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Washington DC Public Sector

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Public Sector Digital Services

Extend beyond the packaged government case types, leveraging the government data model to create your own workflows with low-code tools. Fulfill public service requests end-to-end with pre-packaged playbooks. Deliver a personalized experience to take care of common constituent requests using resources like the portal, service catalog, virtual agent, and online communities. Use the ServiceNow® Public Sector Digital Services application to serve constituents, businesses, and agencies on a single platform.

Explore

Explore Public Sector Digital Services.

Plan and configure

Plan and configure your implementation.

Integrate

Extend capabilities in Public Sector Digital Services by integrating with other applications.

Use

Learn how agents and constituents use Public Sector Digital Services.

Analyze

Track key metrics and evaluate performance with preconfigured dashboards.

Reference

Get details on components such as roles, tables, and forms.

Get started

- Work with an implementation specialist to streamline your setup process. To learn more, see the Customer Success Center.
- Sign up for the ServiceNow Public Sector fundamentals training program and certification to learn about core functionality and release-specific features.
- For information on how to request Public Sector Digital Services and to begin setup, see Install Public Sector Digital Services Core.

Additional resources

- To learn more about what's new and what's changed, see the Public Sector Digital Services release notes.
- To learn more about Public Sector Digital Services components, workflows, and roles, see Components installed with Public Sector Digital Services Core.

Exploring Public Sector Digital Services

Learn about Public Sector Digital Services features to help create a seamless support experience for constituents, businesses, internal agencies, and external agencies.

Benefits

Public Sector Digital Services enables government organizations and external agencies to support constituents and business stakeholders, all from a single platform. Extend beyond the packaged government case type(s), leveraging the government data model to create your own workflows with low-code tools. Fulfill public service requests end-to-end with pre-packaged playbooks. Deliver a personalized experience while increasing agent efficiency, driving action to instantly take care of common constituent requests using resources like the portal, service catalog, virtual agent, and online communities.

Provide a platform for citizens to engage

Serve the public outside of government's walls and hours of operations. Give your constituents the choice of connecting through email, phone, chat, social media, or mobile- anytime, anywhere, and from any device. Provide a streamlined platform for the public to request government services through assisted and self-service. Omni-channel advanced work assignment automatically assigns public service cases to the best-equipped agent based on capacity, skills, and case context.

Assign tasks across the enterprise

Guide government workers to fulfill public service requests quickly and consistently, and monitor the progress of other agents and teams. Create a single flow of work across governments and agencies so that cycle times are minimized and automation is maximized, end-to-end. Enable service delivery from one (sub-) agency to another by connecting public sector to other departments such as field service, finance, and legal, and collaborate with other agencies using the visual task board, workflow, and automation.

Enable insights with reporting and dashboards

Identify opportunities to improve case resolution, agent performance, and the service experience, and act on trends revealed in Performance Analytics for Public Sector Digital Services. Monitor current and prior performance to identify areas for improvement of products, services, and processes. Unlock insights to anticipate trends, prioritize, and drive actionable improvements, such as automating the most frequently recurring case resolutions.

Manage case volume with self-service

Encourage constituents to help themselves with a self-service catalog, communities, knowledge base, and portal. Expand customer support for constituents and businesses by implementing Virtual Agent, a chatbot that runs on the Government Service Portal and in supported third-party messaging applications, such as Engagement Messenger. Public sector end users can request non-emergency services through a pre-built, automated conversation that helps them submit a request.

View and download the full data sheet for a highlight of Public Sector Digital Services features.

Key features

Public Sector Digital Services offers key features that enable system administrators and agents to provide the services and support requested by constituents and businesses.

Public sector key features

Feature	Description	Role
License and Permit Playbook	End-to-end playbook experience that walks government service agents through the process of creating or servicing license and permit applications	Agent
Information Request Playbook	End-to-end playbook experience that walks government service agents through the process of creating or servicing requests for public records and information	Agent
Service Request Playbook	End-to-end playbook experience that walks government service agents through the process of creating or servicing non-emergency service requests	Agent
Government Service Portal	A dedicated portal for constituents, business stakeholders, and contributors (working on behalf of constituents), to request public services, track cases, view and update their profiles, report issues, request government documents, and more. Business owners can also register a new business, manage contacts, and request public services, permits, or licenses.	Constituent
Business Location Service Portal	A dedicated portal for agencies to manage internal and external agency locations, and add service catalog items to specific agency locations.	Agent
Public Services Performance Analytics	Performance indicators and data visualizations on government services offered to and requested by constituents, businesses, and agencies.	Manager
CSM Configurable Workspace	A dedicated, customizable workspace for government agents and agents from external agencies to work	Agent

Public sector key features (continued)

Feature	Description	Role
	on issues and deliver services for constituents, agencies, and businesses. Agents can manage their cases, check on service requests, and even initiate requests for others.	
Persona-based Roles in Public Sector Digital Services	Roles for public sector job functions. These roles control access to public sector features and information. For details, see Persona-based Roles in Public Sector Digital Services.	Administrator
Service definitions for Public Sector Digital Services	Enables you to map a public service, information service, or license and permit service to the list of services your agency offers for resolving that request.	Administrator
Virtual Agent	Provides assistance completing or updating their requests for various public services withVirtual Agent, a chatbot that runs on the Government Service Portal and in supported third-party messaging applications, such as Engagement Messenger.	Agent
Extendable Data Model	The flexibility of the Public Sector Digital Services platform provides you with a data model that you can extend and leverage to fit your needs.	Administrator
Extendable Service Catalog	Types of services available, such as licenses, permits, service requests, and benefits. Pre-built service request options that constituents and businesses can choose from the Government Service Portal.	Administrator
Extendable Government Service Case	The base case type tailored for government services. You can extend this case type to create other government	Administrator

Public sector key features (continued)

Feature	Description	Role
	case types for various government services.	

Agent experience

Public Sector Digital Services provides agents across government agencies with a tailored workspace experience to work on cases created by constituents, businesses, and agencies.

CSM Configurable Workspace

Your government service agents have one stop for constituent interactions, the CSM Configurable Workspace. Multiple tabs allow agents to efficiently manage several cases at once. Agents and managers have ongoing visibility into the status of issues assigned to different agents across the agency. The workspace dynamically displays related contextual information based on the current state. Agents can also set compact mode and dark mode to optimize their experience and productivity.

To learn more about CSM Configurable Workspace, see Explore CSM Configurable Workspace.

Mobile Agent

Your government agents can use the Mobile Agent on a mobile device to create, update, and monitor non-emergency requests. You can also get an overview of your case load, including your new and active service request cases.

The Mobile Agent is currently only supported by the Service Request Playbook.

To learn more about the Mobile Agent application, see Mobile Agent experience for Public Sector Digital Services.

Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to automatically route and assign public sector work items, such as non-emergency requests, to the best-equipped agents, based on their availability, capacity, and skills.

To learn more about Advanced Work Assignment, see Automatically route service requests using Advanced Work Assignment.

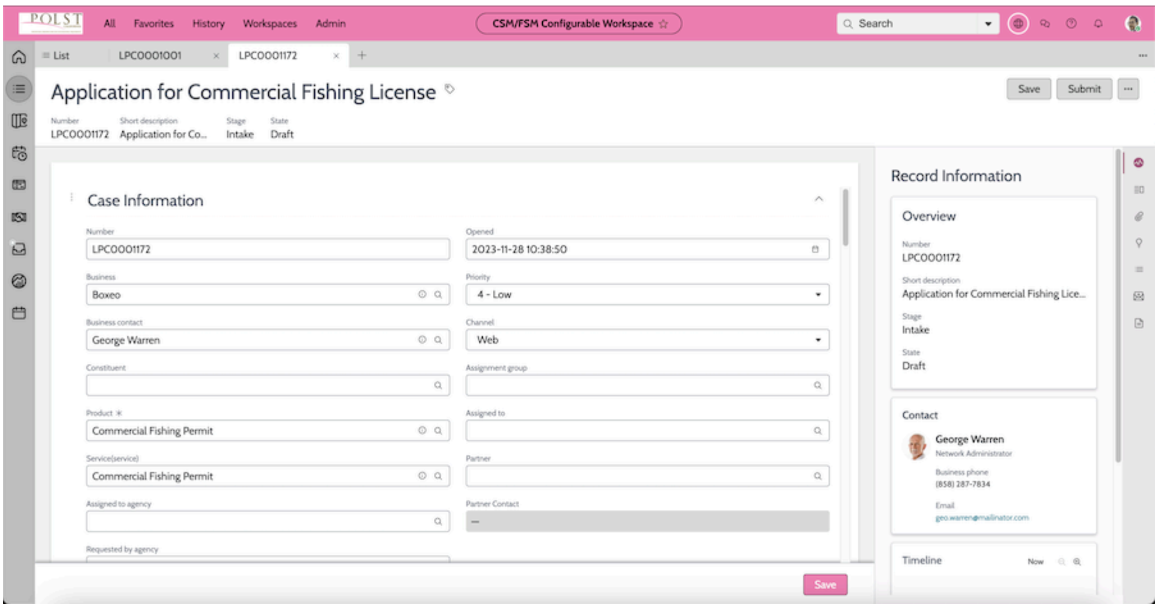
Playbooks for Public Sector Digital Services

A playbook provides government service agents with step-by-step guidance through the life cycle of a public service request case. Use Playbooks to fulfill requests for license and permits, government records and other public information, or non-emergency service requests.

A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete.

By using a playbook, you can visualize the entire life cycle of the public service case workflow. With a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.



Three applications are available with Public Sector Digital Services that enable you to create and use playbooks:

License and Permit Playbook

Provides an end-to-end workflow for handling public record and information requests submitted by public sector end users.

Information Request Playbook

Provides an end-to-end workflow for handling public record and information requests submitted by public sector end users.

Service Request Playbook

Provides an end-to-end workflow for handling non-emergency service requests submitted by public sector end users.

The corresponding playbook for each case type automatically appears in the **Playbook** tab when an agent creates an public service request case in the CSM Configurable Workspace, or when a constituent puts in a request through the Government Service Portal.

To learn more about playbooks, see Playbooks for Public Sector Digital Services.

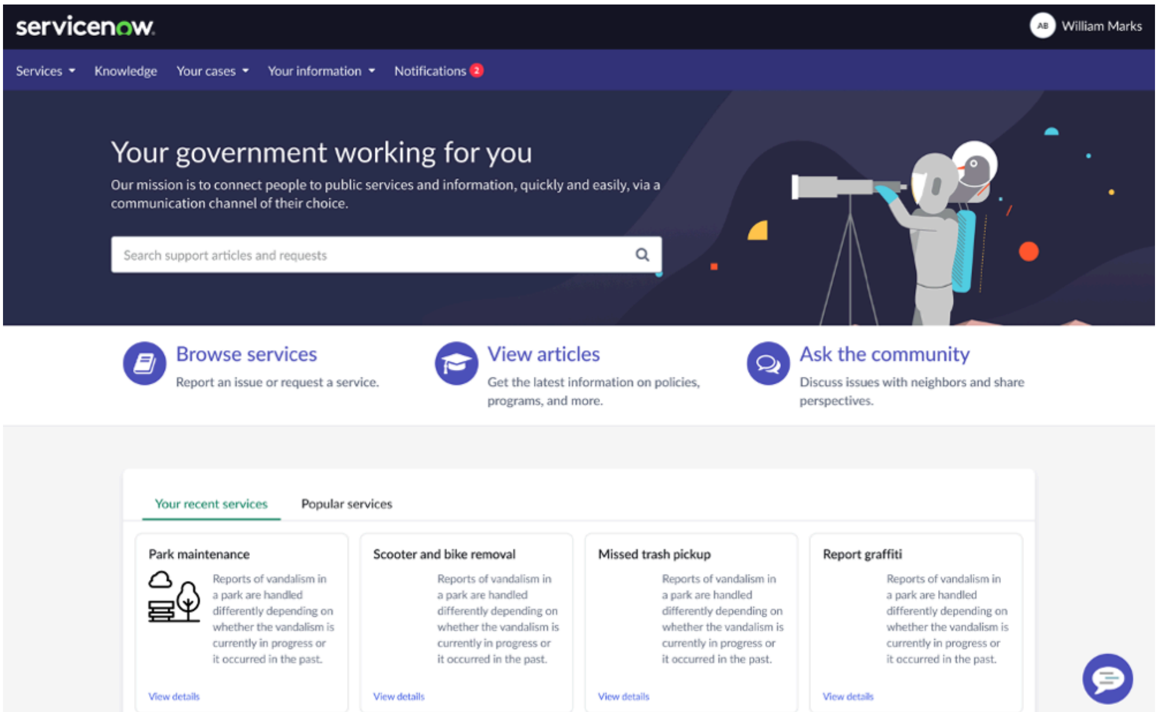
Government Service Portal

By using the Government Service Portal, constituents and businesses can report issues, access and view the status of existing service requests, request public records, search for information about a question or issue, view and update their contact information, and request assistance from a government service agent— all in a user-friendly, customizable interface.

Government Service Portal for constituents

The Government Service Portal experience begins on the portal homepage for constituents. Agencies usually customize their homepages to be viewed by logged-in users and users who aren't logged in. For example, a logged-in user may see different information on the homepage than a user who isn't logged in.

This example shows the default homepage for a registered user of the Public Sector Digital Services Government Service Portal.



Note: Administrators can customize Government Service Portal homepages in Service Portal, so homepage appearance may differ across government agencies.

Constituents can do the following tasks in the Government Service Portal:

- Register as a new user, create a login, and create a user profile.
- Browse and request services or information, track cases, view received services, and report issues.
- Search for information, browse knowledge articles, and engage with the community.
- Get the latest information on policies and programs by searching and viewing articles.
- Discuss issues with neighbors and share perspectives by asking the community.
- View your recent services and see the popular services on the site.
- Get help using Virtual Agent.
- Request services such as street repair, trash removal, building inspections, and other public maintenance.
- Request information and public records from local, state, and federal public agencies.

For more information on the services that are offered in the Government Service portal service catalog, see Government Service Portal service catalog list.

Government Service Portal for businesses and business entities

The Government Service Portal enables businesses to access their cases and service information as well as report issues. Business or business contacts can use the Government Service Portal to view their submitted cases, and raise requests by using the service request catalog.

Business contacts have the same functionality as a constituent user, with a few additional permissions. In addition to the constituent user tasks, business contacts can do the following tasks in the Government Service Portal:

- Register a new business.
- Request services that are related to licenses, benefits, permits, and service requests.
- View services that they received.
- View information records that they requested.
- View all license or permit requests.
- View items that they received.
- View their existing cases.
- View business and child business profiles.
- View business contact information such as names, addresses, and other contact information.
- View publications, such as government pamphlets and newsletters about services.
- View notifications such as government notifications and new contact approvals.

Configuring Public Sector Digital Services

Set up Public Sector Digital Services to enable government agents and service managers to provide government services to constituents, businesses, and other agencies.

Configuring Public Sector Digital Services involves several main tasks:

- Installing and setting up the Public Sector Digital Services Core application and the Performance Analytics content pack.
- Setting up one or more playbooks in the CSM Configurable Workspace for use with Public Sector Digital Services.
- Configuring additional features for public sector use, such as Virtual Agent, Engagement Messenger, and custom service definitions.

Installing and Setting up Public Sector Digital Services

As a user with the admin role, complete the following main configuration tasks to set up Public Sector Digital Services.

Public Sector Digital Services configuration tasks

Configuration task	Description
Install and configure Public Sector Digital Services Core application	Install and configure the Public Sector Digital Services Core application (com.sn_public_sector_digital_services_core) plugin from the ServiceNow Store. It provides the public sector features used by

Public Sector Digital Services configuration tasks (continued)

Configuration task	Description
	constituents, businesses, agency agents, government agents, and government service managers.
Install the Performance Analytics Content Pack for Public Sector Digital Services	Install the Performance Analytics Content Pack for Public Sector Digital Services (com.sn_public_sector_digital_services_pa) plugin from the ServiceNow Store. This application provides dashboards that government agents and service managers can use to track government cases and monitor government services offered to and received by constituents.
Install and configure the Service Request Playbook application	Install and configure the Service Request Playbook application (sn_gsm_srvc_req) plugin from the ServiceNow Store. It provides an end-to-end workflow for handling non-emergency service requests submitted by public sector end users.
Install and configure the Information Request Playbook application	Install and configure the Information Request Playbook application (sn_gsm_info_req) plugin from the ServiceNow Store. It provides an end-to-end workflow for handling public record information requests submitted by public sector end users.
Install and configure the License and Permit Playbook application	Install and configure the License and Permit Playbook application (sn_gsm_license_permit) plugin from the ServiceNow Store. It provides government agents with a pre-defined process for handling and resolving license and permit requests submitted by public sector end users.

Other configuration tasks

In addition to installing the public sector application and playbooks, you can configure other features for public sector use:

ServiceNow® Virtual Agent

Virtual Agent, which is included with a public sector subscription, provides end-user assistance through automated conversations in chat channels.

The Public Sector Digital Services Core application offers several pre-built public sector components (topic blocks) that conversation designers can use to create Virtual Agent conversations.

The Service Request Playbook application provides a pre-built Virtual Agent conversation topic, Create a service request, to help end users submit non-emergency service requests.

For details on configuring Virtual Agent for public sector use, see Configure Virtual Agent for Public Sector Digital Services.

Service definitions

A service definition enables you to map a public service, information service, or license and permit request service to the list of services your agency offers for resolving that request.

As an admin, you can create service definitions that connect the services your agency offers to the services being requested by a constituent or business. When you create a service definition, you can configure the case management processes, such as the case types, for executing those services.

For more information, see Service definitions for Public Sector Digital Services.

Relabel menu items in CSM Configurable Workspace after upgrade

After you upgrade your instance to a new release, certain menus and menu items in the CSM Configurable Workspace may not be labeled appropriately for public sector use. You can relabel the following items for public sector use by changing them in the UX List Categories for Customer and Service Organizations.

For details, see Relabel items for public sector use after upgrade.

Install and configure Public Sector Digital Services Core application

Install the Public Sector Digital Services Core application and configure various features used in the application.

As admins, perform the following administration tasks to install the Public Sector Digital Services Core application and configure key features. After the Public Sector Digital Services Core application is installed, admins configure public service offerings that define services available for request and the agencies that provide them.

Install tasks for Public Sector Digital Services Core

Task	
Install Public Sector Digital Services Core	Install Public Sector Digital Services Core (com.sn_public_sector_digital_services_core) from the ServiceNow® Store. It provides these key features: • Government Service Portal: Used by constituents and businesses to find, track, and request government services. • Business (Agency) Service Location Portal: Used by admins and managers to manage internal and external agency locations. • CSM Configurable Workspace: Used by agency agents, government agents, and government service managers to interact with and assist constituents, businesses, and contributors who are authorized

Install tasks for Public Sector Digital Services Core (continued)

Task	
	to represent or assist constituents and businesses. This workspace requires configuration for public sector use.
Review and assign roles to public sector users	Assign public sector roles to users or groups that have been configured in the Now Platform®. For additional role information, see Roles installed with Public Sector Digital Services Core.
Configure Public Sector Digital Services Core using guided setup	Use guided setup to customize the Government Service Portal used by constituents, businesses and agencies; configure the CSM Configurable Workspace for agents; and set up other features for public sector use.
Optionally configure Public Sector Digital Services Core without guided setup	Customize the government service portal and configure the CSM Configurable Workspace for agents.
Configure Virtual Agent for Public Sector Digital Services	Set up Virtual Agent so that conversation designers (topic authors) can create and modify chatbot conversations for public sector use cases. Also enable your end users to run Virtual Agent in the Government Service Portal and get help with self-service tasks.
Configure a service for constituent, business, or agency	Define the type of public service offered, the service taxonomy, and agency that offers the service.

Install Public Sector Digital Services Core

You can install the Public Sector Digital Services Core application (com.sn_public_sector_digital_services_core) if you have an admin role. The application includes demo data.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Public Sector Digital Services Core application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

  The Public Sector Digital Services Core application requires a subscription.

Role required: admin

About this task

For more information, see Components installed with Public Sector Digital Services Core.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Public Sector Digital Services Core application (com.sn_public_sector_digital_services_core) by using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Install dialog box that is displayed, any dependencies that are installed along with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

   > **Important:** If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

What to do next

Use guided setup to configure the Public Sector Digital Services Core application. If you're not using guided setup, you can customize the Government Service Portal and configure the CSM Configurable Workspace for public sector use by following the optional configuration steps for Public Sector Digital Services Core.

Configure Public Sector Digital Services Core using guided setup

Walk through the guided setup processes to configure the Public Sector Digital Services Core application.

Before you begin

Install the Public Sector Digital Services Core application.

Role required: admin

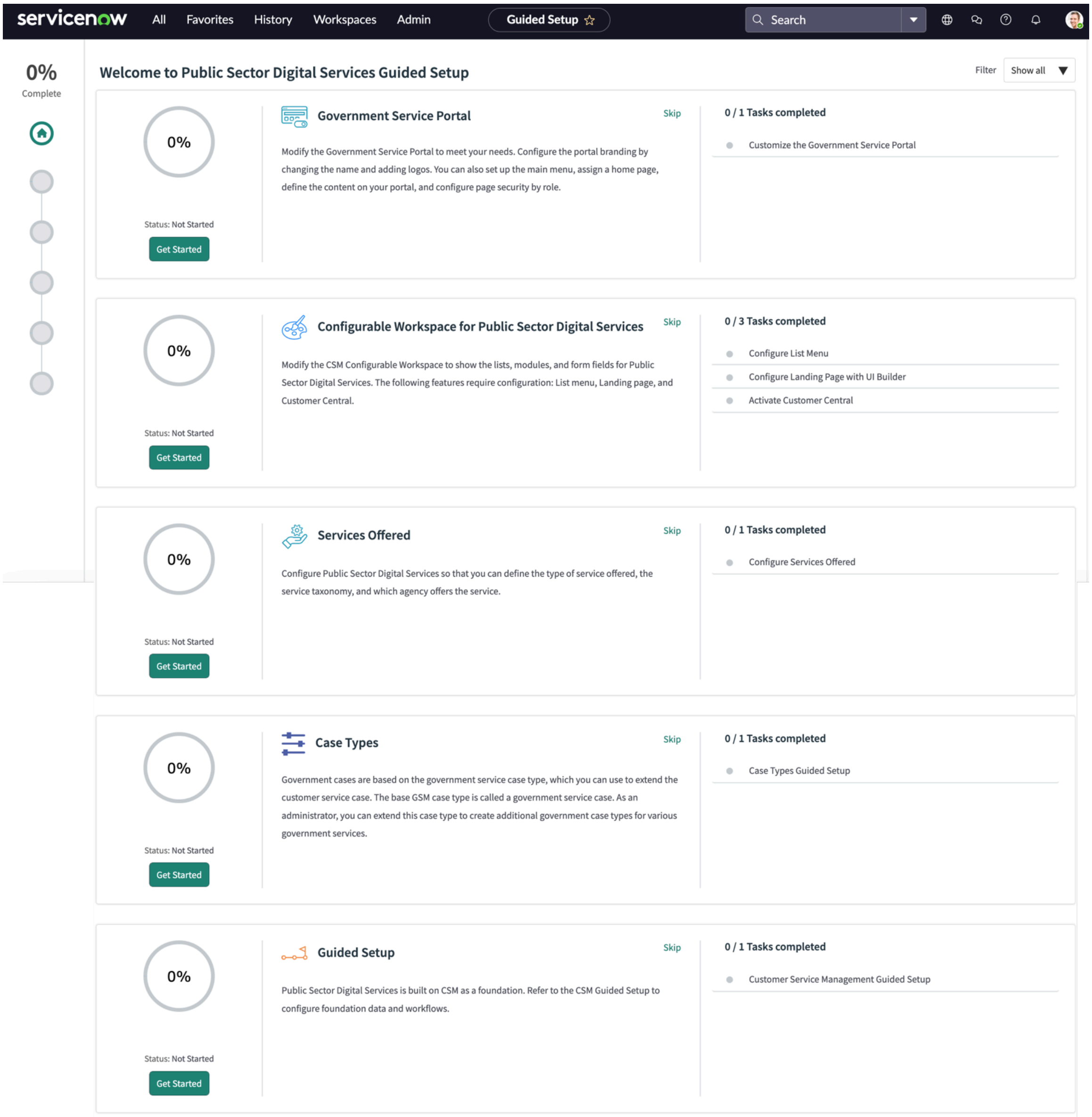
About this task

The Public Sector Digital Services Core application is built on the Customer Service Management application. As part of the guided setup for the Public Sector Digital Services Core application, you also use guided setup for Customer Service Management to configure foundation data and workflows.

Procedure

1. Navigate to **All** > **Constituent Service** > **Administration** > **Guided Setup**.
   The Welcome to Public Sector Digital Services Guided Setup page displays.

2. Review the Getting Started and Public Sector Digital Services Pre-setup Checklist sections, which give information on the setup process and the various requirements to consider before implementing Public Sector.
3. Select **Get Started** to begin configuration.
   The setup page displays the different categories of configuration tasks to be completed.



4. For each category, select **Get Started** and complete the tasks.

What to do next

After you've completed the setup tasks, you can install other public sector applications, such as the Service Request Playbook application and the Performance Analytics Content Pack for Public Sector Digital Services.

Configure User Roles in Public Sector Digital Services

The Public Sector Digital Services application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between users and public sector entities. These roles provide different levels of access to public sector data, to help maintain data security.

Public Sector Digital Services provides many functional and granular roles that you can assign to public sector users.

You can assign roles to users or groups that have been configured in the Now Platform®. A user is an individual who can access your instance and a group is a set of users who share a common purpose. The users associated with a group are listed as group members. After your users and groups are configured, you can assign roles to them.

