



# Introduction

The CRMS is the public-facing component of the SSMIS hence all requests, applications and payments will be routed via CRMS for the respective public/members' service interface.

## Who Benefits From The Human Resource Management System

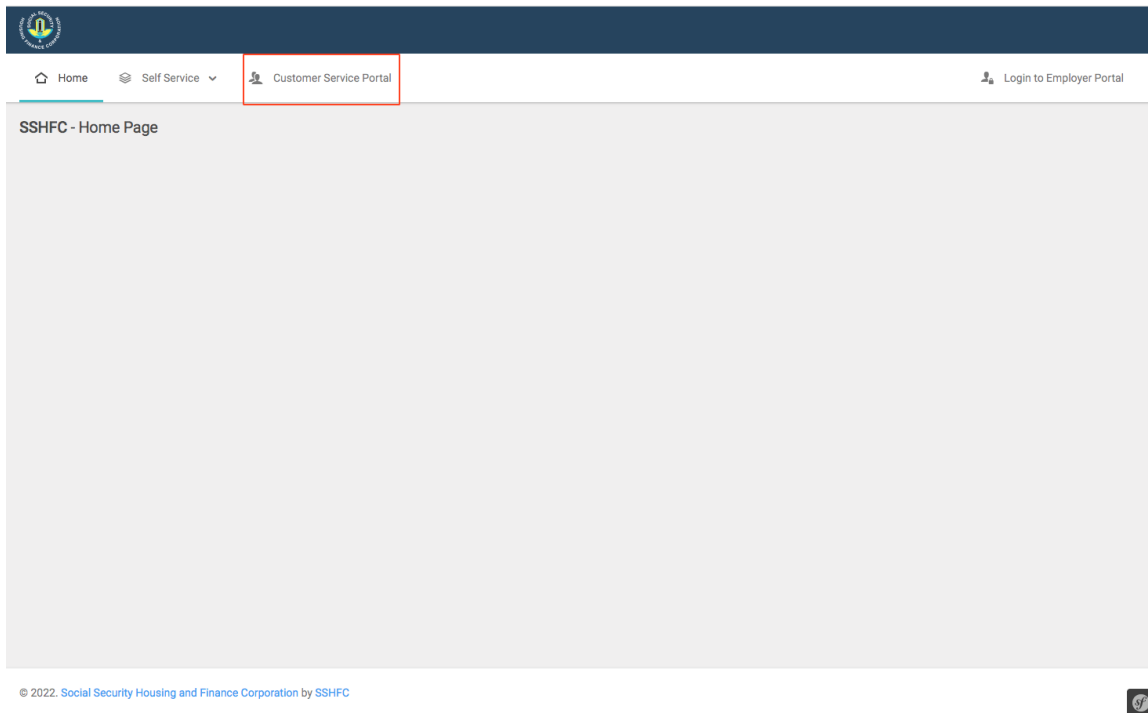
- The general public
- Members of Management
- Information Technology Officials

## System Input

- Requests for Information
- Requests to Book Appointment
- Submissions of Complaints

# External Users

This whole process begins when an external user, visits the public-facing website of SSHFC. Click on **Customer Service Portal**. As shown in the image below.



