
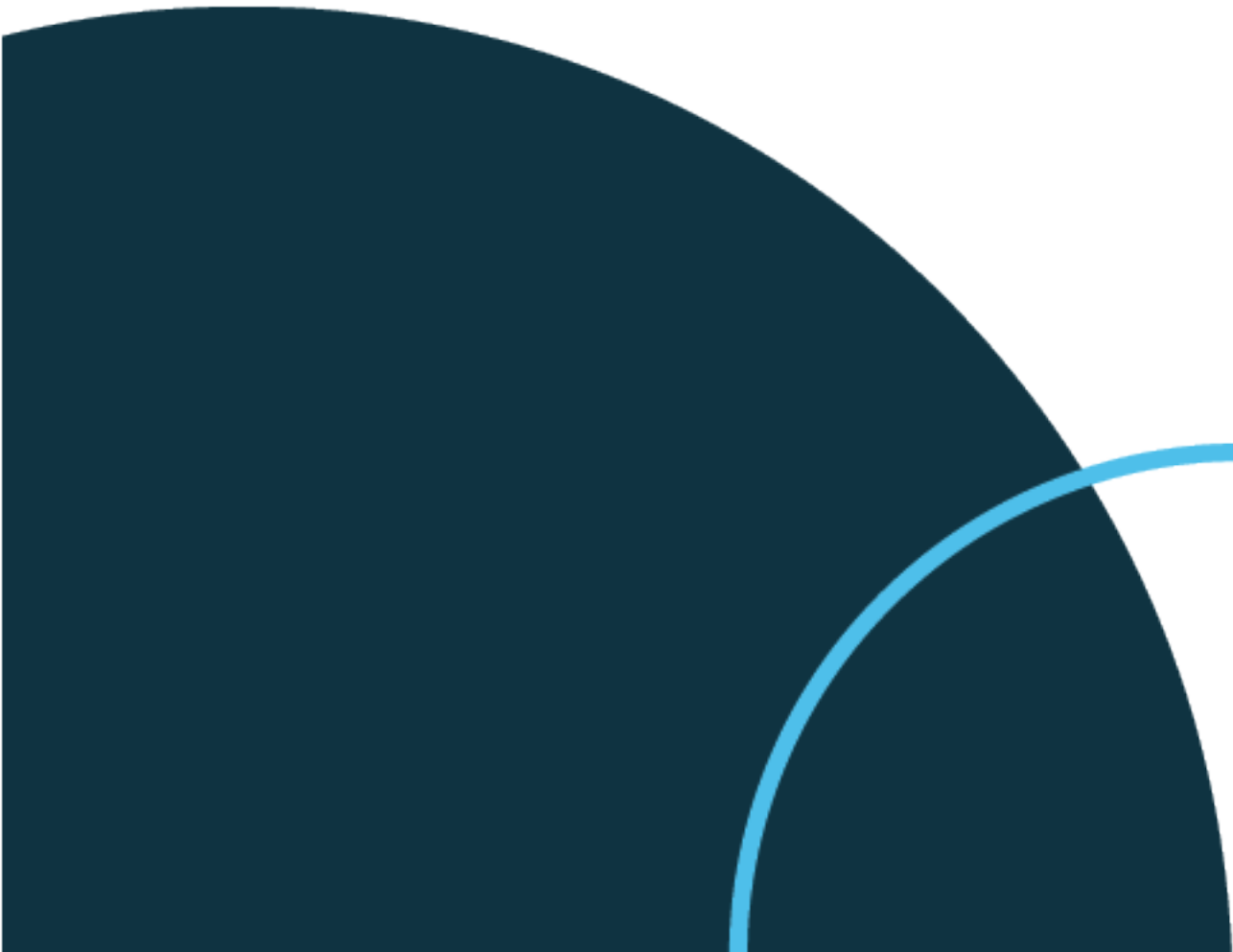




accentCare.[™]

**ServiceNow Portal
Interacting with IT
User Guide**



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Overview

- The ServiceNow Service Portal is the IT interface for AccentCare Operations:
 - Notify IT of 'broken' IT services: applications, hardware, phone/fax, network.
 - Submit requests for new services: application access, new hardware or software, IT onboarding.
 - As a manager, approve the requests for application permissions and hardware/software items. Purchased items must have additional approval from the requestor's cost center manager.

Note: Email to servicedesk@accentcare.com can still be used, but it is not encouraged.

- Key Terms:
 - **Incident:** Created by the service desk to track issues when something is broken. Examples:
 - Data issue in HCHB. Phone system down in Petaluma CA.
 - **Service Request:** When a new service or hardware is required.
 - Requestor will fill out a form specific to the request with all needed information.
 - Examples: Request a new printer, update Cisco phone, application access