For more information about roles, see Roles installed with Public Sector Digital Services Core.

You can assign roles to users and groups using guided setup, or you can use the following Now Platform user administration features to create users and groups and assign the appropriate public sector roles:

Configuring users, groups, and roles

To	See
Create users and groups	• Create a user. • Create a user group. • Add a user to a group.
Assign roles to users and groups	• Assign a role to a user. • Assign a role to a group.

Optional configuration steps for Public Sector Digital Services Core

As an admin, you can customize the Government Service Portal and configure the CSM Configurable Workspace for the Public Sector Digital Services Core application without using guided setup.

For example, the Government Service Portal is tailored for public sector use, but you can customize the portal by adding your own branding such as an agency name and logo. You can also configure various elements of the workspace to display the appropriate public sector modules, lists, and fields, and activate other workspace features for your agents, such as Customer Central.

Customize the Government Service Portal

Modify the Government Service Portal to meet your needs, for example to set the portal branding.

Before you begin

You can customize the government service portal by following this procedure or by using guided setup for Public Sector Digital Services Core application.

Role required: admin

Procedure

Navigate to **All** > **Service Portal** > **Service Portal Configuration**.

Some of the components that you can customize include:

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- **Branding**: Configure the portal branding to give your Government Service Portal its own look and feel. For example, you can give your portal a name and add your logo.
- **Menus**: Configure the portal header menu to set up the main menu, one of the main navigation controls for your users.
- **Homepage**: Assign a homepage to the portal.
- **Widgets**: Use Service Portal widgets to define the content in your portal.
- **Roles**: Configure page security by role to either set up pages to be public (no login required) or to filter them by user role.

Set up the CSM Configurable Workspace for Public Sector Digital Services

Modify the CSM Configurable Workspace to show the lists, modules, and form fields for Public Sector Digital Services.

Certain features in the CSM Configurable Workspace for Public Sector Digital Services require configuration for public sector:

- List Menu
- Public Sector landing page
- Customer Central

Certain features, such as auto-reflow , which restructures Configurable Workspace pages vertically when rhe user zooms in, are available on the page-level automatically. However, administrators can disable auto-reflow for selected experiences, pages, or for the entire Configurable Workspace. For information on how to disable this feature, see Reflow for Configurable Workspace.

> **Note:** You can use guided setup to configure these configurable workspace features. For details, see Configure Public Sector Digital Services Core using guided setup.

Configure the List Menu for Public Sector Digital Services

Add public sector-related menu options to the List Menu in the CSM Configurable Workspace.

Before you begin

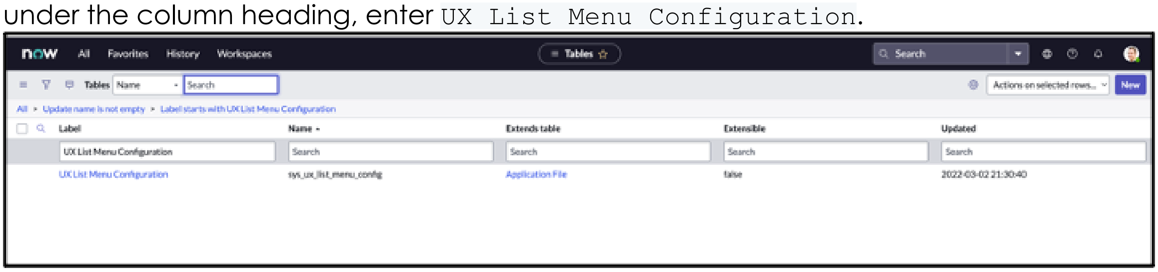
Role required: admin

About this task

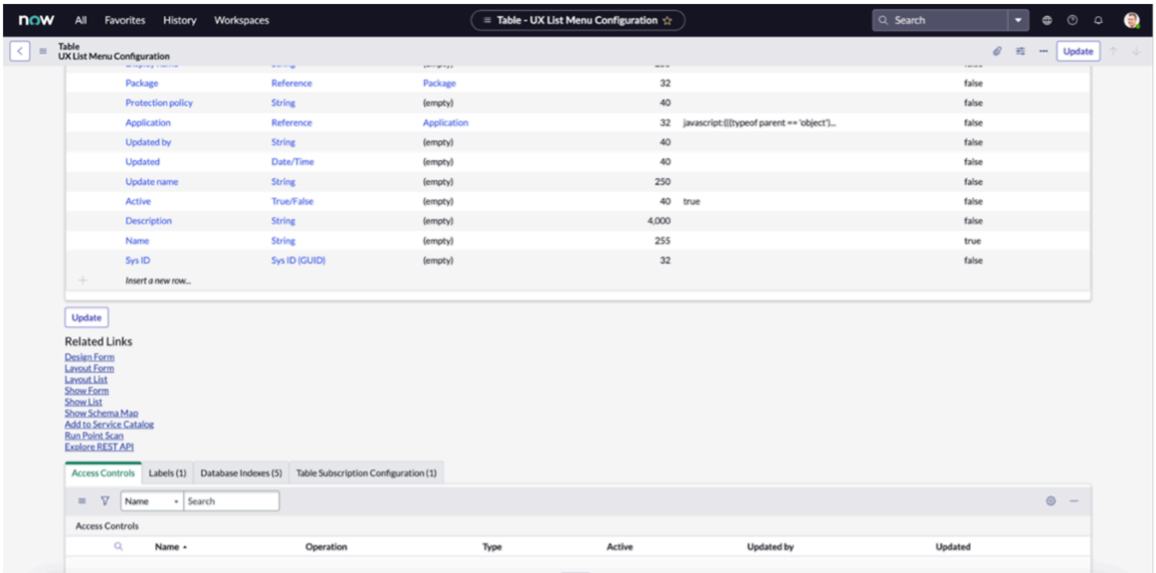
To configure the List Menu, you can follow this procedure or use guided setup for the Public Sector Digital Services Core application.

Procedure

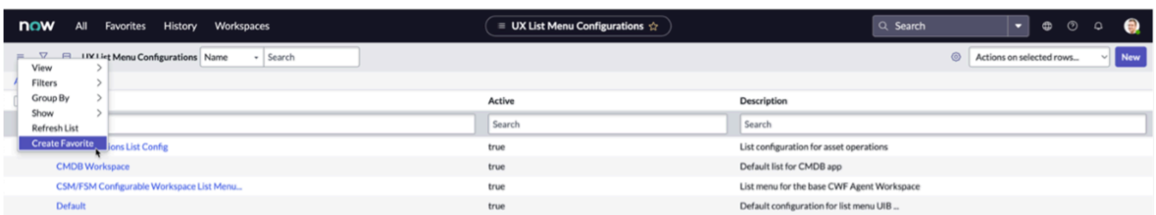
1. Navigate to **All** > **System Definition** > **Tables**.
2. In the Tables [sys_db_object] table, select the **Search** icon next to the **Label** column and under the column heading, enter `UX List Menu Configuration`.



3. In the UX List Menu Configuration List table, go to **Related Links** and select **Show List.**



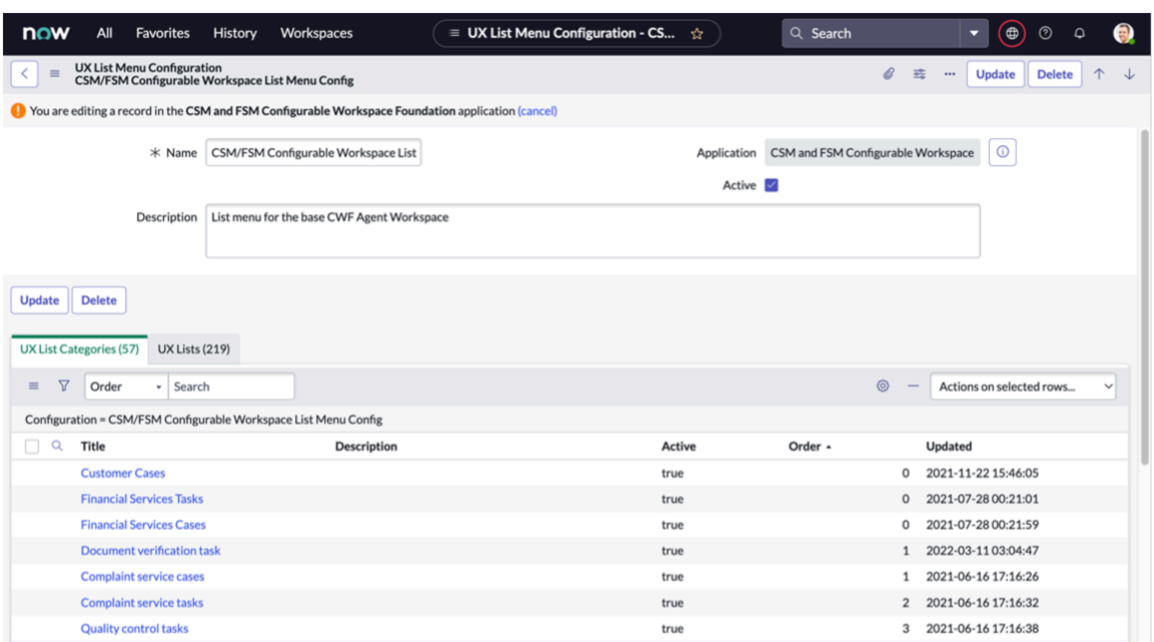
4. Optional: From the Context menu, select **Create Favorite** to bookmark the UX List Menu Configurations table so that you can quickly access it if you need to make changes later.



(Optional)

5. Remove the categories that are not applicable to Public Sector Digital Services.

a. Select the **CSM/FSM Configurable Workspace List Menu** record and go to the **UX List Categories** tab.



b. For each of the following categories, select the category record and change the Active value to false:

> **Note:** If the following message is displayed, select **here** to edit the page.

- Cases
- Major Issue Management
- Tasks
- SLAs
- Incidents
- Problems
- Change
- Requests
- Catalog Tasks
- CMDB
- Conversation Monitoring

What to do next

Configure the Public Sector landing page using UI Builder.

Configure the Public Sector landing page with UI Builder

Use the UI Builder to change certain fields in the Public Sector landing page of the CSM Configurable Workspace.

Before you begin

Role required: admin

About this task

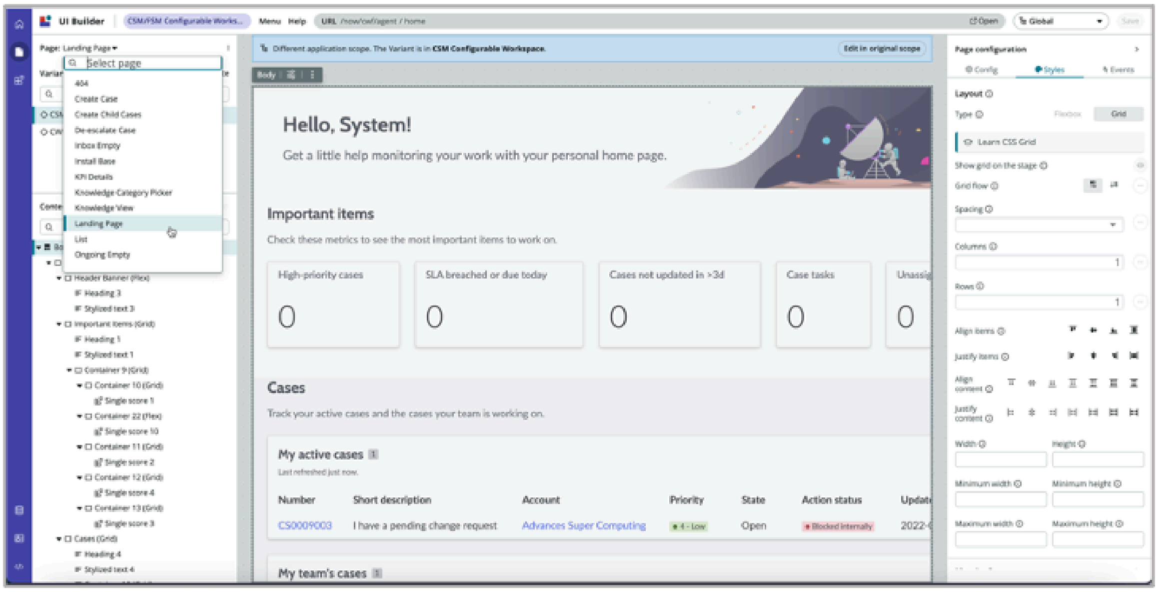
The CSM Landing Page gives agents an overview of their new, assigned, and high-priority cases, plus the cases assigned to their groups. Replace certain fields in the landing page with fields relevant to public sector. You can also add or change other fields as needed. For more information on using UI Builder to modify pages, see Work with pages.

Procedure

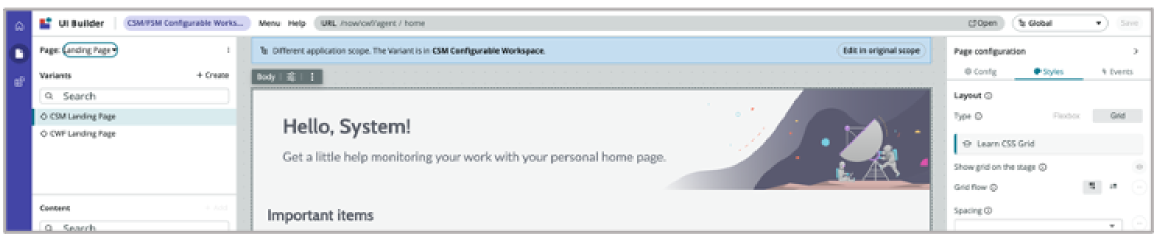
1. Navigate to **All** and in the filter, enter and select **UI Builder**.
2. Navigate to the CSM Landing Page:

   a. In the list of **My experiences**, select the **CSM/FSM Configurable Workspace**.

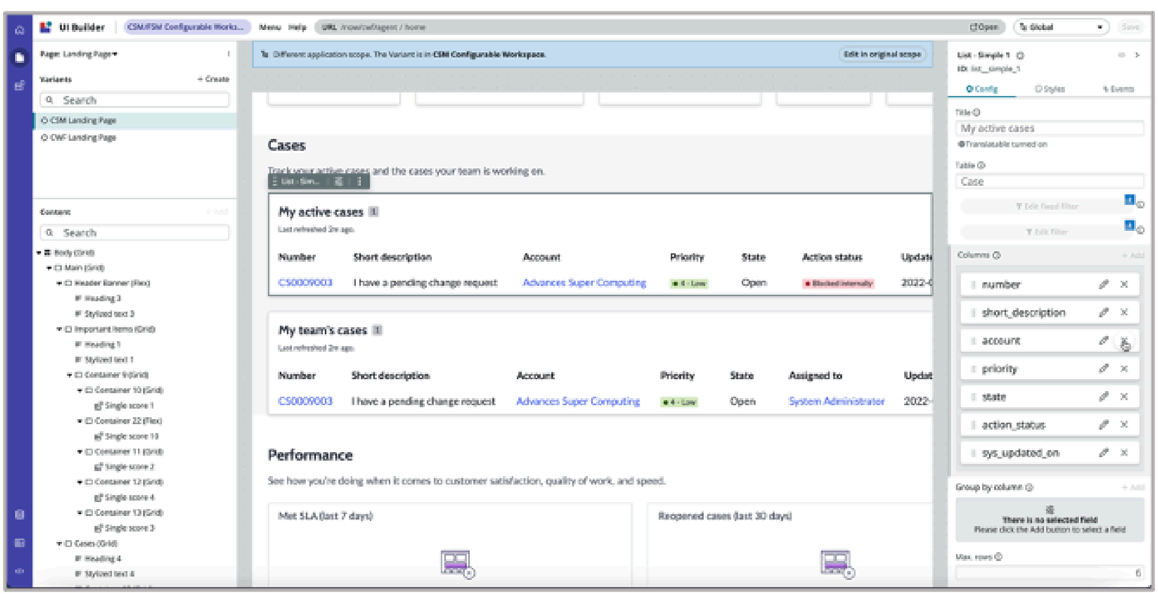
   b. In **UI Builder**, navigate to **Page** > **Landing Page** and select **CSM Landing Page**.



c. In the message displayed at the top of the page, select **Edit in original scope**.

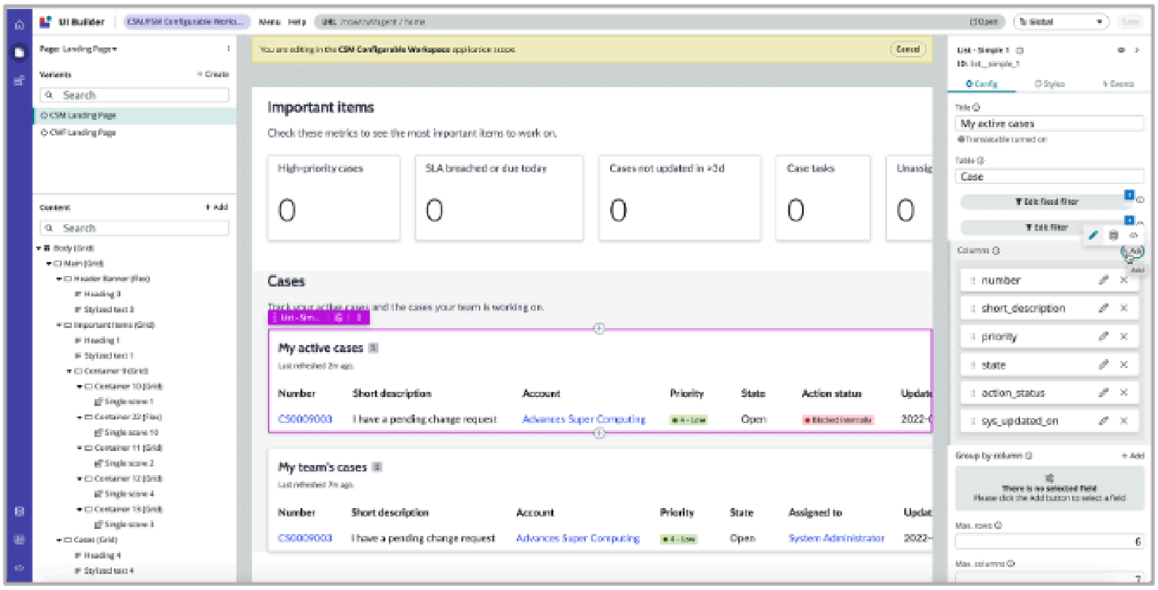


3. In the CSM Landing Page, select the **My active cases** component and in the **Config** tab of the Configuration pane, delete the **account** field from the **Columns**.

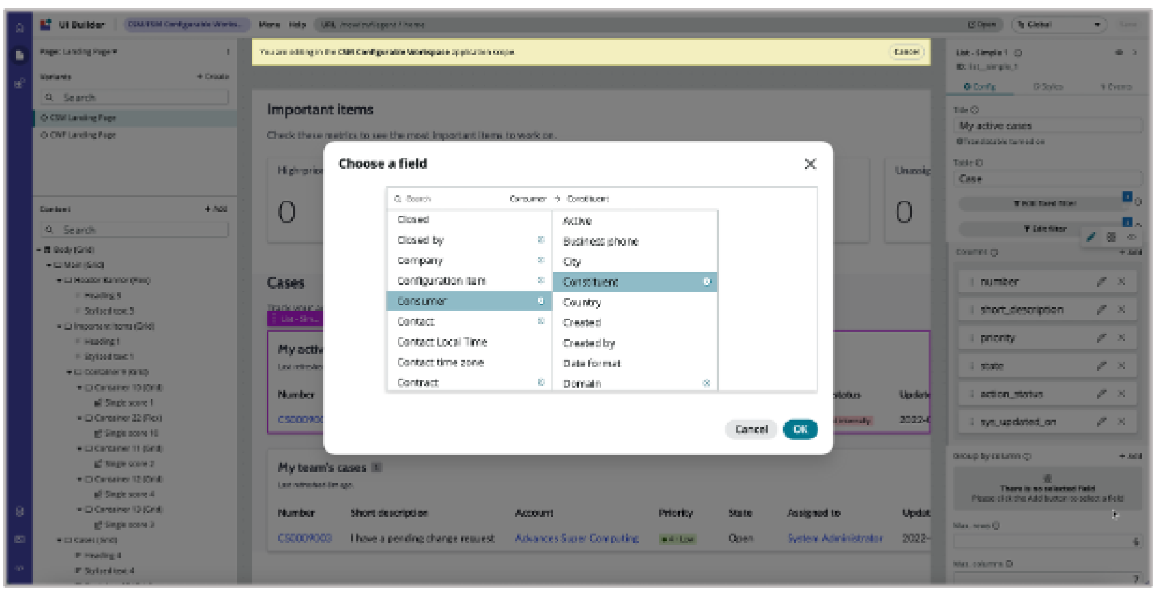


4. Add the **Constituent** field:

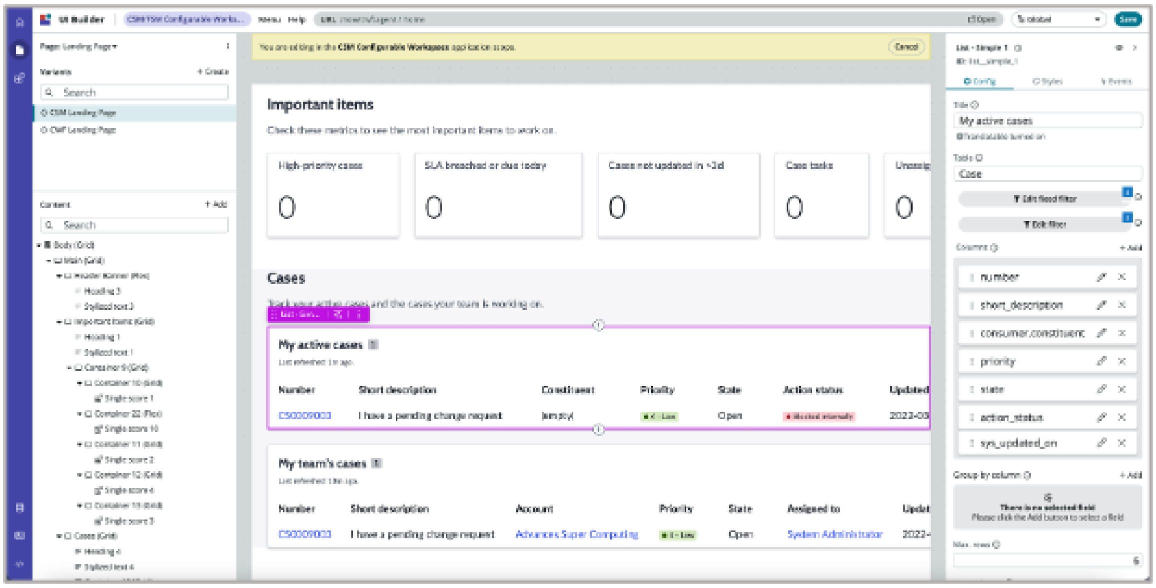
a. In the Configuration pane, select **+Add** in the **Columns** list to open the field chooser.



b. In the Choose a field list, select **Consumer** > **Constituent** and then select **OK**.



c. In the Configuration pane, rearrange the columns by moving **consumer.constituent** below **short.description**.



5. Repeat Steps 3 and 4 to change the **My Team's cases** component.
6. Make other page changes as needed.
7. Select **Save** in the top right corner to save the landing page changes.

Activate Customer Central for viewing profile information

Install Customer Central using Customer Service Guided Setup so that agents can have a complete view of constituent, business, or agency information in Public Sector Digital Services.

Before you begin

Role required: admin

About this task

Customer Central displays all the touchpoints that a constituent, business, or agency has with a government center or agency, in the form of information cards.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. In the section **Customer Central - Customer Information for CSM Configurable Workspace**, locate the list of tasks for setting up the configurable workspace.
3. Select **Activate Customer Central** to install the plugin.

   After installation, one of the following tabs is available on the interaction record:

   - The **Constituent Information** tab when the **Constituent** tab is populated.
   - The **Business Information** tab when the **Business** tab is populated.
   - The **Agency Information** tab when the **Agency** tab is populated.

   You can perform other changes to this layout, as needed. For more information, see Configure the Customer Information view using the CSM Configurable Workspace.

Configure Virtual Agent for Public Sector Digital Services

Set up ServiceNow® Virtual Agent so that conversation designers (topic authors) can create and modify automated conversations for public sector use cases. Also enable your end users to run Virtual Agent in the Government Service Portal and get help with self-service tasks.

Before building Virtual Agent topics for public sector use cases

As admins or topic authors (users with the virtual_agent_admin role), you can do the following with Virtual Agent:

- Use pre-built conversations and topic blocks (components that run subflows or common functions in a conversation). Pre-built conversations and topic blocks are available with the Virtual Agent platform, Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent), and Service Request Playbook application. Pre-built Public Sector topic blocks are available with the Public Sector Digital Services Core application.
- Build your own custom, public sector conversation topics. You can duplicate pre-built topics and topic blocks and then customize them as needed.

Before you or your topic authors (users with the virtual_agent_admin role) create or modify Virtual Agent conversations, meet the following prerequisites for working with pre-built topics and topic blocks in Virtual Agent Designer:

- Activate the Glide Virtual Agent plugin (com.glide.cs.chatbot) to access platform topics and topic blocks and run Virtual Agent Designer.
- Activate the Customer Service Virtual Agent plugin (com.sn_csm.virtualagent) to access pre-built Customer Service Management conversations and topic blocks.
- Become familiar with Virtual Agent Designer to create and update conversation topics.
- Install Public Sector Digital Services Core application to access public sector topic blocks that can be used in public sector conversations.
- Install Service Request Playbook for Public Sector Digital Services to access the pre-built topic, Create a Service Request.

