



# 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

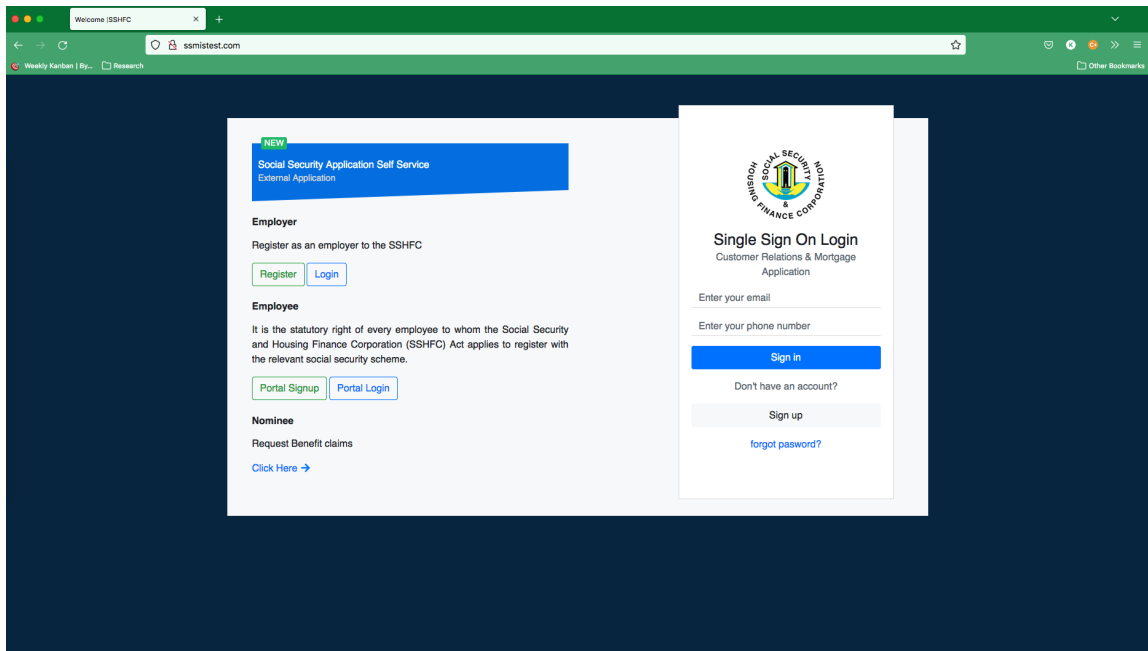
- The general public
- Members of Management
- Information Technology Officials

## System Input

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

## External Users

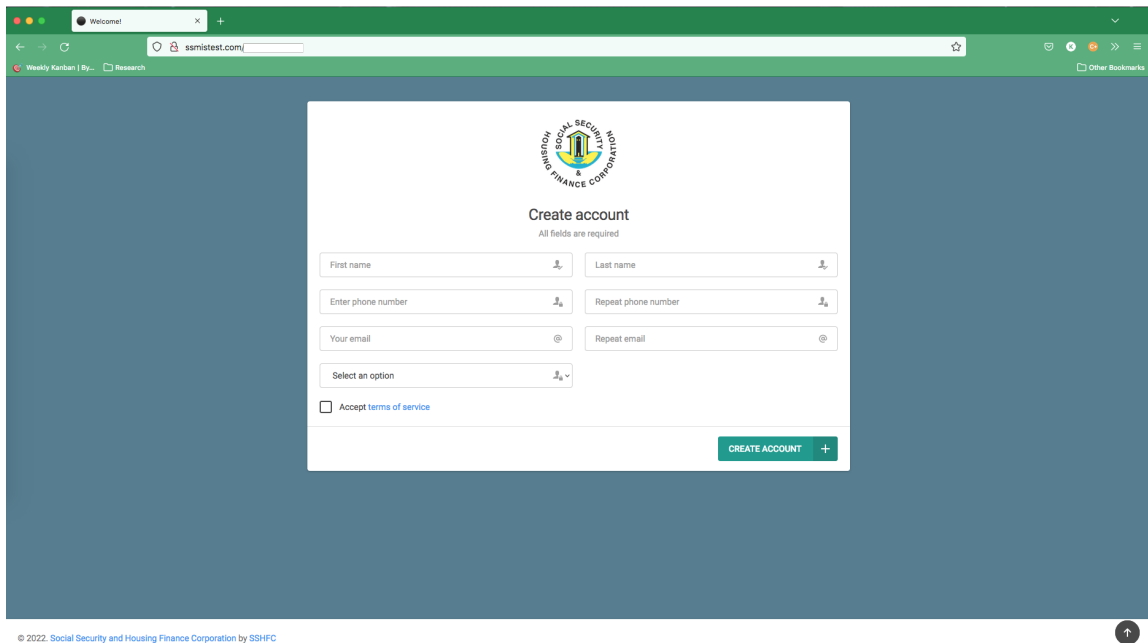
This whole process begins when an external user, visits the public-facing website of SSHFC. As shown in the image below.



