[TO-4100] Quarterly PBHD Project Update Created: 13/Jun/25 Updated: 26/Jul/25 Resolved: 26/Jul/25

Status:	TICKET RESOLVED
Project:	Technology Operations Board
Components:	None
Fix versions:	None

Type:	Epic	**Priority:**	High
Reporter:	Jennifer Teschendorf	**Assignee:**	Solounge Bowen
Resolution:	Resolved	**Votes:**	0
Labels:	None		
Remaining Estimate:	0 minutes		
Time Spent:	3 hours, 30 minutes		
Original estimate:	Not Specified		

Issue links:	**Post-Incident Reviews**			
	reviews	PBHD-8454	Test 2	Canceled
	Relates			
	relates to	~~TO-4135~~	Add automation and widget for Tickets...	TICKET RESOLVED
Office/Clinic Location:	Remote - Home Office			
[Tech Ops] Vendor/ Issue Type:	Software & SaaS Tools - Jira/Atlassian			
[TO] Key Performance Indicator:	Completion and accuracy of records, Data Quality & Safety Improvement, Improved User Experience, Patient Engagement, Reduction of time/workload			
KPI Measure:	Improved ticket traceability and team accountability through role-based automation, labeling, and real-time dashboards by region and support tier.			
Request participants:				

Description

Background: The PBHD team will need a revamp to their project in order to make a seamless experience for users and also be able to track/monitor tickets via the dashboard

Next Steps:

- Provide the team with https://docs.google.com/document/d/1Otp7E7FUJbfnzsY7QUKLHDWreclu0BdDCZP26kfDnAA/edit?tab=t.0#heading=h.5cle3l5gp69u and request they have this filled prior to meeting so that I can go over everything that may need to be updated
- Go over each phase that may need to be updated so that we can confirm all updates/fixes have been completed.

Follow Up:

References:

Comments

Comment by Solounge Bowen [13/Jun/25]

Meeting Summary with Breann and Jennifer:

Future State Objectives

- Create a more streamlined interface for agents handling tickets.
- Propose reducing the number of Default Queues to four to prevent overwhelming users with excessive options.
- Consolidate Default Queues into four categories: North, South, East, and West, with any additional specific categories classified under **Other Queues**.
- Regarding Dashboards:
  - Reintroduce the widget that displays the number of tickets completed within the last 7 days.
  - Develop a filter that retrieves tickets closed in the past 7 days, categorized by reporter.

Action Items

- Await the completed document from the PBHD team to clarify the specific tasks that need to be addressed Jennifer Teschendorf Breann Perri
- Establish the Queues for each region (North, South, East, West).
- Implement automation that identifies the Office/Clinic location and categorizes it by region.

- ~~Connect the "Closed in the Last 30 Days" filter to the dashboard for reporter visibility.~~
- ~~Add a widget for users to track the number of tickets they have closed in the last 7 days.~~

Comment by Solounge Bowen [13/Jun/25]

Per meeting with Jennifer :

- Requested to have a report that pulls the person who commented on the ticket .
- I ensured I would look into it as it may not be as easy to pull in that info

Comment by Solounge Bowen [13/Jun/25]

Updates/Findings
Option 1:
Your team would include a special keyword, like a hashtag `#worklog`, in their comments when they update a ticket. This would let an automation rule identify those comments as work updates and track the user who added them. The key thing is that the team would need to remember to add this hashtag in their comments each time they log work.

Option 2:
We can set up an automation that captures the user who last commented on the ticket—no need to add hashtags. This automation updates a dedicated field called something like “Last Worklogger.” Then, your dashboard can pull from this field to show who last worked on the ticket. This is more seamless but relies on the comment activity itself.

Both options will help provide visibility into ticket work without having to dig into every comment manually. The second option is simpler for users but might not be as precise if multiple comments happen without real work being done.

I will need to follow up with Jen on which route they’d prefer

Comment by Solounge Bowen [17/Jun/25]

Jen confirmed that she would like to proceed with Option #1 and make the hashtag be #pbhd.

https://kindbody.atlassian.net/browse/TO-4135

Comment by Solounge Bowen [08/Jul/25]

The pending list of team members and the completed PBHD Jira document from Jenn and Breann are ready for review.

Comment by Solounge Bowen [11/Jul/25]

Jennifer has shared an update regarding the list of users in the team.

