[TO-3950] Jira: Help Desk TSD Board Revamp

Created: 13/May/25 Updated: 08/Jul/25 Due: 09/Jun/25

Status:	Waiting for Business
Project:	Technology Operations Board
Components:	None
Fix versions:	None

Type:	Epic	**Priority:**	Low
Reporter:	Solounge Bowen	**Assignee:**	Solounge Bowen
Resolution:	Unresolved	**Votes:**	0
Labels:	None		
Remaining Estimate:	0 minutes		
Time Spent:	1 day, 1 hour, 50 minutes		
Original estimate:	Not Specified		

Issue links:	**Post-Incident Reviews**			
	reviews	~~TSD-45141~~	Leave of Absence - test test, test - ...	Done
	Problem/Incident			
	is caused by	TO-3951	Helpdesk Plus Removal from Slack + Tr...	To Do
	Relates			
	relates to	TO-4190	Jira: SRE Project type change	Planning
	relates to	~~TSD-45140~~	Leave of Absence - test test, test - ...	Done
	relates to	HR-3182	Offboarding - test test -	Done
	relates to	~~TSD-45247~~	Offboarding - test test, test - 5/27/...	Canceled
	relates to	~~TSD-45246~~	Leave of Absence - test test, test - ...	Canceled
[Tech Ops] Vendor/ Issue Type:	Software & SaaS Tools - Jira/Atlassian			
[TO] Key Performance Indicator:	Completion and accuracy of records, Data Capture Rate, Data Quality & Safety Improvement, Improved User Experience			
KPI Measure:	Reduce incomplete ticket submissions by 50%, improve agent resolution time by 30%, and increase user satisfaction with TSD board usage by 40% within the next 90 days.			
Item URL:	https://docs.google.com/document/d/1cltneDDYsPwq4oImBLJ8aJ8D-DVYvTcXSuiQ4MBSbak/edit?tab=t.0#heading=h.wziqr4e88op1			
Request participants:	None			
Link URL:	https://docs.google.com/document/d/1jtqgSc7pDB-63keuDrYUFQNmar-2v_qDRrM5t81SJiA/edit?tab=t.0			
Secondary:	Lori Reorowicz			

Description

Background: The TSD board is one of the oldest projects within our Jira (Atlassian) environment and has accumulated a number of nuances and inconsistencies over time. As usage has grown, these legacy issues have made it more difficult for both agents and requesters to efficiently navigate the ticketing process. This initiative aims to address and consolidate those issues to create a more streamlined and user-friendly experience. A key focus is to ensure that users submitting tickets have a better understanding of the system, and that the information provided is complete and actionable for the agents handling the requests. Improving clarity, consistency, and overall usability will help drive faster resolutions and enhance overall effectiveness across teams.

Next Steps:

- ✅ Meet with IT Manager to review existing issues, history, and pain points with the current TSD project.
- 📄 Continue building internal documentation to capture:
  - Current workflows and how they're being used.
  - Pain points from both users and agents.
  - Areas where fields, forms, or statuses are unclear or redundant.
- 🔍 Audit all issue types, custom fields, and workflows currently in use to identify what can be consolidated, renamed, or removed.
- 🧠 Gather feedback from active TSD users (agents and requesters) to understand recurring challenges and potential quick wins.
- 🛠️ Propose a phased approach to changes:
  - **Phase 1:** Clarify field definitions and required fields.
  - **Phase 2:** Simplify request types and update descriptions/tooltips.
  - **Phase 3:** Revise workflows and automation rules.
- 📣 Roll out user education sessions or internal guides to improve adoption and reduce friction when submitting or working on tickets.
- 🔄 Implement a feedback loop after initial updates to measure improvements and catch new issues early.
- 📊 Use Jira dashboards and reports to track success metrics (ticket resolution time, number of incomplete submissions, agent follow-up rates).

