INFORMATION TECHNOLOGY SERVICES

FSU Service Center

Support Request Submission and workflow process

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Support request submission and workflow process

Entry Points for Agent Queue:

Case management system

- Cases automatically routed to appropriate queue through use of category, type, and detail selections during the case creation process
- Cases routed by Service Desk (Tier 1) or Tier 2
- Cases routed by customer who has agent role
- Cases routed by queue manager or another agent

Email

- Before or after working to resolve problem, agent asks requestor to create a case or creates it on their behalf
- Agent assigns case to his/her own queue or routes case to the appropriate service provider queue
- If agent does not assign the case to him or herself, queue manager assigns to available agent

Phone call

- Before or after working to resolve problem, agent asks requestor to create a case or creates it on their behalf
- Agent assigns case to his/her own queue or routes case to the appropriate service provider queue
- If agent does not assign the case to him or herself, queue manager assigns to available agent

In person

- Before or after working to resolve problem, agent creates a case and asks the requestor to create a case next time
- Agent assigns case to his/her queue or routes case to the appropriate service provider queue
- If agent does not assign the case to him or herself, manager assigns to available agent

Note: When cases are created for a customer, they should be created in customer's name.

Queue Manager Role Guidelines:

The **queue manager** is responsible for monitoring provider group cases to ensure timeliness of work efforts and communications and to prevent delays. The queue manager role is typically one or more staff members. The queue manager is assigned this responsibility by the Provider Group Manager.

Case Management

Service Provider Queue Management

General queue management guidelines:

- Queue should be routinely monitored to ensure defined response times are met. Queues may be configured to automatically send emails to provider group members to inform them when cases enter the queue. This can serve as a substitute for directly monitoring the queue from within the Service Center application.
- Provider group managers should establish criteria for assigning cases. This might involve routing cases based on current workload, availability, agent's specialized responsibilities and experience.
- Open cases assigned to agents who are not working (i.e. on vacation, sick leave, etc.) will need to be evaluated and may need to be reassigned to other agents
- Cases should be prioritized due to priority level submitted by customer. If the impact appears greater to the queue manager, priority and response can be elevated. Priority levels should not be reduced without discussing changes with customer. Refer to established **Response Time General Guidelines** for response times.

New case submitted to queue:

- Email notification may be generated and sent to queue manager and all agents when a case is routed to a queue. This notification provides basic information of the case entered. Cases can only be assigned to agents from within the case management system.
- Based on criteria established by provider group manager, case gets reviewed and assigned to an agent

Misrouted cases:

- Add a note with proper routing instruction if known and send the misrouted case to the Service Desk or another queue if the correct provider group is known. Please ensure note is marked as internal.

Quality of service and response guidelines:

- System-wide Service Center reports are generated weekly by ITS Service Management. Reports are sent to provider group managers each Monday.
- Service Center custom reports may be generated by the queue manager as desired by leadership of that unit

Agent Queue Management Guidelines

General queue management guidelines:

- Agent should review open cases throughout the workday
- Cases should be prioritized due to case priority level and balanced with other commitments. Refer to **Response Time General Guidelines**.

New case in queue:

- Initial contact should be made by the Agent according to the **Response Time General Guidelines**, unless the initial customer contact has already made by the Queue Manager. If the initial contact was made by the Queue Manager, the Agent should observe guidelines for resolution and continuing contact.

    - First update for a case should include:
        - Explanation of any change to case priority. Case response guidelines for priority levels must be observed.
        - Any details exchanged outside the Case Management System, including conversations with and attempts to contact the customer.

    - Until initial customer contact is established, an attempt to contact the customer should occur at least two times, by phone and email if possible. Case notes should be added as part of each attempt. If no response is received from the customer within 72 business hours of attempted first contact and there is no additional information to indicate that the problem is unresolved, the case may be closed. If the agent has reason to believe the issue is unresolved then the case may remain open, but all required updates should be made in accordance with these and other relevant guidelines, including those relating to response times. Customer should be notified of case closing through a case note, solution and email, if possible.

Existing cases in queue:

- All cases should be evaluated every day by agent, agent's queue manager or other designee if assigned agent isn't available (e.g. on sick leave, annual leave, etc.).
- Customer should be updated within five business days of last customer update. Notes should contain meaningful information that informs customer of efforts to resolve the support request. When "external" notes are added to the case, the note should be emailed to the customer from within the case management system.
- If resolution of the case requires services be performed by additional provider groups, ensure an internal note has the technical information necessary for management team or other agents to be aware of support efforts and case progress

- When requesting more information from a customer, which is necessary to achieve resolution, reminders should occur at least two times within five business days, by phone and email, if possible. If the requested information is not received within a ten business day period, the case should be closed. Customer should be notified of case closing through a case note and email, if possible.
- When closing cases, a note or solution should be added and emailed to the customer from within the case management system.