Tab 2

**Phone Call Guide - UTS**

**Answering The Phone:**

When you receive a call, your desk phone and your Teams application will ring on your computer. The notification on your computer will indicate that the call is for the OTIS Help Desk. It is recommended that you answer the call on Teams and use your headset to talk to the client so you can type while talking to them. You can answer the call by clicking the blue phone button.

**Hi, this is \*NAME\* with the OTIS Help Desk. How may I assist you?**

*[The user will tell you their request or issue]*

**Gathering Information:**

*[Are they calling about an existing ticket?]*

**Are you calling about an existing ticket, or do you need to put a new ticket in?**

If Yes:

* What is your ticket number?
* Please give me one moment while I pull up the ticket. Search the ticket number in Cherwell
* If they want to provide an update, add the information by creating a new journal note.
* If they want a status update, say that you will discuss with the ticket owner, and they will contact the client with updates shortly.

If No:

* Create a ticket for them
* Ask troubleshooting questions to resolve the issue or collect the information needed to assign to another team member.

1. Troubleshooting

While you are on the phone with the user, your goal is to get as much information as possible for new tickets. Below are some of the questions you will want to ask the client or gather from what they tell you to document in the ticket description:

* What the issue or request is
* Is this an application, device, account, or service? (You can usually infer this from when they start telling you the problem)
* What is it doing or not doing?
* Urgency
* Is this a work stoppage?
* Are there others experiencing this issue?
* How long has this been happening?
* Client Location
* Are you in the office or working remotely?
* If they are trying to reach a website:
* Have you tried using a different browser?
* Which browser works and which one does not?
* Have you tried using an incognito browsing window?
* If they are having issues with an O365 application:
* Have you tried to access your app via portal.office.com? (This also serves as a workaround while we troubleshoot Office issues)

While the user is talking and answering your questions, document this information in the ticket. For some tickets, you are able to solve them over the phone. If you do so, assign the ticket you created to yourself, so you can log your time and resolve it.

If you are unable to resolve it, finish adding any pertinent details or contact information to the ticket and assign it to the Help Desk so someone else can assist them.

# External Callers:

If someone is asking for another institution (usually UT Austin), you can usually find the right phone number by just Googling it. Provide them with the correct number then transfer the call by clicking **Transfer** in the Teams app and entering the correct phone number.

If an external caller is attempting to reach a UT System employee and asking to be transferred, we **do not** transfer calls due to security concerns. Let them know that our systems do not allow us to transfer calls. Instead, they are welcome to Google the employee’s name since that information is publicly available. If they persist, hang up.

The most common external call is typically regarding accessing UT Benefits. These are usually employees of another UT institution. Create a ticket for them and provide their email address and phone number in the ticket description.

If someone does not have an account in Cherwell, you can set it to **Default Customer**. Then, provide their email and phone number in the ticket description. Be sure to provide any follow-up emails to the user via Outlook/Microsoft Teams since they are not a Cherwell customer, so they will not see any journal notes you leave them.

If the caller is attempting to sell a product or partake in non-work related activities, kindly decline and end the call. If the voicemails happen to become tickets, feel free to close them as needed.