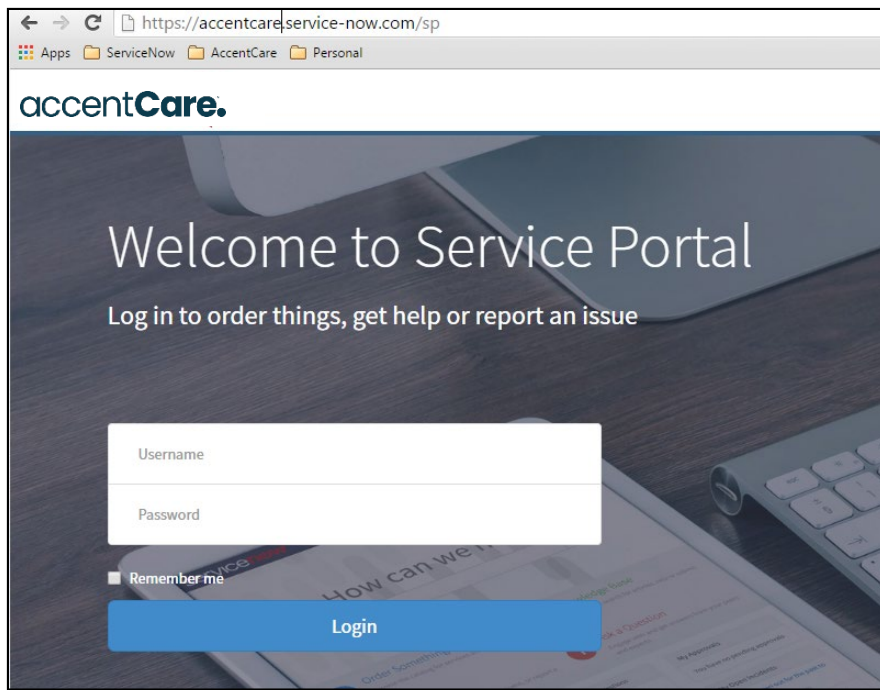
Self Service Portal

Getting Help, Entering a Service Request

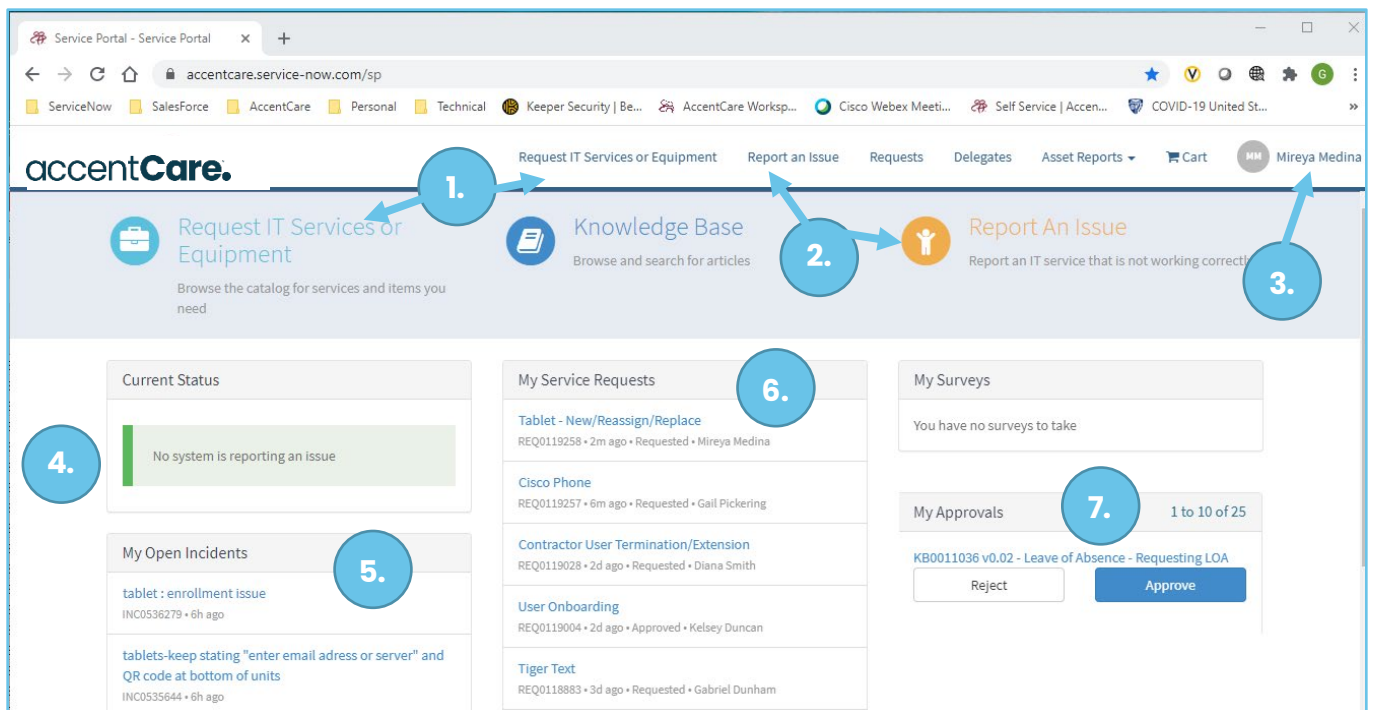
Login to Service Portal

Web Address: <https://accentcare.service-now.com/sp>

Use your AccentCare Windows login.



Self Service Portal Home Page



- | | |
|--|---|
| <ol style="list-style-type: none"> 1. Create new Service Request 2. Report an issue 3. Personal profile / logout 4. Current System Status Messages | <ol style="list-style-type: none"> 5. Your open incidents 6. Your open requests 7. Requests awaiting your approval |
|--|---|

Report an Issue

The navigation bar contains three items:

- Request IT Services or Equipment**: Browse the catalog for services and items you need.
- Knowledge Base**: Browse and search for articles.
- Report An Issue**: Report an IT service that is not working correctly.

1. Click 'Report an Issue' from the Home Page to display the form (right).
2. Fill out the form. Use 'Impacting My Location' to report issues with the phone system, office printer, etc.
 - For non-location issues, the form changes to capture needed information for each type of issue

The screenshot shows the 'Report an issue' form in a web browser. The breadcrumb trail is 'Home > Report an issue > Report an issue'. The form title is 'Report an issue' with a subtext: 'This form is to report an IT service that is not working correctly. For all new service requests, including access requests and new hardware, please click 'Request IT Services or Equipment' from the home page.'

The form fields include:

- *Users Affected**: Radio buttons for 'Affecting Me', 'Affecting Someone Else' (selected), and 'Impacting my location'.
- *Requested For**: A text input field.
- Opened By**: A dropdown menu showing 'Greg Cantrell'.
- This form is to be used ONLY for issues with existing products and services. All new requests for application access, new hardware or software should be requested through the Service Catalog by clicking 'Request IT Services or Equipment' from the home page.**
- *Select the Issue**: Radio buttons for 'Password', 'Personal Hardware', 'Business Application', 'Software', 'Information Security', and 'Desktop Telephone'.
- *Provide detailed information about the issue:**: A large text area.
- *Contact Number (Enter 10 digits only - No dashes or spaces)**: A text input field.
- Submit**: A blue button.
- Add attachments**: A link with a paperclip icon.

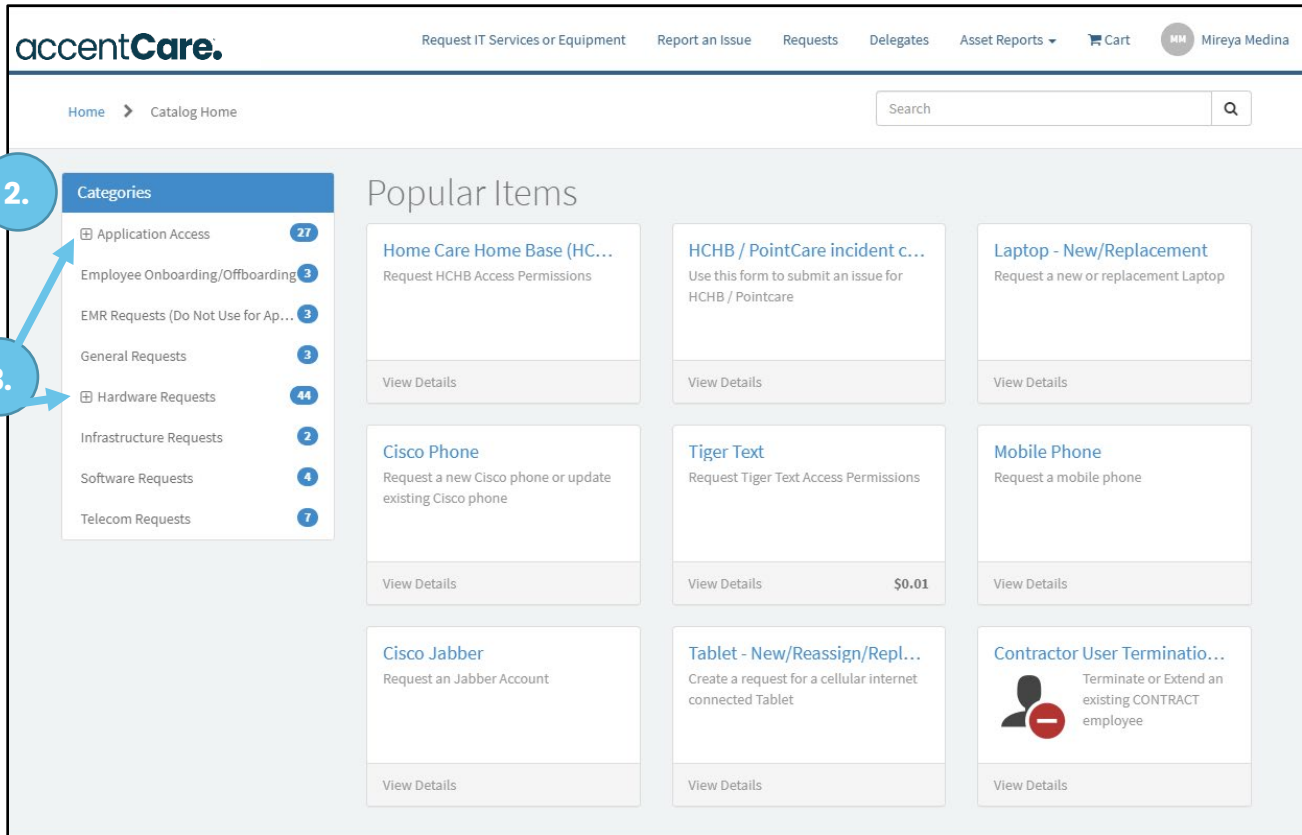
NOTE: Using this process for reporting issues through the portal versus through email significantly reduces the response time.

Service Catalog

The navigation bar contains three items:

- Request IT Services or Equipment**: Browse the catalog for services and items you need.
- Knowledge Base**: Browse and search for articles.
- Report An Issue**: Report an IT service that is not working correctly.