This page gives you access to the SSMIS, MMS and CRMS public facing sections. Both the Mortgage application and CRMS module have a common sign-in interface , as seen in the image above.

## Sign Up

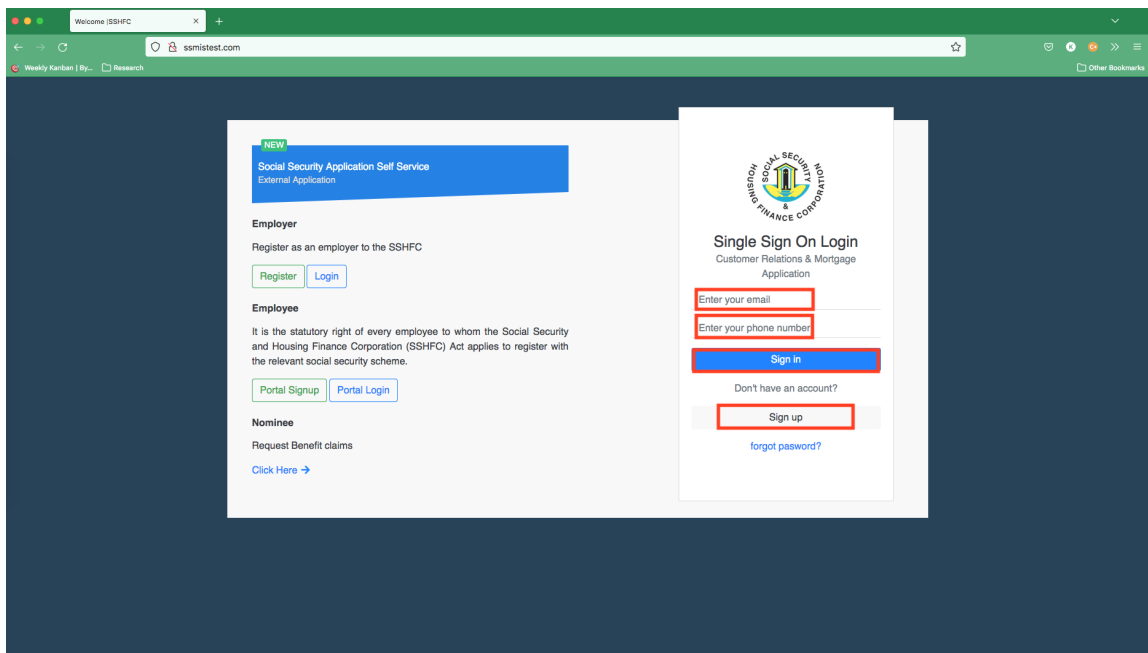
To take advantage of the CRMS the general public will first need to sign up for the platform. This requires an email address, phone number as well as other pertinent details.



