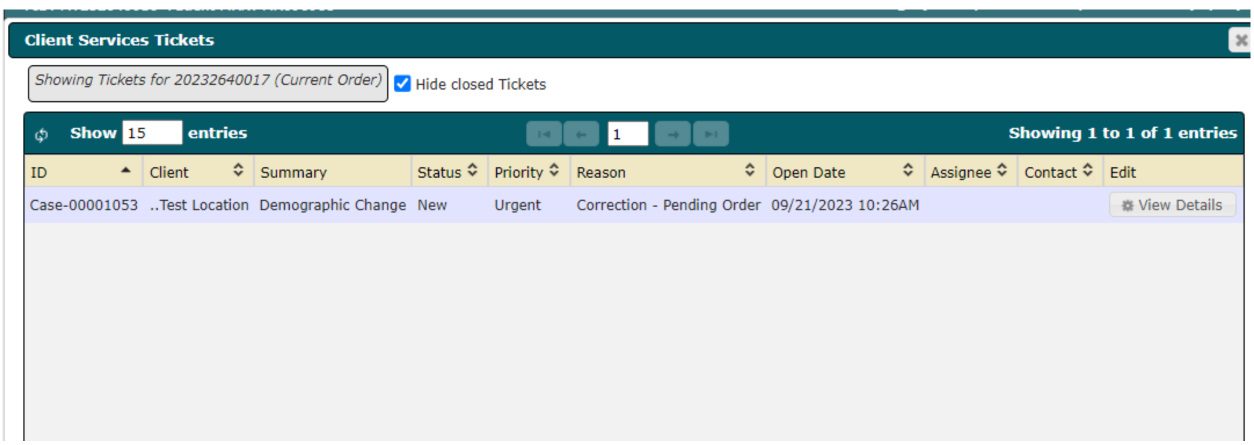
To submit a new ticket

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.”

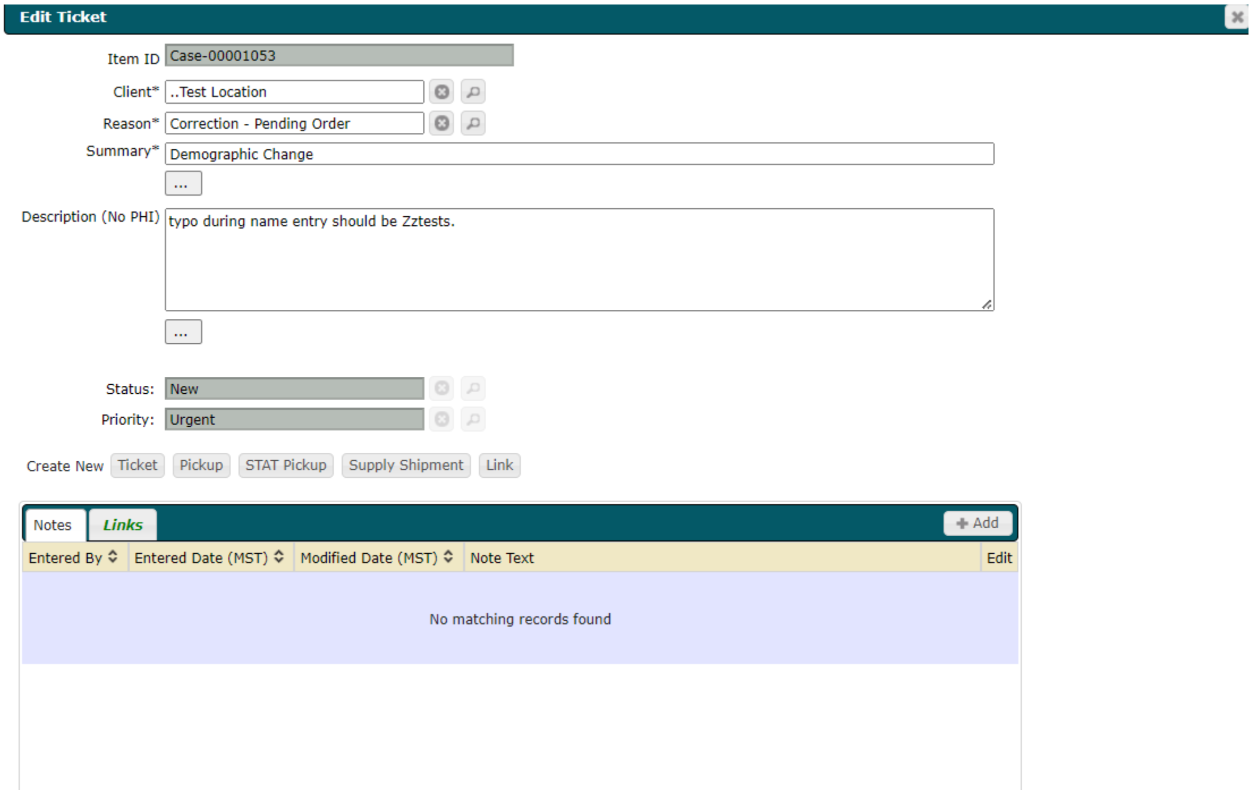
How to Link a Document for a Ticket Opened from Review Order