Configure Virtual Agent conversations for public sector users

As admins or topic authors (users with the virtual_agent_admin role), you can deploy pre-built conversation topics to your end users, such as the **Create a Service Request** topic provided with the Service Request Playbook application, as well as custom conversation topics that you create.

These blocks are subflows that run conversational elements or common tasks in a conversation, such as adding or retrieving records. Topic blocks enable topic authors to quickly add standard functions to Virtual Agent conversations, simplifying conversation design and maintenance.

1. Configure Agent Chat in the Government Service Portal.
   a. Navigate to **All** >**Service Portal** >**Agent Chat**.
   b. Locate **GSP Chat**, and select the checkbox to set the record to **Active**.
2. In Virtual Agent Designer, search for the corresponding topic block.

- For Service Request Playbookrequests,search for and select **Create a Service Request**.
- For License and Permit Playbook requests, search for and select **Start a License/Permit Application**.

3. Select **Publish** to set the topic block to Active and make it available to your end users.
   For more information on creating and publishing Virtual Agent topics, see Publish a Virtual Agent topic.

For more information on working with topics in Virtual Agent Designer, see Getting Started with Virtual Agent Designer.

Example Virtual Agent topics

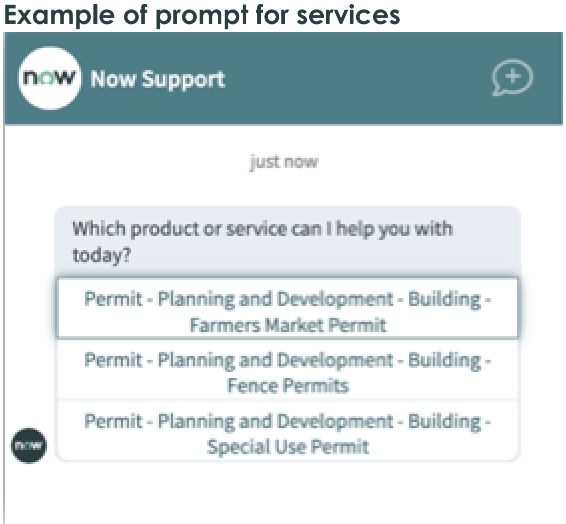
The Public Sector Digital Services Core application provides several OOB topic blocks that you can use in public sector conversations:

- Prompt Service for Constituent – Asks constituents to select a type of government service.
- Create Public Sector Additional Members – Prompts constituents to add other persons who have an authorized interest in an issue or case.

Prompt Service for Constituent topic block

Use this topic block in a conversation to ask constituents to select a service from a list of available government services, for example permits or licenses. Activate the Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

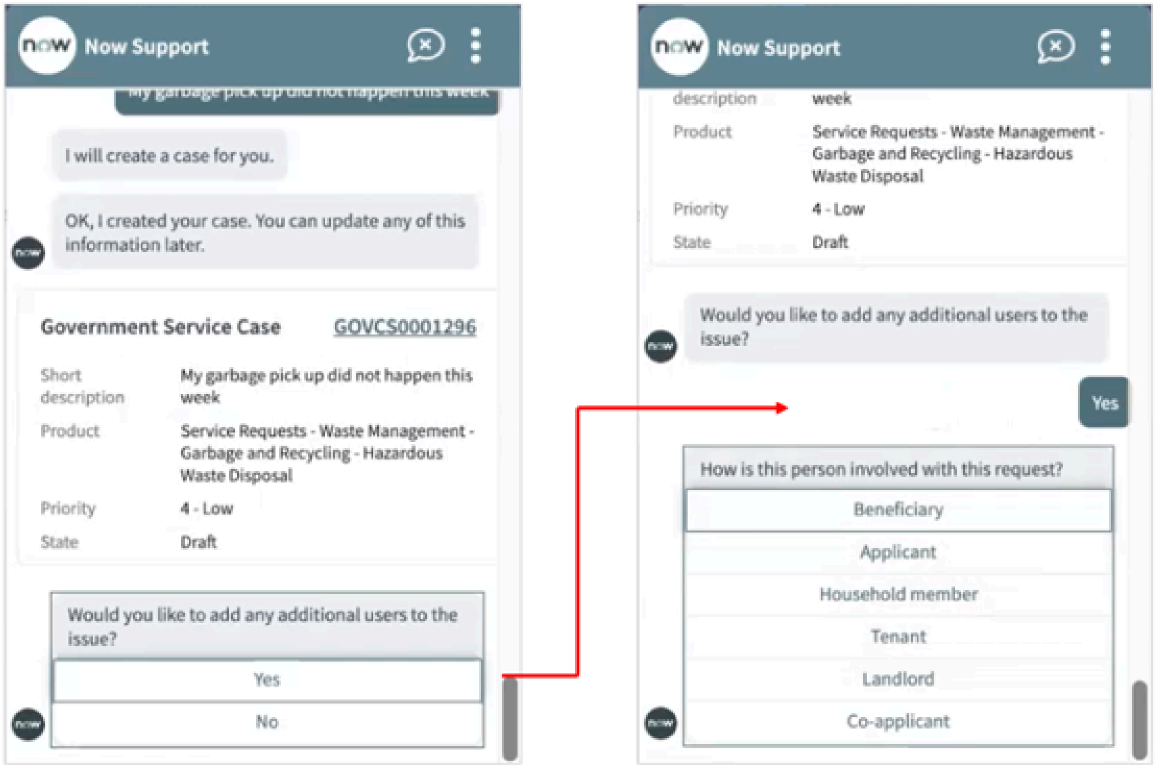
Example of prompt for services



Create Public Sector Additional Members topic block

Use this topic block to let your constituents specify other people, such as family members or other authorized individuals, who can view a case or issue. Activate the Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

Example prompts for adding members to a government service case



When you use this topic block in a conversation, you specify the input parameters from the originating (calling) topic to the topic block.

Public Sector Additional Members input parameters

Parameter	Description
case_id	sys_id of the public sector case record created.
case_type	Extension of the base public sector service.

To learn more about topic blocks and how to use them in Virtual Agent conversations, see Maximizing code reuse with topic blocks

Configure a service for constituent, business, or agency

Configure Public Sector Digital Services service catalog so that you can define the type of public service being offered, the service taxonomy, and which agency offers the service.

Before you begin

Note: Determine which fields contain sensitive information and how to encrypt them to protect sensitive data.

Role required: admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Categories**.
2. Select **New** or open the catalog item to be edited.
3. On the form, fill in the fields.

Public Services Service Catalog form

Field	Description
Name	Name of the public service.
Catalog	Product category that the service falls under. If blank, select **Government Service**.
Category	Indicates the type of public service.
Application	Application scope of the service. Select from the following options: ◦ Public Sector Digital Services Core ◦ License and Permit Playbook ◦ Information Request Playbook ◦ Service Request Playbook
Status	Status of the public service. Mapped in the active field as: ◦ Available = true ◦ Not available = false
Short description	Short description of the public service.
Description	Description of the public service.

4. Select **Submit** or **Update**.

Install the Analytics and Reporting Solution for Public Sector Digital Services

Install the content pack for the Public Sector Digital Services Platform Analytics Solution from the ServiceNow Store.

Before you begin

- Activate the full, subscription version of Performance Analytics on the instance where you are activating this Now Intelligence Solution. You can activate Performance Analytics on a non-production instance without purchasing a subscription. For more information, see Activate your Performance Analytics subscription.
- Install Public Sector Digital Services Core from the ServiceNow Store.

Role required: admin

servicenow

Procedure

1. Navigate to **All** > **System Applications** > **All Applications** > **ServiceNow Store**.
2. Browse for Performance Analytics Content Pack for Public Sector Digital Services and verify that you have the necessary valid entitlements.

   You need a HI account and permission to request applications for the instances under consideration. The HI account and the instance need to be part of the same company. For more information, see Install a ServiceNow Product on the ServiceNow Store.
3. Search for `Performance Analytics Content Pack for Public Sector Digital Services`.
4. Install the application.

Install and configure the Service Request Playbook application

Install the Service Request Playbook application, which enables public sector end users to submit and track non-emergency service requests and provides government agents with a pre-defined process for handling and resolving these requests. You can then configure the features available for submitting requests and routing requests to agents.

As a user with the admin role, complete the following configuration tasks to set up the Service Request Playbook, after you install the Public Sector Digital Services Core application.

Configuration tasks for Service Request Playbook

Task	Description
Install Service Request Playbook application	Install Service Request Playbook (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.
Automatically route service requests using Advanced Work Assignment	Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign public sector service requests to designated agents.
Configure Engagement Messenger for Service Request Playbook application	Configure certain Engagement Messenger settings that enable public sector end users to create and track non-emergency service requests from Engagement Messenger.
Enable public sector end users to create a service request using Virtual Agent	Use Virtual Agent Designer to publish the pre-built conversation topic, **Create a Service Request**, which enables end users to submit a service request using the Virtual Agent chatbot.
Configure the Similar Records Activity UI in Service Request Playbook	View a list of similar requests by location, without having to search for the requests or leave the playbook.
Configure Mobile Agent for Service Request Playbook	(Optional) Install the Customer Service Mobile and Service Request Playbook plugins to enable government service agents to track non-emergency service requests on the Mobile Agent.

Install Service Request Playbook for Public Sector Digital Services

You can install the Service Request Playbook application (sn_gsm_srvc_req) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Certain features in the Service Request Playbook application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plugins.

  Note: Install the Playbooks for Customer Service Management application to enable the playbook experience.

- Review the Service Request Playbook application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The Service Request [sn_gsm_service_request_case] table is installed with Service Request Playbook.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Service Request Playbook application (sn_gsm_srvc_req) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Install dialog box that is displayed, any dependencies that are installed along with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Automatically route service requests using Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign public sector service requests, such as non-emergency requests, to designated agents.

The Service Request Playbook application provides the following items that are used in AWA to automatically route and assign public sector service requests:

- **Service Requests service channel** - The default service channel for routing incoming public sector service requests to specific government agents. This service channel includes related attributes that define the default conditions for determining the items handled in the channel, work queue associated with agent assignment groups, agent inbox layouts, and more.
- **Public Sector Requests assignment group** - The default assignment group that identifies the agents handling public sector service requests. Agent assignments are based on agent availability, capacity, and skills.
- **Public Service Requests queue** - The default queue to which public sector service requests are routed.
- **Inbox layouts** - The default card layouts for service request items displayed in the agent inbox view of CSM Configurable Workspace:
  - Constituent Service Request layout: Includes **Short description**, **Constituent**, and **Service** fields.
  - Business Service Request layout: Includes **Short description**, **Business**, **Business Contact**, and **Service** fields.
  - Generate Service Request Layout: Displayed when anonymous users submit service requests. Includes **Short description** and **Service** fields

As an admin, you can enable and disable Advanced Work Assignment for Service Request cases, as well as change the default attributes for the Service Requests service channel, such as the related assignment group and queue settings. For details, see Configure Service Requests service channel.

Configure Service Requests service channel

Change the default Service Requests service channel attributes in Advanced Work Assignment to control how public sector service requests are routed and assigned to government agents.

Before you begin

- Activate the Advanced Work Assignment plugin (com.glide.awa).
- Activate the Agent Chat plugin (com.glide.interaction.awa).
- Install the Service Request Playbook application.

Role required: awa_admin or admin

About this task

You can modify the context and attributes for service channels in AWA. For the Service Requests service channel, use the Public Sector Requests assignment group to specify the agents handling service requests. You can also add advanced conditions to filter the routing conditions in the Service Request service channel, or change queue settings, such as assignment rules.

Procedure

Configure the Service Requests service channel by modifying the default attributes as needed.

Options	Steps
Enable the Service Request service channel	**a.** Navigate to **All** > **Advanced Work Assignment** > **Settings Presence States**. **b.** Select the **Available** record. **c.** In the Presence State form, go to the**Service Channels** field and move the Service Request channel to the **Selected** column. **d.** Select **Update**.
Add members (agents) to the Public Sector Requests assignment group	**a.** Navigate to **All** > **Advanced Work Assignment** > **Management** > **Groups**. **b.** Select the Public Service Requests group. **c.** In the Group form, navigate to the **Group Members** related list and review the list of example members. Use the examples to determine the government agents, managers, and their associated roles to be added to the assignment group. **Note:** Agents and managers added to this assignment group must also have the awa_agent role. **d.** In the **Group Members** related list, click **Edit** to add members to the group. **e.** Select **Edit**. **f.** Select one or more names in the **Collection** list and move them to the **Group Members** list. **g.** Select **Save**.
Configure the Public Service Requests queue	**a.** Navigate to **All** > **Advanced Work Assignment** > **Settings** > **Queues**. **b.** Select the Public Services Requests queue.

Options	Steps
	c. Change other settings as needed, for example the assignment rule that determines Assignment Eligibility. **d.** Select **Update**. For more information on queue settings, see
Change Inbox card layouts for service request items in CSM Configurable Workspace	**a.** Navigate to **All** > **Advanced Work Assignment** > **Service Channels** and select the Service Request channel. **b.** Select the **Inbox Layouts** related link. **c.** Select the layout and edit the fields to be updated. **d.** Select **Update**. For more information on changing inbox card layouts, see Create or modify an inbox

Configure Engagement Messenger for Service Request Playbook application

Configure certain Engagement Messenger settings to enable public sector end users to create and track non-emergency service requests from Engagement Messenger. With Engagement Messenger, public sector users can access self-service and chat features from third-party web applications outside of the ServiceNow environment.

Before you begin

- Create an Engagement Messenger module. For more information on implementing Engagement Messenger, see Set up Engagement Messenger.
- Be familiar with customizing the Engagement Messenger module. For details, see Customize the feature configuration of Engagement Messenger.
- Activate the Agent Chat plugin (com.glide.interaction.awa).
- Activate the Virtual Agent plugin (com.glide.cs.chatbot), which requires a subscription.
- Activate the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent), which requires a subscription.

Role required: sn_csm_ec.ec_admin or admin

About this task

Public sector end users can create and track service requests in Engagement Messenger. They can choose from a catalog of pre-packaged service requests that are provided with the Service Request Playbook application. If Virtual Agent is implemented, they can use the pre-built Virtual Agent conversation, Create a Service Request, to submit and update non-emergency service requests from Engagement Messenger. You must enable the Government Service Catalog and this pre-built Virtual Agent conversation in Engagement Messenger.

Procedure

1. In Engagement Messenger, navigate to **All** > **Engagement Messenger** > **Modules**.
2. Customize the Catalog feature to use the Government Service Catalog, which provides the pre-packaged, non-emergency services that users can select from when creating a service request.
   a. From the **Features** section, open the **Catalog** feature.
   b. Select **Edit** to search for and then add the Government Service Catalog.
3. Customize the Chat feature by enabling the pre-built Virtual Agent conversation for creating a service request.
   a. From the **Features** section, open the **Chat** feature.
   b. Under **Reference chat**, find and select the **Create a Service Request** conversation topic.
4. Select **Update**.

Configure Mobile Agent for Service Request Playbook

Install the Customer Service Mobile and Service Request Playbook plugins to enable government service agents to track non-emergency service requests on the Mobile Agent. You can then configure the roles.

As a user with the admin role, complete the following configuration tasks to set up the Mobile Agent application.

Admin Tasks for Mobile Agent app configuration

Task	Description
Install Service Request Playbook application	Install Service Request Playbook (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.
Activate the Customer Service Mobile plugin (com.sn_csm_mobile)	You can activate the Customer Service Mobile plugin (com.sn_csm_mobile) using the Customer Service Management guided setup.
(Optional)Activate Field Service Management plugin (com.snc.work_management)	Install the Field Service Management plugin to view the work orders related list. For more information, see Integration with Field Service Management.
Configure public sector roles and permissions for Mobile Agent app	Configure user roles in order for government service agents to access the Mobile Agent app. This step is mandatory for any government service agent to be able to work from the app.

Once the Customer Service Management mobile application is activated and configured, agents can download the ServiceNow Mobile Agent on their mobile devices and access ServiceNow instances.

Configure public sector roles and permissions for Mobile Agent app

Configure user roles for government service agents to access the Mobile Agent app. This step is mandatory for any government service agent to be able to work from the app.

Before you begin
Role required: admin

Procedure

1. In the navigation filter, enter **sys_sg_applet_launcher.list** to open the Applet Launchers [sys_sg_applet_launcher] table.
2. From the Launcher screens table, select the **Cases** record.
   The Required Roles record should contain only the Customer Service Agent (sn_customerservice_agent) role.
3. Optional: If prompted, switch from the Global application to the Customer Service Mobile application.
4. Select the edit icon ( ) under Required Roles and add the following roles:
   - sn_gsm.agency_manager
   - sn_gsm.government_service_manager
   - sn_gsm.constituent_agent
   - sn_gsm.business_agent
   - sn_gsm.agency_constituent_agent
   - sn_gsm.agency_agent
5. Select **Done** to save the roles.
   Agents with the above roles can now log in to the Mobile Agent and work on Service Request cases assigned to them.

Configure a service definition for Playbooks in Public Sector Digital Services

Create a service definition for use with Playbooks in Public Sector Digital Services.

Before you begin
Role required: admin

About this task
Service definitions are records used to store details about a service that is available to end customers. You can create service definitions for each public service offered by your government agency.

After upgrade to Public Sector Digital Services v8.0, Services Offered, an extension of Product Model, will no longer be used to model government services. Services Received, an extension of Sold Product, will no longer be used to model the government services that have been granted/delivered to constituents. The Service Definition table will be used to model all public services offered by governments. The following fields from the Service Offered table will be removed and replaced with Service Model fields:

- Type
- Status
- Number
- Period Start Date
- Period End Date
- Jurisdiction
- Category

- Subcategory
- Payment source

> **Important:** When upgrading to Vancouver, any data in the Services Offered and Services Received tables will need to be manually migrated into the Service Definition table. You can do so by creating a Service Definition for each entry in the Services Offered table. Services Offered and Services Received data will not be accessible within the application until this step is completed. This is an optional task for previous releases.

Procedure

1. To see all data in the Services Offered table that is a candidate for migration, navigate to **System** > **All**.
2. Enter `sn_gsm_government_service_model.list` in the search box and select **Enter**.
3. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
4. Select **New**.
5. Enter the details for the Service Definition.

Service definition form

Field	Description
Name	Name of the service definition.
ID	System-generated unique identifier for the service definition.
Task type	Table associated with the service definition. Select a case or task table based on the service.
View	View to load for the selected service.
Template	Field values that should be defaulted on the form when a case or task is created.
Category	Service definition category for a public service.

6. Select **Submit** or **Update**.
7. Select the new Service Definition Record.
8. In the Default Table Values field, select **Service Definition**.
9. Select the search icon , and select the new Service definition in the choice menu.
10. Select **Submit**.
    The service definition is now created and can be used with any of the playbooks in Public Sector Digital Services.

Configure a custom playbook in Service Request Playbook

Custom playbooks and service definitions enable you to customize the default Service Request Playbook user experience to interact with your desired agency workflows. After creating a service definition, you can associate a playbook with the definition.

Before you begin
Role required: admin

About this task
Before starting this procedure, you must create a service definition to associate your playbook with. For more information on how to create a service definition, see Configure a service definition for Playbooks in Public Sector Digital Services.

When the agent selects **Create Case** on the case type selector screen, the system displays the new case record and launches the playbook associated with the service in a tab on the record page.

Note: This is an optional task.

Procedure
1. Navigate to **All** > **Process Automation** > **Process Automation Designer**.
2. Select **Create a New Process**, fill in the details of the playbook, and select **Select a trigger**.
3. Select a trigger type from the dropdown menu.
   Your trigger type is the service definition you recently created.
4. Select **Go to Designer**.
   Process Automation Designer is now opened.
5. Optional: Select **Add new lane** to add a lane to your process.
   For more information on lanes in Process Automation Designer, seeStages and activities.
6. Select **Activate** after creating the process to your specifications.
   The playbook is now published to run when triggered.
7. Navigate to **All** > **System UI** > **UI Policies**.
   You are taken to edit the UI of the Playbook Record Generator, which is the initial form an agent sees when they are creating a case.
8. Select **New**.
9. Select **Service Request** in the **Table** dropdown menu, and enter a short description describing your new UI policy.
10. Add the necessary conditions under the **When to Apply** and **Script**tabs,and select **Submit**.
    Your UI policy and playbook are now created.

Configure the Similar Records Activity UI in Service Request Playbook

The Similar Records Activity UI uses the name and description of existing cases to display a list of cases associated with the current case, allowing an agent to determine whether the current case is a duplicate of an existing case. Similar records can also provide helpful information about a current case.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Process Automation** > **Process Automation Designer**.
2. Select **Service Request**.
3. Under Intake, select **Add Activity**.
4. Select**Playbooks for Customer Service Management** > **Similar Records**
5. Under When to Start, select **With Previous**from the dropdown.

6. Select **View all properties**, then **Automation**.
7. Select the arrow next to Record, and select **Trigger- Service Request** > **Service Request Record**.
8. Under Conditions, select **Stage** > **is not** > **Intake**.
9. Toggle **Advanced** in the top right corner of the screen.
10. Select **Experience**, and set the associated table to "Service Request".
11. Set the associated record to **Trigger- Service Request** > **Service Request Record**
12. Optional: To set parameters for.
13. Set the title to **This activity** > **Label**.
14. Select **Done**, then select **Activate**.

Result
The Similar Records UI activity is now configured, and the modal should now display when you open a new or existing Service Request Playbook.

Install and configure the Information Request Playbook application

Install the Information Request Playbook application, which enables public sector end users to submit and track public record requests and provides government agents with a pre-defined process for handling and resolving these requests. You can then configure the features available for submitting requests and routing requests to agents.

As a user with the admin role, complete the following configuration tasks to set up the Information Request Playbook, after you install the Public Sector Digital Services Core application.

Configuration Tasks for Information Request Playbook

Task	Description
Install Information Request Playbook for Public Sector Digital Services	Install Information Request Playbook (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.
Automatically route service requests using Advanced Work Assignment	Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign public sector information requests to designated agents.
Configure Restricted Caller Access privilege settings in Public Sector Digital Services	You can use a requested RCA to grant store apps access to protected resources in the Now Platform® without the need to wait for the next family release. If you have the system admin or application admin role, you can review requested RCAs and approve and deny them.
Create or edit a legal, review, or final review assignment group	Create a legal, review, or final review assignment agent group for the final review steps of an Information Request.
Configure the Manage documents activity UI in Information Request Playbook	Create documents, search for documents with the auto-complete name lookup, and

Configuration Tasks for Information Request Playbook (continued)

Task	Description
	link or unlink existing documents to a case, all from one modal within the playbook.
Configure Similar Request Documents UI in Information Request Playbook	Search documents from similar cases, preview multiple sets of documents at one time, and link or unlink documents to or from the case from one modal, without having to leave the playbook.
Configure Mobile Agent for Information Request Playbook	(Optional) Install the Customer Service Mobile and Information Request Playbook plugins to enable agents to view and track information requests on the Mobile Agent.

Install Information Request Playbook for Public Sector Digital Services

You can install the Information Request Playbook application (sn_gsm_info_req) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Certain features in the Information Request Playbook application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plugins.

  Note: Install the Playbooks for Customer Service Management application to enable the playbook experience.

- Review the Information Request Playbook application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The Information Request [sn_gsm_information_request] table is installed with Information Request Playbook.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Information Request Playbook application (sn_gsm_info_req) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.

3. Select a version from the list and select **Install**.

In the Install dialog box that is displayed, any dependencies that are installed along with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

   > **Important:** If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Automatically route information requests using Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign information requests, such as public records requests, to designated agents.

The Information Request Playbook application provides the following items that are used in AWA to automatically route and assign public sector information requests:

- **Information Request service channel** - The default service channel for routing incoming public sector information requests to specific government agents. This service channel includes related attributes that define the default conditions for determining the items handled in the channel, work queue associated with agent assignment groups, agent inbox layouts, and more.
- **Public Sector Information Request assignment group** - The default assignment group that identifies the agents handling public sector information requests. Agent assignments are based on agent availability, capacity, and skills.
- **Public Sector Information Requests queue** - The default queue to which public sector information requests are routed.
- **Inbox layouts** - The default card layouts for information request items displayed in the agent inbox view of CSM Configurable Workspace:
  - Constituent Information Request layout: Includes **Short description**, **Constituent**, and **Service** fields.
  - Business Information Request layout: Includes **Short description**, **Business**, **Business Contact**, and **Service** fields.
  - Generic Information Request layout: Includes **Short description** and **Service** fields.

As an admin, you can enable and disable Advanced Work Assignment for Information Request cases, as well as change the default attributes for the Information Requests service channel, such as the related assignment group and queue settings. For details, see Configure Information Requests service channel.

Configure Information Requests service channel

Change the default Information Requests service channel attributes in Advanced Work Assignment to control how public sector information requests are routed and assigned to government agents.

Before you begin

- Activate the Advanced Work Assignment plugin (com.glide.awa).
- Activate the Agent Chat plugin (com.glide.interaction.awa).
- Install the Information Request Playbook application.

Role required: sn_gsm_info_req.admin, awa_admin, admin

About this task

You can modify the context and attributes for service channels in AWA. For the Information Requests service channel, use the Public Sector Requests assignment group to specify the agents handling information requests. You can also add advanced conditions to filter the routing conditions in the Information Request service channel, or change queue settings, such as assignment rules.

Procedure

Configure the Information Requests service channel by modifying the default attributes as needed.