## Sign In

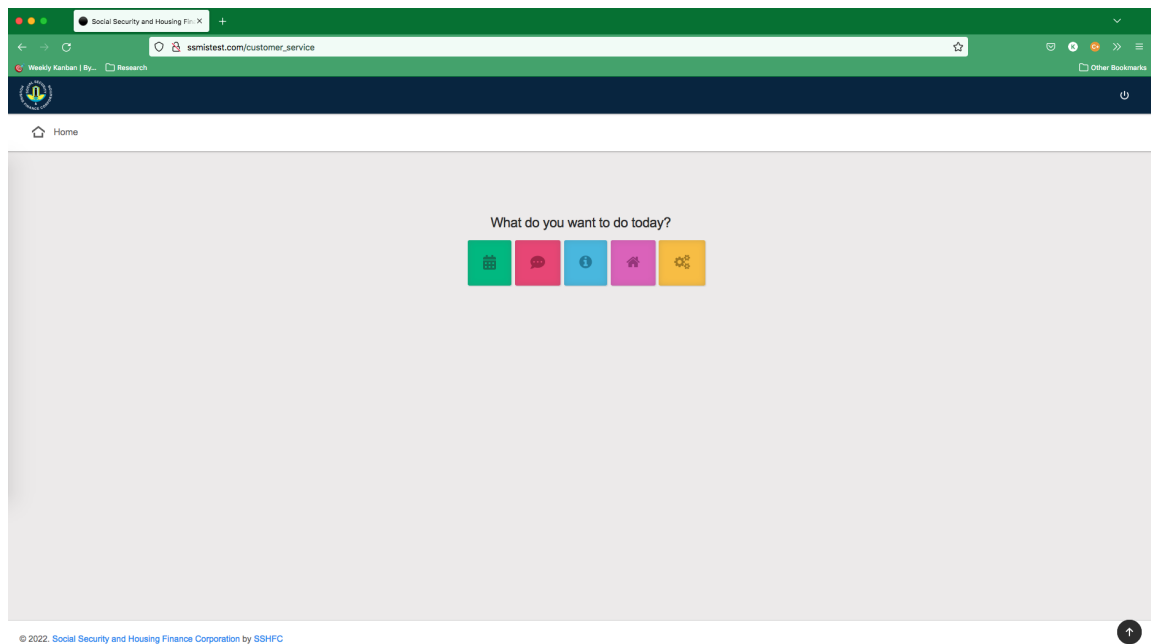
To log, into the system, one will need to be authenticated, via a username and password. After providing these details, the system grants you access to your portal where you will be allowed to submit various requests.

- Requests for Information
- Requests to Book Appointment
- Submissions of Complaints
- Initiate a mortgage application



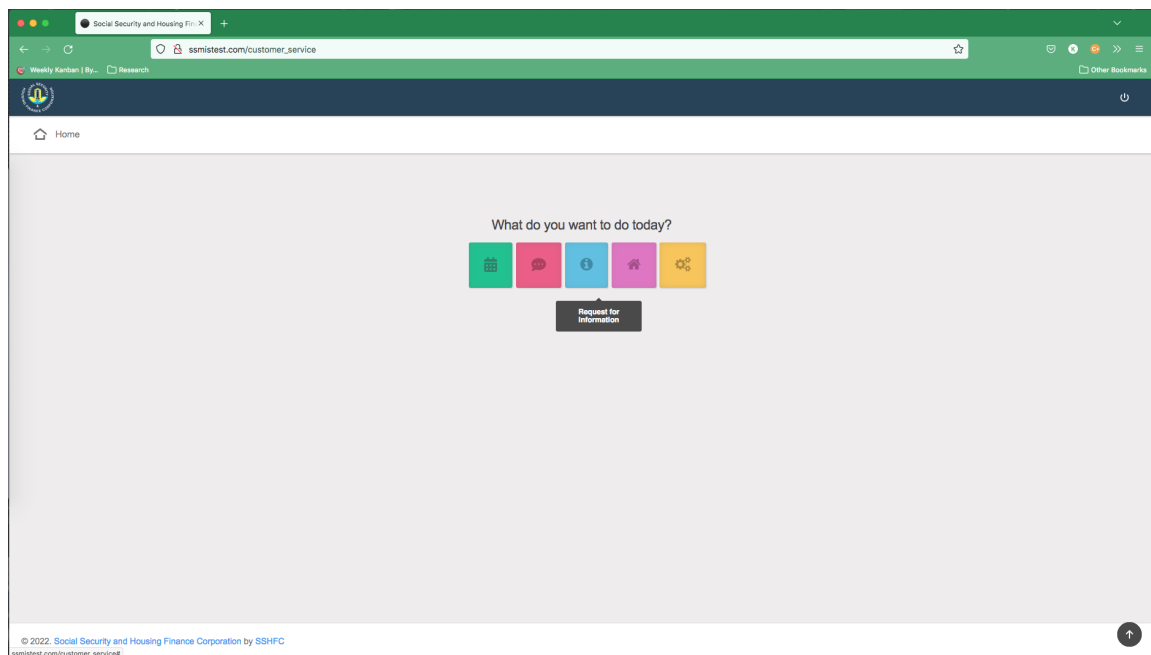
The screenshot shows a web browser window with the URL `ssmistest.com`. The page features a dark blue header and a main content area with a light blue background. On the left, there is a 'NEW' banner for 'Social Security Application Self Service External Application'. Below this, there are sections for 'Employer' (with 'Register' and 'Login' buttons), 'Employee' (with a paragraph about the statutory right and 'Portal Signup' and 'Portal Login' buttons), and 'Nominee' (with a 'Request Benefit claims' link and a 'Click Here' link). On the right, there is a 'Single Sign On Login' form with the SSHFC logo. The form includes input fields for 'Enter your email' and 'Enter your phone number', both highlighted with red boxes. Below these fields is a blue 'Sign in' button. At the bottom of the form, there is a 'Don't have an account?' section with a 'Sign up' button (highlighted with a red box) and a 'forgot password?' link.