## Sign Up

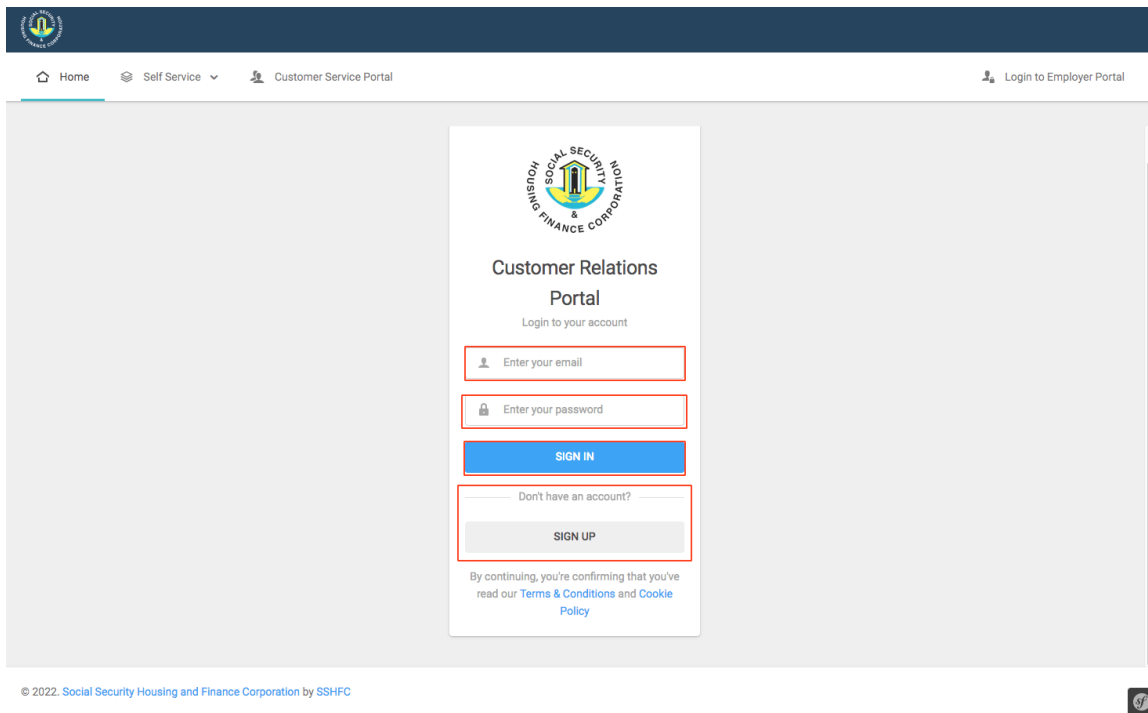
To take advantage of the CRMS the general public will first need to sign up for the platform. This requires a username, email, phone number and password.

A screenshot of the SSHFC 'Create account' form. The form is centered on a light gray background. At the top of the form is the SSHFC logo. Below the logo, the text 'Create account' is displayed, followed by the note 'All fields are required'. The form contains several input fields: 'First name', 'Last name', 'Enter phone number', 'Your email', 'Confirm Email', 'Password', and 'Confirm Password'. The 'Password' field has a tooltip that says 'Please fill out this field.' A red rectangular box highlights the 'CREATE ACCOUNT' button, which is green with a white plus sign. At the bottom left of the page, there is a copyright notice: '© 2022. Social Security Housing and Finance Corporation by SSHFC'. At the bottom right, there is a small circular logo.

## Sign In

To log, into the system, one will need to be authenticated, via a username and password. After providing these details, the system grants you access to your portal where you will be allowed to submit various requests.

