

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

The screenshot shows the 'Client Services Request' modal. It contains three buttons: 'Request Supplies', 'Create Ticket' (highlighted with a red arrow), and 'My Past Requests'. Below these is a 'Cancel' button. At the bottom right of the modal are 'Save Patient' and 'Create Ticket' buttons. The background shows a patient form for 'Zztest, Baby11' with fields for Patient MRN, Date of Birth, Sex, Collection Location, Collection Date, Ordering Location, Order Date, Ordering Provider, and Submitter SID. There are also checkboxes for 'Newborn Screening Only' (NBS Form No, NBS Repeat, NICU).

2. From a specific order:

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

The screenshot shows a list of orders. One order is highlighted with a blue background and contains the text '4044-HL-20205'. To the right of this text is a 'Review Order' button. Below the order list 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.)

The screenshot shows the 'Order Choices' screen for patient 'Zztest, Baby11'. The patient's MRN is 565845. The order ID is 42254-on-22363 and the status is 'NO RESULTS'. The screen contains a form for patient demographics (Race, Ethnicity, Address, City, State, ZIP/Postal Code) and a 'Create Ticket' button (highlighted with a red box). There are also buttons for 'Save Patient' and 'Create Ticket' at the bottom right. The screen also displays a 'Newborn Screening Only' section with checkboxes for 'NBS Form No', 'NBS Repeat', and 'NICU'.

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

Zzttest, Cougar
10m F
PID: C202204169787 Patient

Order ID: NEW ORDER

A signed physician's order

Patient: Zzttest
Collection Location: ..Test
Collection Date: 12
Ordering Location: ..Test
Order Date: 12
Ordering Provider: ..Lab
Submitter SID: ..

Newborn Screening Only: NBS
NBS
NICU

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

Create Ticket

Item ID: -

Client: ..Test Location

Reason: ..

Summary: ..

Description: ..

Create New Link

Links

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:** A text input field with a dash "-" as the value.
- Client*:** A dropdown menu showing "Test Location".
- Reason*:** A dropdown menu showing "Correction - Pending Order".
- Summary*:** A text input field with a "..." button to its left.
- Description (No PHI):** A large text area with a "..." button below it.
- Status:** A dropdown menu showing "New".
- Priority:** A dropdown menu showing "Routine".

A "Quick Comments" modal window is open in the center of the screen. It has a title bar with a close button. The modal contains a list of checkboxes:

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

Below the list, there are two dropdown menus: "Postpend" and "Separate Comments with: Comma". At the bottom of the modal 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

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

System Issue or Inquiry

Undesignated/Other

Description (No PHI)

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

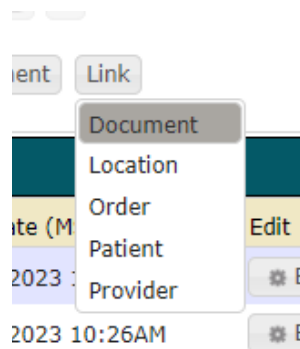
Create Ticket

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.)

Client Services Tickets										
Showing Tickets for 20232640017 (Current Order)										<input checked="" type="checkbox"/> Hide closed Tickets
Show 15 entries		1		Showing 1 to 1 of 1 entries						
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”.



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

Add Link

Name*

Document* [Switch to browser upload](#)

Preview

[Select Image](#)

NO FILE ADDED

Notes

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