Options	Steps
Enable the Information Request service channel	**a.** Navigate to **All** > **Advanced Work Assignment** > **Settings Presence States**. **b.** Select the **Available** record. **c.** If prompted, move to the **Global** application to edit the record. **d.** In the Presence State form, go to the**Service Channels** field and move the Information Request channel to the **Selected** column. **e.** Select **Update**.
Add members (agents) to the Public Sector Requests assignment group	**a.** Navigate to **All** > **Advanced Work Assignment** > **Management** > **Groups**. **b.** Select the Information Requests group. **c.** In the Group form, navigate to the **Group Members** related list and review the list of example members. Use the examples to determine the government agents, managers, and their associated roles to be added to the assignment group. **Note:** Agents and managers added to this assignment group must also have the awa_agent role. **d.** In the **Group Members** related list, click **Edit** to add members to the group.

Options	Steps
	e. Select **Edit**. f. Select one or more names in the **Collection** list and move them to the **Group Members** list. g. Select **Save**.
Configure the Information Requests queue	a. Navigate to **All** > **Advanced Work Assignment** > **Settings** > **Queues**. b. Select the Information Requests queue. c. Change other settings as needed, for example the assignment rule that determines Assignment Eligibility. d. Select **Update**. For more information on queue settings, see .
Change Inbox card layouts for information request items in CSM Configurable Workspace	a. Navigate to **All** > **Advanced Work Assignment** > **Service Channels** and select the Information Request channel. b. Select the **Inbox Layouts** related link. c. Select the layout and edit the fields to be updated. d. Select **Update**. For more information on changing inbox card layouts, see Create or modify an inbox .

Configure Mobile Agent for Information Request Playbook

Install the Customer Service Mobile and Information Request Playbook plugins to enable government agents to track public record information requests on the Mobile Agent. You can then configure the roles.

As an admin, complete the following configuration tasks to set up the Mobile Agent application.

Admin Tasks for Mobile Agent app configuration

Task	Description
Install Information Request Playbook application	Install Information Request Playbook (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.

Admin Tasks for Mobile Agent app configuration (continued)

Task	Description
Activate the Customer Service Mobile plugin (com.sn_csm_mobile)	You can activate the Customer Service Mobile plugin (com.sn_csm_mobile) using the Customer Service Management guided setup.
Configure public sector roles and permissions for Mobile Agent app	Configure user roles in order for government agents to access the Mobile Agent app. This step is mandatory for any government agent to be able to work from the app.

Once the Customer Service Management mobile application is activated and configured, agents can download the ServiceNow Mobile Agent on their mobile devices and access ServiceNow instances.

Create or edit a legal, review, or final review assignment group

Create or edit a legal, review, or final review assignment group for Information Requests.

Create an assignment group

Create a legal, review, or final review assignment group for Information Requests.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. On the form, fill in the fields.

Assignment groups form

Field	Description
Name	Name of the assignment group.
Manager	Group manager or lead.
Type	Category for this group. In the **Select target record** field, search for **OT** to add it to the type field.
Group email	Group email distribution list or the email address of the point of contact.
Parent	Other group that the group is a member of.
Description	Description of the assignment group.

4. Select **Submit**.

Edit an assignment group

Edit a legal, review, or final review assignment group for Information Requests.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select the group you wish to edit.
3. Select **Group Members**
4. Select **New**
5. On the form, fill in the fields.

Assignment group members form

Field	Description
User ID	User ID of the user you are adding to the group.
Name	Name of the user you are adding to the group.
Title	Title of the user you are adding to the group.
Department	Department of the user you are adding to the group.
Phone	Phone number of the user you are adding to the group.
Password needs reset	When checked, enforces a password reset upon the user at the next login.
Locked Out	When checked, prevents the user from logging in.
Web service access only	When checked, the user cannot log in to an instance or a service portal, connect through single-sign-on, or use their credentials to log into ServiceNow UI.
Internal Integration User	When checked, allows users to bypass the WS-Security authentication requirement.
Geolocation Tracked	When checked, enables location tracking for the specified user.
Location	The physical location of the user.

6. Select **Submit**.

Configure Restricted Caller Access privilege settings in Public Sector Digital Services

Define cross-scope access to an application, application resource (such as an access control role, a business rule, a UI action, or a script include), or event. You can use a requested RCA to grant store apps access to protected resources in the Now Platform without the need to wait for the next family release. If you have the system admin or application admin role, you can review requested RCAs and approve and deny them. You can even use these settings to allow or deny requests for access.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Case Types** > **Manage Case Types**.
2. Validate there is a record for Information Request and the short description is 'Manage requests for FOIA/public records.
3. Create a case from a list in Workspace and validate the fields are populated correctly.

Configure the Manage documents activity UI in Information Request Playbook

Configure the Manage Documents activity UI in Information Request Playbookto allow agents to view, link, or unlink documents to an information request case.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Process Automation** > **Process Automation Designer**.
2. Select **Information Request**.
3. Under Intake, select **Add Activity**.
4. Select**Playbooks for Customer Service Management** > **Manage Documents List**.
5. Select the edit button, and rename the action to **Manage Documents**.
6. Under When to Start, select **Immediately**.
7. Select **View All Properties** to set the trigger and edit other configurations.
8. In the top right corner of the screen, select the Advanced button to toggle it on.
   The Experience tab should now display.
9. Select **Automation**.
10. Under Record, select **Trigger- Information Request** > **Information Request Record**.
11. Under Conditions, select **State Is New**, then select Done.
12. Select Experience.
13. Under Associated table, select **Information Request**, and under Associated Record, select **Trigger- Information Request** > **Information Request Record**.
14. Under Title, select **This Activity** > **Label**.
15. Select **Done**, then **Activate**.

Result
The Manage Documents UI activity is now configured, and the modal should now display when you open a new or existing Information Request Playbook.

Configure Similar Request Documents UI in Information Request Playbook

The Similar Request Documents Activity UI uses the name and description of existing information request cases to display a list of documents associated with the current case, providing helpful information the documents used to resolve similar information requests in Information Request Playbook.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Process Automation** > **Process Automation Designer**.
2. Select **Information Request**.
3. Under Intake, select **Add Activity**.
4. Select**Playbooks for Customer Service Management** > **Similar Documents**.
5. Select the edit button, and rename **Similar Documents** to **Similar Request Documents**.
6. Under When to Start, select **Immediately**.
7. Select **View All Properties** to set the trigger and edit other configurations.
8. In the top right corner of the screen, select the Advanced button to toggle it on.
   The Experience tab should now display.
9. Select **Automation**.
10. Under Record, select **Trigger- Information Request** > **Information Request Record**.
11. Under Conditions, select **State Is New**.
12. Select the Experience tab.
13. Under Associated table, select **Information Request**, and under Associated Record, select **Trigger- Information Request** > **Information Request Record**.
14. Under Related Record Encoded Query, enter**state=3**.
15. Under Title, select **This Activity** > **Label**.
16. Select **Done**, then **Activate**.

Result

The Similar Documents UI activity is now configured, and the modal should now display when you open a new or existing Information Request Playbook.

Install and configure the License and Permit Playbook application

Install the License and Permit Playbook application, which enables public sector end users to submit and track license and permit requests and provides government agents with a pre-defined process for handling and resolving these requests. You can then configure the features available for submitting requests and routing requests to agents.

As a user with the admin role, complete the following configuration tasks to set up the License and Permit Playbook, after you install the Public Sector Digital Services Core application.

Configuration tasks for License and Permit Playbook

Task	Description
Install License and Permit Playbook for Public Sector Digital Services	Install License and Permit Playbook (com.sn_public_sector_digital_services_core) from the ServiceNow® Store.

Configuration tasks for License and Permit Playbook (continued)

Task	Description
Configure service definition catalog items for License and Permit Playbook application	The Services Offered and Services Received tables have been migrated into the Service Definition table. All Services Offered data must be converted into individual Service Definitions. For more information, see Services Offered and Services Received Migration Guidance.
Enable public sector end users to create a License or Permit request using Virtual Agent	Use Virtual Agent Designer to publish the pre-built conversation topic, **Start a License/ Permit Application**, which enables end users to submit a license or permit request using the Virtual Agent chatbot.
Automatically route license and permit requests using Advanced Work Assignment	Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign license and requests to designated agents.
Configure E-sign in License and Permit Playbook	Configure E-sign to allow constituents the option of drawing their signature when they submit cases through the Government Service Portal.
Configure Eligibility Checklist UI in License and Permit Playbook	Configure the eligibility checklist UI to allow agents to confirm whether an applicant is eligible for the specific license or permit requested.
Configure decision tables for License and Permit Playbook	Use decisions tables to simplify the pricing configuration of a license or permit request that depends on multiple factors. Decision tables provide a single point where you can create, view, and modify pricing and dependent attributes.
Append price to Pricing Attribute label	Prices are appended to all Boolean Price Attributes by default. Client scripts must added for any price choice attributes or price control attributes.
Create Document Templates for License and Permit Playbook	Use the Document Templates application to generate templates for various types of Licenses and Permits issued through the License and Permit Playbook.

Install License and Permit Playbook for Public Sector Digital Services

You can install the License and Permit Playbook application (sn_gsm_license_permit) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Certain features in the License and Permit Playbook application are available based on your ServiceNow entitlements and may require installation of other ServiceNow applications and activation of specific plugins.

  Note: Install the Playbooks for Customer Service Management application to enable the playbook experience.

- Review the License and Permit Playbook application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The License and Permit Request [sn_gsm_license_permit_castpe] table is installed with License and Permit Playbook.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the License and Permit Playbook application (sn_gsm_license_permit) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Install dialog box that is displayed, any dependencies that are installed along with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Automatically route license and permit requests using Advanced Work Assignment

Use the ServiceNow Advanced Work Assignment (AWA) application to route and assign information requests, such as public records requests, to designated agents.

The Information Request Playbook application provides the following items that are used in AWA to automatically route and assign license/permit requests:

- **License and Permit Request service channel** - The default service channel for routing incoming public sector information requests to specific government agents. This service channel includes related attributes that define the default conditions for determining the items handled in the channel, work queue associated with agent assignment groups, agent inbox layouts, and more.
- **Public Sector License and Permit Request assignment group** - The default assignment group that identifies the agents handling public sector license/permit requests. Agent assignments are based on agent availability, capacity, and skills.
- **Public Sector License and Permit Requests queue** - The default queue to which public sector license/permit requests are routed.
- **Inbox layouts** - The default card layouts for information request items displayed in the agent inbox view of CSM Configurable Workspace:
    - Constituent License/Permit Layout: Includes **Short description**, **Constituent**, and **Case Type** fields.
    - Business License/Permit Layout: Includes **Short description**, **Business**, **Business Contact**, and **Case Type** fields.

As an admin, you can enable and disable Advanced Work Assignment for Information Request cases, as well as change the default attributes for the Information Requests service channel, such as the related assignment group and queue settings. For details, see Configure Information Requests service channel.

Configure License and Permits Requests service channel

Change the default Information Requests service channel attributes in Advanced Work Assignment to control how public sector license and permit requests are routed and assigned to government agents.

Before you begin

- Activate the Advanced Work Assignment plugin (com.glide.awa).
- Activate the Agent Chat plugin (com.glide.interaction.awa).
- Install the License and Permit Request Playbook application.

Role required: sn_gsm_info_req.admin, awa_admin, admin

About this task

You can modify the context and attributes for service channels in AWA. For the License and Permit Requests service channel, use the Public Sector Requests assignment group to specify the agents handling license and permit requests. You can also add advanced conditions to filter the routing conditions in the License and Permit Request service channel, or change queue settings, such as assignment rules.

Procedure

Configure the Information Requests service channel by modifying the default attributes as needed.

<table>
<tr><th>Options</th><th>Steps</th></tr>
<tr><td>Enable the License and Permit Request service channel</td><td>a. Navigate to All > Advanced Work Assignment > Settings Presence States.
b. Select the Available record.
c. If prompted, move to the Global application to edit the record.
d. In the Presence State form, go to theService Channels field and move the License and Permit Request channel to the Selected column.
e. Select Update.</td></tr>
<tr><td>Add members (agents) to the Public Sector Requests assignment group</td><td>a. Navigate to All > Advanced Work Assignment > Management > Groups.
b. Select the Information Requests group.
c. In the Group form, navigate to the Group Members related list and review the list of example members.

Use the examples to determine the government agents, managers, and their associated roles to be added to the assignment group.

Note: Agents and managers added to this assignment group must also have the awa_agent role.

d. In the Group Members related list, click Edit to add members to the group.
e. Select Edit.
f. Select one or more names in the Collection list and move them to the Group Members list.
g. Select Save.</td></tr>
<tr><td>Configure the License and Permit Requests queue</td><td>a. Navigate to All > Advanced Work Assignment > Settings > Queues.
b. Select the Information Requests queue.
c. Change other settings as needed, for example the assignment rule that determines Assignment Eligibility.
d. Select Update.</td></tr>
</table>

Options	Steps
	For more information on queue settings, see
Change Inbox card layouts for information request items in CSM Configurable Workspace	**a.** Navigate to **All** > **Advanced Work Assignment** > **Service Channels** and select the Information Request channel. **b.** Select the **Inbox Layouts** related link. **c.** Select the layout and edit the fields to be updated. **d.** Select **Update**. For more information on changing inbox card layouts, see Create or modify an inbox

Configure service definition catalog items for License and Permit Playbook application

Create a service definition for use with the License and Permit Playbook in Public Sector Digital Services.

Before you begin

Service definitions are records used to store details about a service that is available to end customers. You can create service definitions for each license/permit service offered by your government agency.

Important: After upgrade to Public Sector Digital Services v8.0, you will now be required to create a Service Definition for every previous Service Offered record. The deprecation of Services Offered means that Service Definitions now must be created for every Service that your agency offers. For more information, see Services Offered and Services Received Migration Guidance.

Role required: admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Categories** > **Licenses/ Permits**.
2. Select **Permits** or **Licenses**, depending on which category you wish to add a catalog item to.
3. Optional: Switch to the Public Sector Digital Services Core application, if prompted.
4. Under the Catalog item related list, select **New**.
5. On the form, fill in the fields.

Public Services Service Catalog form

Field	Description
Name	Name of the public service.
Catalog	Product category that the service falls under. If blank, select Government Service.

Field	Description
Category	Indicates the type of public service. If blank, select either **Permits** or **Licenses**, depending on which category you wish to add a catalog item to.
Application	Application scope of the service. If blank, select .
Status	Status of the public service. Mapped in the active field as: ◦ Available = true ◦ Not available = false
Short description	Short description of the public service.
Description	Description of the public service.

6. Select **Submit**.
   Your catalog item is created and ready for use by constituents submitting cases through the Government Service Portal, or agents creating a case from scratch in the CSM Configurable Workspace.

Configure E-sign in License and Permit Playbook

E-Signature enables users to sign their applications from Government Service Portal with a typed or drawn e-signature that implies an acknowledgement to the application. This functionality can be optionally configured by an admin upon upgrade.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Record Producers**.
2. Select the **Request License** record producer.
3. Under the Variables tab, select **New**.
4. Under Type, select **Custom**.
5. In the **Questions** tab, enter **Esignature for Record Producers** in the Question field, and `esignature_for_record_producers` in the Name field.
6. In the **Type Specifications** tab, enter **Esignature for License Permit in Portal** in the Widget field.
7. Select **Submit**.
8. Under the Variables tab, select **New**.
9. Under Type, select **Multi Line Text**.
10. Select the checkbox for **Hidden**.
11. In the **Questions** tab, enter **Esignature Variable** in the Question field, and `esignature_variable` in the Name field.
12. Optional: If an eligibility checklist is configured for License and Permit Playbook, navigate to **All** > **Service Catalog** > **Catalog Administration** > **Catalog UI Policies** to create a Catalog UI Policy for the record producer catalog item.
    Switch to the Public Sector Digital Services Core application if prompted.
13. Optional: Add a show/hide logic to the script of the record producer for the `esignature_for_record_producers` widget.

14. Append the following code block in the server script of the **Request license** record producer in the **What it will contain** tab.
Switch to the Public Sector Digital Services Core application if prompted.

```
if (gs.nil (producer.esignature_variable) || producer.
 esignature_variable == "") {
gs. addErrorMessage(gs. getMessage ('Please do the E-signature and
 click on Accept. '));
current.setAbortAction(true);
var caseTable = sn_gsm. GovernmentServicesConstants.
 LICENSE_PERMIT_CASE;
var attachment = new GlideSysAttachment();
var caseRecord = new GlideRecord (caseTable);
caseRecord.get (current.sys_id) ;
var fileName = 'applicantESign.png';
var contentType = "image/png';
attachment.writeBase64(caseRecord, fileName, contentType,
 producer.esignature_variable);
var sigRec = new GlideRecord( 'signature image');
sigRec.signed_on = new GlideDateTime ().getDisplayValue();
sigRec.user = gs.getUserID();
sigRec.table = caseTable;
sigRec.document = current.sys_id;
sigRec.is_drawing = true;
sigRec.active = true;
sigRec.acknowledgment_text = "This constitutes your electronic
 signature and has the same legal impact as signing a printed version
 of this document.";
var signSysId = sigRec.insert();
var signRecord = new GlideRecord('signature image');
signRecord.get (signSysId);
attachment.writeBase64(signRecord, fileName, contentType,
 producer.esignature_variable);
```

15. Select **Update**

Result
The **Draw Signature**tab is now be displayed alongside the **Type Signature** tab. When a constituent creates a License and Permit case, the option to type draw a signature is shown. When an application is submitted with an E-Signature, an image is created containing E-Signature of the user, which is then mapped and attached to the corresponding application.

Configure Eligibility in License and Permit Playbook

The eligibility criteria in License and Permit Playbook allows an agent to confirm whether an applicant is eligible for the specific license or permit requested.

The License and Permit Playbook uses eligibility criteria, a series of questions posed to an applicant, to determine whether they are eligible to apply for a license or permit. Using a set eligibility criteria for License and Permit Playbook may aid in deflecting applications in which the applicant is not eligible to obtain a license or permit.

Eligibility criteria is established by performing the following three activities:

- Creating a checklist template for the license or permit class.
- Adding the eligibility checklist to the license or permit record producer.
- Mapping it to the respective license or permit class.

If the applicant fulfills all the eligibility criteria, then the agent can proceed in creating a case for the applicant. If the applicant does not fulfill at least one of the eligibility criteria, an agent cannot proceed in creating a case for the applicant.

Configure Eligibility Checklist UI in License and Permit Playbook

Configure the eligibility checklist UI as a part of Record Generator in License and Permit Playbook.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the **Checklist Template** table by clicking on the label link.
3. Select **Show List** under the related list.
4. Select **New**.
5. Create a Checklist Template record by filling in the fields.
6. Select **Submit**.
7. Right-click on the top menu bar of the new Checklist Template record, and in the context menu, select **Copy sys_id**.
8. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
9. Open the `sn_gsm_lic_prmt.GSMLicensePermitConfig` record, and locate the `getEligibilityChecklist` function.
10. Optional: Switch to the License and Permit Playbook application to edit the record, if prompted.
11. Add the logic after the `if`function.
    An example logic, placing within the quotes the table name and sys_id numbers, respectively.

    ```
    } else if(tableName == "[table name]") {
    return "[sys_id]";
    ```

12. Select **Create implementation**.

Result

The Eligibility Checklist now displays when you create a new License and Permit record in the first License and Permit Playbook activity. See Define Eligibility Questions in License and Permit Playbook to configure the criteria used to determine eligibility for the License or Permit.

Define Eligibility Questions in License and Permit Playbook

Configure the eligibility criteria questions for users beginning an application for a license or permit.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Variables** > **Variables Sets**.
2. In the Variable Set list view, select **New**.
3. Select **Single-Row Variable Set**.

4. Enter the desired title and internal name and select **Submit**.
5. In the list, locate and open the newly created Variable Set.
6. In the **Variables** related list, select **New** to create a variable for each eligibility question.
7. Select **Yes/No** as the variable type.
8. Repeat steps 6-7 until a variable is created for each eligibility question.
9. Create a variable with the name **Eligible**, and enter **Yes/No** in the Question field.
10. Select **Yes/No** as the variable type.
11. In the **Catalog UI Policies** related list, select **New**.
12. Enter a short description for the policy.
13. Navigate to the **When to Apply** tab.
14. Add a catalog condition to the UI policy for each eligibility question, and set the condition to **is Yes**.
15. Navigate to the **Script** tab, and add the following scripts to the True and False conditions.
16. Select **Submit**.
17. Navigate to#**All** > **Service Catalog** > **Catalog Definition** > **Record Producers**.
18. Locate the License/Permit Record Producer and open the record.
19. Navigate to the **Variable Sets** tab and then select **Edit**.
20. Locate the Variable Set created for the eligibility criteria and move it to the variable sets list by selecting the right arrow button.
21. Select **Save**.

Result

The eligibility criteria questions are now defined and can be used to determine if a constituent is eligible to begin a license or permit application.

Configure decision tables for License and Permit Playbook

Use decisions tables to simplify the pricing configuration of a license or permit request that depends on multiple factors. Decision tables provide a single point where you can create, view, and modify pricing and dependent attributes.

Before you begin

Role required: admin

About this task

In decision tables, each factor is a decision input. For example, if your agency is setting the price of a fishing permit, these inputs might include the location where the permit is being requested, the type of fish (one or multiple) that a fishing permit is being requested for, and the size of the fishing boat. Using a decision table can allow agents to present pricing in a straightforward manner, even when it depends on multiple factors.

Procedure

1. Identify which table fields in the License and Permit record will affect the fee associated with the license or permit request.
   For example, each type of fish under the fishing permit record has a different fee associated with it. These are examples of table fields that affect the total fee associated with the permit request.
2. Navigate to **All** > **System Definition** > **Decision Tables**.

3. Select **New**.
4. Enter a name for the decision table and ensure the table is accessible from **All Application Scopes**.
5. Select **Create & Continue**.
6. Select **Add** to add an input.
7. Create an input with **Case** as the label, **Reference** as the type, and **License & Permit case extension table**as the table.
8. Select **Add result column** to add the pricing column.
9. Set the column label to **Price**, and set the result type to **Currency**.
10. Select **Done**.
11. Select **Add condition column**.
12. Set the input to **Case**, and set the Data to evaluate to **Field**.
13. Select the drop-down menu under Field, and select the field that is associated with pricing.
14. Select **Done**.
15. Select **Add New Decision Row**.
16. Select the new table cell that was added under the Field label column and ensure the operator reads "is".
    If the field type is choice, the input value cannot be "None". Select the appropriate choice input from the dropdown menu. If the field type is true/false, the input value should be **true**.
17. Select the new table cell that was added under the Price column, and enter the price associated with the field value.
    If the field type is **choice**, repeat steps 15-17 for each option of the choice.
18. Optional: Select the plus icon that appears below Results, and choose **Add Condition Column** to add another pricing field.
    Repeat until all pricing fields are added.
19. Select **Save** to save the decision table, then select **Close**.

Result

The decision table is now created and can be associated with the License and Permit case type. For more information on how to do this, see Associate a decision table with a License & Permit case type.

Associate a decision table with a License & Permit case type

After you configure a pricing configuration decision table, associate it with the License & Permit case type to append pricing configurations to that case type table.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Decision Tables**.
2. Locate the pricing configuration decision table for the License and Permit case type, and right-click.
3. In the context menu, select **Copy sys_id**.
4. Navigate to **All** > **System Definition** > **Dictionary**.

5. Locate the entry with **sn_gsm_license_permit_case** as the Table name, and **attribute_pricing_config** as the Column name.
6. Select the record to open it.
7. Under the Dictionary Overrides tab, select **New**.
8. Set the Table field to the License and Permit case type table that you wish to associate with the decision table.
9. Select the checkbox for **Override default value**.
10. Paste the copied sys_id value into the **Default value** field.
11. Select **Submit**.

Result

The decision table is now associated with the License & Permit case type.

Add a price adjustment to a decision table

As an admin, you can use a price adjustment definition to add adjustments to field prices based on the conditions of fields that are not price fields, such as resident status of the constituent for the location they are requesting the permit or license in.

Before you begin

Role required: admin

About this task

A base amount can be entered and saved for each license/permit option, and can be modified from its current value to a new value based on one or more control conditions. A price adjustment definition consists of only one price field, and as an admin, you can create multiple.

Procedure

1. Navigate to **All** > **System Definition** > **Decision Tables**, and open a decision table that has been associated with a License and Permit case type.
   For information on how to associate a decision table with the case type, see Associate a decision table with a License & Permit case type.
   You should be brought to Workflow Studio.
2. Select **Add condition column**.
3. Set the Input to **case**, and set Data to evaluate to **Field**.
4. Under Field, select the field that controls the pricing for the price adjustment in question.
5. Enter the name of the aforementioned field in the condition column label, and select **Done**.
6. Repeat steps 4-6 for all price control fields.
7. Select **Add new decision row**.
8. Select the newly added cell under any of the price control columns to add control conditions.
9. Specify the control condition for that field.
   If the field type is a choice, the input value cannot be “None”. Select the appropriate condition from the dropdown.
10. Repeat steps 11-12 to add conditions for other control fields.
11. *If the price field where the adjustment applies is set to choice, enter the price choice affected.If the price field where the adjustment applies is not choice, set the value to true.*

12. Enter the adjustment price in the newly-added cell under the Price column, the price when those control conditions apply.
    If the price field is a Boolean, the value of the price field has to be set to **true**. If the price field is a choice, the value of the price field cannot be set to **none**. Enter the value of the adjustment price in the field.
13. Select **Save**, then **Close**.

Append price to Pricing Attribute label

Prices are appended to Boolean Price Attributes by default. Client scripts must be added for the price choice attributes and the price control attributes to append to prices when there are price adjustments.

Add Client Scripts to Price Choice Fields

As an admin, you can add and modify client scripts to configure forms, fields, and field attributes (such as price choice attributes) while the user is filling out the form.

Before you begin
Role required: admin

About this task
Client scripts allow the system to run JavaScript on the client (web browser) when client-based events occur on the Government Service Portal, such as when a constituent makes a choice, submits a form, or changes a value. For more information on client scripts, see Client scripts.