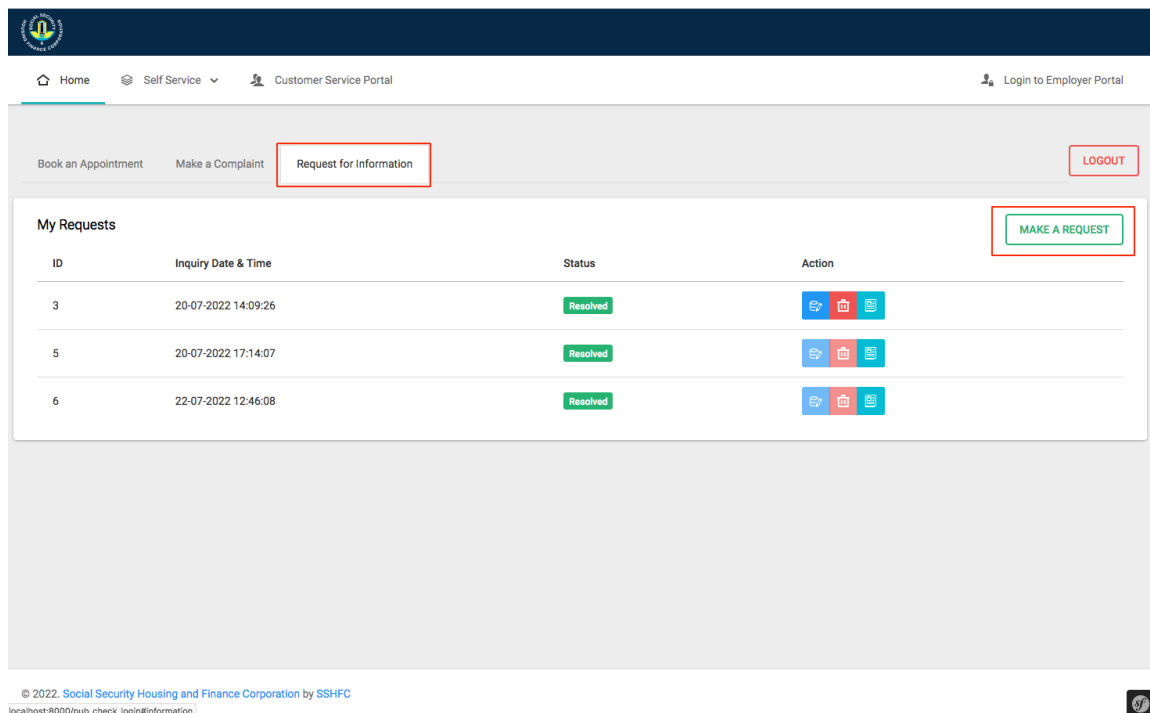
- Requests for Information
- Requests to Book Appointment
- Submissions of Complaints



The screenshot displays the login interface for the SSHFC Customer Relations Portal. At the top, a dark blue header contains the SSHFC logo on the left and navigation links for Home, Self Service, and Customer Service Portal in the center. On the right side of the header is a link to the Employer Portal. The main content area features a central white login box. This box includes the SSHFC logo, the title 'Customer Relations Portal', and the instruction 'Login to your account'. Below this, there are two input fields: 'Enter your email' and 'Enter your password', each with a corresponding icon (an email icon and a lock icon). A blue 'SIGN IN' button is positioned below the password field. Underneath the button is a link for users who do not have an account, labeled 'Don't have an account?' with a 'SIGN UP' button. At the bottom of the login box, a disclaimer states: 'By continuing, you're confirming that you've read our [Terms & Conditions](#) and [Cookie Policy](#)'. The footer of the page shows the copyright notice '© 2022. Social Security Housing and Finance Corporation by SSHFC' on the left and a small SSHFC logo on the right.

## Request for Information

Under this tab, a user can request information. Here, the customer is given the opportunity to submit his question or request for information.



On the Tab - Request for information, click on the **Make a Request** button. This action opens up the page you see below:

The screenshot shows the 'Make a Request' form. The form has the following fields:

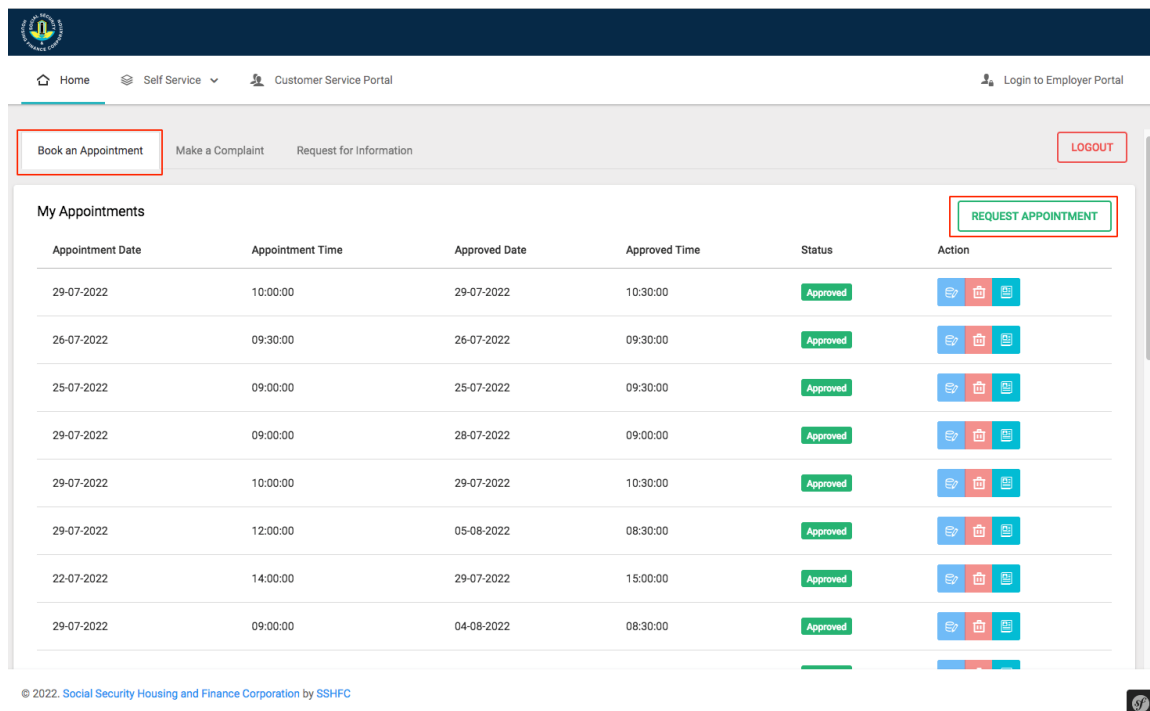
- First Name\***: gawu
- Last Name\***: gawu
- Phone Number\***: 0265544789
- Email\***: gawu@hoh.com
- Enquiry Date & Time**: 29 / 07 / 2022, 12:57:26 pm
- Question\***: (A large text area for the user to enter their question, highlighted with a red box.)

At the bottom right of the form, there are two buttons: 'BACK' and 'SUBMIT'.

The footer contains the copyright notice: '© 2022. Social Security Housing and Finance Corporation by SSHFC' and a small logo.

## Book Appointment

























Under this tab, a user can book an appointment. A range of dates and times are available for the user to select. However, an approved date will be communicated when the request is officially acknowledged.



Home Self Service Customer Service Portal Login to Employer Portal

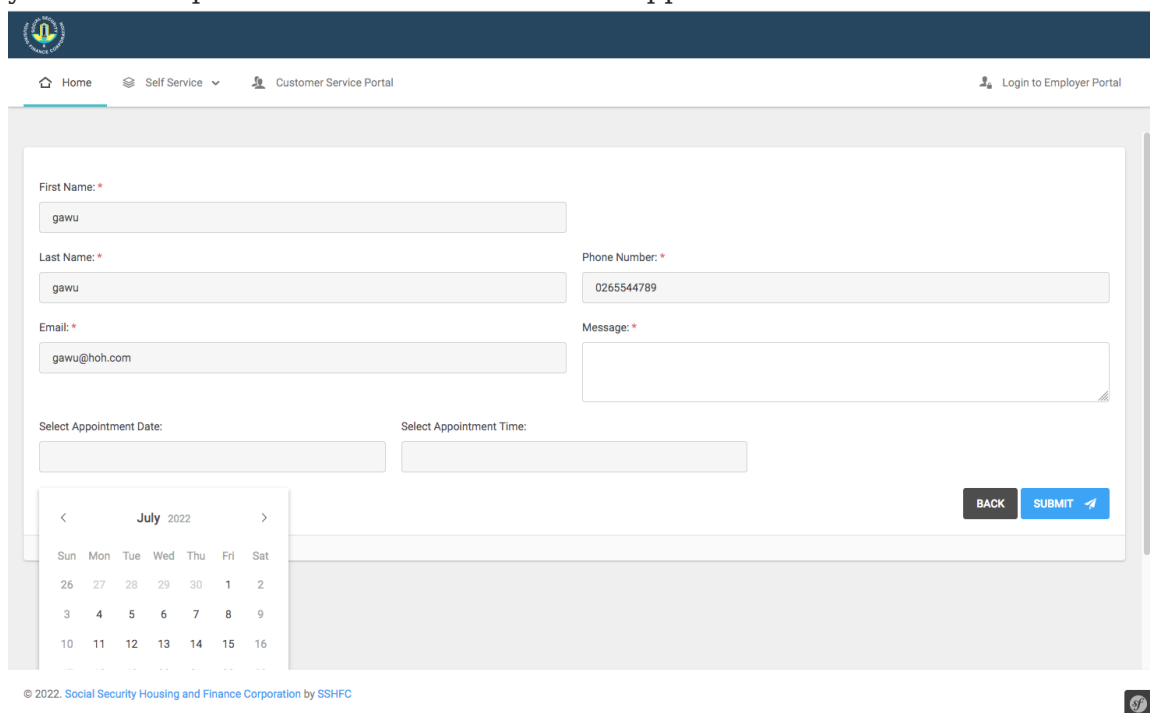
Book an Appointment Make a Complaint Request for Information LOGOUT