- At her request, she has asked for a method to document the roles of users who primarily interact with the tickets. This will help us understand, at a group level, who has been working on the tickets. Essentially, this will capture all relevant details within the Dashboard.
- She has also provided the office locations along with the corresponding regions they fall under.

Next Steps

- Investigate the addition of First Line and Second Line roles within the PBHD project.
- Assign the correct roles to the list of users within the team.
- Create a custom field for **Region (North, South, East, West)**.
- Develop automation that assigns the region of the ticket based on the Office/Clinic location.
- Test within the Dashboard to ensure this information is being pulled in correctly.

Comment by Solounge Bowen [24/Jul/25]

Update

- I've proceeded to create new Global Level Roles thats can also be used within PBHD project.
  - **Tier 1 Support**
  - **Tier 2 Support**
- Assigned users based on the PBHD Quarterly document
- Since Jira natively does not support dashboard/roles, I've proceeded to create labels to capture the PBHD tiers
  - **PBHD_Tier1**
  - **PBHD_Tier2**

Next Steps

- Built our automation that updates the label in a ticket whenever a user within a certain role comments
- Create a custom field of regions to capture each individual queue
- Built/update automation that updates the Region of the ticket

Comment by Solounge Bowen [24/Jul/25]

Update

- Created Automation that adds labels based on commenter's role and it will then proceed to update the the dashboard of the labels within the tickets
  - Link to Automation
    - ~~Ran the automation to update all of the 1798 open PBHD tickets~~
      - ~~First Rule Ran = 1878.66s (31min)~~
      - ~~2nd Run = 17.34s~~
      - ~~3rd run = 771.34s (12min)~~
      - ~~4th run =314.15 (5min)~~
      - ~~Last run - 90.37 (1.5min)~~

        - ~~**Ran the automation then work on remaining 7564 tickets which can take up to 2 days to have uploaded**~~
- Created automation that updates the region based on the office location of the ticket
    - Link to Automation
    - Ran the automation to update all of the 1798 open PBHD tickets
        - First Rule Ran = 1464.42s (24min)
        - 2nd Run = 681.20s (11min)
        - Final Run = 155.46s (2min)
    - Ran automation to update remaining 7625 tickets that have Region empty
        - First Rule Ran = 1816.69s (30min)
        - **for the last 6394 tickets will take about 2 days to have updated**

Next Steps

- Need to verify with Jennifer if there is a preference on filter needed for the dashboard.
    - Should this be pulling only open tickets?
    - Should this capture all thickets ever opened in PBHD?
- Create Region Queues

Comment by Solounge Bowen [24/Jul/25]

I've come to understand that the tickets were automatically assigning themselves to me due to my role as the initiator of the automation. I have since removed this setting, and it seems that the labels will function correctly for new comments. However, any previous tickets will not be updated unless someone from the team adds a comment.

Next Steps

- Need to verify with Jennifer if there is a preference on filter needed for the dashboard.
    - Should this be pulling only open tickets?
    - Should this capture all tickets ever opened in PBHD?
- Need to review workflow with Jennifer to notify about what to expect with the labels
- Need confirmation on which queues to delete since the 4 region queues are created

Comment by Solounge Bowen [25/Jul/25]

Scheduled a meeting with Jennifer to review workflow

Jennifer / Solounge- PBHD review
Friday, July 25 · 10:30 – 11:00am

Time zone: America/Chicago
Google Meet joining info
Video call link: https://meet.google.com/vwp-syzf-bjr
Or dial: (US) +1 402-409-0039 PIN: 826 178 374#
More phone numbers: https://tel.meet/vwp-syzf-bjr?pin=4010609089405

Comment by Solounge Bowen [25/Jul/25]

Updates

- Update filter to have captured tickets that were commented in the last 7 days →

https://kindbody.atlassian.net/issues/?filter=12833&atlOrigin=eyJpIjoiMmFjZWRjYjM0NmU3NDU0YzhhYjhiMGZlYzU4Y2FiNWEiLCJwIjoiaiJ9

- Remove the extra queues and only left the following
  - Assigned to me
  - Closed/Resolved Tickets
  - North Region
  - South Region
  - East Region
  - West Region

Confirmed this ticket can be closed as all requests have been made and completed

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