Follow Up:

References:

Comments

Comment by Solounge Bowen [14/May/25]

Created documentation on this revamp
https://docs.google.com/document/d/1jtqgSc7pDB-63keuDrYUFQNmar-2v_qDRrM5t81SJiA/edit?tab=t.0

- Built out a Hardware Request form as an example of how this can be implemented
  - https://kindbody.atlassian.net/servicedesk/customer/portal/10/group/42/create/10464
- Currently going through all of the automations built within TSD and cleaning up the name and adding descriptions before meeting with Lori to review which automation can potentially affect the request types

- Added Labels for the automations

Comment by Solounge Bowen [14/May/25]

Meeting with Lori to review

Lori / Solounge - TSD Project Revamp Review
Thursday, May 15 · 12:15 – 12:45pm
Time zone: America/Chicago
Google Meet joining info
Video call link: https://meet.google.com/fmp-doyr-ccj
Or dial: (US) +1 401-903-2171 PIN: 220 965 847#
More phone numbers: https://tel.meet/fmp-doyr-ccj?pin=6107150282028

Comment by Solounge Bowen [15/May/25]

After meeting with Lori we've confirmed the following

- We do like the direction of where this adjustment is going however with so many things linked, we fears there may be something that messes something up
- Lori suggests that making a new HelpDesk board altogether would fix this issue.
- I believe while that may be a good route, we can clean up the existing and consolidate the issue/request types so that it can still have the historical data live

Next Steps

- Review all projects that are linked to TSD and their relationship to avoid any interuptions with automations
- Set time with Lori to review the future state and how we can approach these in phases, the first being Hardware since that seems to be the tickets that she has been gettin significantly more lately.
- Will begin to use this document as a reference for the future state framework of the TSD Project.
    - https://docs.google.com/document/d/1cItneDDYsPwq4oImBLJ8aJ8D-DVYvTcXSuiQ4MBSbak/edit?tab=t.0#heading=h.wziqr4e88op1

Comment by Solounge Bowen [15/May/25]

Scheduled a meeting tomorrow with Lori to begin the revamp process. I believe the first attempt to go to Request Types& Workflows and clean up the Issue Statuses

I went through each request type and outlined the current statuses in use (including duplicates and those that may no longer serve a purpose). I've also made a few initial suggestions for statuses we could potentially remove or consolidate .

- Clarifying the current vs. future state of the Help desk workflow along with how it should interact with its fellow IT teams
- Confirming which statuses to be removed/added for each request type

Lori / Solounge- TSD Jira Revamp
Friday, May 16 · 10:00 – 10:30am
Time zone: America/Chicago
Google Meet joining info
Video call link: https://meet.google.com/czn-pngw-hqc
Or dial: (US) +1 508-970-9162 PIN: 567 743 658#
More phone numbers: https://tel.meet/czn-pngw-hqc?pin=2476313927992

Comment by Solounge Bowen [16/May/25]

Per meeting with Lori

- Reviewed the Status and overall workflow for TSD's updated request types
    - https://docs.google.com/document/d/1cItneDDYsPwq4oImBLJ8aJ8D-DVYvTcXSuiQ4MBSbak/edit?tab=t.0
    - Confirmed that LOA will be treated as its own request type and workflow since its a tad bit different process from onboarding/off boarding
        - Have to ensure that the People Ops board matches this new update

Next Steps [TO DO]

- ~~Look into People Ops project automations and which fields/statuses/automations could potentially be affected and update to match~~
- Create the forms and add the questions that would be asked and link it to the existing custom fields
    - ~~Hardware Support ➡️ [Link to Form|https://kindbody.atlassian.net/jira/servicedesk/projects/TSD/settings/forms/form/3057064684239444/edit]~~
    - General IT Help ➡️
    - ~~User Onboarding ➡️ Link to Form~~
    - ~~Off boarding ➡️ Link to Form~~
    - ~~Leave of Absence ➡️ Link to Form~~
    - Application or Software Issue ➡️
    - Access or Permission Request ➡️
    - Patient Merge Request ➡️
    - Security or Incident Report ➡️
- Build out automation in TSD board to match any updated request type
    - Link People Op automation to newest automation to ensure nothing breaks
- Solounge to go through each request type and their workflows in TSD project to consolidate and remove any un-needed statuses/workflows