**My Appointments** REQUEST APPOINTMENT

Appointment Date	Appointment Time	Approved Date	Approved Time	Status	Action
29-07-2022	10:00:00	29-07-2022	10:30:00	Approved	  
26-07-2022	09:30:00	26-07-2022	09:30:00	Approved	  
25-07-2022	09:00:00	25-07-2022	09:30:00	Approved	  
29-07-2022	09:00:00	28-07-2022	09:00:00	Approved	  
29-07-2022	10:00:00	29-07-2022	10:30:00	Approved	  
29-07-2022	12:00:00	05-08-2022	08:30:00	Approved	  
22-07-2022	14:00:00	29-07-2022	15:00:00	Approved	  
29-07-2022	09:00:00	04-08-2022	08:30:00	Approved	  

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Clicking on the **Request an Appointment** Button opens up a page that allows you to select possible dates and times for an appointment. See below:



Home Self Service Customer Service Portal Login to Employer Portal

First Name: \*  
gawu

Last Name: \*  
gawu

Phone Number: \*  
0265544789

Email: \*  
gawu@hoh.com

Message: \*

Select Appointment Date: Select Appointment Time:

July 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16

BACK SUBMIT

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## Submit a Complaint













Users of this portal are given the chance to also submit complaints they might have about SSHFC.

Home Self Service Customer Service Portal Login to Employer Portal

Book an Appointment **Make a Complaint** Request for Information **LOGOUT**

**My Complaints** **MAKE A COMPLAINT**

Filter: Type to filter... Show: 10 COPY EXCEL CSV PDF

Ticket Number	Complaint Date & Time	Status	Action
1658326270	20-07-2022 14:11:00	Resolved	  
1658337757	20-07-2022 17:13:47	Resolved	  
1658494096	22-07-2022 12:41:21	Resolved	  
1658494612	22-07-2022 12:45:47	Resolved	  

Showing 1 to 4 of 4 entries 1

Complaints are captured in the text field highlighted.

Home Self Service Customer Service Portal Login to Employer Portal

Ticket Number  
1659099604

First Name\* Last Name\*  
gawu gawu

Phone Number\* Email\* Complaint Date & Time  
0265544789 gawu@hoh.com 29 / 07 / 2022, 12: 56: 32 pm

**Complaint\***

BACK SUBMIT

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## Track your Submissions













Also on this portal, is the ability to view the outcome of your submissions once they have been worked on. This is indicated by the status message on the dashboard.

Home Self Service Customer Service Portal Login to Employer Portal

Book an Appointment Make a Complaint Request for Information LOGOUT

My Complaints MAKE A COMPLAINT

Filter: Type to filter... Show: 10 COPY EXCEL CSV PDF

Ticket Number	Complaint Date & Time	Status	Action
1658326270	20-07-2022 14:11:00	Resolved	  
1658337757	20-07-2022 17:13:47	Resolved	  
1658494096	22-07-2022 12:41:21	Resolved	  
1658494612	22-07-2022 12:45:47	Resolved	  

Showing 1 to 4 of 4 entries 1


Highlighted in the image above are:

- Status: Tracks the state of your submission
- Filter: This allows you to search and filter from your list of submissions
- Action: Allows you to perform actions like edit, delete, and view your submissions
- Exports: This allows you to export your data in any of the listed formats
- Show: This allows you to determine the number of rows visible at any one time.