1. Click on Request IT Services or Equipment from the ServiceNow Home Page.

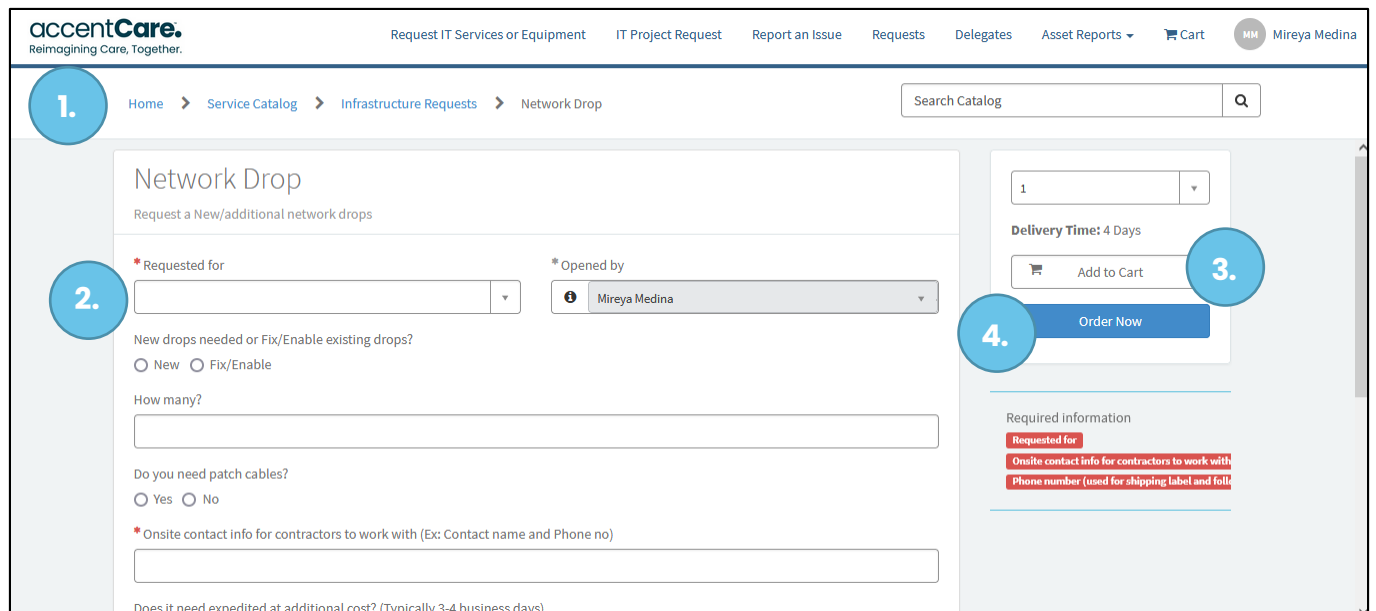


2. These are request categories. Click on each to show the individual service catalog items.

3. Click on '+' to open sub-categories

Note: Visibility for catalog items depends on role, line of business (HCHB App access item won't be available to a PCS user.)

Typical Request Form



1. See Breadcrumbs. Click 'Home' to go back to home page. (Or click on AccentCare logo.)
2. Set the 'Requested For' to be the person receiving the service or hardware. All approvals will be based on this person's manager hierarchy
3. Use 'Add to Cart' if you want to request additional items for same person.
MUST click on Cart icon in menu to order items in Cart!
4. User 'Order Now' to request ONLY the item displayed. **This action will NOT order other items in the Cart!**

Hints: Cannot Edit 'Requested For'

The screenshot shows the 'Microsoft Teams Conference Bridge' request form. The 'Requested for' dropdown menu is highlighted with a green box and contains the name 'Novera Monwar'. The 'Opened by' dropdown menu contains 'Mireya Medina'. A green arrow points from the 'Requested for' field to the 'Cart' icon in the top navigation bar. The form includes a checkbox for acknowledging the add-on, a notes/comments section, and a phone number field.

If you are unable to change the Requested For and Ship Address, check your cart. The Portal allows you to add new items to the Cart, but ONLY for the same person for which a Request has already been started.

Either submit the items in your cart, or clear your cart to create a request for a new person.

Using the IT Peripheral request form

IT Peripheral / Hardware Request

This form is divided into five optional categories. For each category follow the below steps.

- 1) - Click the "Add" button to view a list of available items for the selected category.
- 2) - Click the drop down and select an item; Update quantity if needed.
- 3) - Click the "Add" button to add the item to the list.

* Requested for: Novera Monwar

* Opened by: Greg Cantrell

* Select the laptop: Dell Latitude 5420 - 74WP8C3

Laptop not listed / I could not find the laptop in the lookup

Laptop Accessories

Add Remove All

Actions	Laptop Accessories	Quantity
No data to display		

Soft Phones Headsets

Add Remove All

Actions	Soft Phones Headsets	Quantity
No data to display		

Delivery Time: 0 Days

Add to Cart

Order Now

Most IT hardware is requested from the special IT Peripheral form. Follow the on screen directions indicated to complete.

Add Row

* Laptop Accessories

-- None --

Search

-- None --

Dock

Keyboard and mouse set - Ergonomic

Keyboard and mouse set - Standard

Monitor

Power Adapter for Dock (Replacement Only)

Power Adapter for Laptop (Replacement Only)

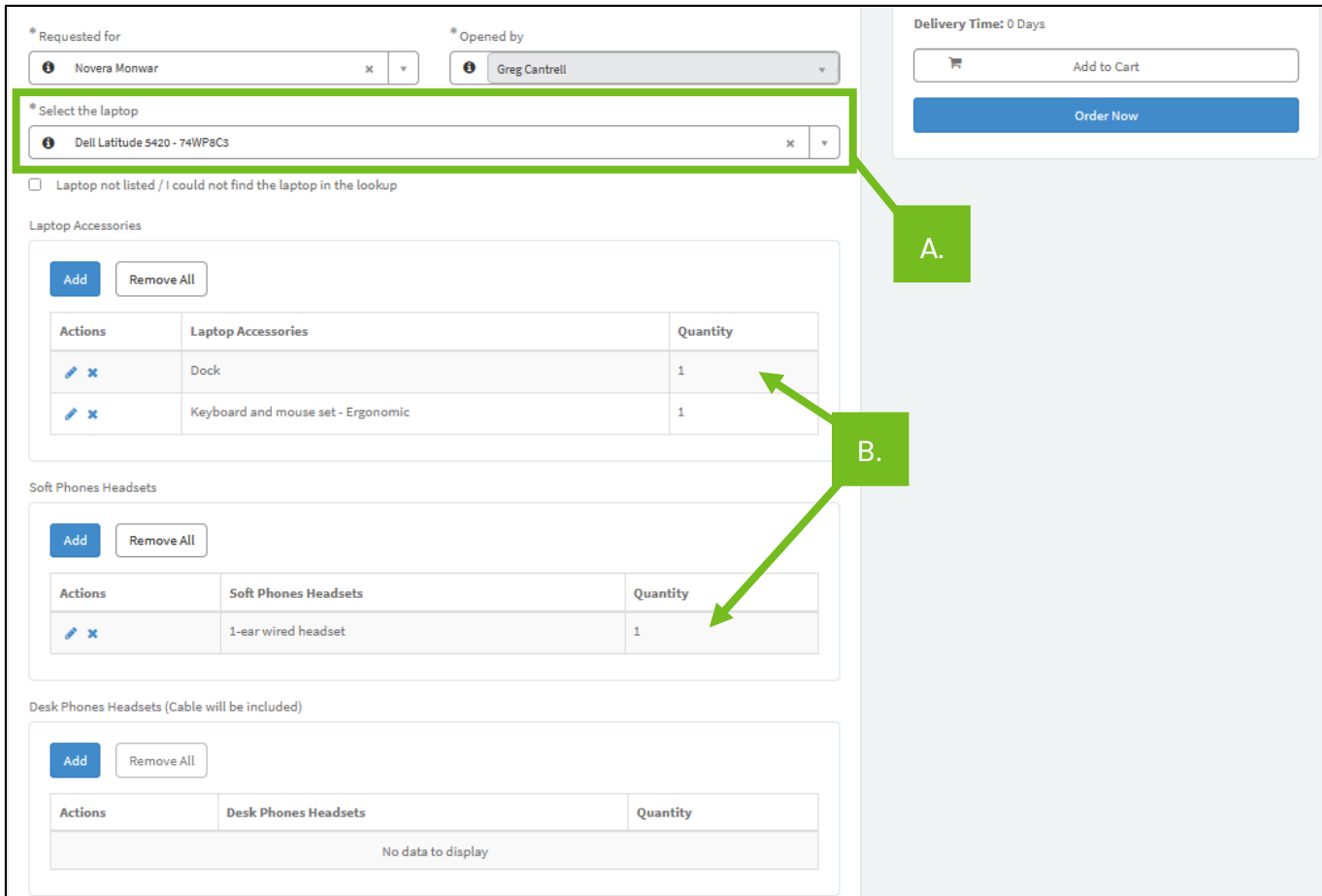
* Quantity: 1

Cancel Add

Notes:

- Select items that are needed from each group on the form. Update quantity if needed.
- Multiple items can be added from each group.
- Power adaptors are