Comment by Solounge Bowen [21/May/25]

Automations that are linked to TSD board:

- **Send to IT -** When the assignee selects Send to IT, a TSD Off boarding ticket is then generated
- **Manually Send to IT** - Manual Trigger that creates a TSD Off boarding ticket that fills in the following fields
    - **Summary**
    - **Offboard/LOA**
    - **SD First Name**
    - **SD Last Name**
    - **Job Title**
    - **Due Date/Time**
    - **Return Equipment Address**
    - **Sensitive**
    - **Reporter**
    - **Legacy Org**
    - **Office/Clinic Location**
    - **Supervisor's Email**
    - **Supervisor Name**

Comment by Solounge Bowen [21/May/25]

Update

- I've completed the following:
  General IT Help ➡️

Still working on the Application/ Software Request. I'll then continue the remaining.

Comment by Solounge Bowen [22/May/25]

Completed the Application / Software Form, workign on ther remaining forms

- ~~Access or Permission Request ➡️~~
- Patient Merge Request ➡️
- Security or Incident Report ➡️
- Build out automation in TSD board to match any updated request type
- Link People Op automation to newest automation to ensure nothing breaks
- Solounge to go through each request type and their workflows in TSD project to consolidate and remove any un-needed statuses/workflows

Comment by Solounge Bowen [22/May/25]

Completed Forms

Access or Permission Request ➡️ https://kindbody.atlassian.net/jira/servicedesk/projects/TSD/settings/forms/form/3352965281485178/edit

Decided to leave the Security and the Patient Merge request as is

Remaining Task

- Build out automation in TSD board to match any updated request type
- Link People Op automation to newest automation to ensure nothing breaks
- Solounge to go through each request type and their workflows in TSD project to consolidate and remove any un-needed statuses/workflows

Comment by Solounge Bowen [22/May/25]

Update:

- I created a test automation and executed it against the TSD Test Request type to verify if it would adhere to the rule of generating a separate LOA ticket. This automation functioned partially because the Offboarding form (➡️ Link to Form) already contained the necessary fields linked. While the ticket is generated, the fields do not appear. I will need to remove them from the form for them to show up in the TSD ticket.
- I will schedule a meeting with Lori to confirm whether the Offboarding/LOA form is actively used within the Help Desk portal, or if it should be removed and only be available internally.
  - The rationale behind this is that if I utilize the form and link the fields, it will eliminate them from the built-in request type form. This ultimately means that users are expected to place orders via the Kindbody Support portal. However, if Offboarding tickets are exclusively generated through HR tickets, I recommend removing that option from the portal and allowing only the People Ops project to maintain its own form.
- Test Example: https://kindbody.atlassian.net/browse/HR-3182 & https://kindbody.atlassian.net/browse/TSD-45140

Comment by Solounge Bowen [22/May/25]

Created the following Automation :

[Generate Re-activate User Ticket on LOA Ticket Closure|https://kindbody.atlassian.net/jira/servicedesk/projects/TSD/settings/automate#/rule/0196f9fa-528b-7ba4-905e-914732563101/__RULE_UPDATED] - Current disabled, until further notice

Comment by Solounge Bowen [23/May/25]

- Lori confirmed that the Offboarding/LOA forms are specifically used for contractors, as HR does not manage them.
- People Ops does not handle contractors due to the difficulty in tracking, since vendors do not consistently provide updates on their contractors.
- Lori has been managing and monitoring these ticket types every three months to determine if contractors are still with the company.
    - Takes about ~2 hours of manual hours
- We have confirmed that this process and workflow can be put on hold, as it involves another team and requires updates to workflows.

Future State

- **Google Admin**
    - Lori suggested creating a Contractor Organizational Unit (OU) within Google Admin to better organize and track current contractors in each department.
- **Contractor Forms**
    - It was proposed that the onboarding and offboarding forms for contractors be transferred to People Ops. Once these tickets are generated in their project, a TSD ticket will be created that links to Helpdesk, ensuring they are aware of new contractors.
- **Contractor Current Status**
    - Lori recommended generating a ticket every three months to remind Helpdesk to pull the current list of contractors from the Contractor OU in Google Admin. This list should then be provided to People Ops for review and confirmation, after which Offboarding tickets can be created for users who are no longer with the company.