## Internal Users / Members

Internal users and Members also have the ability to Book Appointments, Submit requests for Information & Make Complaints. The process to do these are similar to the processes outlined above.





John Awotwi  
johnawotwi@gmail.com

My account

USER

SETUP

DASHBOARD

AACMS

AACMS

CRMS

Complaint

Information Request

Request Appointment

DEPARTMENT

HELPDESK

REPORTS










SETUP

Search

CRMS - Make a Complaint


CRMS - Make a Complaint

MAKE A COMPLAINT

First Name	Last Name	Phone Number	Email	Complaint Date & Time	Ticket Number	Status	Actions
John	Awotwi	6575676	john@hj.com	19-07-2022 14:40:52	1658242137	Resolved	  
John	Awotwi	11212445	john@hj.com	22-07-2022 12:43:24	1658494065	Resolved	  
John	Awotwi	76888876	john@hj.com	22-07-2022 13:09:03	1658495971	Pending	  

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Complaint Page



John Awotwi  
johnawotwi@gmail.com

My account

USER

SETUP

DASHBOARD

AACMS

AACMS

CRMS

Complaint

Information Request

Request Appointment

DEPARTMENT

HELPDESK

REPORTS







SETUP

Search

CRMS - Make an Enquiry

CRMS - Make an Enquiry

MAKE AN ENQUIRY

First Name	Last Name	Phone Number	Email	Enquiry Date & Time	Status	Actions
John	Awotwi	767667676	john@gmail.com	13-07-2022 13:04:30	Resolved	  
John	Awotwi	767667676	john@gmail.com	22-07-2022 12:44:03	Resolved	  

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Enquiry Page

John Awotwi  
johnawotwi@gmail.com

My account

- USER
- SETUP
- DASHBOARD
- AACMS
- CRMS
- Request Appointment
- DEPARTMENT
- HELPSDESK
- REPORTS
- SETUP

CRMS - Make an Appointment

Filter: Type to filter... Show: 10 EXCEL PDF COLUMN VISIBILITY

First Name	Last Name	Phone Number	Email	Appointment Date	Appointment Time	Status	Actions
John	Awotwi	78676999	john@kjsd.ckn	14-07-2022	10:50:00	Approved	[Icons]
John	Awotwi	5686558685	john@kjsd.ckn	22-07-2022	10:00:00	Approved	[Icons]
John	Awotwi	78676999	jamesg@gmail.com	25-07-2022	10:00:00	Approved	[Icons]

Showing 1 to 3 of 3 entries

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## Appointment page

However, Internal users have the ability only limited by the permission and role granted, to coordinate and approve requests that come through the system.

## HelpDesk

This role is the glue that binds requests and bookings that come in with the responsible party or department qualified to manage such a task. The person or department assigned these tasks, will have the opportunity to work on all complaints, booking and information requests that come into SSHFC through the system. These are grouped into external and internal requests, to differentiate requests that come in through the public interface and those that are generated from within.

CRMS - Help Desk Notes (Appointments)

Filter:  Show: 10 [EXCEL](#) [PDF](#) [COLUMN VISIBILITY](#)

First Name	Last Name	Phone Number	Email	Appointment Date	Appointment Time	Registered?	Actions
John	Awotwi	78676999	john@kjsd.ckn	14-07-2022	10:50:00	Yes	<a href="#">View</a> <a href="#">Edit</a>
John	Awotwi	5686558685	john@kjsd.ckn	22-07-2022	10:00:00	Yes	<a href="#">View</a> <a href="#">Edit</a>
John	Awotwi	78676999	jamesg@gmail.com	25-07-2022	10:00:00	Yes	<a href="#">View</a> <a href="#">Edit</a>
Technical	Administrator	9098798	john@kjsd.ckn	22-06-2022	09:00:00	Yes	<a href="#">View</a> <a href="#">Edit</a>

Showing 1 to 4 of 4 entries

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In the HelpDesk portal, you can review requests, assign responsible departments meant to take care of the issue and determine the level of urgency.