Procedure

1. Navigate to **All** > **System Definition** > **Client Scripts**.
2. Select **New**.
3. Specify a name for the script.
   For example, if you are adding a script to update the price values each time the permit type is changed by the constituent submitting the application, you may wish to label your script "Update Price Label on Permit Type Change".
4. Set the table to the License/Permit case extension table.
5. Set UI type to **All**, and set the Type to **OnChange**.
6. Select the price choice field under the dropdown for field name.
   In the above example, the field name selected would be **Commercial Permit Type**; that is the choice the constituent makes that then determines the price values that are displayed. For more information on the client script form fields, see Client scripts.
7. Enter the script with the content below:

```
function onChange(control, oldValue, newValue, isLoading, isTemplate) {
if (isLoading) {
return;
}
g_scratchpad.updatePriceLabel();
}
```

8. Select **Submit**.

Add Client Scripts to Price Control Fields

As an admin, you can add and modify client scripts to configure forms, fields, and field attributes (such as price control attributes) while the user is filling out the form.

Before you begin

Role required: admin

About this task

Client scripts allow the system to run JavaScript on the client (web browser) when client-based events occur on the Government Service Portal, such as when a constituent makes a choice, submits a form, or changes a value. For more information on client scripts, see Client scripts.

Procedure

1. Navigate to **All** > **System Definition** > **Client Scripts**.
2. Select **New**.
3. Specify a name for the script.
   For example, if you are adding a script to update the price value based on whether or not the constituent communicates that they are a resident of the requested location, you may wish to label your script "Update Price Label on Resident Change".
4. Set the table to the License/Permit case extension table.
5. Set UI type to **All**, and set the Type to **OnChange**.
6. Select the price control field under the dropdown for field name.
   In the above example, the field name selected would be **Resident**; that is the control field then determines the price value that is displayed. For more information on the client script form fields, see Client scripts.
7. Enter the script with the content below:

   Note: Remove `newValue === ''` in the script if the field type is a choice.

```
function onChange(control, oldValue, newValue, isLoading, isTemplate) {
if (isLoading || newValue === '') {
return;
}
g_scratchpad.updatePriceLabel();
}
```

8. Select **Submit**.

Extend the License and Permit Base Case

Licenses and permits are modelled as products, and for approved applications, the license or permit instances will be generated and recorded in the specific install base item extensions, referred to as Items Received. You can further extend the install base to define specific license or permit items received classes.

Before you begin

Role required: admin

Procedure

1. Review the legacy permit application's attributes and pre-determine the attributes to be created on the extended case type.
2. Navigate to **All** > **System Definition** > **Tables** and select **New**.
3. Enter the name of the license or permit for which new cases will be created.

   Note: The value in the Name field will be auto-populated based on the value entered in the Label field.

4. Select the License and Permit Case value in the Extends table field.
5. Right-click in the record header and select **Save**.
6. Select **New** under the Columns tab to add additional fields relevant to the license/permit application.
7. Enter a value in the Column label field, and select options for the other column-level attributes.
8. On the form, fill in the fields, adding new columns for each question listed in the license/permit application.
9. Select **Update**.

Create Document Templates for License and Permit Playbook

With the ServiceNow Document Templates application, you can create HTML and PDF document templates to generate standard letters or documents. You can automate and simplify the process of filling, signing, and reviewing a document online. Use the Document Templates application to generate templates for various types of Licenses and Permits issued through the License and Permit Playbook.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Document Templates** > **All Document Templates**.
2. Select **New**.
3. Select **PDF Document Template**.
4. On the form, fill in the fields:

PDF Template form

Field	Description
Name	Name of the PDF document template.
Table	Determines where the documents are attached. Select License and Permit Case [sn_gsm_license_permit_case] to map the generated PDF to the case. Select License and Permit Install Base Item [sn_gsm_license_permit_install_base_item] to map the generated PDF fields to the Item Received.
Category	Document category in which the template is added. For License and Permit Playbook, select License and Permit.

Field	Description
Application	Scope of the application in which the document template is created.
State	Current state of the document template. ◦ **Draft**: Indicates that the document template is not yet published. ◦ **Editing**: Indicates that the document template is being edited after it has been published. ◦ **Published**: Indicates that the document template can be consumed by services and cases.
User criteria	Audience criteria for this document. For example, you can create a permit intended for only Canadian residents. **Note:** When defining conditions like case sensitivity or null values, see APIGlideFilter - Scoped, Global.
Start date	Date starting which the PDF document template is valid. **Start date** helps in maintaining multiple versions of same template. **Note:** Start date must be before the end date.
End date	Date until which the PDF document template is valid. **End date** helps in maintaining multiple versions of same template. By default, if values in **Start date** and **End date** are blank, it is implied that the template will always be valid. If you specify an end date, you must also specify a start date.
Template date format	Format in which you want the date to appear when an agent previews the document, or generates the attachment, or initiates document tasks for participants. **Note:** ◦ When signing using a ServiceNow application or the AdobeSign application: If no value is selected in **Template date format**, the value specified in the **template_date_format** system property is considered. If both **Template date format** and **template_date_format** system property are empty, the value in the Date format field from agent's user profile is considered. ◦ When signing using the DocuSign application: The date format selected in Signing settings in the DocuSign application is considered over **Template date format** in the configured PDF template in a ServiceNow instance.

Field	Description
Template language	Language in which dynamic tokens are translated when an agent previews the document, or generates the attachment, or initiates document tasks for participants. **Note:** ◦ Template language is a mandatory field. The default language is none. ◦ Translation feature is available only when the language plug-ins are installed on the instance.
Signing type	Option to specify the application that is used for signing or filling the document. For example, ServiceNow Sign, DocuSign or AdobeSign. **Note:** Signing types are available only when respective integration plug-ins are installed.
Attachment type	Option to upload a new document or select a document from ServiceNow Managed Documents.
Document	Option to upload the attachment of a fillable PDF for further customization. **Note:** This field appears when **Upload new document** is selected in **Attachment type**.
Document revision	Option to select a document from ServiceNow Managed Documents. **Note:** This field appears when **Select from document revision** is selected in **Attachment type**.
Active	Option for enabling the PDF document template for use.
Acknowledgment text	Text that prompts the user to select a check box when submitting a filled document.
Source template	Source template from which you created a copy of current template.

5. Optional: Select the **Parse PDF** related link to automatically parse information and fields from the PDF and store that information in the PDF Mapping table for reuse.
   Each PDF field can now be mapped to its corresponding Mapping Field in the License and Permit install base table.
6. Optional: In the **PDF Template Mappings** related list, define additional PDF field mappings. See Define a PDF field mapping for more information.
7. Select **Update**.

   To determine what Document Template to use for generation, you must map the created Document Template to the corresponding Install Base Item/Items Received extension table. This is accomplished by using Document Template Mapping in Decision Tables.
8. Navigate to **Decision Management** > **Decision Builder**.

9. On the form, fill in the fields.

PDF Template form

Field	Description
Document Template Category	Use this field for having multiple templates for a single Install Base Item Table.
Table Name	Use this field for what table should map to the document template.
Document Template	Use this field to indicate what Document Template to use for a given document template category and table name.
isPdfTemplate	Use this field to indicate whether the Document Template selected is a PDF template (value = true) OR an HTML template (value = false)

10. Add additional decision rows to configure additional Document Templates.

Result

The PDF generated by the Document Template is created after the **Propose decision** activity is granted/approved. You will be able to view the generated PDF that is attached to the corresponding install base item/item received in the Create License/Permit activity in the Decision stage.

What to do next

In the **Participants** related list, add additional participants. See Create participants for a PDF document template for more information.

Relabel items for public sector use after upgrade

After you upgrade your instance, you can relabel certain items in the CSM Configurable Workspace for public sector use.

Before you begin

Role required: admin

About this task

Certain menus and menu items in the CSM Configurable Workspace are relabeled for public sector use. However, after upgrading your instance, those items revert to the original labels used for Customer Service Management (CSM). You can relabel the following items for public sector use by changing them in the UX List Categories for Customer and Service Organizations.

Label changes in CSM Configurable Workspace for public sector

CSM label	Change to public sector label
Accounts	Businesses
Consumers	Constituents
Internal Business Location	Internal Agency
External Business Locations	External Agency
Service Organization External Staff	External Staff

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. In the Tables context menu, select **Label** and in the **Search** box enter `*UX list` to search for lists, then select the UX List Category record.
3. In the UX List Category record, scroll down to the Related Links section and select **Show List**.
   a. In UX List Categories, select the **Customer** record.
   b. In the UX List Category for Customer form, go to the UX Lists section and select the **Consumers** record.
   c. In the **Title** field of the UX List Category for Consumers form, change `Consumers` to `Constituents` and select **Update**.
4. In UX List Categories, select the **Accounts** record.
   a. In the **Title** field of the UX List Accounts form, change `Accounts` to `Businesses`.
   b. Select **Update**.
5. In UX List Categories, select the **Service Organizations** record.
   a. In the **Title** field of the UX List Service Organizations form, change `Service Organizations` to `Agency`.
   b. Select **Update**.
6. In the UX List Category Agency form, go to the UX Lists section and do the following:
   a. Select the **Internal Business Location** record.
   b. In the **Title** field of the UX List Internal Business Location form, change `Internal Business Location` to `Internal Agency`.
   c. Select **Update**.
   d. Return to the UX Lists section, and repeat steps a through c for the **External Business Location** record.
      In the **Title** field, change `External Business Location` to `External Agency`.
   e. Return to the UX Lists section and repeat steps a through c for the **Service Organization External Staff** record.
      In the **Title** field, change `Service Organization External Staff` to `External Staff`.

Relabel Business Service Location portal items for public sector use after upgrade

Using Guided Setup, you can optionally modify the "Business Location Details" page in the Business Location Services Portal to be relabeled "Agency Location Details" using Public Sector Digital Services terms during configuration.

Before you begin

Role required: admin

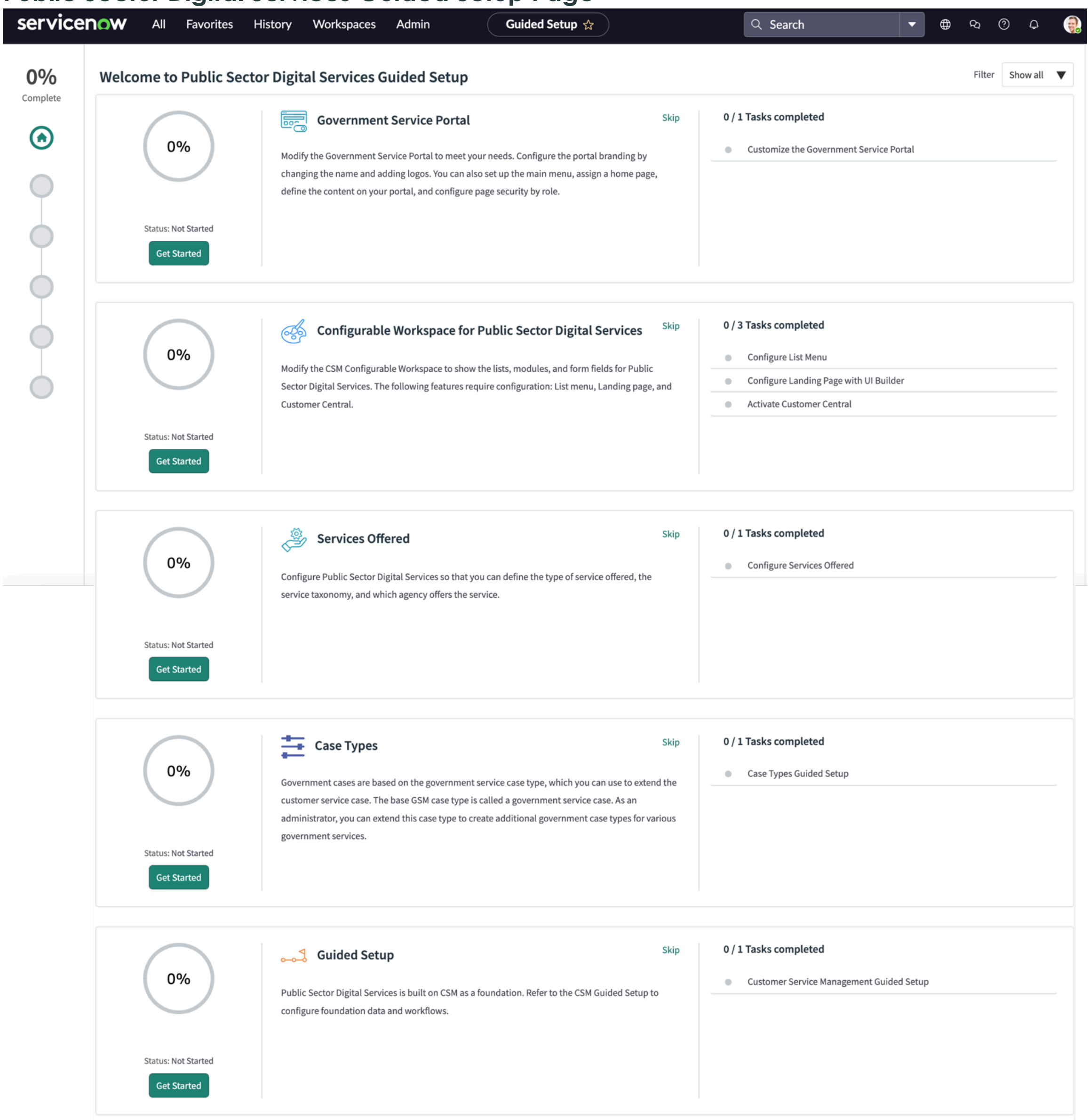
About this task

This script will relabel the "Business Location Details" page within the Business Location Services Portal to "Agency Details". References to "Business Locations" will be changed to "Agencies." The "Install Base" section of the page will be changed to "Items Received." The "Products" section will be removed; there is no equivalent use case of this in Public Sector Digital Services.

Procedure

1. Navigate to **All** > **Constituent Service** > **Administration** > **Guided Setup**.
2. Select **Get Started** to begin configuration.

Public Sector Digital Services Guided Setup Page



The setup page displays the different categories of configuration tasks to be completed.

3. Select **Get Started** under the Government Service Portal category.
4. Select **Customize the Business Location Services Portal**.
5. Follow the steps to complete the Guided Setup task.

Associate an agency location to a Public Service

Associate your government service agency locations with a service definition using the Public Sector Digital Services (PSDS) application. With this association, your government service agency staff can address constituent requests for documents, records, or services that are offered at a particular agency location, and can raise a case on behalf of a constituent or business.

Before you begin

Role required: admin

About this task

An agency location can have multiple public services associated with it. This can include 311 service or maintenance requests, federal or state public records requests, or requests for license and permit services. For example, a specific agency location can offer an application for food stamps or medical assistance, but not an application for a CDL license or a commercial fishing license. A public service-to-agency-location criteria association can be added to each existing service definition in the Service Organizations offering Service [service_organizations_offering_service] table.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definition**.
2. Select a service definition by selecting the number.
3. In the Service Organizations offering Service related list, select **New**.
4. On the form, fill in the fields.

Agency Locations offering Public Service form

Field	Data type	Description
Service Organizations/ Agency Location criteria	Reference	Criteria to define the agency locations that provide the service.
Service definition	Reference	Service that this specific agency location provides. **Note:** The **Service definition** field is automatically filled in with the name of the selected service definition.
Active	True/False	Check box to activate or deactivate the agency location criteria. By default, the active field is set to **True**. **Note:** Only one active criterion is enabled per table to be associated to a service definition.

5. Select **Submit**.
   The agency locations criteria are added to the Agency Locations offering Public Service related list.

Configure a custom playbook in Service Request Playbook

Custom playbooks and service definitions enable you to customize the default Service Request Playbook user experience to interact with your desired agency workflows. After creating a service definition, you can associate a playbook with the definition.

Before you begin

Role required: admin

About this task

Before starting this procedure, you must create a service definition to associate your playbook with. For more information on how to create a service definition, see Configure a service definition for Playbooks in Public Sector Digital Services.

When the agent selects **Create Case** on the case type selector screen, the system displays the new case record and launches the playbook associated with the service in a tab on the record page.

Note: This is an optional task.

Procedure

1. Navigate to **All** > **Process Automation** > **Process Automation Designer**.
2. Select **Create a New Process**, fill in the details of the playbook, and select **Select a trigger**.
3. Select a trigger type from the dropdown menu.
   Your trigger type is the service definition you recently created.
4. Select **Go to Designer**.
   Process Automation Designer is now opened.
5. Optional: Select **Add new lane** to add a lane to your process.
   For more information on lanes in Process Automation Designer, seeStages and activities.
6. Select **Activate** after creating the process to your specifications.
   The playbook is now published to run when triggered.
7. Navigate to **All** > **System UI** > **UI Policies**.
   You are taken to edit the UI of the Playbook Record Generator, which is the initial form an agent sees when they are creating a case.
8. Select **New**.
9. Select **Service Request** in the **Table** dropdown menu, and enter a short description describing your new UI policy.
10. Add the necessary conditions under the **When to Apply** and **Script**tabs,and select **Submit**.
    Your UI policy and playbook are now created.

Service definitions for Public Sector Digital Services

Service definitions are records used to store the details about a service provided to end users. By using a service definition, you can connect a public service with a case type to extend the types of services that can be requested, and the types of cases that can be created to support those services. You can also configure the support types for those services.

Overview of a service definition

In addition to case types, you can use a service definition to create a customized process for connecting a requester with the service needed to resolve their claim. A service definition enables you to map a public service, information service, or license and permit service to the list of services your agency offers for resolving that request. When you create a service definition, you can configure the case management processes, such as the case types, for executing those services.

Service definitions enable you to do the following tasks:

- Configure the support types for services so that applicable services are displayed based on the service requested by the constituent or business.
- Create the case types that support the requested services.
- Automatically select a case type that is based on the service or information type that a constituent or business is requesting.

With a service definition, you establish connections between the public services that are requested and those that are offered. By associating the relevant public services that are offered for the services requested, you can use a service definition to simply the service requests that are based on the constituent's context.

Service definitions are available with the Customer Service Case Types plugin (com.snc.csm_case_types) that is automatically activated when you enable the Public Sector Digital Services Core plugin.

Important:

After upgrade to Public Sector Digital Services v8.0, Services Offered, an extension of Product Model, will no longer be used to model government services. Services Received, an extension of Sold Product, will no longer be used to model the government services that have been granted/delivered to constituents. The Service Definition table will be used to model all public services offered by governments. The following fields from the Service Offered table will be removed and replaced with Service Model fields:

- Type
- Status
- Number
- Period Start Date
- Period End Date
- Jurisdiction
- Category
- Subcategory
- Payment source

For more information on how to create a service definition, see Configure a service definition for Playbooks in Public Sector Digital Services.

Service definition tasks for administrators

The following main components are needed to create a service definition:

- Service definition record that you create for the new service.
- New view and view rule that you create for the new service on the case type table.
- New flow that you create for the new service. This flow is triggered when a new record is created on the case type table. Flows are only needed for more complex use cases, such as the cases that have multiple tasks or subtasks.
- New record producer for an end-user requester to create through the service catalog.

You can do the following tasks:

- Define the available services.
  - Define the details for each public service that is offered.
  - Associate a playbook with a service.
  - Associate a service catalog item with a service definition so that constituents or businesses can request this service directly.
- Associate the relevant public services that are offered with each request.
- Associate different services with different case types (This task automates the case type selection for the agents by the service that they select).

Integrating Public Sector Digital Services with other applications

Extend the capabilities of Public Sector Digital Services and connect with other departments to assist with case resolution by integrating with other applications.

Public Sector Digital Services provides integrations with the following applications:

Integration with Field Service Management

Integration with Field Service Management

The Customer Service Management integration with the ServiceNow® Field Service Management application enables you to view work order and work order task information from a public sector case.

Integrating the Public Sector Digital Services application with the Field Service Management application enables you to create and view all work orders and appointments related to your case, depending on the business needs.

The Field Service Management application users can view the constituent, household, business, and contacts on work orders and work order tasks in the Field Service Management application.

Product use rights included with this application

If you've purchased a subscription for both the Public Sector Digital Services (PSDS) application and the Field Service Management (FSM) application, PSDS agents can create and view all work orders and appointments related to their cases.

FSM field agents can view relevant PSDS data from work orders with the right roles.

External users with the snc_external and other relevant PSDS and Customer Service Management (CSM) roles can view all case-related work orders and appointments related to their accounts.

Configuring the integration with Field Service Management

To configure the Public Sector Digital Services application integration with the Field Service Management application, complete these steps:

1. Activate the Customer Service with Field Service Management plugin. (com.snc.csm_fsm_integration).
2. Add UI actions to the PSDS case type tables where needed. Depending on your experience, you can also add some actions to relevant playbooks.
3. Add the Work orders related list to the PSDS case type tables for all relevant views on Classic UI and or Workspace.
4. If you're an FSM field agent, you can view the relevant PSDS customer data from the work orders by being assigned with the right customer data viewer roles.
5. **Note:** An administrator must assign the appropriate PSDS customer data viewer roles to FSM field agents so that they can view the relevant PSDS customer data from work orders. For more information on roles, see Roles installed with Public Sector Digital Services Core.

Using Public Sector Digital Services

Learn how public sector agencies help constituents and businesses with digital services and resolve their issues.

Using the Government Service Portal in Public Sector Digital Services

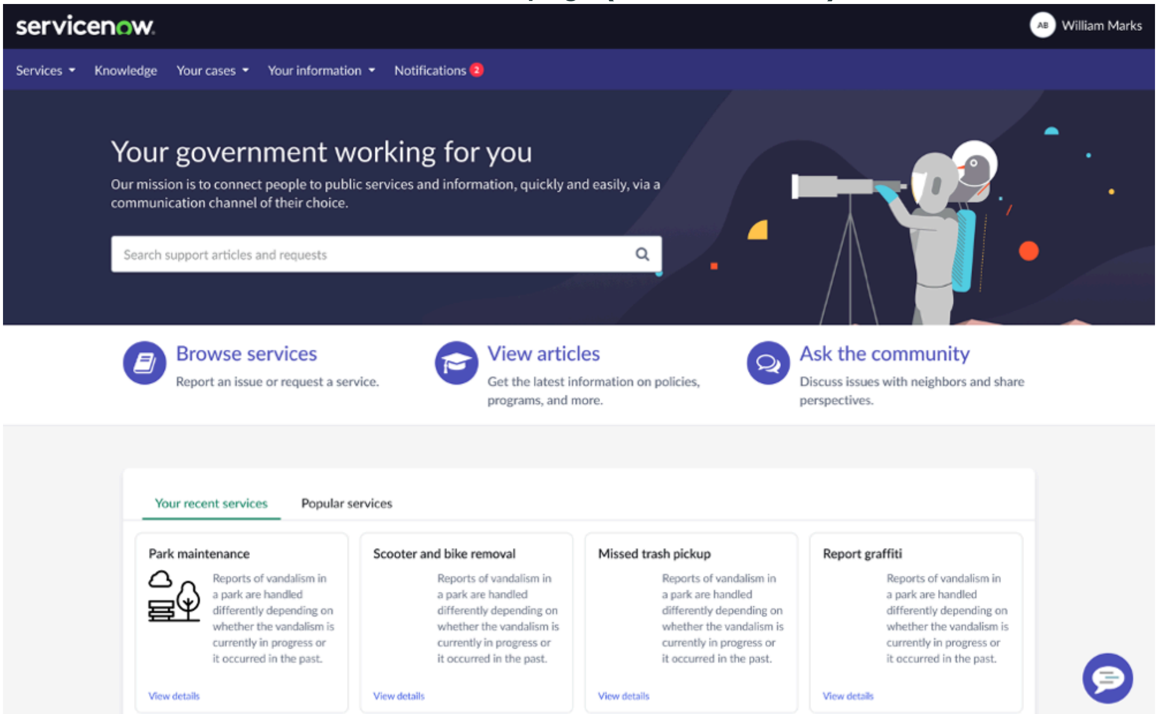
By using the Government Service Portal, constituents and businesses can report issues, access and view the status of existing service requests, request public records, search for information about a question or issue, view and update their contact information, and request assistance from a government service agent— all in a user-friendly, customizable interface.

Using the Government Service Portal as a constituent

The Government Service Portal experience begins on the portal homepage for constituents. Agencies usually customize their homepages to be viewed by logged-in users and users who aren't logged in. For example, the logged-in users may see different information on the homepage than the users who aren’t logged in.

This example shows the default homepage for a logged-in user of the Public Sector Digital Services Government Service Portal.

Government Service Portal default homepage (Constituent view)



Constituents on the Government Service default homepage can select the following communication options:

1. Browse and request services or information, track cases, view received services, and report issues.
2. Get the latest information on policies and programs by searching and viewing articles.
3. Discuss issues with neighbors and share perspectives by asking the community.
4. View your recent services and see the popular services on the site.

Note: Administrators can customize Government Service Portal homepages in Service Portal, so homepages may differ visually across government agencies. For more information on customization, see Customize the Government Service Portal.

The following table lists what constituents can access through the homepage.