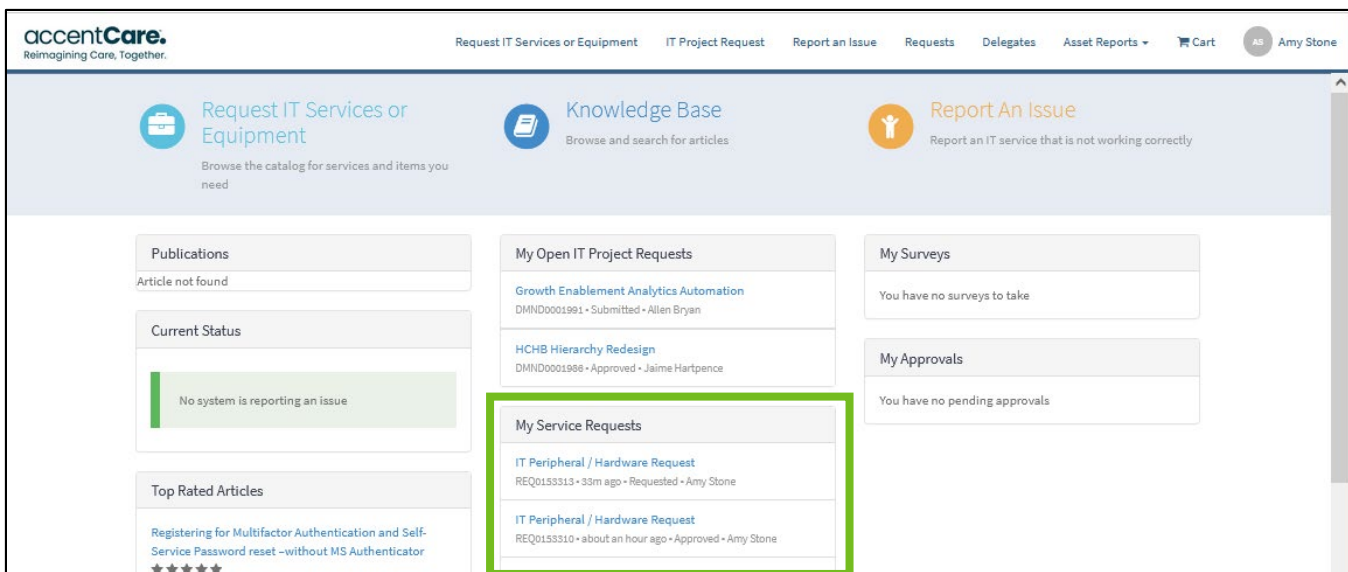
provided for ordered docking stations and laptops.



A. Laptop must be identified for certain items (docking station).

B. Items requested will show up in the section table as they are added.

Check Request Status from Portal



Click My Service Requests on the Home Page.

Submitted : 2022-01-24 15:08:14					
Request Number : REQ0153313					
Requestor : Amy Stone					
Estimated Delivery : 2022-01-24					
Approval Status : Requested					
Waiting Approval : Semone Neuman					
Item	Delivery Date	Stage	Price (ea.)	Quantity	Total
IT Peripheral / Hardwar...	2022-01-24		\$870.00	--	\$870.00
					Total: \$870.00

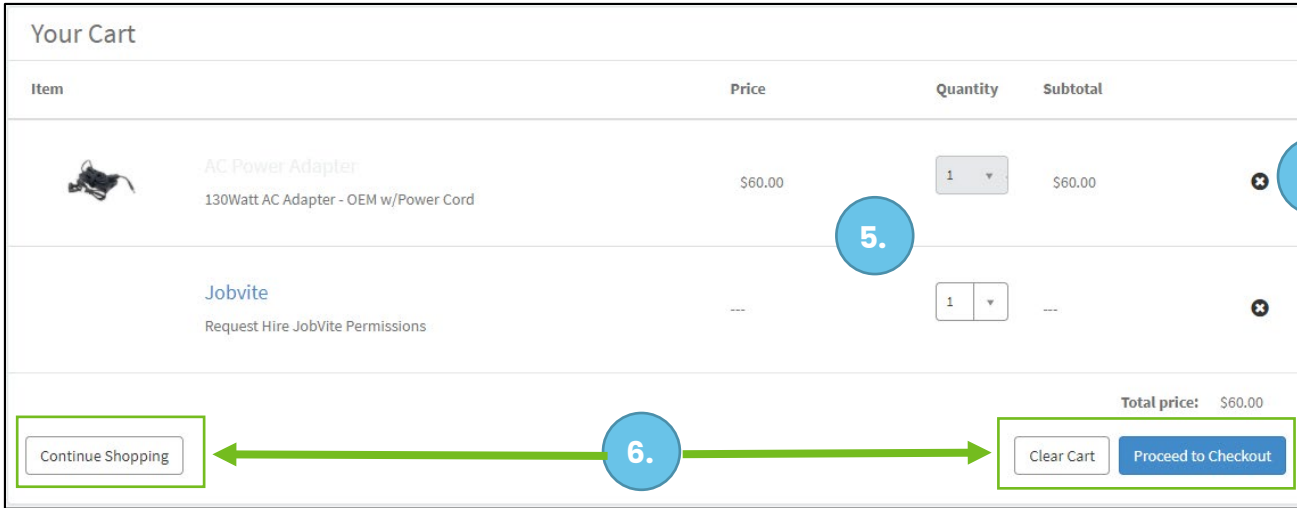
The item opens in a new window. Click the blue text under the Item column.

An expanded view of the request is displayed.

Cart Behavior

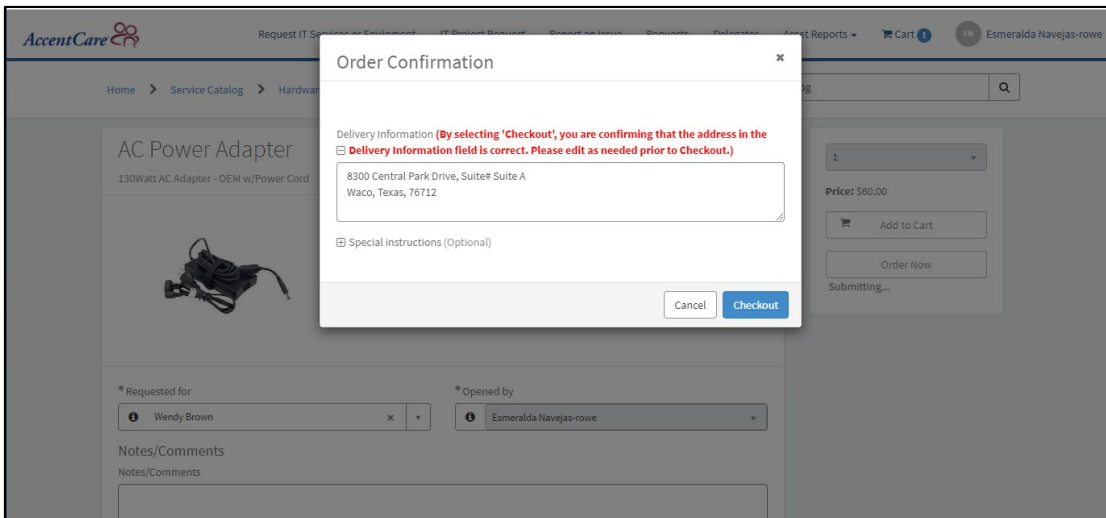
1. If you have completed a request form and clicked 'Add to Cart', requested items can be viewed by clicking the cart icon in the menu header.

2. Order all items in Cart immediately by clicking 'Proceed to Checkout'.
3. Click 'View Cart' to review and/or remove items from Cart.



4. Click 'x' to remove a single item.
5. Change the number to increase quantities
6. Click 'Continue Shopping' to go back to add new items, 'Clear Cart' to clear all items from cart or 'Proceed to Checkout' to order all items in cart.

Order/Address Confirmation



IMPORTANT!!

The address in the order confirmation is defaulted to the 'Requested For' user's location address. (Or if listed as Remote, it will be empty.)

Confirm and update address as need for items that require shipping. Especially if the person needing the items is working from a remote location!