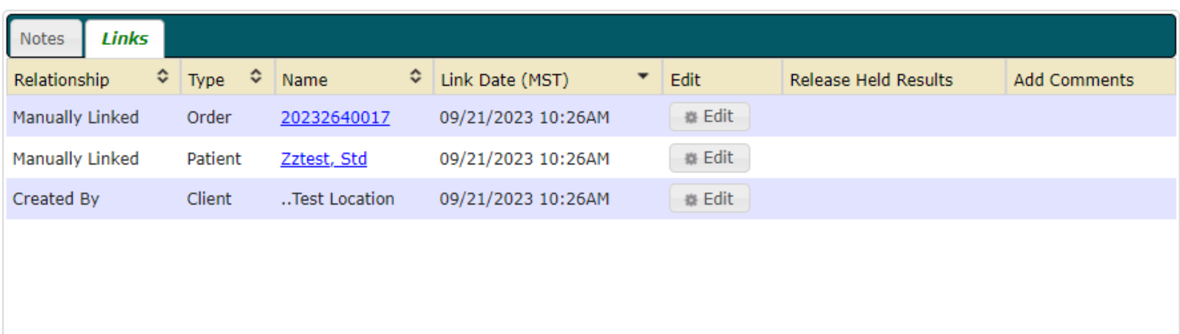
View Tickets from the Review order screen. (If there is not an available ticket on this order the “View Tickets” button will not be available to click.)



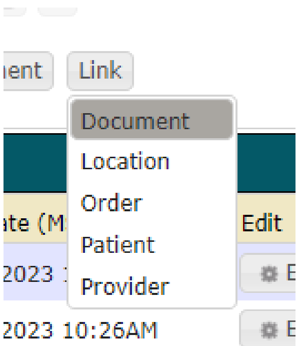
Select “View Details”.



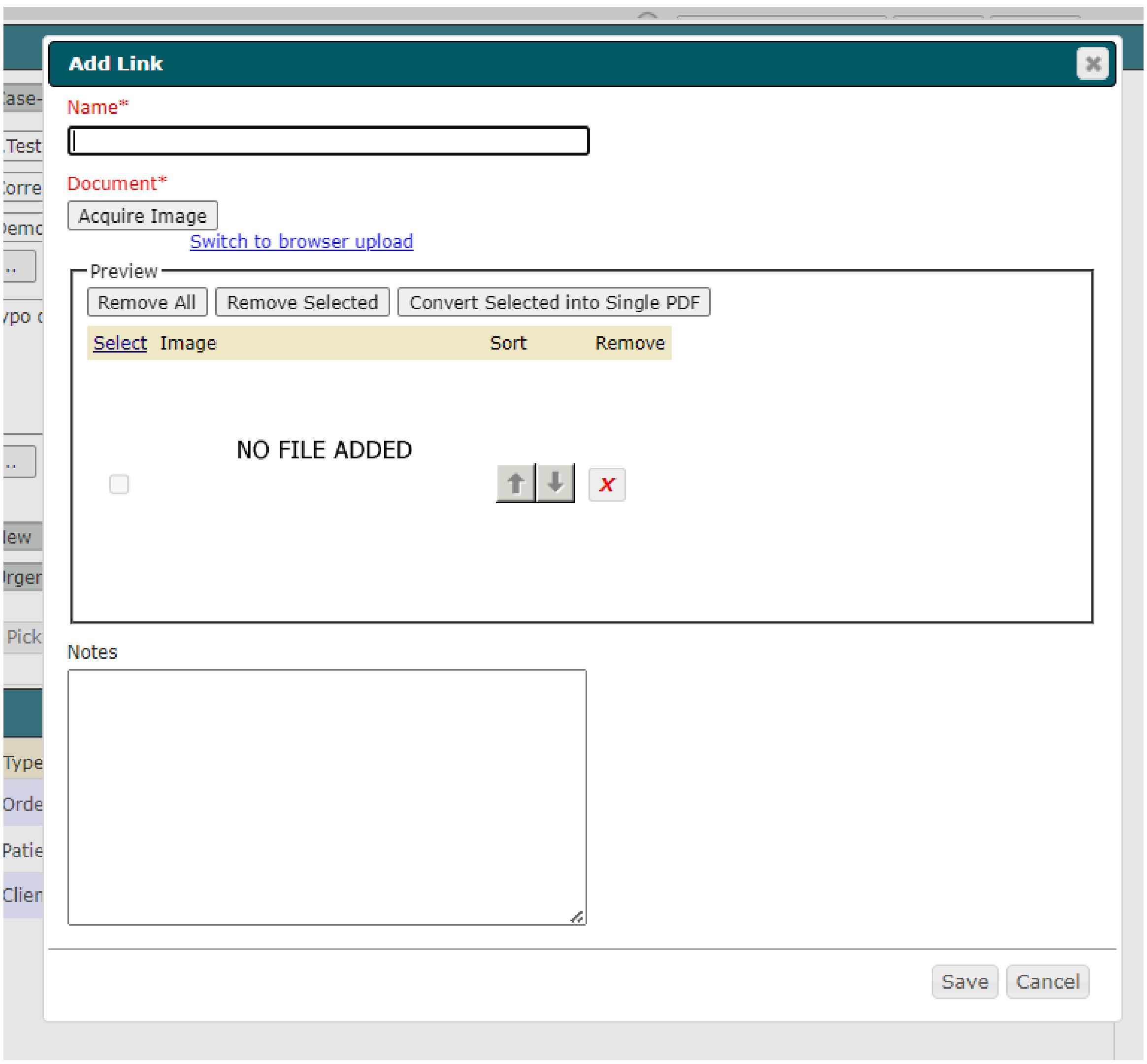
You can add notes to this ticket or view notes from MTPHL on this ticket.



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.