Government Service Portal homepage for logged-in constituents

UI component	Description
Knowledge	Tab where constituents can access the Knowledge homepage and search or view a list of the top-rated or most viewed knowledge base articles.
Services	Tab where constituents can find all the available services in the catalog. They can search through the service catalog or view a list of the recently used or most popular catalog items.
Your Cases	Tab where constituents can find all their cases.
Your Information	Tab where constituents can access quick links to their personal information:

Government Service Portal homepage for logged-in constituents (continued)

UI component	Description
	• Businesses (agent experience only) • Contacts (agent experience only) • Publications
Notifications	Tab where constituents can see their notifications for resolved cases, cases awaiting information, publications, and approvals.
Tours	Link where constituents can view a tour for additional guidance on how the Public Sector Digital Services application works. An administrator determines whether tours appear on pages.
Live Chat	Link where constituents can chat with a virtual agent or a customer service agent. For more information on using Virtual Agent to get help, see Get help with Public Service requests using Virtual Agent.
Engagement Messenger	Link where constituents can use Engagement Messenger to submit service requests from a third-party web application that is outside of the ServiceNow environment. For more information, see Configure Engagement Messenger for Service Request Playbook application.
Profile menu	Link where constituents can access a profile photo to either view a profile or log out.
Search	Link where constituents can search the portal by either entering a keyword to use the type-ahead search or enter one or more words to view all search results.
Most viewed articles	Link where constituents can view a list of the most viewed articles.
Featured articles	Link where constituents can view featured community content.
Most useful articles	Link where constituents can view the most useful knowledge articles by the usage count of the articles.

Constituents can do the following tasks in the Government Service Portal:

- Register as a new user, create a login, and create a user profile.
- Search for information, browse knowledge articles, and engage with the community.
- Get help using Virtual Agent.
- Request services such as street repair, trash removal, building inspections, and other public maintenance.
- Request information and public records from local, state, and federal public agencies.

After registering and logging in to the Government Service Portal, constituents can:

- View the services that they received.
- View information records that they requested.
- View all license or permit requests.
- View constituent profiles (includes household information, such as names, addresses, and other constituent information).

- View existing cases.
- View publications and notifications including government pamphlets and newsletters about services as well as government notifications.

For more information on the services that are offered in the Government Service portal service catalog, see Government Service Portal service catalog list.

Using the Government Service Portal as a business

The Government Service Portal enables businesses to access their cases and service information as well as report issues. Business or business contacts can use the Government Service Portal to view their submitted cases, and raise requests by using the service request catalog.

Business contacts have the same functionality as a constituent user, with a few additional permissions. In addition to the constituent user tasks, business contacts can do the following tasks in the Government Service Portal:

- Register a new business.
- Request services that are related to licenses, benefits, permits, and service requests.
- View services that they received.
- View information records that they requested.
- View all license or permit requests.
- View items that they received.
- View their existing cases.
- View business and child business profiles.
- View business contact information such as names, addresses, and other contact information.
- View publications, such as government pamphlets and newsletters about services.
- View notifications such as government notifications and new contact approvals.

Customizing the Government Service Portal

To customize this portal, navigate to **Service Portal** > **Portals** and select Government Service. See Service Portal for more information about creating a custom interface.

Register for the Government Service Portal

Register for the Public Sector Digital Services Government Service Portal so that you can search for information, request assistance from a government service agent, or track the status of your request.

Before you begin

Role required: none

Procedure

1. Navigate to the Government Service Portal
2. In the portal header, select **Register**.
3. Select whether you want to register as a **Constituent**, a **Business contact**, or a **Business**.
4. Fill in the fields on the registration form.

Your email address must be unique. If you enter an address that is already in the system, you receive an error message. Try again with a different email address.

5. Select the **Security Code** check box, complete the CAPTCHA validation, and select **Verify**.
6. When prompted to agree to the privacy policy and to the community terms and conditions, select the agree check box.
7. Select **Sign Up**.
   A verification email is sent to the email address that you provided.
8. Select the link in the email to verify your email address.

Result

Your registration is complete. You can now log in to the Government Service Portal.

Self-register a business account in the Public Sector Digital Services government service portal

As a business owner, you can self-register your business on the government service portal to gain access and to create a business profile.

Before you begin

Role required: none

Procedure

1. Go to the Government Service Portal page and select **Register** in the portal header.
2. When prompted, select **A new business**.
3. On the form, fill in the fields.
   For more information on the business registration fields and the information that is collected when you sign up as a new business, see Business Profile form.
4. Select the **Security Code** check box, complete the CAPTCHA validation, and select **Verify**.
5. Agree to the privacy policy and to the community terms and conditions by selecting the check box.
6. Select **Register**.
   Your request is routed to an administrator, who can approve or deny the registration request. If the registration request is approved, you receive an email prompting you to set a user ID and password for login to the government service portal. If the registration request is denied, you're notified by email.

View or update a constituent profile in the government service portal

As a registered constituent, view your profile, update your information, and change your password directly on the Public Sector Digital Services government service portal.

Before you begin

Role required: sn_gsm.constituent

Procedure

1. Log in to the government service portal.
2. Select your user name in the portal header and select **Profile**.
3. To update the personal information in your profile, including your name, contact information, and address, do the following steps:

a. Select the field that you want.

b. In the pop-up window, enter the new information.

c. Select **Save**.
For more information on the fields, see Agency Service Constituent Profile form.

4. To change your password, select **Change Password**.
The **Change Password** link appears on the government service portal profile only when the Self Service Password Reset plugin (com.snc.password_reset) is activated by an admin.
5. In the Change Password pop-up window, fill in the fields and select **Update**.
6. To manage your email notification preferences, select **Notification Preferences** and check the options that you want or clear the options that you don't want.
Your preferences are automatically saved.

Track your cases from the Government Service Portal in Public Sector Digital Services

Keep track of your service request, information request, or license/permit request cases in the Government Service Portal by viewing a list of your cases and selecting the ones that you want to see more details about. Here, you can respond to an agent's inquiry, view a response, or see if there are any next steps required to resolve the case.

Before you begin

Role required: sn_gsm.constituent

About this task

Selecting a case opens a form with the following sections:

- A record of activity on the case, including added attachments or any interactions between the requester and the license and permit request case agent.
- Tasks or actions that need to be taken on the user's part, such as accepting or rejecting a case outcome.
- The case details, including contact information, the case number, and the case's stage and status.
- Any attached files.

Procedure

1. In the Government Service Portal portal header, navigate to **Your Cases**.
The following table lists the case categories that are visible:

Your Cases Category list

Category	Description
All Cases	List of all cases.
Action Needed	Cases in the Resolved state that are awaiting a constituent response.
Your Cases	Cases that haven’t yet been submitted for resolution.
Your Requests	Cases that have been submitted for resolution and are awaiting an agent response.

Category	Description
Your Service Requests	All service request cases that a user has access to. The Service Requests list shows the following fields: ◦ Service Request Number ◦ Short Description ◦ Constituent, Business, or Business Contact ◦ State ◦ Reported on
Your Information Requests	All information request cases that a user has access to. The Information Requests list shows the following fields: ◦ Information Request Number ◦ Short Description ◦ Constituent, Business, or Business Contact ◦ State ◦ Reported on
Your Licenses/Permits	All license and permit request cases that a user has access to. The License and Permit Requests list shows the following fields: ◦ License and Permit Request Number ◦ Short Description ◦ Consumer, Business, or Business contact ◦ State ◦ Reported on

2. In your list of cases, select the case number that you want to view more information about.
3. Optional: If you want to add a message for an agent, enter the message, and select **Post**. Your message becomes part of the case conversation. All responses from the agent are also included in the conversation, and you can see responses from other agents here.

Creating a government service request with Public Sector Digital Services

You can create a case about a community question or issue from the Government Service Portal in Public Sector Digital Services. The Government Service Portal supports submissions by both registered and anonymous users.

Before you begin

Role required: none.

About this task

Constituents can use the Government Service Portal to request services and report issues in their community. They can also use the portal to view the status of existing service requests, as well as update their contact information.

Constituents can submit their non-emergency requests through the Government Service Portal self-service experience, through Virtual Agent, or using Engagement Messenger. For more information on using Virtual Agent with Public Sector Digital Services, see Get help with Public Service requests using Virtual Agent.

Create a service request as a registered user

Create a service request as a registered user in the Public Sector Digital Services application.

Before you begin

Role required: constituent, business_contact, business_partner

About this task

As a constituent, you can use the Government Service Portal to request services and report issues in their community. You can also use the portal to view the status of existing service requests, as well as update their contact information.

As a constituent, you can submit non-emergency requests through the Government Service Portal self-service experience, through Virtual Agent, or by using Engagement Messenger. For more information on using Virtual Agent with Public Sector Digital Services, see Get help with Public Service requests using Virtual Agent.

Procedure

1. Navigate to the Government Service Portal.
2. Select **Services** > **Service Requests** to expand the list of Service Requests categories that are offered by Public Sector Digital Services, and select the category that you want.
3. Select the Service Request issue that you want to report.
   For more information on the services that are offered in the Government Service Portal, see Government Service Portal service catalog list.
4. On the form, fill in the fields.

   Create Case form

Field	Description
Location Type	Location type of the service request. The choices are: ◦ **Address** ◦ **Intersection**
Street Address	Address for this case, if **Address** is selected as the location type.
First Cross Street/Second Cross Street	Cross-streets for the case, if **Intersection** is selected as the location type.
Short Description	Brief description of the question, issue, or problem.
Details	Detailed description of the question, issue, or problem.
Contact Information	Contact information for the business or individual who reported this case.

5. Add any attachments.
6. Select **Submit**.

Result
The case is created, assigned a case number, and is now viewable in the **Your Cases** list in the Government Service Portal. For information on how to track the case as it moves through the various stages, see Track the status of a public service request from the Government Service Portal.

Create a service request as a public user

Create a service request as a public user in the Public Sector Digital Services application. You can submit a service request anonymously without logging in to the application.

Before you begin
Role required: none

About this task

Note: To allow public users to submit service requests, certain settings must be configured by an administrator. For more information on how an administrator might configure these settings, see Unauthenticated users cannot submit catalog items on Service Portal.

Organizations usually customize their landing pages, and anonymous users may see different information than users who are logged in.

Procedure

1. Navigate to the Government Service Portal.
2. On the portal header, select **Services**.
3. Expand the list of Service Requests categories offered by Public Sector Digital Services by selecting **Service Requests**, and select the category that you want.
4. Select the Service Request issue that you want to report.
5. On the form, fill in the fields.

Create Case form

Field	Description
Location Type	Location type of the service request. The choices are: ◦ **Address** ◦ **Intersection**
Street Address	The address for this case, if **Address** is selected as the location type.
First Cross Street/Second Cross Street	The cross-streets for the case, if **Intersection** is selected as the location type.
Short Description	Brief description of the question, issue, or problem.
Details	Detailed description of the question, issue, or problem.
Contact Information	Option to report this case as a business or as an individual.

Note: You may choose to leave the Contact Information fields blank, or you may add your email to receive updates on the case status. Adding attachments isn't supported as a public user.

6. Select the Security Code check box, complete the CAPTCHA validation, and select **Submit**.
   You're taken back to the service request catalog, where you can submit another service request or register for an account.

   Note: If you didn't provide any contact information, you can't track the status of this request or see the details of the case after you select **Submit**. If you would like to check the status of this request after your submit it, you must register for an account. For instructions, see Register for the Government Service Portal.

Create an information request with Public Sector Digital Services

Create a case requesting public records from federal or state public agencies from the Government Service Portal in Public Sector Digital Services.

Before you begin

Role required: constituent, business_contact, business_partner

About this task

As a constituent, you can use the Government Service Portal to request and obtain copies of public records maintained by government agencies. For example, you can request access to state or local public records such as inspection reports, financial reports, corporate and property records, adoption records, and birth, death, or marriage certificates. You can also use the portal to view the status of existing information requests, as well as add details, upload documents, or update your contact information.

Users can submit a request for any public record, so long as it does not fall under one of nine exemptions:

1. Exemption One: Classified national defense and foreign relations information.
2. Exemption Two: Internal agency personnel rules and practices.
3. Exemption Three: Information that is prohibited from disclosure by another federal law.
4. Exemption Four: Trade secrets and commercial or financial information obtained from a person that is privileged or confidential.
5. Exemption Five: Inter-agency or intra-agency memoranda or letters that are protected by legal privileges.
6. Exemption Six: Personnel, medical, financial, and similar files the disclosure of which would constitute a clearly unwarranted invasion of personal privacy.
7. Exemption Seven: Certain types of information compiled for law enforcement purposes.
8. Exemption Eight: Records that are contained in or related to examination, operating, or condition reports prepared by, on behalf of, or for the use of any agency responsible for the regulation or supervision of financial institutions.
9. Exemption Nine: Geological and geophysical information and data, including maps, concerning wells.

Procedure

1. Navigate to the Government Service Portal.
2. Navigate to **Services** > **Information Requests**.
3. Select the desired type of information request.
   You can choose between a FOIA request (federal) or a Public Records request (state).
4. Fill in your contact information.

If you're requesting information for someone else, select the **Requesting on behalf of someone else** check box.

5. Fill in the request details.
6. Fill in the fee details.
7. Request a fee waiver by selecting the **Fee Waiver** check box.
   You may qualify for a fee waiver if you're making a request on behalf of a non-profit or educational institution.
8. Optional: If you need to request expedited processing, select the **Expedite Processing** check box.
9. Optional: Add any attachments, such as documentation required to verify your identity. Required attachments vary by request.
10. Select **Submit**.
    You're now taken to the case page, where you can review or update the details of your request. On this page, you can view the exemption checklist, which is a list of categories of information that are not available due to regulatory reasons. After your request has been fulfilled, you must return to the portal to accept or reject the fee estimate for fulfilling your request. You can access pending fee approvals on the **Notifications** tab.

Create a license request in the Public Sector Digital Services Government Service Portal

Create a case requesting a license or permit from a government agency using the Government Service Portal in Public Sector Digital Services. The portal will allow you the opportunity to see how pricing and fees change based on your selections.

Before you begin

Role required: none

About this task

As a constituent, you can use the Government Service Portal to request a permit or license. You can also use the portal to view the status of existing license and permitting requests, as well as add details, upload documents, or update your profile and contact information.

Before you begin

Role required: none

Procedure

1. Navigate to the Government Service Portal.
2. Navigate to **Services** > **License & Permits**.
3. Select **Request License/Permit**.
4. If prompted, confirm eligibility.
5. On the form, fill in your contact information and the request information.
   If the name to appear on the permit differs from that of the requester, enter that name here.
6. Optional: If you are submitting this application on behalf of another constituent or for a business contact, select the checkbox for **I am requesting on behalf of someone else**.
7. Optional: In the Individual Type dropdown, select **Constituent**or **Business**.
8. Optional: Enter the name of the constituent or business you are submitting the application on behalf of.
9. Optional: Add any additional related parties.

Related parties may include business partners, managers, or any business contact who may need access to this license/permit. They must be contacts already registered and associated with your business.

10. Optional: Upload any documents that verifies the identity of the requester and the related party, or provides additional context for your request.
    Required documentation varies by request.
11. Optional: Select any add-ons, such as permit endorsements.
    You may add more than one. The pricing of the license or permit varies with each selection or combination of selections. If you are fee exempt, select the **Request Fee Waiver** checkbox to claim an exemption.
12. Review the fees associated with your choices.
    The fee total changes dynamically based on the options selected.
13. Select the checkbox to acknowledge the Commercial Affidavit and DDR Affidavit.
14. Enter your signature.
    If an admin has configured e-signature, you have the option of drawing or typing a signature.
15. Add any attachments.
16. Select **Submit**.

Result
Your request is now routed to a License and Permit agent, who will process your request. You're now taken to the case page, where you can review or update the details of your request. After your request has been fulfilled, you must return to the portal to accept or reject the fee estimate for fulfilling your request, as well as upload any identification or supporting documents needed to fulfill your request. You can access pending approvals and tasks on the Notifications tab.

Related constituents and business contacts added to the license/permit application are now able to view the case details in the Government Service Portal.

Track the status of a public service request from the Government Service Portal

Monitor the status of a case that you submitted through the Government Service Portal in Public Sector Digital Services. On the case page, you can see when the case was created, when it was last updated, and whether it's awaiting a response from you or from an agent.

Before you begin
Role required: constituent, business_contact, business_partner

Procedure

1. Navigate to the Government Service Portal.
2. In the Government Service Portal header, select **Your Cases**.
   The following table lists the case categories that are visible:

Your Cases Category list

Category	Description
All Cases	List of all cases.
Action Needed	Cases in the Resolved state that are awaiting a constituent response.

Category	Description
Your Cases	Cases that haven't yet been submitted for resolution.
Your Requests	Cases that have been submitted for resolution and are awaiting an agent response.
Your Service Requests	All service request cases that a user has access to. The Service Requests list shows the following fields: ◦ Service Request Number ◦ Short Description ◦ Constituent ◦ Business ◦ Business Contact ◦ State ◦ Reported on

3. Under **Your Cases**, select the case number that you want.
   The following table describes the fields that are displayed:

Government Service Portal Case Fields

Fields	Description
Timeline	Visual display that shows when the case was created and when it was last updated.
State	Current status of the case for the given stage. For a detailed explanation of each case state, see Government Service Portal Case states.
Constituent, Business, or Business Contact	Contact information for the reporting party.
Service	Type of service being requested.
Stage	Phase through which a case moves. For a detailed explanation of each case stage, see Government Service Case type.
Location Type	Option that indicates whether the location of the issue is an address or intersection.
Address or Cross Streets	Address or cross streets where the issue is located.
Related tabs	Additional case information, activity, or comments. The Related tabs show the following fields:

Fields	Description
	◦ Activity ◦ Attachments ◦ Related Tasks You can add attachments or comments here.

Manage your government service cases from the Government Service Portal

Create, accept, assign, escalate, de-escalate, cancel a case, and even more actions for various government services all from the Government Service Portal.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. Navigate to the Government Service Portal.
2. Do one of the following actions that are related to your case:

Service Request Case Actions

Action	Description
Create Case	Creates a case and associates the new case with the originating case. The new case appears in the Related Cases related list. This action displays the Select Case Type pop-up window where you can select the type of case to create.
Accept	Accepts an assigned case. This action is performed by the logged-in user.
Assign to me	Assigns the case to the logged-in user. This action is available if the case is unassigned and the logged-in user has the correct role.
Compose Email	Opens an email window in a new sub-tab on the **Case** tab. ◦ The **To** field displays the customer's email address. ◦ The **Subject** field displays the case number and issue. This action is available from the **More UI Actions** menu.

Action	Description
Escalate Case	Escalates the case, which highlights the case and raises awareness about a customer or issue. This action is available if the logged-in user has the correct role.
De-escalate Case	De-escalates a case. This action is available if a case has been escalated and the logged-in user has the correct role.
Report Knowledge Gap	Opens a knowledge feedback task in a new sub-tab for the case. After being saved, the task appears in the Knowledge Gaps related list. This action is available from the More UI Actions menu.
Propose Solution	Enables the agent to propose a solution for a case.
Record Time	Records the time worked for the case or case tasks. Selecting **Record Time** opens a Time Worked form with the **Task** and **User** fields already populated. This action is available from the More UI Actions menu.
Create Work Order	Creates a work order for the case. After a work order is created, it appears in the Work Orders related list. The case number is also referenced on the work order. This action is available from the More UI Actions menu.
Close Case	Closes a case. This action is available after a resolution code and any information related to the closure is provided in the Resolution notes field.
Open case	Changes the state of a case from Awaiting Info to Open.
Submit application	Saves the application and moves the state of the case from Draft to New. This action is available when the state of a case is Draft.

Action	Description
Request Info	Requests information about a case or case task from the constituent, business, or agency. This action is available when the state of a case is not Draft, Resolved, Closed, or Cancelled.
Start Work	Begins work on an open case. This action is available to the agent who is assigned to the task when the state of a case is Open.
Cancel	Updates the state of the case to Cancelled. This action is available when the state of a case is not Resolved, Closed, or Cancelled.

These actions are inherited by the case types that are created by extending the service case type.

The actions in the following table are available with the cases when the corresponding plugins are activated.

Actions available with corresponding case plugins

Plugin	Action
Service Management	◦ Create Incident ◦ Create Standard Change ◦ Create Problem
Major Case Management	Shows all major case actions.
Special Handling Notes	Shows any special handling notes for the case.
Case Action Status	Indicates the current action state.

Create and submit License or Permit request applications on behalf of others

In the Government Service Portal, constituents can create license/permit requests on behalf of someone else, and add multiple parties (constituents, business contacts) to the watchlist.

Before you begin

Role required: none

Procedure

1. Navigate to the Government Service Portal.
2. Navigate to **Services** > **License & Permits**.
3. Select **Request License/Permit**.
4. If prompted, confirm eligibility.

5. On the form, fill in your contact information and the request information.
   If the name to appear on the permit differs from that of the requester, enter that name here.
6. Select the checkbox for **I am requesting on behalf of someone else**.
7. In the Individual Type dropdown, select **Constituent**or **Business**.
8. Enter the name of the constituent or business you are submitting the application on behalf of.
9. Optional: Add any additional related parties.
   Related parties may include business partners, managers, or any business contact who may need access to this license/permit. They must be contacts already registered and associated with your business.
10. Optional: Upload any documents that verifies the identity of the requester and the related party, or provides additional context for your request.
    Required documentation varies by request.
11. Optional: Select any add-ons, such as permit endorsements.
    You may add more than one. The pricing of the license or permit varies with each selection or combination of selections.
12. Review the fees associated with your choices.
    The fee total changes dynamically based on the options selected. If you are fee exempt, select the **Request Fee Waiver** checkbox to claim an exemption.
13. Select the checkbox to acknowledge the Commercial Affidavit and DDR Affidavit.
14. Enter your signature.
    If an admin has configured e-signature, you have the option of drawing or typing a signature.
15. Add any attachments.
16. Select **Submit**.

Result

Your request is now routed to a License and Permit agent, who will process your request. You're now taken to the case page, where you can review or update the details of your request. After your request has been fulfilled, you must return to the portal to accept or reject the fee estimate for fulfilling your request, as well as upload any identification or supporting documents needed to fulfill your request. You can access pending approvals and tasks on the Notifications tab.

The constituent for which you were acting as a proxy, as well as any related constituents and business contacts added to the license/permit application, is now able to view the case details in the Government Service Portal.

Email notifications for the Service Request Case Type

Email notifications are automatically triggered by both the Government Service Portal and Service Request Playbook in Public Sector Digital Services. Notifications can result from an agent action, a response needed from an agent, constituent, or business contact, or from an update on a case status.

Email notifications in the Service Request Playbook are automatically sent to the constituent, business, agency, or contributor watchlist, when an agent performs one of the following case activities:

- Opens a case for a constituent
- Comments on a constituent's case
- Moves the case to another stage
- Provides a resolution for a constituent's case
- Closes a constituent's case
- Cancels a constituent's case
- Requests more information on the unresolved case

Email notifications are automatically sent to the assigned agent when:

- A case is assigned to the agent.
- A case needs attention or requires an agent response.
- Case work notes or comments are updated.
- A case task is assigned.
- There’s new activity on the case.
- The proposed solution is rejected.
- There’s a service level agreement (SLA) warning or breach.

Business contacts, contributors, other agents, and other constituents that are added to the case watchlist should receive all email notifications that are also received by the constituent who submitted the request.

For agents, email notifications in the Government Service Portal or Service Request Playbook can also be triggered by certain SLAs. For more information on SLAs for agents, see Service level agreements for government service cases.

Service level agreements for government service cases

A service level agreement (SLA) is a record that you use to guarantee a specific time that a service or information must be provided by, or that an agent must finish a task must by. The Public Sector Digital Services application uses SLAs with government service request cases.

You can attach an SLA to a service request in the Government Service Portal or to a service request in the Service Request Playbook. You can configure an SLA to start, pause, or stop depending on any government service case attributes that you or someone else assigned to the SLA.

An SLA is automatically associated to a case when the case is created or updated depending on the conditions that have been set up in the SLA definition. The specific record that gets attached to a case is the Task SLA record, which tracks the SLAs for that particular case. The Task SLA table [task_sla] stores the Task SLA records. For more information on SLA definitions, see Service Level Agreement (SLA) definition.

An SLA sends notifications at certain events that are defined in the workflow. For information on defining SLA workflow events, see Create an SLA definition.

By default, SLA notifications are triggered and sent to the assigned agent on the following occasions:

- A Service Request case is in the Intake stage for more than two days.
- A Service Request case is in the Review stage for more than eight days.
- A Service Request case is in Processing stage for more than eight days.

- A Service Request case is in the Decision stage for more than two days.
- A constituent's comment or query hasn't been responded to for two days.
- An SLA is at 50 percent of the duration that is specified in the SLA definition.
- An SLA is at 75 percent of the duration that is specified in the SLA definition. A notification is sent to the agent and agent manager.
- An SLA is breached. A notification is sent to the agent and agent manager.

An SLA's timer pauses when the case is awaiting information from the constituent who had a comment or query. The timer is canceled if the state of the case changes to **Closed** or **Cancelled**.

To learn more about SLAs, see Service Level Management concepts.

Get help with Public Service requests using Virtual Agent

Public sector users can get assistance completing or updating their requests for various public services by using a pre-built Virtual Agent chatbot conversation. Users can run this Virtual Agent conversation from the Government Service Portal or from Engagement Messenger. Virtual Agent is currently supported by Service Request Playbook and License and Permit Playbook.

Get help with service requests using Virtual Agent

Public sector end users can get assistance completing or updating non-emergency service requests by using a pre-built Virtual Agent chatbot conversation. End users can run this Virtual Agent conversation from the Government Service Portal or from Engagement Messenger.

Before you begin

Role required: constituent, business_contact, business_partner

About this task

The information (user inputs and bot responses) exchanged during the Virtual Agent conversation, Create a Service Request, enables the chatbot to assist users with non-emergency service requests.

Procedure

1. Navigate to the Government Service Portal or to the Engagement Messenger module if implemented.
2. Click **Chat**.
3. Select **Show me everything**.
4. Create or update a non-emergency service request by selecting **Create a Service Request**.

   Virtual Agent asks the user whether this is a new request or an update to an existing request.