Onboarding / Offboarding

Onboarding and Offboarding for Employees, Clinical Employees, Contractors

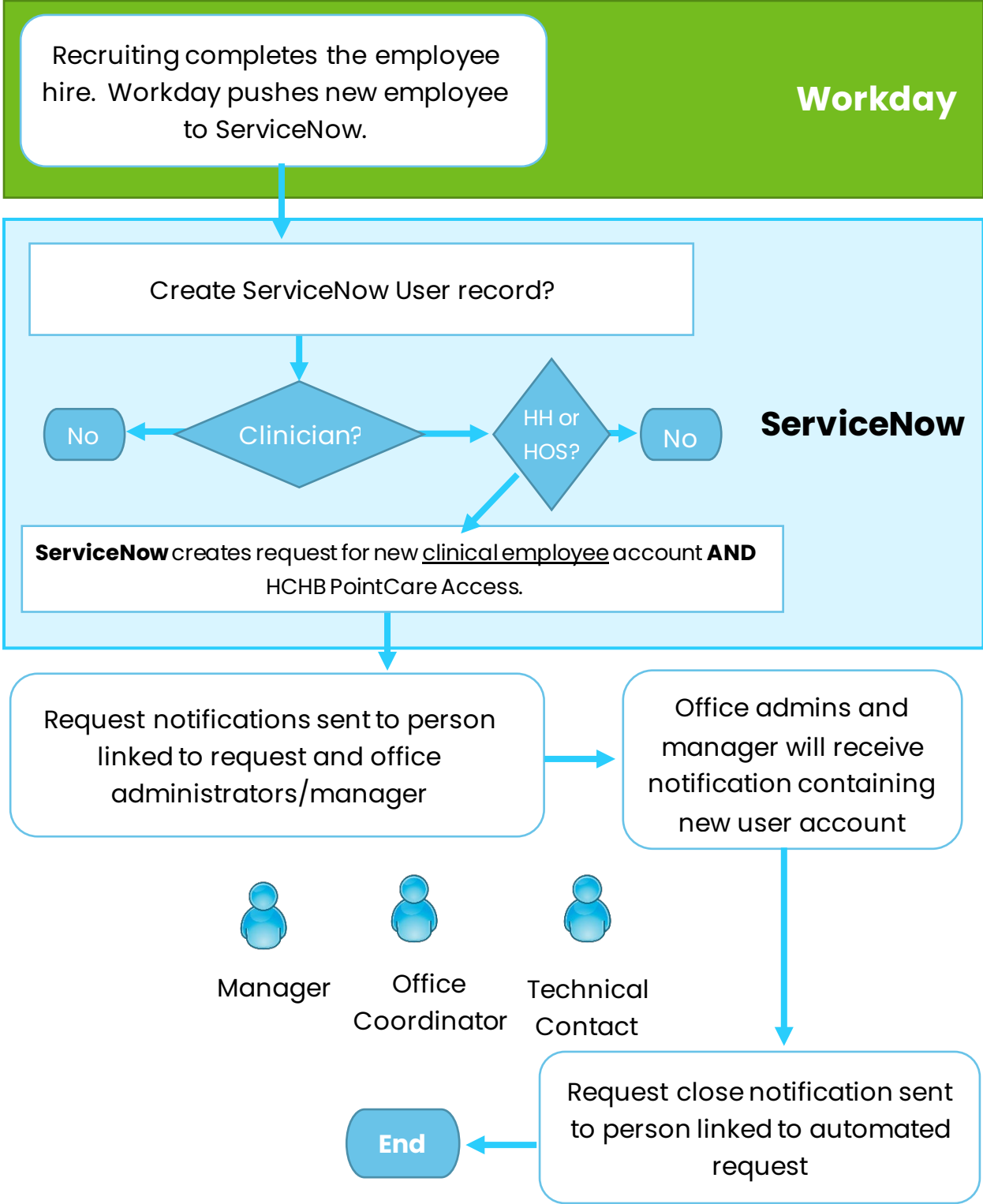
Onboarding Process

- Employees: IT onboarding initiated in Workday:
 - When SSN is entered after hire AND the HR Admin approves the hire, employee is 'pushed' to ServiceNow.
 - Hiring Manager receives an email notification with a link to the IT onboarding form in the Service Portal.
 - Once onboarding forms completed AND request approved, IT work begins.
- Employee Clinicians (HH and HOS):
 - ServiceNow will automatically create an onboarding request for AccentCare credentials and HCHB PointCare access.
- Contractors: IT onboarding initiated in ServiceNow
 - Contractor name, location, cost center, title entered in Snow
 - Remainder of forms works exactly like employee onboarding.
- Onboarding Order Guide
 - Onboarding is managed by an Order Guide that steps requestor through all the hardware, software, and access permissions required for the new worker

Clinical Onboarding Process

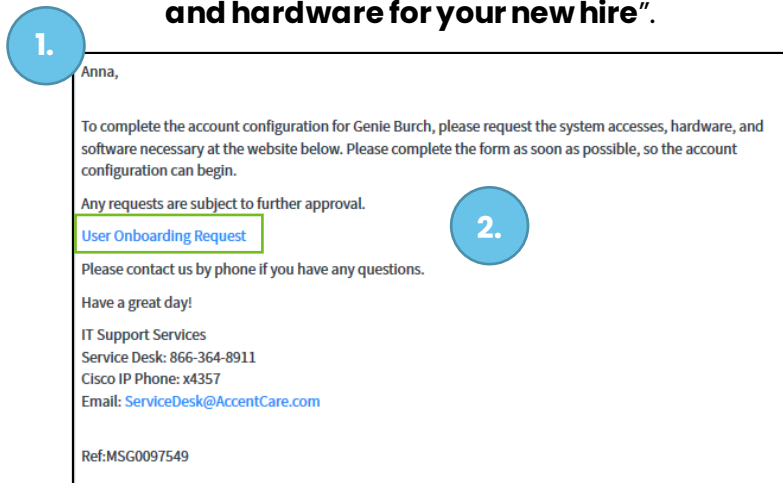
Clinical employees are in one of the following HH or HOS departments:

- Skilled Nursing-LVN (601)
- Physical Therapy (602)
- Miscellaneous/Occupational Therapy (603)
- Speech Therapy (604)
- Skilled Nursing (607)
- Dietary-Field (610)
- Medical Social Services (613)
- **Process NOT applicable for contract clinicians!**



Employee Onboarding Order Guide

1. Upon HR Admin approval of a new hire, the manager will receive an email notification from ServiceNow. Email subject line will be: **"Please request access and hardware for your new hire"**.



2. Click User Onboarding Request link in email.

User Onboarding
Provision a new employee

Describe Needs | Choose Options | Summary

Use this form to input all necessary information relating to the new employee or contractor.

User Onboarding (Application Permissions, IT Hardware and Software)

Use the form below to input all necessary information relating to your new employee or contractor. Ensure that the information on this screen is accurate before proceeding.

Note: Select the User Type that most appropriately fits the user as described below:

- **Contractor** - The user requires an email account and hardware, but is not an employee. IT onboarding started on this form.
- **Employee** - The user is an employee in Workday and requires an email account and IT hardware. This form cannot be submitted until hiring process in Workday is complete. Hiring manager will receive IT onboarding instructions from ServiceNow after Workday hire process is complete.

3. * User Type
Employee

* Requested for
Novera Monwar

* Opened by
Mireya Medina

4. Select items required for onboarding employee

- Laptop
- Tablet
- Application and Telecom Access

The following items are optional and all are expensed to the branch. Cost center manager approval will be required.

- IT Peripherals (laptop accessories, phone headsets, office equipment)
- Software (Adobe, Microsoft Applications)

3. Complete User Type 'Employee-AD' and 'Requested For.'
4. For every selection the order guide will create a new tab that must be filled out.

Contractor Onboarding Order Guide

1. Categories	
Application Access	27
Employee Onboarding/Offboarding	3
EMR Requests (Do Not Use for Ap...	3
General Requests	3
Hardware Requests	44
Infrastructure Requests	2
Software Requests	4
Telecom Requests	7

1. From the Service Portal Home page, select 'Request IT Services or Equipment.' 'Employee Onboarding/Offboarding.'

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Request IT Services or Equipment Report an Issue Requests Delegates Asset Reports Cart

User Onboarding

Provision a new employee

Describe Needs Choose Options Summary

2.

Use this form to input all necessary information relating to the new employee or contractor.

User Onboarding (Application Permissions, IT Hardware and Software)

Use the form below to input all necessary information relating to your new employee or contractor. Ensure that the information on this screen is accurate before proceeding.

Note: Select the User Type that most appropriately fits the user as described below:

- Contractor** - The user requires an email account and hardware, but is not an employee. IT onboarding started on this form.
- Employee** - The user is an employee in Workday and requires an email account and IT hardware. This form cannot be submitted until hiring process in Workday is complete. Hiring manager will receive IT onboarding instructions from ServiceNow after Workday hire process is complete.

* User Type
Contractor

* First Name
Job Title

* Preferred Name
Manager (Note: Contractor not allowed as Manager)

Middle Name
Department

* Last Name
Cost Center

2. Enter user Type 'Contractor'. Fill out the top part of the form with the Contractor name, cost center, etc. The remainder of the form functions the same as employee onboarding.


Note: Manager approval will be routed to the manager entered on the form (unless the manager submits the form.)

Onboarding – Main Form

User Onboarding

Provision a new employee

Describe Needs | Choose Options | Summary



Use this form to input all necessary information relating to the new employee or contractor.

User Onboarding (Application Permissions, IT Hardware and Software)

Use the form below to input all necessary information relating to your new employee or contractor. Ensure that the information on this screen is accurate before proceeding.

Note: Select the User Type that most appropriately fits the user as described below:

- **Contractor** - The user requires an email account and hardware, but is not an employee. IT onboarding started on this form.
- **Employee** - The user is an employee in Workday and requires an email account and IT hardware. This form cannot be submitted until hiring process in Workday is complete. Hiring manager will receive IT onboarding instructions from ServiceNow after Workday hire process is complete.