After you successfully sign-in you are sent to the homepage, from which point you can access all other sections. See below:



## 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.

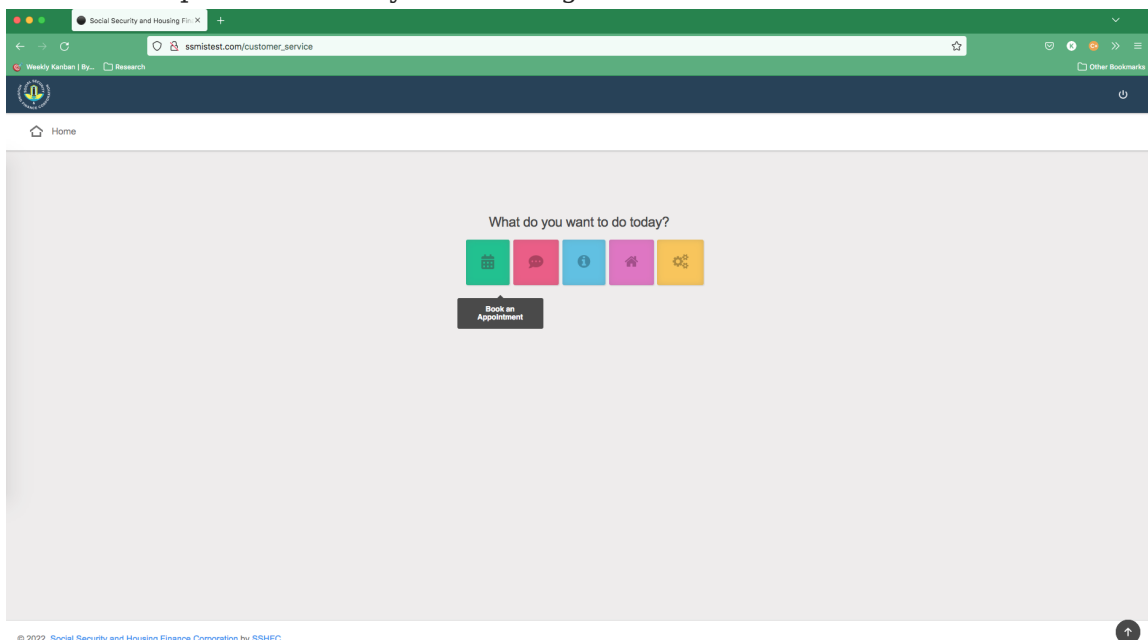


On the Tab - Request for information, click on the **Make a Request** button. This action opens up the page you see below:

The screenshot shows a web browser window with the URL `ssmtest.com/customer_service`. The page has a dark blue header with the SSHFC logo and navigation links: Home, Self Service, and Customer Service Portal. A 'Login to Employer Portal' link is also present. The main content area is a registration form with the following fields: First Name (gawu), Last Name (gawu), Phone Number (0265544789), Email (gawu@hoh.com), and Enquiry Date & Time (29 / 07 / 2022, 12:57:26 pm). A 'Question' text area is highlighted with a red border. At the bottom right of the form are 'BACK' and 'SUBMIT' buttons, with the 'SUBMIT' button also highlighted by a red border. The footer contains the copyright notice '© 2022. Social Security Housing and Finance Corporation by SSHFC'.

