

IHCDA

Energy Assistance Program

Documentation

Client Ticketing Portal

Prepared by

Roeing Corporation

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Roeing will provide tier 1, 2, and 3 support to the LSP's for the Energy Assistance Program software for the 2019 program year. LSP's will contact the Roeing support team directly for any issues with the software.

All support issues will be managed through our ticketing system. Tickets can be created via email, creating the ticket through the ticket portal, or by calling the Roeing helpdesk. The ticketing portal allows an LSP to view all of their tickets, the status, and the history of the communications. The ticketing portal will automatically notify the designated LSP user via email when a ticket requires attention and when it is resolved. If an issue is reported over the phone, we will create a ticket as part of that call so that you can monitor the status of that ticket.

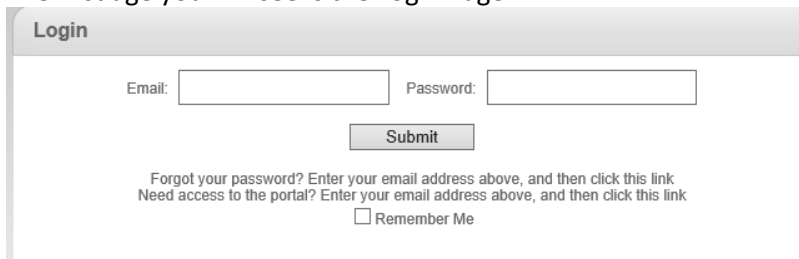
We ask that each LSP identify a primary person as the main contact for support issues. This helps to ensure that we are getting the right information on issues back to your agency accurately. We will gladly work with any user who has an issue, but we want to be sure that the information is communicated back to your program manager.

Client Ticketing Portal

To provide our customers the ability to manage their software concerns and issues, we utilize a Client Ticketing Portal. You can access the portal through the following link

Navigate to <https://connect.roeing.com/support>

1. The first page you will see is the Login Page



The screenshot shows a login form with the following elements:

- Title: Login
- Fields: Email, Password
- Button: Submit
- Links: [Forgot your password? Enter your email address above, and then click this link](#), [Need access to the portal? Enter your email address above, and then click this link](#)
- Checkbox: Remember Me

2. Enter your **Email Address** and the **Password**.
3. Click **Submit**.

4. The Customer Portal Home page allows you to access all of the ticketing portal features.

ROEING CORPORATION

Brad Forgey | [My Account](#) | [Log Out](#)

Home Tickets [Create Ticket](#)

Welcome Brad Forgey

Welcome to the Roeing Corporation Customer Care portal.

Our customer care portal is a convenient method to:

- View and update your open service requests
- Create a new service requests

Open Tickets (33)

- [24785 - error msg with budgets on professional service contracts](#)
- [24725 - ihcdaonline claim total incorrect for contracts](#)
- [24713 - Password Reset Error](#)
- [24706 - Reservation 81348 Needs Data Changed](#)
- [24658 - DPA Return Date and Info Not Saving in Ihcdaonline If Reservation is Old](#)

[See All >>](#)

Alerts

- [0 Open unapproved tickets](#)

Statistics

33 Open Tickets 1 Tickets This Month 153 Tickets This Year

Ticket Totals By Month

Month	2017	2018
J	48	28
F	43.2	33.6
M	33.6	24
A	24	24
M	38.4	19.2
J	19.2	14.4
J	24	9.6
A	14.4	4.8
S	19.2	0
O	24	0
N	19.2	0
D	38.4	0

My Account

In the My Account View, you can maintain your information, including changing your password.

My Account Last Updated @ 3/3/11 By

FirstName LastName

Security Level

Log-in Email [Change Password](#)

Home Email

Other Email

Phone Email

StopMailingMe

Direct Ext:

Home Ext:

Mobile Ext:

Pager Ext:

Fax Ext:

FaxHome Ext:

Log Out

When you are finished using the Customer Portal, click the **Log Out** link on the top right-hand portion of the screen.

Navigating the Customer Portal


The following information will assist you in successfully navigating the customer portal.


Most of the Customer Portal Tabs will have a **Sort** menu that will enable you to filter and narrow down your searches.

Tickets

Sort: Ascending Descending

Most of the Customer Portal Tabs will also have a **Summary View** and a **List View** available. A Summary View will provide you with more Summary details about the item, while the List View condenses the details into one row.

Tickets Summary View 

Sort: Ascending Descending List View 

Create Ticket Button

DOCUMENT: IH CDA EAP – CLIENT TICKETING PORTAL

Use the Create Ticket button to enter a new service request. When you create a new service ticket your name, address, telephone number and email will automatically populate on the ticket.

The following is a list of field descriptions when you create a new ticket.

Select Service Needed	Use the Arrows on left and right side to carousel through the types of Service Request to enter.
Due Date	Enter the date you would like the service ticket to be completed.
Emergency	Select this check box if the service request is an emergency.
PO Number	If applicable enter a Purchase Order number to authorize the billing of this service ticket.
Title	Enter a summary for the problem or issue.
Problem Description	Enter a complete description of the problem or issue.
Attach document	Use the Choose File field to browse for a document to attach. In the Title field, enter a title for the attachment.

After completing the required fields and clicking **Submit**, you will receive a confirmation message with your ticket number.

Tickets Tab

The Ticket Tab enables you to view all service tickets for your company. Certain security levels may be necessary in order to view all valid service tickets. From this screen you can select to open a new service request by selecting the **Create Ticket** button.

You can also use the **Search by** section to assist in filtering results.

Search By

Summary

Status
 Open
 Closed

Ticket #

Contact

[Show More](#)

Click on the **Summary** link to review the details or add information.

Tickets

Sort: Ascending Descending

<input type="checkbox"/>				
<input type="checkbox"/>	Test Ticket	212751		Type
	Thu 8/2/2018/2:19 PM UTC-04/ Brad Forgey brad.forgey@roeing.com (portal) This is a sample ticket to demonstrate the portal.	>New		Sub Type
		Status		
	Portal, Aug 2, 2018			

Create Tickets by Email

You can also create a ticket in the system by simply sending an email to: DMSSupport@roeing.com

It will show up in our queue as if the ticket was entered from the portal, or if we entered it. Please be aware that tickets created by email will take a couple minutes to be displayed in the portal.