* User Type
Employee

* Requested for: Novera Monwar | * Opened by: Mireya Medina

Select Items required for onboarding employee

- Laptop
- Tablet
- Application and Telecom Access

The following items are optional and all are expensed to the branch. Cost center manager approval will be required.

- IT Peripherals (laptop accessories, phone headsets, office equipment)
- Software (Adobe, Microsoft Applications)

After this page is completed, click 'Next' at bottom of form to 'Choose Options'.

Open each form and fill out all needed fields for the requested item.

NOTE: Some items don't indicate required fields, but open and verify! For example, Home Care Home Base doesn't have required fields indicator, but must have fields entered before it can be fulfilled!

The ^ v arrows open and close item forms.

Onboarding – Choose Options – Removing Items

User Onboarding
Provision a new employee

Describe Needs Choose Options Summary

Included Items: * Mandatory Fields

Item	Description	Options	Toggle
User Account Provisioning	Provision a new user	Options	Blue
Laptop - New/Replacement	Request a new or replacement Laptop	Options	Blue
Home Care Home Base (HCHB)	Request HCHB Access Permissions	Options	Blue
Dell Docking Station	Dell Docking Station	Options	Grey
Logitech MK320 Wireless Keyboard & Mouse Set	Logitech MK320 Wireless Keyboard & Mouse Set	Options	Blue

Previous Next

To remove an item from a request, slide tab from Blue to Grey.

To finish request on 'Summary' page, click Next.

User Onboarding
Provision a new employee

Describe Needs Choose Options Summary

Order Guide Details	Quantity	Price (ea.)	Recurring (ea.)	
User Account Provisioning	1	---	---	
Laptop - New/Replacement	1	---	---	
Home Care Home Base (HCHB)	1	---	---	
Dell Docking Station	1	\$140.00	---	NOT INCLUDED
Logitech MK320 Wireless Keyboard & Mouse Set	1	\$30.00	---	

Total : \$30.00

Add to Cart Edit Options Order Now

Onboarding-Request Summary Actions

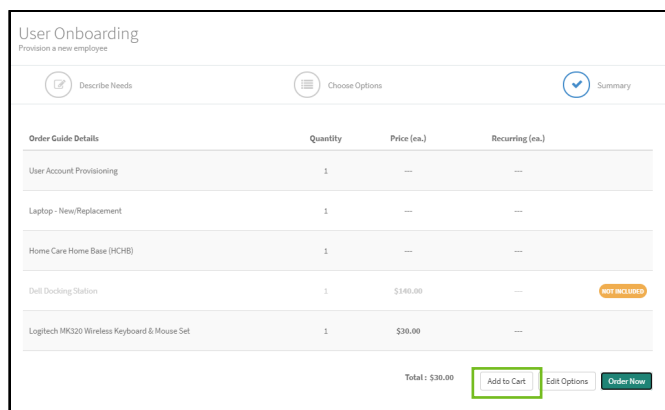


Summary Page is displayed by clicking Next button on Choose Options page

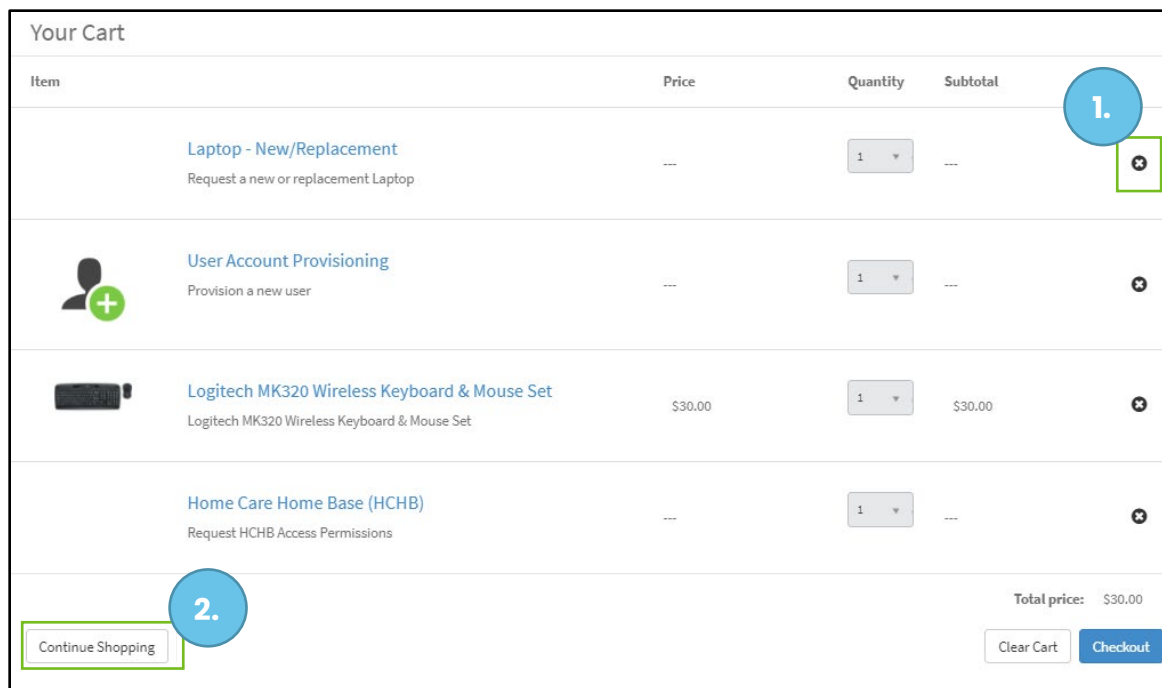
1. Add all items to Cart for further review. Also allows addition of new items for same person before submitting request
2. Go back to Choose Options page.
3. Order all items as currently displayed without going to Cart. Will **NOT** order other items already in Cart!!

Request Cart

Items removed on Options page are not visible in Cart.



Click Add to Cart to view cart.



1. Items can be removed using the 'x' icon.
2. 'Continue Shopping' is used to display the catalog. This allows requestor to add additional items for SAME person.

Login Credentials

A notification email is sent to the manager and the office admin for the onboarded employee / contractor when new the new account is created.

See the account credential notes in the email!

Preview Email ✕

User Account Information

An account has been created for access to the laptop(if requested) and email:

User Name: [REDACTED]
Initial Password: pXOmyO3!

DO NOT change the password until all requested equipment has been received. Changing the password prior to equipment receipt will delay the provisioning process.

Other Account Credentials

Accounts for other systems:

- **Workday (Employees only):** Credentials for Workday are sent during the HR onboarding to the employees personal email address used during the hire process.
- **AccentCare Education:** An ACE account is automatically provisioned for every employee. The account login is the nine digit employee number and the initial password is "AccentCare01!!" without the quotes. If ACE credentials are required for contractors, these must be requested in the IT Service Portal using this [link](#).
- **Other Application Access:** Access to other backoffice applications (HCHB, VividCare, etc.) are requested in the IT Service Portal [here](#). If access was requested as part of the IT onboarding request, these application credentials will be sent directly to the user's email address as the application provisioning teams complete their assigned tasks. Status for these individual items can be found using the IT Service Portal.

If an HCHB or RSL tablet was requested for this user

FOR DEDICATED TABLETS:

The device password is the user's initials of their first and last name in lower case, a period (.) and the last four digits of their social security number. For example, if your name is Robert Marley and the last four digits of your SSN are 9999, then your password would be rm.9999. The password for PointCare/RSL is the same.

Offboarding Process

- Employee: IT offboarding is initiated in Workday
 - NO action is required in ServiceNow by manager.
 - Accounts are automatically disabled and offboarding tasks for IT are generated midnight of the term date.
 - See Tablet training – retrieving/wiping tablets.
- Contractor: IT offboarding is initiated in ServiceNow
 - Contractors MUST be extended every 90 days or they will automatically be terminated and accounts disabled.
 - To terminate:
 - From the Service Portal, request IT Services or Equipment > Employee Services.
 - Select the 'Contractor User Termination'. Select the Requested For contractor and the termination date (can be in the future).

- Remaining offboarding process matches that for employees.

Contractor Offboarding Form

From the Service Portal Home page, select 'Request IT Services or Equipment' → 'Employee Onboarding/Offboarding' → 'Contractor User Termination.'