## 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.



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:


The screenshot shows the SSHFC Customer Service Portal with a dark blue header. The navigation bar includes 'Home', 'Self Service', and 'Customer Service Portal', with a 'Login to Employer Portal' link on the right. The main form area contains several input fields: 'First Name' (gawu), 'Last Name' (gawu), 'Phone Number' (0265544789), 'Email' (gawu@hoh.com), and a 'Message' text area. Below these are 'Select Appointment Date' and 'Select Appointment Time' dropdowns. A calendar for July 2022 is displayed, showing dates from 26 to 16. 'BACK' and 'SUBMIT' buttons are at the bottom right. The footer includes the copyright notice '© 2022. Social Security Housing and Finance Corporation by SSHFC' and a small SSHFC logo.

## Submit a Complaint

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

The screenshot shows the SSHFC Customer Service Portal home page. The header and navigation bar are identical to the previous screenshot. The main content area features a prompt 'What do you want to do today?' above five colorful icons: a calendar, a speech bubble, an information icon, a person icon, and a gear icon. A 'Make a Complaint' button is positioned below the speech bubble icon. The footer contains the same copyright notice and logo as the previous screenshot.

Complaints are captured in the text field highlighted.



HomeSelf ServiceCustomer Service PortalLogin to Employer Portal

Ticket Number

1659099604

First Name\*

gawu

Last Name\*

gawu

Phone Number\*

0265544789

Email\*

gawu@hoh.com

Complaint Date & Time


29 / 07 / 2022, 12 : 56 : 32 pm

Complaint\*

BACK

SUBMIT

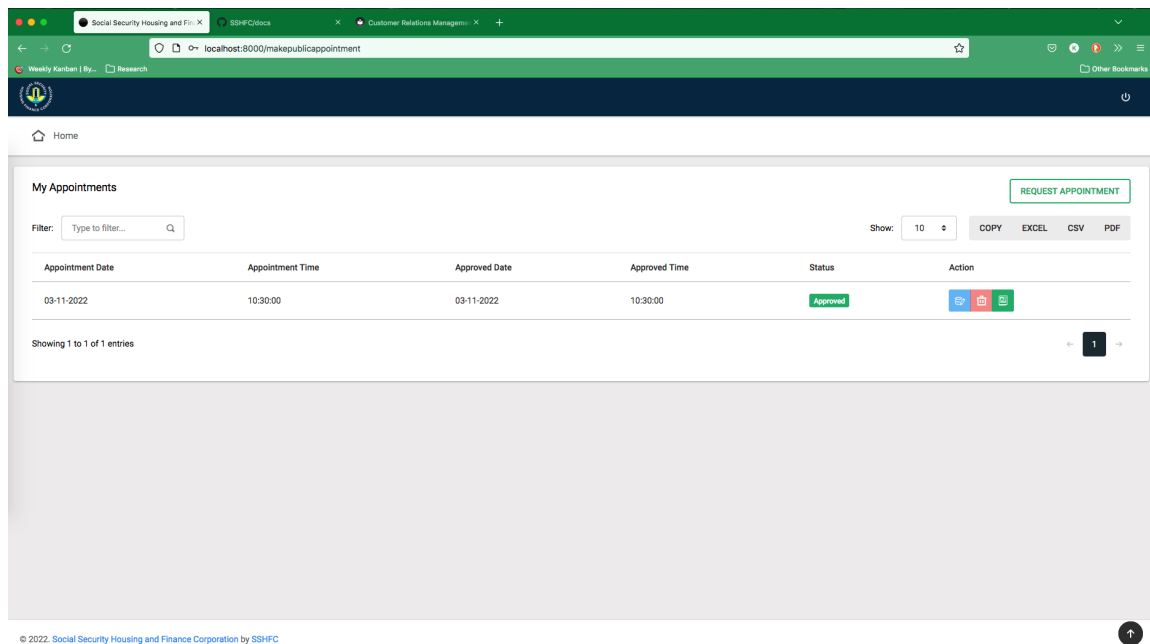
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## Track your Submissions

Also, is the ability to view the outcome of your submissions once they have been worked on. This is indicated by the status message on each module. Once you click on a module: complaints, appointments, information requests, you are able to submit a request as well as view the status of requests that have been already made.