- For new requests, the bot displays categories of non-emergency services that the user can choose from.
  - If the user needs a service that isn't offered, the user can enter a short description of the issue and continue working with the bot to create a service request.
  - If the issue requires a location to be specified, the bot prompts the user to enter the address or intersection of the issue.
- For existing requests, the bot displays the list of cases for service requests submitted by the user and then prompts the user to update the case by adding an image or comment about the case.

The bot creates or updates the case for the service request. The user can continue working on a different issue with the bot or indicate that no further help is needed, which ends the Virtual Agent conversation.

Get help with license and permit requests using Virtual Agent

Public sector users can get assistance completing or updating their requests for license and permit services by using a pre-built Virtual Agent chatbot conversation. Users can run this Virtual Agent conversation from the Government Service Portal or from Engagement Messenger.

Before you begin

Role required: constituent, business_contact, business_partner

About this task

The information (user inputs and bot responses) exchanged during the Virtual Agent conversation, Create a Service Request, enables the chatbot to assist users with non-emergency service requests.

Procedure

1. Navigate to the Government Service Portal or to the Engagement Messenger module if implemented.
2. Click **Chat**.
3. Select **Show me everything**.
4. Create or update a license or permit request by selecting **Start a License/Permit Application**.

   Virtual Agent asks the user whether this is a new request or an update to an existing request.

   - For new requests, the bot displays categories of license and permit services that the user can choose from.
     - If the user needs a service that isn't offered, the user can enter a short description of the issue and continue working with the bot to create a request.
     - If the issue requires a location to be specified, the bot prompts the user to enter the address.
   - For existing requests, the bot displays the list of license and permit requests submitted by the user, and then prompts the user to update the case with an image, comment, file, or additional information.

   The bot creates or updates the case for the license and permit request. The user can continue working on a different issue with the bot or indicate that no further help is needed, which ends the Virtual Agent conversation.

Using the Business (Agency) Location Service Portal

You can use the Business (Agency) Location Service Portal (BLSP), available with the Public Sector Digital Services application, as a one-stop shop to manage internal and external agency locations.

As a user with the sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, or admin role, you can use the Business (Agency) Location Service Portal page to:

- Get a 360° view of an agency location.
- Add and manage agency members.
- Submit cases against agency locations, or public services at a service organization.
- Access Knowledge Base articles and engage with the community.

From the Business Location Service Portal, you can access and use the following features:

Business Location Service Portal

UI component	Description
Support	Click **Support** to create a customer case.
Knowledge	Clicking **Knowledge** on the header takes you to the kb_home page. You can search the Knowledge Base or view a list of top-rated or most viewed Knowledge Base articles.
Cases	View the list of cases.
Your Information	Navigate to agency locations, services received, and install base items.
Profile menu	Click your profile photo to either view your profile or log out.
Search	Enables you to search support articles and requests. Enter a search term and click **Search** to view the search results.
Browse Services	Click **Browse Services** to report an issue or request a service. Use the service to register a member at an external agency location.
View Articles	Explore the knowledge base to get the information.
Ask the community	Provides access to the Community homepage. You can use the community to ask questions and get answers, connect with people who share similar expertise, and join forums and participate in discussions.
Agency Locations	Get the 360° view of the agency location. Use the feature to: • Add a member to an agency location. • Report cases on behalf of an agency location.

Business Location Service Portal (continued)

UI component	Description
	• Report cases against services received from a specific agency location. • Report cases against public services offered at a particular agency location.
Featured Articles	View featured community content.
Most Viewed articles	View a list of the most viewed articles.

Depending on the configuration set by your administrator, you can perform the following tasks from the Agency Location Service Portal:

- Register and assign staff members to an agency location
- Report cases on behalf of an agency location
- Report cases against services received from a specific agency location
- Report cases against public services offered at a particular agency location
- Access knowledge base articles and frequently asked questions

Using Service Request Playbooks for Public Sector Digital Services

If you're a government service agent or manager, you can use the Service Request Playbook to manage and resolve requests for services like park maintenance, broken stop signs, or other types of community issues.

Overview

A playbook provides a step-by-step guidance through the life cycle of a government service case.

The Service Request Playbook automatically appears in the **Playbook** tab when you open or create a service request case in the CSM Configurable Workspace.
A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a constituent when a stage or activity is complete, or auto-sending a work order to a field service agent. When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The workflows that are associated with a specific type of case and the activities that need to be completed to resolve this type of case are detailed in the playbook. Playbooks also help you to visualize the entire lifecycle of the service request workflows by displaying your progress through the playbook in the header.

Playbook stages

The Service Request Playbook has four stages, listed in the following table.

Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the service request and assigning it to the right agent.
Review	Acts as a checkpoint for duplicate cases and provides you with an opportunity to review the case details to verify that the issue is valid and needs to be resolved.
Process	Guides you through the activities for case resolution.
Decision	Captures and communicates the decision that you made on the service request to the constituent and any other agents or involved parties.

Playbook layout

A playbook is made up of several areas, including the playbook life cycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook.

The default activity view for the Service Request Playbook is the Process-based experience view. This view, which is shown in the following example, shows constituent or business information and case task information at the forefront of the playbook work area as you work on it.

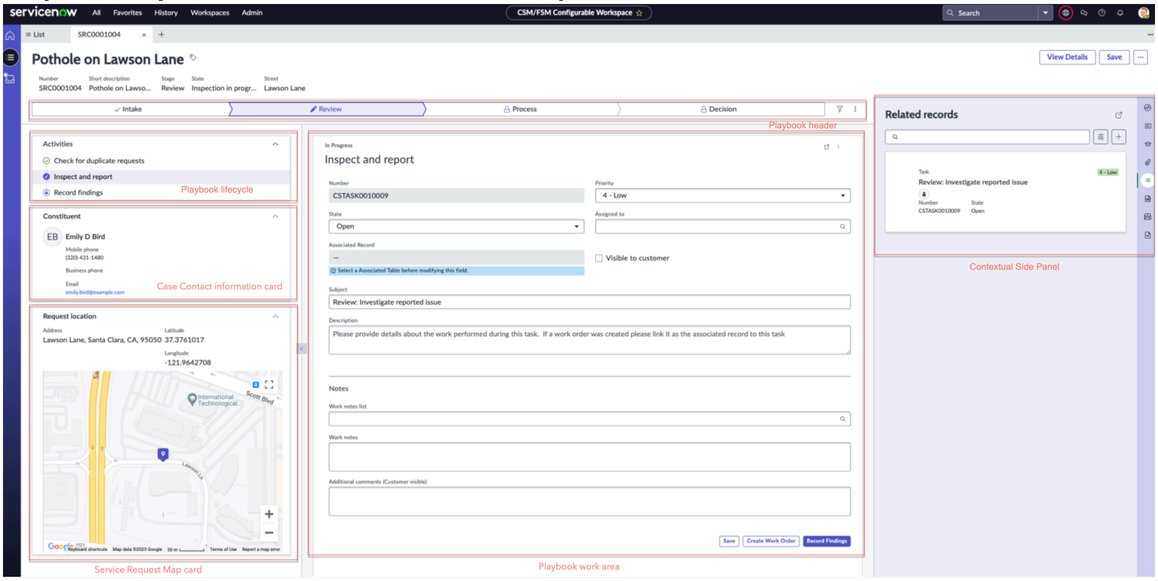
The process-based playbook layout shows the following features:

- A horizontal stage picker that gives the agent a complete view of the entire process and where they currently are in that process. Agents can use the stage picker to track their overall progress as they work on cases.

- Record information on the left side of the page, such as the contact information that is always available.

- Related records in the contextual side panel supported by the dynamic related records component.

Playbook layout with the Process-based experience view



The following table shows the components that you can see in the Service Request Playbook process-based workspace.

Playbook components

Playbook area	Description
Playbook header	• Appears at the top of the playbook. • Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages. • Includes a filter that you can use to filter the activities by the assigned user or the activity status. • Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.
Playbook Lifecycle	• Appears in a panel on the left side of the playbook. • Displays a list of the activities for each stage. • With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	• Appears in the middle of the playbook. • Displays the card for the current activity.
Contextual side panel	• Appears on the right side of the playbook. • Includes the tabs that you can use to display the following types of information:

Playbook components (continued)

Playbook area	Description
	◦ Case or case task activity stream. ◦ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ◦ Dynamic related records. For more information, see Dynamic related records.
Constituent or Business Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook.
Service Request Map Card	• New component of the process-based playbook layout. • Appears after the intake stage, if the sn-geo-map plugin is installed, and Google API key is configured.

For more information on process-based layouts and process-based variants in the CSM Configurable Workspace, see Process page variants.

Create a service request record by using playbooks in Public Sector Digital Services

Create a service request record in the Public Sector Digital Services application by using a Service Request Playbook activity. By using a playbook, you can have an efficient, streamlined way to create and resolve a service request.

Before you begin

Note: Before starting this procedure, verify that the Service Request Playbook application, which is separate from Public Sector Digital Services Core, has been installed and enabled in the CSM Configurable Workspace. For instructions, see Install Service Request Playbook for Public Sector Digital Services.

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

If a playbook is configured to use the record generator feature, you can create a record using a playbook activity. If a case is already associated with a playbook, a new service request case type is opened in a new tab, with Playbook as the default tab. Creating a record from a list or form, or from an activity in another playbook, opens the Service Request playbook and initiates the first activity. This activity, the first step of the intake stage, guides you through the record creation process.

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists** > **Service Requests list** > **All**.
2. Select **New**.
   The Service Request Playbook opens and initiates the first activity for collecting the request details, which is the Intake stage.
3. On the Enter Request Details activity card, fill in the information.
4. Select **Save**.
   A case is created with the service request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity.

What to do next

Continue using the playbook stages and activities to resolve the constituent's issue and complete the case.

Resolving a service request case by using playbooks in Public Sector Digital Services

You can use playbooks to create cases and to complete the tasks and activities that are needed to resolve specific types of cases.

Note: Verify that the Service Request Playbook application, which is separate from the Public Sector Digital Services Core application, has been installed and configured. For instructions, see Install and configure the Service Request Playbook application.

By default, the following stages are available to you as a government service agent in the Service Request Playbook in the CSM Configurable Workspace.

- Intake
- Review
- Processing
- Decision

Stages in a Service Request Playbook

The Service Request Playbook experience starts with the Intake stage. This stage is the default playbook stage for a new service request case. Use this playbook stage to gather information about the requester and the complaint for the service request case. You can also request additional information from the requester.

The playbook continues with the Review stage. In this stage, you can do the initial troubleshooting on the case, check for similar or duplicate case requests, and determine what services need to be rendered and if a field service agent needs to be dispatched. For more information on the Public Sector Digital Services integration with Field Service Management, see Integration with Field Service Management.

The playbook continues with the Process stage. In this stage, you can assess resources, request resource approval, create case tasks, and add or request new information before case resolution begins. If a field service agent needs to be dispatched to the service request location, you can create a work order during the process stage. The case status changes to Work in Progress after the field service agent begins work on the service request case. After work has been completed, the case is moved to the Decision stage.

The final stage of the Service Request Playbook is the Decision stage. At the Decision stage, the state of the case is updated from Work in Progress to Ready for Decision after an agent sends in a decision. A notification is sent to the requester that lets them know that a decision has been reached. The requester can then either accept or reject the solution. If the requester accepts the solution, the case is automatically closed. If the requester rejects the solution, the case is reopened, and the agent must propose another solution.

Complete the Intake Stage in Service Request Playbook

Complete the intake stage as your first step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists** > **Service Request case list** > **All**.
2. Select **New**.
   The Service Request playbook opens and initiates the first activity for collecting the request details
3. On the Enter Request Details activity card, fill in the information.
4. Select **Save**.
   A case is created with the service request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity. If you have enabled the Similar Records UI activity, this will display as the second activity. For more information, see Configure the Similar Records Activity UI in Service Request Playbook.
5. Review the similar records that are displayed in the Similar Records Activity UI, and determine whether any of them are a duplicate of the current case.
   - If the current case is a duplicate of any of the cases displayed in the Similar Records UI, select **Mark as Primary Case**, then select **Move to Decision**.
   - If the current case is not a duplicate of any of the cases displayed in the Similar Records UI, select **Existing Case Check Done** to move to the next activity.
6. Review the details of the case and make updates if needed.
7. Select **Submit**.
8. Select **Move to review**.
   The Intake stage is now complete and the case is moved to the Review stage.

Complete the Review Stage in Service Request Playbook

Complete the review stage as your second step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. In the contextual side panel, check for duplicate cases using the Related records feature in the contextual side panel.
2. Do one of the following actions depending on whether or not you have duplicate cases.

Options	Steps
If there are no duplicate cases	Select **Request inspection**, then check the box to confirm that there are no similar service requests.
If there are duplicate cases	**a.** In the Parent field, select the search icon ( ) and then select the duplicate case. **b.** Select **Mark as duplicate** and then select **Move to decision** to skip the Process stage to move the case directly to the Decision stage. Select again to confirm. In the Decision stage, the Resolution code is `Void/Cancelled, Duplicate Issue` by default. **c.** Resolve the case and notify constituents by selecting **Propose solution**. **d.** If the solution doesn't work, select **Repropose solution** to delete the existing solution and then resubmit the case. You're redirected to the Decision stage, where you can edit any field. Submit the updated solution and notify constituents by selecting **Propose solution**. After a solution has been proposed, the state of the case changes to Resolved.

3. Fill in the Inspect and report case form.
   For more information on how Public Sector Digital Services integrates with Field Service Management, see Integration with Field Service Management.
4. Do one of the following actions depending on whether a field service agent must be dispatched to the service request location.

Option	
If a field service agent must be dispatched	**a.** Select **Create work order** if a field service agent must be dispatched to the service request location to resolve the issue. **b.** Fill in the details of the work order request. **Note:** Agents can't proceed with the rest of the playbook until the work order is complete. **c.** Once the work order has been fulfilled, select **Move to process** to move to the next activity.
If no field service agent must be dispatched	If a field service agent doesn't need to be dispatched to the service request location, or if Field Service Management hasn't yet been integrated with Public Sector Digital

Option	
	Services, select **Record findings** to go to the next activity.

5. Fill in the Record findings case form.
6. Verify if any open case tasks need to be closed, and then select **Move to process**. The Review stage is now complete and the case is moved to the Process stage.

Complete the Process Stage in Service Request Playbook

Complete the process stage as your third step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. Fill in the Assess resources case form.
2. Do one of the following actions depending on whether a resource approval is required to proceed.

Options	Steps
If a resource approval is required	a. Select **Request approval**. The case moves to the **Approve resources** activity, where an approval record case task is created, and each approver can approve or reject the proposed conditions. b. After all approvals have been received, select **Start work** to move to the **Perform work** activity.
If a resource approval is not required	If no approvals are needed, select **Start work** to bypass the **Approve resources** activity. The case is moved to the **Perform work** activity.

3. Fill in the Perform work case form.
4. Do one of the following actions depending on whether a field service agent must be dispatched to the service request location.

Options	Steps
If a field service agent must be dispatched to the request location	a. Select **Create work order**. b. Fill in the required information and select **Submit**.
If no field service agent must be dispatched	If no field service agent must be dispatched to the service request location, or if Field Service Management hasn't yet been integrated with Public Sector Digital Services, select **Mark complete.**

5. Verify that everything is correct and that you've added all your comments.
6. Select **Move to decision**, and confirm again when prompted.
   The Process Stage is complete and the case is moved to the Decision stage.

Complete the Decision Stage in Service Request Playbook

Complete the decision stage as your last step in resolving a case using the Service Request Playbook.

Before you begin

Role required: admin, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

Procedure

1. Fill in the Resolve case form.
2. Select **Propose solution**.
   All case tasks must be closed before an agent can propose a solution to the case.
   A notification is sent to the constituent that lets them know that a decision has been reached. The constituent can either accept or reject the solution. If the constituent accepts the solution, the case is automatically closed. If the constituent rejects the solution, the case is reopened, and the agent must propose another solution.

Using the contextual side panel in Public Sector Digital Services Service Request Playbook

The contextual side panel provides you with the tools that can help you to research and resolve problems about your cases.

The contextual side panel in the CSM Configurable Workspace gives you access to information that can help you resolve government service cases.

It includes a column of icons that you can select to access different types of information.

The following table shows you the tabs that you should see on the contextual side panel in the Service Request Playbook.

Contextual side panel tabs

Field	Description
Record information icon	Relevant information about a record. In Service Request Playbook, the ribbon displays the record information, constituent details, the case timeline, and the active and inactive service level agreements (SLAs). For more information on how to view information about the ribbon in playbooks, see Viewing the ribbon information in Service Request Playbook.
Agent assist icon ( )	List of search results with the content that is related to the record that you are viewing. The content may include knowledge articles, recommended actions, or other records.

Contextual side panel tabs (continued)

Field	Description
	For more information, see Agent assist Overview.
Attachments icon ( )	Ability for you to attach knowledge base content to a response to the requester in the activity stream.
Template icon ( )	Standard content that is related to resolving the issue. To create a template, select the template icon Create.
Response template icon ( )	Reusable messages that you can copy and paste into the cases and case tasks. For more information on using and creating response templates, see Use response templates in Service Request Playbook.
Dynamic Related Records icon ( )	Related records in the contextual side panel that dynamically change based on the context of the current record or playbook activity.
Activity stream icon	Ability for you to communicate with requesters and make internal notes about the work that is done on a record.

Use response templates in Service Request Playbook

Respond to cases by using the response templates in the contextual side panel in CSM Configurable Workspace. Good templates save you time by eliminating repetitive work.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

About this task

Selecting the response templates icon shows the reusable messages that you can copy and paste into cases and case tasks. For information on how to create response templates, see Create or modify a response template.

Procedure

1. In the CSM Configurable Workspace, open a service request task.
2. In the contextual side panel, select the response templates icon to display a list of the available templates.
3. In the Response Templates side panel, search for a template.
4. Select a template and then select **Copy** to copy the template to the clipboard.
   Paste the template text into the **Work notes** field or the **Additional comments** field.

Using the activity stream in Service Request Playbook

You can access the activity stream in the contextual side panel in CSM Configurable Workspace after you create a service request record. The activity stream enables you to communicate with constituents and make internal notes about the work that is done on a record, making it easier to relay and track the information.

Using the activity stream

You can use an activity stream to communicate with constituents and track the information on a record. The activity stream updates when the current activity in the playbook is updated.

You can access the activity stream by selecting the activity stream icon () in the contextual side panel.

Agent tasks in the activity stream

The following table lists the tasks that you can do in the activity stream.

Agent tasks

Task	Description
View posts for the case or case task	Current activity in the playbook work area that determines the information that is displayed in the activity stream. Scroll through the posts in the Activity section to view the case or task information. Select **Case** or **Task** at the top of the activity stream to switch views.
Add work notes or comments	In the Compose section: **1.** Select the **Work notes** or **Comments** activity. **2.** Add the information to the text field. **3.** Select **Post Work Notes** or **Post Comments**. The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.
Filter or search posts	Select the filter icon ( ) at the top of the Activity section to display the filter selections: • **Post types:** Select the types of posts to view, such as the work notes or attachments. • **Field changes:** Select the fields that you want to view the posts for in only those fields.

Agent tasks (continued)

Task	Description
	• **Flagged:** Enable this button to view the posts that have been flagged as important. • **Filter sets**: Select two or more filters in this list. Select the search icon ( ) to search all activity posts.
Sort posts	Select the sort icon ( ) to sort the posts by the newest to the oldest or the oldest to the newest posts.
Expand and collapse posts	Select the more options icon (•••) to expand and collapse posts: • **Expand all posts**: Expands the posts to view additional details. • **Collapse all posts**: Returns the posts to their previous state.

Viewing the dynamic related records in Service Request Playbook

You can view the dynamic related records in the playbook contextual side panel in CSM Configurable Workspace. These records dynamically change based on the current record or playbook activity.

Using related records in Service Request Playbook

You can view, search, and sort the records in the **Related Records** tab in the contextual side panel after you create a service request record. For details on how to create a record, see Create a service request record using playbooks in Public Sector Digital Services.

The **Related Records** tab displays the related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the **Related Records** tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

Types of related records

The related records appear in the list as a read-only card. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list. Depending on the related record configuration for the source record or playbook activity, you can see the following types of related records:

- Similar Service Requests
- Open Case Tasks

- Related Work Orders
- Blocked Tasks
- Emails
- Approvals
- SLAs
- Escalations for the case or customer

Default related records

The following table shows the default related records that are based on each playbook step.

Default related records

Stage	Playbook Activity	Default related record
Intake	All activities	Similar Service Requests
Review	Check similar requests	Similar Service Requests
Review	• Inspect and report • Record findings	Open Case Tasks
Process	• Assess resources • Perform work	Open Case Tasks
Process	Approve resources	Approvals
Decision	All activities	Open Case Tasks

You can search the Related Records list by entering the text in the search field or by filtering the list to display the records of a specific type. You can expand a card to show a more detailed view or open the list in a subtab. If you have the create permission, you can also create new related records of the selected type.

Customizing the related records view

The following table lists the customization options for the related records view.

Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon (☰) that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is

Customizing the Related records view (continued)

Task	Description
	determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You can also use the filter to see the current selection. For more information, see Customizing the related records view in Service Request Playbook.
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. For more information, see Customizing the related records view in Service Request Playbook.
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record. In the subtab, you can view the record details and perform the available actions.
Open the related record list in a list view in a subtab	List view icon ( ) to display the related records in a list view in a subtab under the parent record.
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record.

Viewing the ribbon information in Service Request Playbook

You can view the information about the ribbon in the contextual side panel in CSM Configurable Workspace. The ribbon displays the important information about the case, such as the service record information, constituent contact details, and the case timeline.

Select the record information icon ( ) in the contextual side panel to view the information about the ribbon.

You can see the information about the fields in the contextual side panel in the following table.

Contextual Side Panel Ribbon fields

Field	Definition
Record Information	Fields, case record number, short description, stage, state, and address.
Requester Overview Card	Details about the constituent and contact for the case.
Timeline	Chronological summary of the case activities, including the case state changes and interactions

Contextual Side Panel Ribbon fields (continued)

Field	Definition
	between the agent and the customer. You can also see how much time that the agent and customer spent on the case.
SLAs	Active service level agreements (SLAs) for the case, including the time remaining, the SLA state, and any breaches.

Customizing the related records view in Service Request Playbook

You can customize

The following table lists the customization options for the related records view.

Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon (☰) that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You can also use the filter to see the current selection. **1.** Select the filter icon ( ). **2.** Select a record type from the menu. The menu includes the related lists that have been configured for the parent record.
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. **1.** In the search field at the top of the Related Records list, enter the search text. **2.** Select the search icon ( ). **Note:** The search field is grayed out if search is not available for the selected type of related records.
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record.

Customizing the Related records view (continued)

Task	Description
	In the subtab, you can view the record details and perform available actions.
Open the related record list in a list view in a subtab	Display the related records in a list view in a subtab under the parent record by selecting the subtab icon ().
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record. 1. Select the create record icon () at the top of the Related Records list. 2. Fill in the fields on the record form and select **Save**.

Track government service requests by using Service Request Playbook

Track all the service requests that are assigned to you or other agents in your government agency by using the Service Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

When you select a case, a form opens with the following sections:

- A conversation of the interaction between the user and the government service agent.
- The action that needs to be taken on the user's part, such as accepting or rejecting a solution.
- The case details, including the case number and status.
- Any attached files.

Procedure

1. Open the Service Request Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **Service Requests** list and click **All**.
3. In the Service Requests section, select a list that is described in the following table:

Service Request Lists

List	Description
All	All service request cases that the agent has access to.
My Cases	All service request cases that are assigned to the agent.
My Open	Open cases that are assigned to the government service agent.

List	Description
Unassigned for my group	Cases that belong to any of the government service agent's groups but haven't been assigned to an agent.

You can see the following fields under each list:

- Number
- Short description
- Action status
- Service
- Constituent
- Business
- Business contact
- State
- Address type
- Reported on
- Assigned to agency
- Assigned to

For a detailed description of these fields, see Government Service Case form.

Using Information Request Playbook for Public Sector Digital Services

If you're an information request case agent or manager, you can use the Information Request Playbook to manage and resolve requests for information and public records.

Overview

A playbook provides you with step-by-step guidance through the life cycle of an information request case.

The Information Request Playbook automatically appears in the **Playbook** tab when you create an information request case by using the CSM Configurable Workspace.
A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete. When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The workflows for a type of case and the activities that you need to resolve these cases are in the playbook. By using a playbook, you can visualize the entire life cycle of the information request workflow.

Playbook stages

The Information Request Playbook stages are listed in the following table.

Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the information request and assigning it to the right agent.
Review	Acts as a checkpoint for duplicate cases and provides you with an opportunity to review the case details to verify that the issue is valid and needs to be resolved.
Process	Guides you through the activities for the information request fulfillment.
Decision	Captures and communicates the documents and information to the constituent and any other agents or involved parties.

Playbook layout

A playbook is made up of several areas, including the playbook life cycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook.

The default activity view for the Information Request Playbook is the Process-based experience view. This view, which is shown in the following example, shows constituent or business information and case task information at the forefront of the playbook work area as you work on it.