The screenshot shows the ServiceNow portal interface. The breadcrumb navigation is: Home > Service Catalog > Employee Onboarding/Offboarding. A search bar is located in the top right. On the left, a navigation menu lists various request types, with 'Employee Onboarding/Offboarding' highlighted and showing a count of 3. The main content area is titled 'Employee Onboarding/Offboarding' and contains three cards: 'Contractor User Demographic Information Add/Change', 'Contractor User Termination/Extension' (highlighted with a green box), and 'User Onboarding'. The 'Contractor User Termination/Extension' card includes a description: 'Terminate or Extend an existing CONTRACT employee' and a 'View Details' button.

The screenshot shows the 'Contractor User Termination' form. The breadcrumb navigation is: Home > Service Catalog > Employee Services > Contractor User Termination. A search bar is in the top right. On the left, there is a card with a person icon and a red minus sign. The main form area is titled 'Contractor User Termination' and includes the subtitle 'Terminate an existing CONTRACT employee'. The form contains a dropdown for 'Contractor Requested For', a date field for 'Termination Date' (highlighted with a green box), and a dropdown for 'Open By' (set to Gregory Cantrell). Below the form is a 'Notes/Comments' section with a text area and a note: 'If this is a request for a replacement laptop please include a detailed description of why it is being replaced. Please note that troubleshooting with the Service Desk may be required before a replacement is issued.' At the bottom, there is a 'Submit' button, an 'Add attachments' link, and a 'Required information' section with a red error message for 'Termination Date'.

Find Contractor in the list. Users **Will NOT** be able to select Employees here. Employee terminations are initiated in Workday.

Select termination date here. Accounts will be disabled midnight of termination date.

Self Service Portal

Manager SR Approval / Checking Incident and Request Status

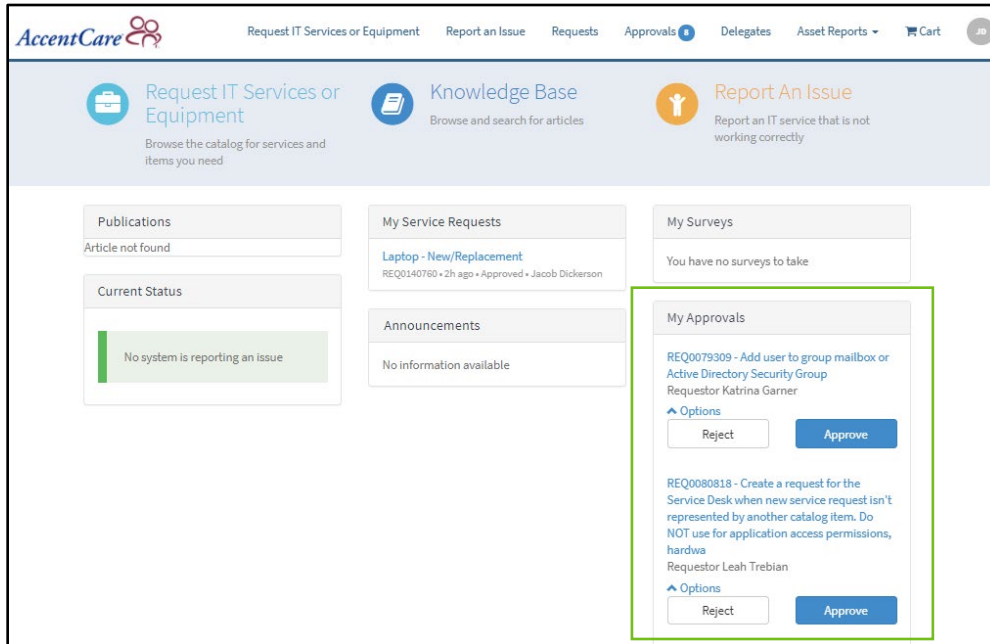
Service Request Approval Matrix

- NO Service Requests get worked until approvals are complete.
- Most requests require a manager's approval, including application permissions, hardware, and software.
 - Exception: When the manager is the submitter.
- For hardware requested on the IT Peripherals request form, cost center manager approvals are requested in Coupa.
- Some cost center manager approvals remain in ServiceNow:
 - IT Software and any purchased hardware not requested on the IT Peripheral form.
- For Home Health and Hospice cost center managers (Executive Directors) can approve up to \$2500. For PCS/MHC, Branch managers can approve up to \$500. Requests between \$500 and \$2500 require Area VP approval.

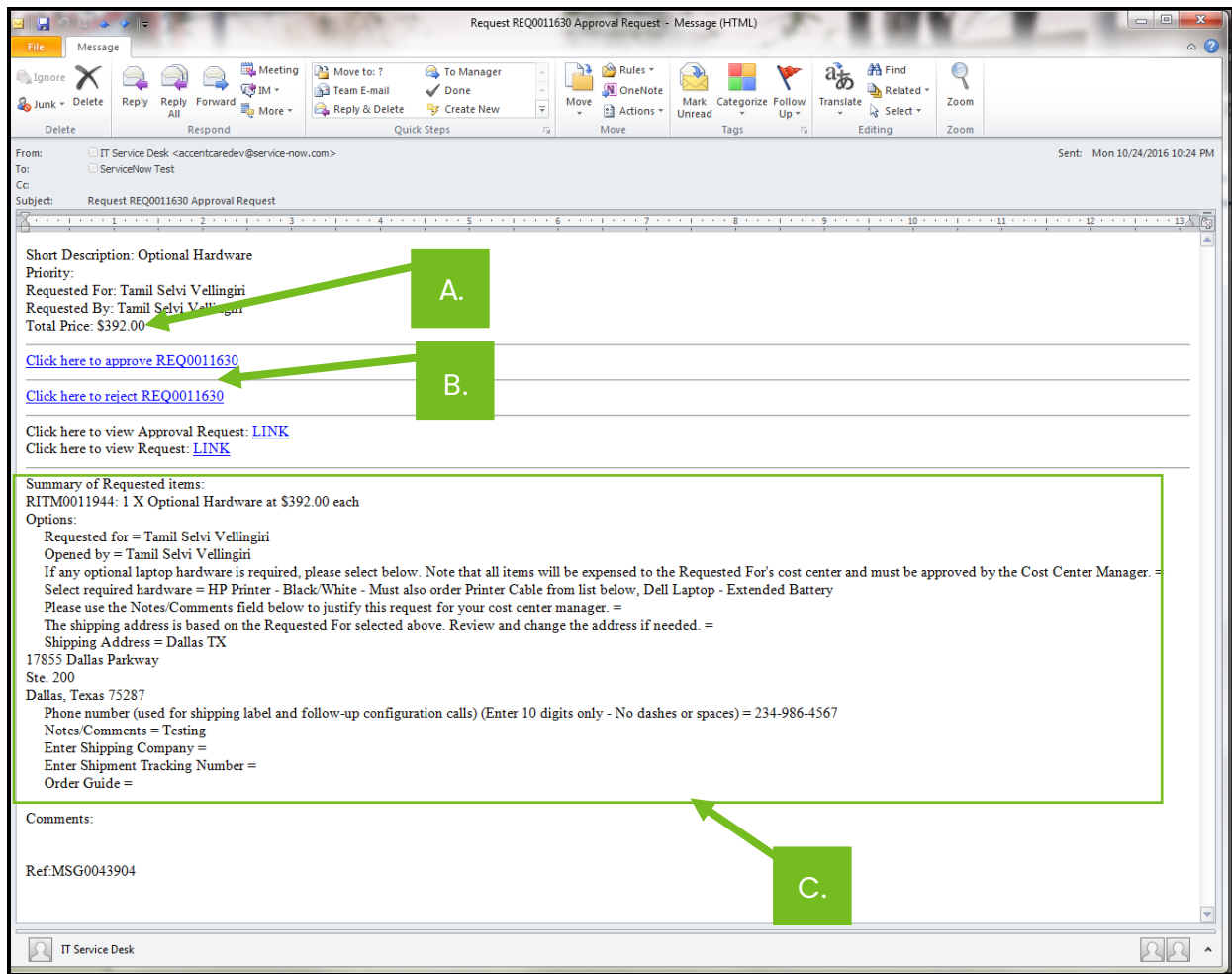
Service Request Approval Process

Two ways:

- **Preferred:** Managers can approve ALL outstanding requests from Service Portal.