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

CRMS

Complaint

Information Request

Request Appointment

DEPARTMENT

HELPDESK










REPORTS

SETUP

Search


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

CRMS

Complaint

Information Request

Request Appointment

DEPARTMENT

HELPDESK







REPORTS

SETUP

Search

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

The screenshot shows the 'CRMS - Make an Appointment' page. The sidebar on the left contains the following menu items: USER, SETUP, DASHBOARD, AACMS, CRMS (expanded), Complaint, Information Request, Request Appointment (highlighted), DEPARTMENT, HELPDISK, REPORTS, and SETUP. The main content area has a header 'CRMS - Make an Appointment' and a 'REQUEST APPOINTMENT' button in the top right. Below the header is a filter input field and a 'Show: 10' dropdown. The table below shows three entries:

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:  Show: 10 EXCEL PDF COLUMN VISIBILITY

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	 
gawu	gawu	0265544789	gawu@hoh.com	29-07-2022	10:00:00	Yes	 
gawu	gawu	0265544789	gawu@hoh.com	26-07-2022	09:30:00	Yes	 
gawu	gawu	0265544789	gawu@hoh.com	25-07-2022	09:00:00	Yes	 
gawu	gawu	0265544789	gawu@hoh.com	29-07-2022	09:00:00	Yes	 
gawu	gawu	0265544789	gawu@hoh.com	29-07-2022	10:00:00	Yes	 
gawu	gawu	0265544789	gawu@hoh.com	29-07-2022	12:00:00	Yes	 
gawu	gawu	0265544789	gawu@hoh.com	22-07-2022	14:00:00	Yes	 

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Help Desk Notes (Update External Appointments)

First Name:

Last Name:  Phone Number:

Email:  Message:

Select Appointment Date:  Select Appointment Time:

Notes:

Escalation Status:

Department Assigned:

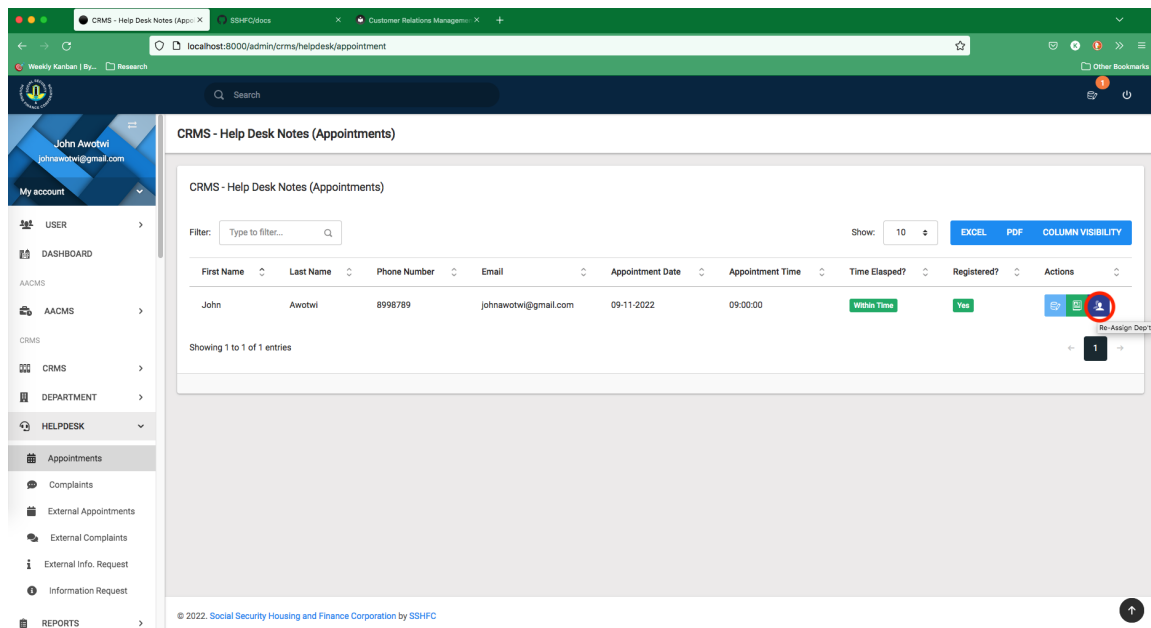
Registered:

BACK UPDATE

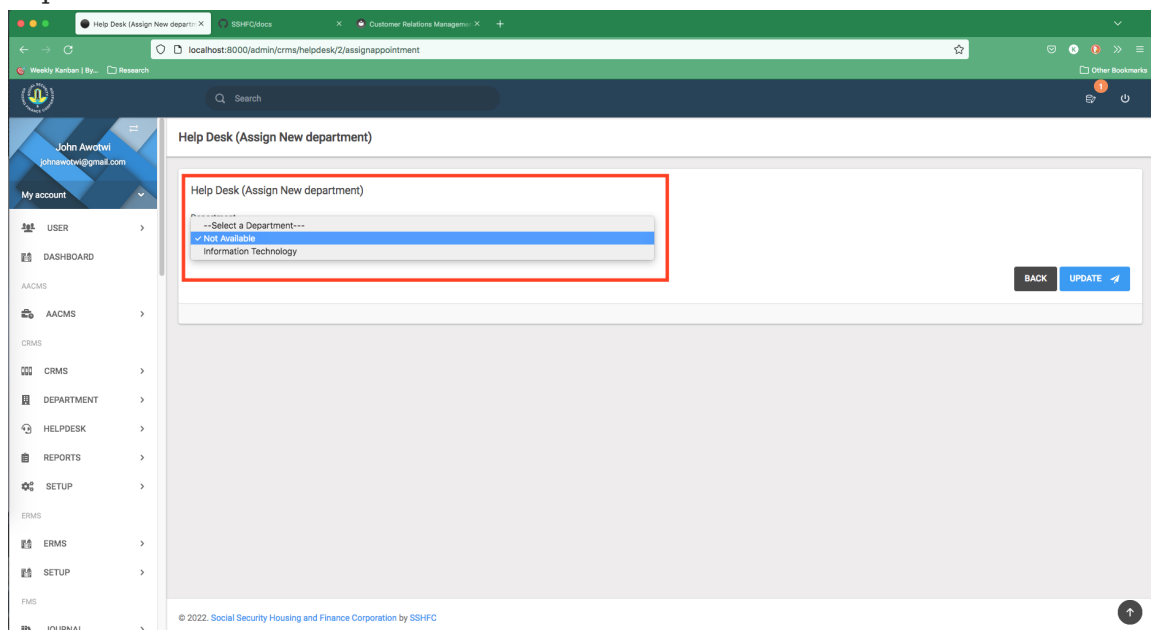
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Above are highlights showing what fields are available to the help desk personnel. These allow the helpdesk to submit extra details and information to the responsible department. Issues worked upon are then redirected to the department assigned to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

When issues have been pending for a longer time than usual, the person in charge of the help desk has the option to re-assign the issue to another department. This is done using the re-assign button. As shown below.



The screen that shows next, allows you to select from a drop down, the list of departments available.



## 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.

**CRMS - Department Help Desk Notes (External Complaints)**

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

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	<a href="#">View</a> <a href="#">Edit</a>
gawu	gawu	gawu@hoh.com	22-07-2022 12:41:21	1658494096	Yes	<a href="#">View</a> <a href="#">Edit</a>
gawu	gawu	gawu@hoh.com	22-07-2022 12:45:47	1658494612	Yes	<a href="#">View</a> <a href="#">Edit</a>

Showing 1 to 3 of 3 entries

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

**CRMS - Department Help Desk Notes (Enquiries)**

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

First Name	Last Name	Phone Number	Enquiry Date & Time	Registered?	Actions
John	Awotwi	767667676	13-07-2022 13:04:30	Yes	<a href="#">View</a> <a href="#">Edit</a>
John	Awotwi	767667676	22-07-2022 12:44:03	Yes	<a href="#">View</a> <a href="#">Edit</a>

Showing 1 to 2 of 2 entries

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What you see in the image below is the interface that allows Department personnel to manage resolutions.

**Department Help Desk Notes (Updates Complaints)**

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

Department Assigned: Information Technology

Resolution

BACK UPDATE

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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.

**Department Help Desk Notes (Show Appointments)**

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

BACK EDIT

## 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.