Comment by Solounge Bowen [23/May/25]

Things to Update per meeting with Lori:

- Proceed to turn on the automation on by EOD Tuesday. -**For LOA/Offboard Process**
    - [Generate Re-activate User Ticket on LOA Ticket Closure|https://kindbody.atlassian.net/jira/servicedesk/projects/TSD/settings/automate#/rule/0196f9fa-528b-7ba4-905e-914732563101/__RULE_UPDATED] - Current disabled, but will need to be adjusted to match the existing Offboarding and LOA request type that exist
- Adobe to match Microsoft issue type options in the custom field “Application/Software issue type”**[DONE]**
    - **Need Access/ License**
    - **Need Application on Computer**
    - **Password Reset**
    - **Other**

In the Access/Permissions support form:

1. If user selected **Other** and selects anything that is not managed by HD, redirect user to the proper team’s form**[DONE]**
2. If user selected **Patient Merge** under **Kindbody EMR** , redirect user to the Patient Merge form**[DONE]**

In the Application /Software support form:

1. If user selected **Physical Phone in Nextiva**.**[DONE]**
    1. Prompt user to add **Mac Address** and **Description** for more info
        1. Verbiage” **Mac Address can be found next to barcode bottom of phone**”
2. If user selects anything Access or Permissions related, redirect user to Access/ Permissions form**[DONE]**

For RI Witness

- If user selected **Tablet Hardware**, redirect user to enter a **Hardware form**.**[DONE]**

Comment by Solounge Bowen [23/May/25]

Access / Permission form officially live.

Reference: https://kindbody.atlassian.net/browse/TSD-45172

Comment by Solounge Bowen [28/May/25]

Lori has confirmed we will send out a company wide email by midday today in hopes to be i full affect by Monday, June 2, 2025

https://docs.google.com/document/d/1k3JMyhseGYbduH7o22wVc9JmyVJ-OZibi9FrARgzK6w/edit?tab=t.0#heading=h.e6vggp33i6b

I will be working on preparing the following request types for go live

- Access & Permissions**[LIVE]** - will just need to re-link the summary and description back to form
- Quick Onboarding **[IN PROGRESS]**
- Offboarding **[IN PROGRESS]**
- LOA **[IN PROGRESS]**
- Application/Software Request **[IN PROGRESS]**
- Patient Merge **[IN PROGRESS]**
- Security Request **[IN PROGRESS]**
- Hardware Request **[IN PROGRESS]**
- General IT **[IN PROGRESS]**

Comment by Solounge Bowen [28/May/25]

Reaching out to Luis and confirm his workflow with the status ENG-REQ to see if that is needed.

Comment by Solounge Bowen [28/May/25]

Per Luis's update:

- Confirms he created the **ENG-Req** status to track cases awaiting completion and keeps active cases in a separate queue, noting that he currently has 25 cases waiting for engineering/prod.
- Discussed the use of the Escalated to ES status, with Luis indicating that he does not create separate tickets for escalations and usually VIet and Elizabeth are the ones who create the PROD/ENG ticket and links it to the TSD ticket
- Confirmed that Jordie also uses this status for her reports

Action Items

- Will confirm with Lori if it's okay to remove Escalated to ES since it's no longer used
- Will need to confirm with Jordie & team the difference between PROD & KE and if there should be new statuses for that so that it can save other teams time
- Confirm with Lori if Quick onboard can be removed, I noticed the last ticket was in 2022 and this was for FTE and not contractors

Comment by Solounge Bowen [28/May/25]

Per meeting with Lori:

- Decided to push the go live to **Monday June 9, 2025 t**o avoid any other update conflicts