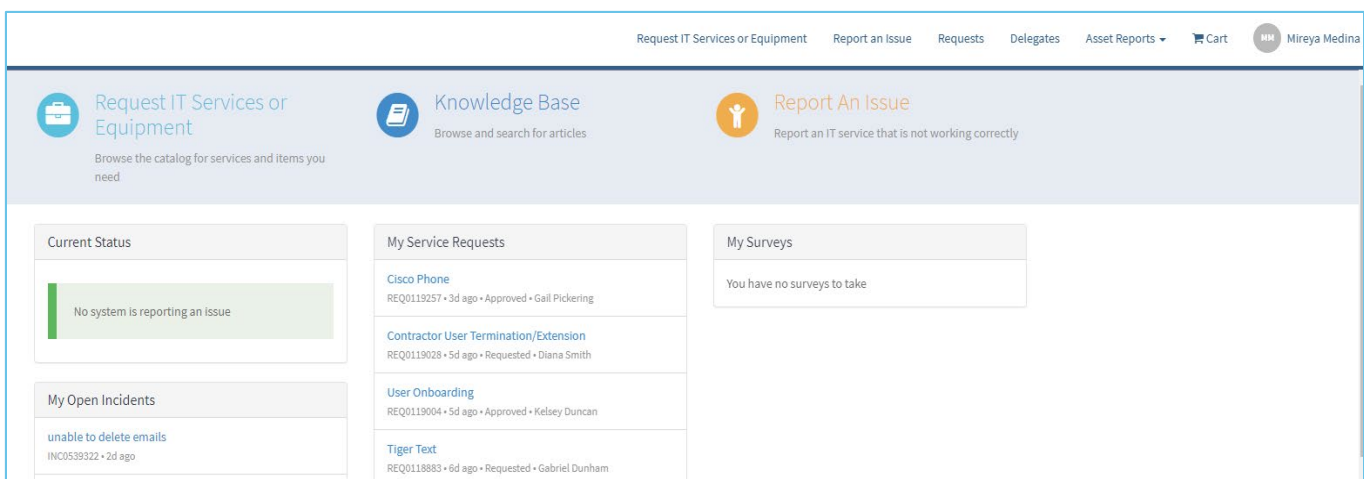


- Respond to approval request email.



- A. Amount >\$0 if an expense item is requested. These requests will require CC Manager approval.
- B. Approve/Reject Link. Click 'Send' on email that pops up.
- C. Details of Request.

Get Current Ticket Information

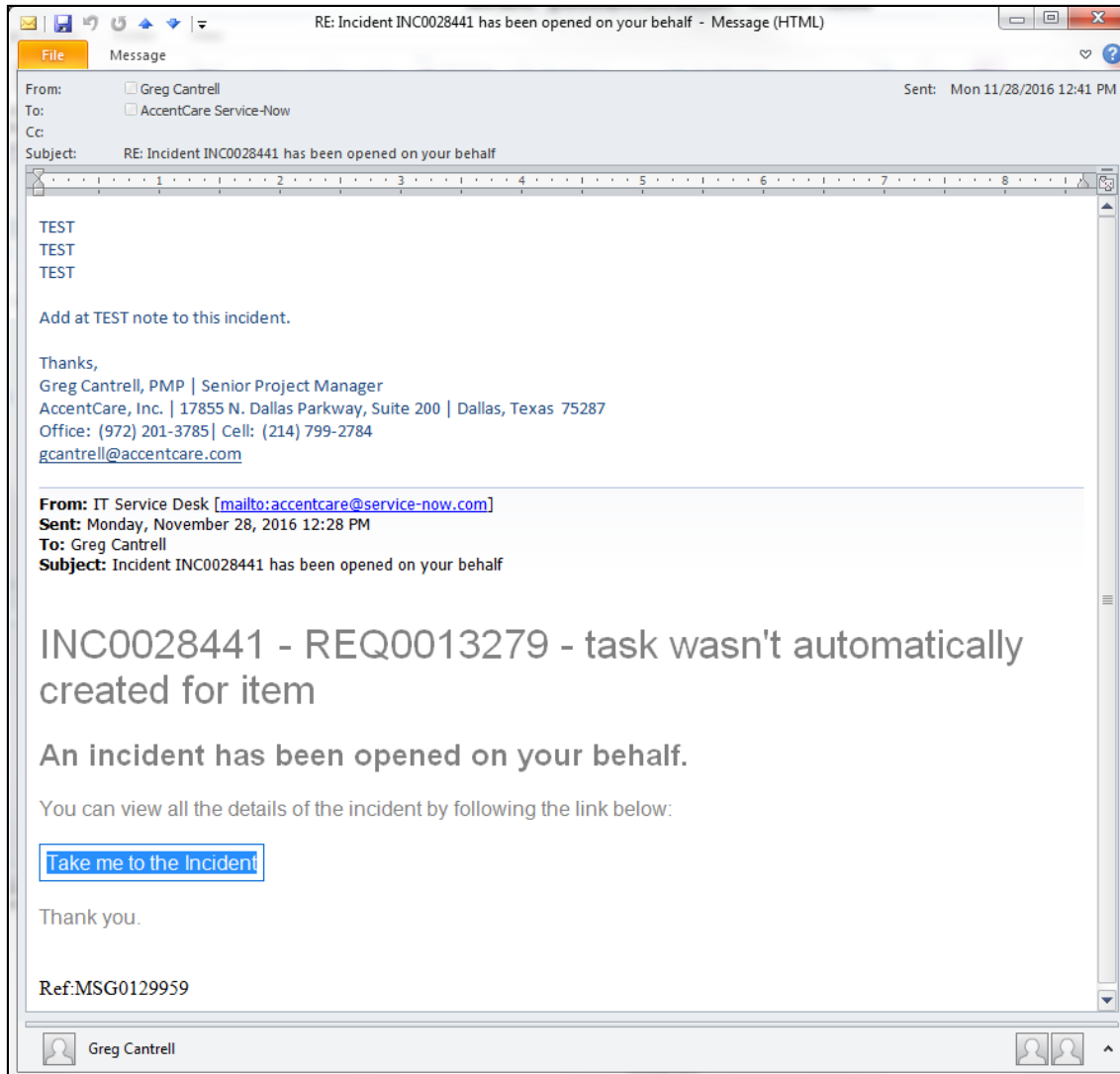


From Home screen, click on blue text hyperlinks.

The screenshot displays a ServiceNow ticket form. At the top, there is a search bar and a breadcrumb trail 'Home > Ticket Form'. Below this, a message input field is labeled 'A.' with a green arrow pointing to it. The input field contains the text 'Type your message here...' and a 'Send' button. Below the input field is a message history section. The first message is from Evelyn Castro, dated '2d ago', and contains a screenshot of a remote support session. This message is labeled 'B.' with a green arrow pointing to it. Below the screenshot is a blue text hyperlink: 'Remote-Support-Mireya-Medina-@#64;-LT8H7G3G2-20210129151424.png' with a file size of '81 KB'. Below the message history is a 'Start' button. The right sidebar contains incident details for Evelyn Castro, including ticket number, state, priority, and assignment group. Below the incident details are sections for 'Set up Google Maps API' and 'Attachments', which shows the same screenshot as the message history.

- A. Comments can be added to the ticket here.
- B. More detailed view of Incident response and support work notes provided on detail pages.

Incident Communication with Support



Be on the lookout for updates and/or questions from support on your submitted issues.

Response to this email will place your comments directly in your ticket and provides information to support.

Tips to improve your service experience

General

1. Make sure to include your **Contact Phone Number**. Many of the service request forms have a required field for contact phone number, add one even if it is not required. Include the contact phone on all inbound emails to the service desk if a signature line not used.
2. Call the Service Desk directly (1-866-364-8911, use the Priority line) for **High Priority Issues**. Issues impacting large groups of people are considered high

- priority. These can include phones down for a branch or application (app) is not working.
3. Use the 'Report an Issue' link on the Service Portal instead of sending an email to the Service Desk. Sending an email will create unnecessary delays.
 - This form will route your issue to the appropriate support team much more quickly!
 4. Use the Service Catalog and create a Service Request when the applicable item exists.
 5. **Avoid** sending emails to servicedesk@accentcare.com for application access, hardware requests, and onboarding/offboarding. Sending an email will create unnecessary delays. The Service Request forms gather all required information to provision request and will route your issue to the appropriate support team much more quickly!.
 6. **Avoid** using the General Request when the exact catalog item exists. The service desk forwards these request manually to the correct support person AND many times some required information is missing. This manual process will create unnecessary delays.

Service Request Approvals

All manager approvals must be complete **before** provisioning tasks are generated (and work begins) for service requests.

Laptop replacement requests

Before requesting a laptop replacement, call the service desk or create an incident on the problem you are having. Troubleshooting "in place" can resolve many issues.

User Onboarding

- If the office manager is processing the onboarding request, the manager should forward the IT onboarding email notification to them to initiate the process.
- Windows/email credentials are sent from ServiceNow to the manager. Passwords for systems such as WorkDay, AccentCare University and HCHB are sent from those systems directly and are NOT part of the credentials provided in the onboarding notification.

Revision History

0001	01/25/2022	G Cantrell/M McCoy