CRMS - Help Desk Notes (Appointments)

Filter:  Show: 10 [EXCEL](#) [PDF](#) [COLUMN VISIBILITY](#)

First Name	Last Name	Phone Number	Email	Appointment Date	Appointment Time	Registered?	Actions
John	Awotwi	78676999	john@kjsd.ckn	14-07-2022	10:50:00	Yes	<a href="#">View</a> <a href="#">Edit</a>
John	Awotwi	5686558685	john@kjsd.ckn	22-07-2022	10:00:00	Yes	<a href="#">View</a> <a href="#">Edit</a>
John	Awotwi	78676999	jamesg@gmail.com	25-07-2022	10:00:00	Yes	<a href="#">View</a> <a href="#">Edit</a>
Technical	Administrator	9098798	john@kjsd.ckn	22-06-2022	09:00:00	Yes	<a href="#">View</a> <a href="#">Edit</a>

Showing 1 to 4 of 4 entries

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Above is an image showing the appointments, under the HelpDesk section. Below is the snapshot of External Appointments, Highlighted are the registered columns, and action column that mark if a job has been seen and attended to and the

various actions that can be taken.

CRMS - Help Desk Notes (External Appointments)

Filter:  Type to filter...

Show:  10

First Name	Last Name	Phone Number	Email	Appointment Date	Appointment Time	Registered?	Actions
mama	deoe	131313455	mdoe@gmail.com	06-07-2022	10:30:00	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
gawu	gawu	0265544789	gawu@hoh.com	29-07-2022	10:00:00	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
gawu	gawu	0265544789	gawu@hoh.com	26-07-2022	09:30:00	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
gawu	gawu	0265544789	gawu@hoh.com	25-07-2022	09:00:00	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
gawu	gawu	0265544789	gawu@hoh.com	29-07-2022	09:00:00	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
gawu	gawu	0265544789	gawu@hoh.com	29-07-2022	10:00:00	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
gawu	gawu	0265544789	gawu@hoh.com	29-07-2022	12:00:00	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
gawu	gawu	0265544789	gawu@hoh.com	22-07-2022	14:00:00	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

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Help Desk Notes (Update External Appointments)

First Name\*:  mama

Last Name\*:  deoe

Phone Number\*:  131313455

Email\*:  mdoe@gmail.com

Message\*:  ulam bator

Select Appointment Date:  2022-07-06

Select Appointment Time:  10:30

Notes:

Escalation Status:  Urgent

Department Assigned:  Not Available

Registered:  Yes

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Above are highlights showing what fields are available to the help desk personnel. These allow the helpdesk to submit extra details and information to the responsible department. Issues worked upon are then redirected to the department assigned to resolve said tasks.

## Department

This role handles the requests that are assigned on a department basis. As such only issues assigned to the department are seen in this portal. Approvals, answers to queries and complaints are submitted here, for onward submission to the user who initiated the process. The image below shows the Department's Interface for External Complaints.

The screenshot shows the 'CRMS - Department Help Desk Notes (External Complaints)' interface. The left sidebar contains a 'My account' menu with options: USER, SETUP, DASHBOARD, AACMS, and CRMS. Under the 'DEPARTMENT' section, there are links for Appointments, Complaint, External Appointments, External Complaints (highlighted with a red box), External Info. Requests, and Information Request. The main content area displays a table of external complaints. The table has columns: First Name, Last Name, Email, Complaint Date & Time, Ticket Number, Registered?, and Actions. There are three entries in the table, all with 'gawu' as the first and last name and 'gawu@hoh.com' as the email. The first entry has a complaint date of 20-07-2022 17:13:47 and ticket number 1658337757. The second entry has a complaint date of 22-07-2022 12:41:21 and ticket number 1658494096. The third entry has a complaint date of 22-07-2022 12:45:47 and ticket number 1658494612. All entries are marked as 'Registered? Yes'. The interface also includes a search bar, a filter dropdown, and buttons for 'EXCEL', 'PDF', and 'COLUMN VISIBILITY'. The footer shows the copyright notice: © 2022. Social Security Housing and Finance Corporation by SSHFC.