- Confirmed we can remove the following Request Types:
  - **Lumos**
  - *Quick Onboard (*Migrate to onboarding)
  - **Phone Calls** (Migrate to Application & Software request type)
  - **Nextiva App & Phone System** (Migrate to Application & Software request type)

Things to Update

- Add a redirect link for Equipment Return request within the forms

Comment by Solounge Bowen [28/May/25]

In the recent meeting with Jordie, the following points were confirmed:

- The creation of ENG-Req was established to address a specific group of TSD tickets that necessitate engineering enhancements.
- It was agreed that this requirement can be removed if it disrupts the workflow; I mentioned that I am currently navigating around it.
- I also confirmed that I can eliminate the "Escalated to ES-" status

Differences Between PROD and KE

- **PROD**: Focuses on business requirements and aims to outline the project scope.
- This can translate to approximately 3-5 KE tickets.
- **KE**: Represents more technical requirements intended for engineering teams.
- KE tickets typically contain more technical fields, while business tickets have a different set of criteria. Consequently, the same issue may need to be divided between two teams for clarity.

I've suggested added a Escalated to Prod and Escalated to KE status for Viet and Elizabeth to use so that they's be able to auto generate tickets

Comment by Solounge Bowen [28/May/25]

Successult added the LOA request type and now I will have to fix the tickets that are LOA and sitting under the Offboarding request type

- This may be manual because it's important to retain the Estimated ROW field

Link to Filter →

https://kindbody.atlassian.net/issues/?jql=project%20%3D%20TSD%20AND%20type%20%3D%20%22Off%20boarding%22%20AND%20textfields%20~%20%22leave%22%20ORDER%20BY%20created%20DESC

Comment by Solounge Bowen [30/May/25]

Per Lori's request:
Ideally, I'd like all tickets to have the fields organized with the following order (but that's a low priority):Reporter:
Assignee:
Request Participants:
Priority:
Tech Team:
Agent Selected System:

Labels:
Knowledge Base:

Then any other additional fields for specific ticket types at the bottom, such as the necessary ones for Hardware requests like the tracking number

Then next time we meet about this optimization, I'd like to talk about setting the defaults for the Agent Selected System for ticket types based on some selections. Some simple like all offboarding or LOA tickets would be Agent Selected System: *Other Options > LOA/Offboarding* and others a bit more complex if possible, like Problems ticket with the systems selected in the form being something like Keeper would default to Agent Selected System: *Other Options > Keeper* (which also needs 1Password removed from that field since we're well past that now)

Comment by Solounge Bowen [25/Jun/25]

Pending on Lori to confirm we can resume setting this live and phasing out HelpDesk+

Comment by Solounge Bowen [26/Jun/25]

After getting feedback from the SRE team, they've suggested to have a status named "Escalated to SRE" that then puts the ticket into a certain queue and then a ticket is generated in their Software based project

https://kindbody.atlassian.net/browse/TO-4190

Comment by Lori Reorowicz [27/Jun/25]

Solounge Bowen I love the idea of an Escalated to SRE status specifically for Problem or Security issue types. When the SRE ticket is generated, the Reporter (on SRE Ticket) should be the Assignee from the TSD ticket, that way the HD agent gets updates as we do not have any other visibility into the SRE project. If possible, it would be great to have the Reporter of the original TSD ticket added as a participant on the SRE ticket for additional visibility and follow up to troubleshooting inquiries.

The "Escalated to SRE" status could behave the same way as the "Waiting for Business" status.

Once the HD team is not receiving feedback about sending tasks to SRE that shouldn't have been (i.e. issue with ISP that should have been followed up by HD not escalated to SRE) then we could change the status behavior to close the ticket (like the behavior of "Escalated to Tech Ops") but should wait until we make sure proper escalation procedures are followed.

Comment by Solounge Bowen [08/Jul/25]

Thank you for confirming, Lori Reorowicz!
I have created an "Escalated to SRE" status and granted the Help Desk team view access to the SRE project tickets once they are escalated to them. Additionally, I have configured the system so that the assignee of the TSD ticket will also be set as a requesting participant.

Link to Automation