L1 Ticket Handling Training Guide-Email

I. Ticket Documentation:

1. Opening a Ticket

When a new ticket is assigned, begin by reviewing the company record in HubSpot. Click the company name and review the following:

• Confirm whether the client is hosted or on prem

• Copy the MVE account number for reference (MVE Database name from HubSpot company profile)

• Review prior open tickets for context/ duplicates (if any). Skim summaries to understand ongoing issues.

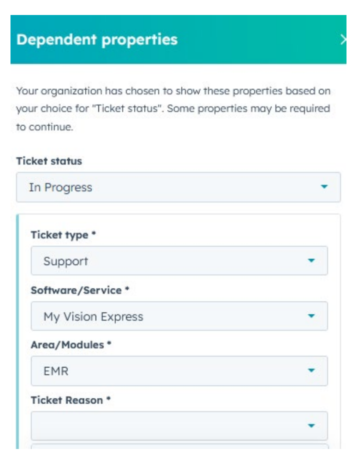
2. Verify Contact Information/ Account Status

Check the ticket sender against company contacts:

- If the sender is listed, proceed.
- If new, confirm with the admin before providing details. When possible, verify contact details over the phone.
- Verify the account status by going to YayPay. Always check the last paid invoice. **Yaypay Guide**

2. Editing the Ticket Details

- **Title:**
  - ✓ MVE/hosted or on prem/ Acct # (MVE database name in company profile)/ summary of issue
- **Ticket Description:**
  - ✓ Detailed summary of the issue/ request (Will be modified after contacting the client)
- **Sightview Priority:**
  - ✓ Determine by level of reported issue (Please see link: **MVE Ticket Priority Levels**)
- **Ticket Type:**
  - ✓ Support
- **Software/ Service:**
  - ✓ MVE
- **Area/ Module:**
  - ✓ EMR
- **Ticket Reason:**
  - ✓ Adjust based on scenario
- **Ticket Status:**
  - ✓ In progress



II. Contacting the client:

1. First point of contact should always be a phone call to the client

- If you are unable to call right away, send an email to acknowledge the ticket has been received

2. Confirm the client information

- Name
- Email
- Phone number

3. Obtain all necessary details to update the Ticket Description

Approach this as a ‘who, what, when, where’ scenario to help organize the information clearly.

Who
Hosted: List how many CALs (including usernames) and devices are affected.
On-Prem: List how many users/devices are affected.
Confirm the contact information of the person reporting the issue.

What
• **Clearly describe the problem in the client’s words, followed by your observations.**
• **Include replication steps:**
○ **Step-by-step actions taken to reproduce the issue.**
○ **Note if replication was successful or unsuccessful.**
• **Evidence:**
○ **Screenshots (include file names if attached).**
○ **Screen recordings (if provided).**

When
• **Note when the issue occurs:**
○ **Intermittent or constant.**
○ **First reported time/date.**
○ **If possible, the last known time it was working correctly.**

Where
• **Environment details:**
○ **Hosted vs. On-Prem.**
○ **Workstation(s), devices, or modules affected (Exam, Orders, Calendar, etc.).**
○ **Any specific locations or offices affected.**

Summary
• **Concise description of the issue.**
• **Key replication steps and results.**
• **Evidence provided (screenshots, recordings, logs).**

Verification
• **Contact verification status (confirmed with correct admin or authorized user).**
• **Note if call or conversation was documented (per compliance: "If it's not on the ticket, it didn't happen").**

> **Goal**
>
> **Objective:**
>
> Ensure any L2 agent (or another L1) can open the ticket and immediately understand the context without needing to call the client again for basic details.

4. Escalation and Follow-Up

If unable to resolve at L1:

• Escalate with full details and supporting evidence.

• If unable to reach the client, send a follow-up email and log it in HubSpot.

• Always leave the ticket status as In Progress until resolved, escalated, or closed.

5. Sample Follow-Up Email

Subject: Support Request – Follow-Up; Ticket ID XXXXXXXXXXXX

Hello [Client Name],

I attempted to reach you regarding your support request. Please let me know a convenient time for us to connect and review this issue further. "Below are some times I'm available — happy to adjust if needed:
- [Time Slot 1]
- [Time Slot 2]
- [Time Slot 3]

Please reply with the best time for you.

Thank you,
[Your Name]
SightView Software Support

III. Visual References and Examples

Example: Ticket Title and Description

L1 Hubspot Ticket Example

Important Note

If you call a client or a client calls in and you speak with them: you must record it on the ticket or on the company page as a note. If it is not documented, it is treated as if it never happened. Documentation ensures the entire support history is transparent and accessible to anyone reviewing the case.

8. Quick Reference Checklist

☐ Open company record in HubSpot

☐ Confirm hosting type (Hosted/On-Prem/Own Server)

☐ Copy MVE account number

☐ Review prior open tickets

☐ Update title: MVE [Hosted/On-Prem] – Account # – Brief Issue

☐ Verify fields: Owner, Description, Record Source, Support, EMR

☐ Set correct SightView Priority (P1, P1 Enterprise, P1 Outage, P2, P3)

☐ Verify contact or confirm new contacts with admin

☐ Read issue, call client, replicate issue or gather screenshots

☐ Document issue clearly in ticket description

☐ Escalate only with complete details

☐ Send follow-up email if client unreachable

☐ Keep status In Progress until closed or escalated