First Name	Last Name	Email	Complaint Date & Time	Ticket Number	Registered?	Actions
gawu	gawu	gawu@hoh.com	20-07-2022 17:13:47	1658337757	Yes	[Icon]
gawu	gawu	gawu@hoh.com	22-07-2022 12:41:21	1658494096	Yes	[Icon]
gawu	gawu	gawu@hoh.com	22-07-2022 12:45:47	1658494612	Yes	[Icon]

The image below shows the Department's Interface for Internal Enquiries.

The screenshot shows the 'CRMS - Department Help Desk Notes (Enquiries)' interface. The left sidebar is identical to the previous screenshot, with the 'Information Request' link under the 'DEPARTMENT' section highlighted with a red box. The main content area displays a table of internal enquiries. The table has columns: First Name, Last Name, Phone Number, Enquiry Date & Time, Registered?, and Actions. There are two entries in the table, both with 'John' as the first name and 'Awotwi' as the last name. The first entry has a phone number of 767667676 and an enquiry date of 13-07-2022 13:04:30. The second entry has a phone number of 767667676 and an enquiry date of 22-07-2022 12:44:03. Both entries are marked as 'Registered? Yes'. The interface also includes a search bar, a filter dropdown, and buttons for 'EXCEL', 'PDF', and 'COLUMN VISIBILITY'. The footer shows the copyright notice: © 2022. Social Security Housing and Finance Corporation by SSHFC.

First Name	Last Name	Phone Number	Enquiry Date & Time	Registered?	Actions
John	Awotwi	767667676	13-07-2022 13:04:30	Yes	[Icon]
John	Awotwi	767667676	22-07-2022 12:44:03	Yes	[Icon]

What you see in the image below is the interface that allows Department

personnel to manage resolutions.

The screenshot shows a web application interface for managing help desk notes. The left sidebar contains a navigation menu with options: USER, SETUP, DASHBOARD, AACMS, CRMS, DEPARTMENT, HELPDISK, REPORTS, and SETUP. The main content area is titled "Department Help Desk Notes (Updates Complaints)". It contains a form with the following fields: Employee/Member ID (22), Ticket Number (1658495971), First Name (John), Last Name (Awotwi), Phone Number (76888876), Email (john@hj.com), Complaint Date & Time (22/07/2022, 01:09:03 pm), Complaint (test), Notes (test list), Escalation Status (Urgent), and Department Assigned (Information Technology). A red box highlights the "Resolution" field, which is currently empty. At the bottom right, there are "BACK" and "UPDATE" buttons. The footer indicates "© 2022. Social Security Housing and Finance Corporation by SSHFC".

The image below shows, the aspect of the Department Help Desk, that list out a completed submission. The view option gives you an uneditable list of transaction records.

The screenshot shows the "Department Help Desk Notes (Show Appointments)" view. The left sidebar is the same as the previous image. The main content area displays a list of appointments. A red box highlights the "Department Help Desk Notes (Show Appointments)" title. Another red box highlights the details of a specific appointment. The details are as follows:

First Name	Technical
Last Name	Administrator
Phone Number	9098798
Email	john@kjsd.ckn
Message	appointment one
Appointment Date	22-06-2022
Appointment Time	09:00:00
Approved Date	27-07-2022
Approved Time	13:00:00
Notes	test
Escalation Status	Urgent
Department Assigned	Information Technology
Status	Approved

At the bottom right, there are "BACK" and "EDIT" buttons.

## Track your Submissions

Also on this portal, is the ability of each role assigned to the task to track, search and filter through all submissions that come through the system.

## Email Usage

The system is designed to send email prompts throughout the lifecycle of a request submitted through the portal.