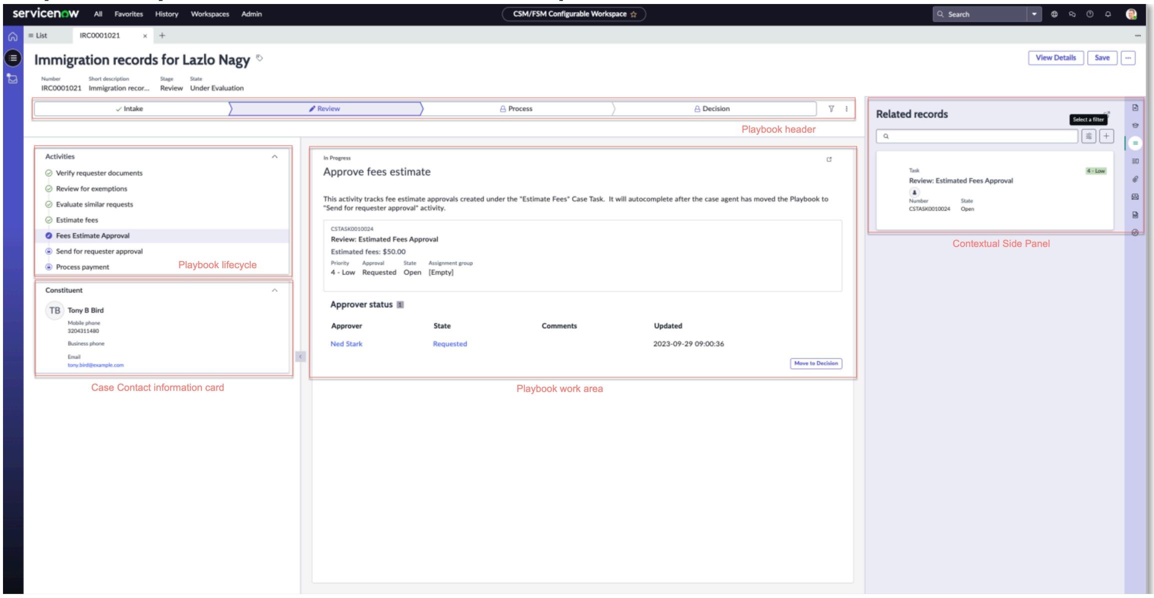
The process-based playbook layout shows the following features:

- A horizontal stage picker that gives the agent a complete view of the entire process and where they currently are in that process. Agents can use the stage picker to track their overall progress as they work on cases.

- Record information on the left side of the page, such as the contact information that is always available.

- Related records in the contextual side panel supported by the dynamic related records component.

Playbook layout with the Process-based experience view



The following table shows the components that you can see in the Information Request Playbook workspace.

Playbook components

Playbook area	Description
Playbook header	• Appears at the top of the playbook. • Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages. • Includes a filter that you can use to filter the activities by the assigned user or the activity status. • Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.
Playbook Lifecycle	• Appears in a panel on the left side of the playbook. • Displays a list of the activities for each stage. • With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	• Appears in the middle of the playbook. • Displays the card for the current activity.
Contextual side panel	• Appears on the right side of the playbook. • Includes the tabs that you can use to display the following types of information:

Playbook components (continued)

Playbook area	Description
	◦ Case or case task activity stream. ◦ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ◦ Dynamic related records. For more information, see Dynamic related records.
Constituent or Business Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook.

For more information on process-based layouts and process-based variants in the CSM Configurable Workspace, see Process page variants.

Create an information request record by using Information Request Playbook

Create an information request record in the Public Sector Digital Services application by using an Information Request Playbook activity. By using a playbook, you can have an efficient, streamlined way to create and resolve an information request.

Before you begin

Note: Before you start this procedure, verify that the Information Request Playbook application, which is separate from Public Sector Digital Services Core, is installed and enabled in the CSM Configurable Workspace. For instructions, see Install Information Request Playbook for Public Sector Digital Services.

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

If a playbook is configured to use a record generator, you can create a record by using a playbook activity. If a case is already associated with a playbook, a new information request case type is opened in a new tab, with Playbook as the default tab. Creating a record from a list or form, or from an activity in another playbook, opens the Information Request Playbook and initiates the first activity. This activity, the first step of the Intake stage, guides you through the record creation process.

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists** > **Information Requests** > **All**.
2. Select **New**.
   The Information Request Playbook opens and initiates the first activity for collecting the request details, which is the Intake stage.
3. On the Enter Request Details activity card, fill in the information.
4. Select **Save**.
   A case is created with the information request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity.

Using the contextual side panel in Public Sector Digital Services Information Request Playbook

The contextual side panel provides you with the tools that can help you to research and resolve problems about your cases.

The contextual side panel in the CSM Configurable Workspace gives you access to information that can help you resolve information request cases.

It includes a column of icons that you can select to access different types of information.

The following table shows you the tabs that you should see on the contextual side panel in the Information Request Playbook.

Contextual side panel tabs

Field	Description
Record information icon	Relevant information about a record. In Service Request Playbook, the ribbon displays the record information, constituent details, the case timeline, and the active and inactive service level agreements (SLAs). For more information on how to view information about the ribbon in playbooks, see Viewing the ribbon information in Information Request Playbook.
Agent assist icon ( )	List of search results with the content that is related to the record that you are viewing. The content may include knowledge articles, recommended actions, or other records. For more information, see Agent assist Overview.
Attachments icon ( )	Ability for you to attach knowledge base content to a response to the requester in the activity stream.
Template icon ( )	Standard content that is related to resolving the issue. To create a template, select the template icon Create.
Response template icon ( )	Reusable messages that you can copy and paste into the cases and case tasks. For more information on using and creating response templates, see Use response templates in Information Request Playbook.
Dynamic Related Records icon ( )	Related records in the contextual side panel that dynamically change based on the context of the current record or playbook activity.
Activity stream icon	Ability for you to communicate with requesters and make internal notes about the work that is done on a record.

Use response templates in Information Request Playbook

Respond to cases by using the response templates in the contextual side panel in CSM Configurable Workspace. Good templates save you time by eliminating repetitive work.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

About this task

Selecting the response templates icon shows the reusable messages that you can copy and paste into cases and case tasks. For information on how to create response templates, see Create or modify a response template.

Procedure

1. In the CSM Configurable Workspace, open an information request task.
2. In the contextual side panel, select the response templates icon to display a list of the available templates.
3. In the Response Templates side panel, search for a template.
4. Select a template and then select **Copy** to copy the template to the clipboard.
   Paste the template text into the **Work notes** field or the **Additional comments** field.

Using the activity stream in Information Request Playbook

You can access the activity stream in the contextual side panel in CSM Configurable Workspace after you create an information request record using the Information Request Playbook. The activity stream enables you to communicate with requesters and make internal notes about the work that is done on a record, making it easier to relay and track information.

Using the activity stream

You can use an activity stream to communicate with requesters and track information on a record. The activity stream updates when the current activity in the playbook is updated.

You can access the activity stream by selecting the activity stream icon () in the contextual side panel.

Agent tasks in the activity stream

The following table lists the tasks that you can do in the activity stream.

Agent tasks

Task	Description
View posts for the case or case task	Current activity in the playbook work area that determines the information that is displayed in the activity stream. Scroll through the posts in the Activity section to view the case or task information.

Agent tasks (continued)

Task	Description
	At the top of the activity stream, select **Case** or **Task** to switch views.
Add work notes or comments	In the Compose section: 1. Select the **Work notes** or **Comments** activity. 2. Add the information to the text field. 3. Select **Post Work Notes** or **Post Comments**. The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.
Filter or search posts	At the top of the Activity section, select the filter icon ( ) to display the filter selections: • **Post types:** Select the types of posts to view, such as the work notes or attachments. • **Field changes:** Select the fields that you want to view the posts for in only those fields. • **Flagged:** Enable this button to view the posts that have been flagged as important. • **Filter sets**: Select two or more filters in this list. Search all activity posts by selecting the search icon ( ).
Sort posts	Sort the posts by the newest to the oldest or the oldest to the newest posts by selecting the sort icon ( )
Expand and collapse posts	Expand and collapse posts by selecting the more options icon (•••): • **Expand all posts**: Expands the posts to view additional details. • **Collapse all posts**: Returns the posts to their previous state.

Viewing the dynamic related records in Information Request Playbook

You can view the dynamic related records in the playbook contextual side panel in CSM Configurable Workspace. These records dynamically change based on the current record or playbook activity.

Using related records in Information Request Playbook

You can view, search, and sort the records in the **Related Records** tab in the contextual side panel after you create an information request record.

The **Related Records** tab displays the related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the **Related Records** tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

Types of related records

The related records appear in the list as a read-only card. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list. Depending on the related record configuration for the source record or playbook activity, you can see the following types of related records:

- Similar Information Requests
- Open Case Tasks
- Related Work Orders
- Blocked Tasks
- Emails
- Approvals
- SLAs
- Escalations for the case

Customizing the related records view

The following table lists the customization options for the related records view.

Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon (☰) that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You

Customizing the Related records view (continued)

Task	Description
	can also use the filter to see the current selection. For more information, see Customizing the related records view in Service Request Playbook.
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. For more information, see Customizing the related records view in Service Request Playbook.
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record. In the subtab, you can view the record details and perform the available actions.
Open the related record list in a list view in a subtab	List view icon ( ) to display the related records in a list view in a subtab under the parent record.
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record.

Viewing the ribbon information in Information Request Playbook

You can view the information about the ribbon in the contextual side panel in CSM Configurable Workspace. The ribbon displays the important information about the case, such as the information request record information, constituent contact details, and the case timeline.

Select the record information icon ( ) in the contextual side panel to view the information about the ribbon.

You can see the information about the fields in the contextual side panel in the following table.

Contextual Side Panel Ribbon fields

Field	Definition
Record Information	Fields, case record number, short description, stage, state, and address.
Requester Overview Card	Details about the constituent and contact for the case.
Timeline	Chronological summary of the case activities, including the case state changes and interactions between the agent and the customer. You can also see how much time that the agent and customer spent on the case.

Contextual Side Panel Ribbon fields (continued)

Field	Definition
SLAs	Active service level agreements (SLAs) for the case, including the time remaining, the SLA state, and any breaches.

Track government information requests by using Information Request Playbook

Track all the information requests that are assigned to you or other agents in your government agency by using the Information Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager

About this task

When you select a case, a form opens with the following sections:

- A conversation of the interaction between the requester and the information request case agent.
- The action that needs to be taken on the user's part, such as accepting or rejecting a case outcome.
- The case details, including the case number and status.
- Any attached files.

Procedure

1. Open the Information Request Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **Information Requests** list and select **All**.
3. In the Information Requests section, select a list that is described in the following table.

Information Request Lists

List	Description
All	All information request cases that the agent has access to.
My Cases	All information request cases assigned to the agent.
My Open	Open cases assigned to the information request case agent.
Unassigned for my group	Cases that belong to any of the information request case agent's groups but haven't been assigned to an agent.

For a detailed description of the fields under each list, see Information Request case form.

Resolving an information request case by using playbooks in Public Sector Digital Services

You can use playbooks to create cases and to complete the tasks and activities that are needed to resolve specific types of cases.

Overview

Note: Verify that the Information Request Playbook application, which is separate from the Public Sector Digital Services Core application, has been installed and configured. For instructions, see Install and configure the Information Request Playbook application.

By default, the following stages are available to you as an information request case agent in the Information Request Playbook in the CSM Configurable Workspace.

- Intake
- Review
- Processing
- Decision

Stages in an Information Request Playbook

The Information Request Playbook experience starts with the Intake stage. This stage is the default playbook stage for a new information request case. Use this playbook stage to gather information about the requester, the documents being requested, and any exemption categories that the request falls into. You can also request additional information from the requester.

The playbook continues with the Review stage. In this stage, you can do the initial troubleshooting on the case, evaluate similar or duplicate requests, and determine whether the information requested can be released and if a fee needs to be charged. You can move the case to the next stage when the requester accepts the fee, or if a fee waiver is submitted and approved.

The playbook continues with the Process stage. In this stage, you can assess resources, request a fee approval, create case tasks, and add or request new information before the case resolution begins. The case status changes to Work in Progress once the fee payment is processed or waived. The case is then sent for legal review. After legal review is complete, the case is moved to the Decision stage. You may solicit additional information from the requester at any time during this stage.

The final stage of the Information Request Playbook is the Decision stage. At the Decision stage, the status of the case is updated from Review in Progress to Ready for Decision after the case has passed legal review. A notification is sent to the requester that lets them know that case approval has been has obtained and the requested documents have been uploaded. The requester can then either accept or reject the document. If the requester accepts the documents, the case is automatically closed. If the requester rejects the solution, the case is reopened, and the agent must propose another outcome.

Complete the Intake stage in Information Request Playbook

Complete the Intake stage as your first step in resolving a case using the Information Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists** > **Information Requests** > **All**.
2. Select **New**.

The Information Request Playbook opens and initiates the first activity for collecting the request details.

3. On the Enter Request Details activity card, fill in the information.
4. Select **Save**.
   A case is created with the information request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity. If you have enabled the Similar Request documents UI activity, this will display as the second activity. For more information, see Configure Similar Request Documents UI in Information Request Playbook.
5. Optional: Select a related document to link it to the request, and select **Next**.
6. Review the details of the case and make updates if needed.
7. Select **Submit**.
8. Select **Assign to me**.
9. Select **Move to review**.
   The Intake stage is now complete and the case is moved to the Review stage.

Complete the Review stage in Information Request Playbook

Complete the Review stage as your second step in resolving a case using the Information Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Review the files attached to the case, and confirm that the requester has included the required documents to validate their identity by selecting the boxes associated with the document type.
2. Select **Mark as Complete**.
3. Select any exemptions that apply to the case, and select **Mark as Complete**.
   If no exemptions apply to the case, select **No exemption code(s) applicable**.
4. Do one of the following actions depending on whether you have similar or linked completed requests.

Options	Steps
If there are no similar or linked completed requests	Select **Mark as Complete**.
If there are similar or linked completed re-quests	Review them to see if any are relevant to the current request.

5. Estimate the fees associated with this request by using the fee estimator.
   The fee estimator can only be run once.
6. Enter details on the fee estimate in the work notes, then select **Request Fee Approval**.
   If the requester qualifies for a fee waiver, enter that information here. The fee estimate is now sent to billing to be approved. Once the fee estimate has been approved, mark the step as complete.

7. Select **Send for Requester Approval** to send the fee estimate to the requester.

   This activity will automatically be marked complete once the requester has approved the fee, and the case will be moved to the Process Payment activity.

8. Verify the payment has been sent, and select **Move to Process**.
   The Review stage is now complete and the case is moved to the Process stage.

Complete the Process stage in Information Request Playbook

Complete the Process stage as your third step in resolving a case using the Information Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Upload the documents needed to fill this request by selecting **New Document** or **Link Document**.
2. Move to the next activity by selecting **Prepare for Review**.
3. Enter any additional work notes or details needed for legal review, and then select **Send for Legal Review**.
   A case task is now created and assigned to the Legal Review assignment group for approval. If the uploaded documents are rejected during the legal review, you may need to make changes and request a review again or move the case directly to the Decision stage.
4. After the legal review is complete, select **Mark as Complete**.
   The case is moved to the Final Review Pre-release activity, where the documents and details of the request are reviewed by the Final Review Team assignment group.
5. After the documents have been approved by the Final Review Team, select **Move to Decision**.
   The Process stage is complete and the case is moved to the Decision stage.

Complete the Decision stage in Information Request Playbook

Complete the Decision stage as your last step in resolving a case using the Information Request Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Enter any work notes for the customer or other users on the case watch-list, and then select **Release** to release the information to the requester.
2. Optional: If the requester has opted to be notified by mail, in the work notes, verify that the notice has been sent by mail and select **Mark as Complete**.
3. Optional: If the requester has opted to be notified by phone, in the work notes, verify that the notice has been sent by phone and select **Mark as Complete**.
4. Review the resolution code and resolution notes, and select **Propose solution**.

All case tasks must be closed before an agent can propose a solution to the case. A notification is sent to the constituent that lets them know that the request is completed. The constituent can either accept or reject the proposal. If the constituent accepts the proposal, the case is automatically closed. If the constituent rejects the solution, the case is reopened, and the agent must propose another outcome.

Add Multiple Parties to a record in Information Request Playbook

As a government agent, you can add other business contacts or constituents to an information request application.

Before you begin
Role required: admin

Procedure

1. Open the Information Request Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **Information Requests** list and select **All**.
3. Open the Information Request case you wish to add multiple related parties to.

   Note: Related parties can only be edited if the case is in the **Intake** or **Review** stage.

4. Navigate to the **Add related parties** activity in the Intake stage of Information Request Playbook.
5. Select **Add Related Party**.
6. Select the Type and Responsibility of the related party in the dropdown, then enter their contact name in the Contact field to look up existing contacts that match this name.

   Note: All information request co-applicants must be registered on the Government Service Portal to be included on a information request application. Each co-applicant can create an account by registering on the Government Service Portal, or a government service agent can create a business contact account for them. For information on how agents can create a business contact record from information entered in an Information Request application, see Create a business record in CSM Configurable Workspace.

7. Select **Save**.
8. Repeat steps 5-7 to add as many related parties as needed.
9. Select **Mark as Complete**.

Using License and Permit Playbooks

If you're an license and permits case agent or manager, you can use the License and Permits Playbook to manage and resolve requests for licenses and permits.

Overview

A playbook provides you with step-by-step guidance through the life cycle of a license and permits request case.

The License and Permit Playbook automatically appears in the **Playbook** tab when you create an license and permit request case by using the CSM Configurable Workspace.

A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete. When using a playbook, you can:

- View the playbook stages and activities.
- Select an activity and perform the work to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities to resolve the case.

The workflows for a type of case and the activities that you need to resolve these cases are in the playbook. By using a playbook, you can visualize the entire life cycle of the information request workflow.

Playbook stages

Like other PSDS playbooks, this playbook contains four stages (i.e., Intake, Review, Process, and Decision) and several activities in each stage. Below is a diagram illustrating the base License & Permit playbook workflow. This workflow can be modified to match a specific license/permit use case.

The License and Permit Playbook stages are listed in the following table.

Playbook stages

Task	Description
Intake	Guides you through the record creation process by capturing the details of the license and permit request and assigning it to the right agent.
Review	Acts as a checkpoint for duplicate cases and provides you with an opportunity to review the case details.
Process	Guides you through the activities for the license and permit request fulfillment.
Decision	Captures and communicates the documents and information to the constituent and any other agents or involved parties.

Playbook layout

A playbook is made up of several areas, including the playbook life cycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook.

The default activity view for the License and Permit Playbook is the Process-based experience view. This view, which is shown in the following example, shows constituent or business information and case task information at the forefront of the playbook work area as you work on it.

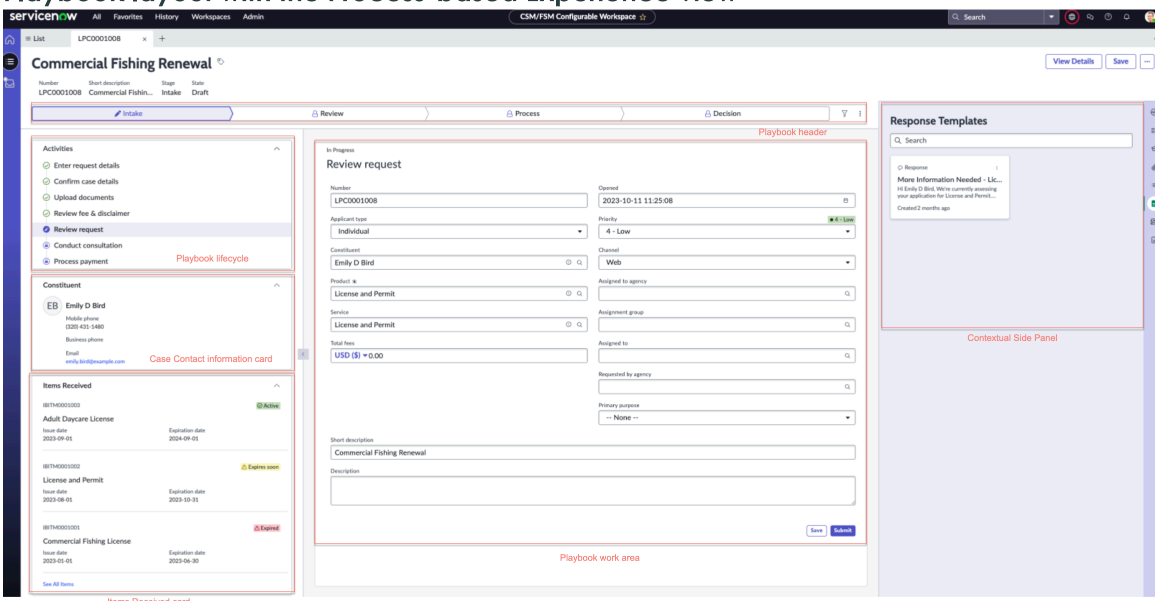
The process-based playbook layout shows the following features:

- A horizontal stage picker that gives the agent a complete view of the entire process and where they currently are in that process. Agents can use the stage picker to track their overall progress as they work on cases.

- Record information on the left side of the page, such as the contact information that is always available.

- Related records in the contextual side panel supported by the dynamic related records component.

Playbook layout with the Process-based Experience view



The following table shows the components that you can see in the License and Permit Playbook workspace.

Playbook components

Playbook area	Description
Playbook header	• Appears at the top of the playbook. • Shows the title of the playbook and a horizontal stage picker that displays progress through the playbook stages. • Includes a filter that you can use to filter the activities by the assigned user or the activity status. • Includes the Playbook Actions menu that you can use to select the playbook-level and activity-level actions.

Playbook components (continued)

Playbook area	Description
Playbook Lifecycle	• Appears in a panel on the left side of the playbook. • Displays a list of the activities for each stage.] • With the horizontal stage layout, you can expand or collapse the entire list of activities for the current stage.
Playbook work area	• Appears in the middle of the playbook. • Displays the card for the current activity.
Contextual side panel	• Appears on the right side of the playbook. • Includes the tabs that you can use to display the following types of information: ◦ Case or case task activity stream. ◦ Ribbon information such as the case overview, customer details, timeline, and service level agreements (SLAs). ◦ Dynamic related records. For more information, see Dynamic related records.
Case Information Contact Card	• Contact information for the constituent or business that submitted the request. • Appears in a panel on the left side of the playbook.
Items Received Card	• Appears on the left side of the playbook. • Shows licenses/permits that are active, expired, and expiring soon, and the time remaining on each one.

For more information on process-based layouts and process-based variants in the CSM Configurable Workspace, see Process page variants.

Resolving a license and permit case using License and Permit Playbook

You can use playbooks to create cases and to complete the tasks and activities that are needed to resolve specific types of cases.

Overview

Note: Verify that the License and Permit Playbook application, which is separate from the Public Sector Digital Services Core application, has been installed and configured. For instructions, seeInstall and configure the License and Permit Playbook application.

By default, the following stages are available to you as a government service agent in the License and Permit Playbook in the CSM Configurable Workspace.

- Intake
- Review
- Processing
- Decision

Case Stages in License and Permit Playbook

The License and Permit Playbook experience starts with the **Intake** stage. This stage is the default playbook stage for a new license and permit request case.

Use this playbook stage to gather and confirm information about the requester, the license or permit being requested, whether the requester is eligible for this type of license or permit, and whether they are exempt from the fees associated with the license or permit.

You can also request additional information from the requester at this stage, upload additional documents, add additional comments, add related parties, and schedule a consultation through the work notes.

If the case was submitted by a constituent through the Government Service Portal, the constituent will be able to upload documents, and review the fees and disclaimers associated with the license or permit application before the case continues.

At the end of the Intake stage, agents must enter details about the payment that was processed or waived.

The playbook continues with the **Review** stage. In this stage, you can do the initial troubleshooting on the case, verify supporting documents and credentials, and set up any inspections needed for license or permit approval.

You can move the case to the next stage when details are provided in the work notes on the inspections (open work orders or work performed during) or verifying documents.

The playbook continues with the **Process** stage. In this stage, the case might be routed to a higher-tier agent, who can assess the entire request for the license or permit, approve a fee exemption, create case tasks, request or perform additional inspections, and add or request additional information.

Once requests for any additional information and any open case tasks are complete, the case is moved to Propose Decision. Additional information may be solicited from the requester at any time during this stage.

After the decision, often made by a higher-tier agent, is proposed, it is routed to the original agent, who may request or perform their own additional inspections, and add or request more information. This agent then has the option of confirming or vetoing the decision proposal of the other agent.

The final stage of the License and Permit Playbook is the **Decision** stage.

At the Decision stage, the status of the license or permit is changed to Granted, and the license or permit can be generated and sent. A notification is sent to the requester that lets them know that license or permit approval has been has obtained and the requested license or permit has been generated and delivered via the Government Service Portal.

The requester can then either accept or reject the license or permit. If the requester accepts the outcome, the case is automatically closed. If the requester rejects the solution, the case is reopened, and the agent must propose another outcome.

A request for a license or permit may also be conditionally approved, or denied. The agent can specify why in the work notes.

Complete the Intake stage in License and Permit Playbook

Complete the Intake stage as your first step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists** > **Information Requests** > **All**.
2. Select **New**.
   The License and Permit Playbook opens and initiates the first activity for collecting the request details.
3. On the Enter Request Details activity card, fill in the information.
4. Select **Save**.
   A case is created with the information request information. The case number is added to the tab and the first activity in the Intake stage is marked as complete. The second activity in this stage is highlighted as the current activity. If you have enabled the Similar Request documents UI activity, this will display as the second activity. For more information, see Configure Similar Request Documents UI in Information Request Playbook.
5. Optional: Select a related document to link it to the request, and select **Next**.
6. Review the details of the case and make updates if needed.
7. Select **Submit**.
8. Select **Assign to me**.
9. Select **Move to review**.
   The Intake stage is now complete and the case is moved to the Review stage.

Complete the Review stage in License and Permit Playbook

Complete the Review stage as your second step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Review the files attached to the case, and confirm that the requester has included the required documents to validate their identity by selecting the boxes associated with the document type.
2. Select **Mark as Complete**.
3. Select any exemptions that apply to the case, and select **Mark as Complete**.
   If no exemptions apply to the case, select **No exemption code(s) applicable**.
4. Do one of the following actions depending on whether you have similar or linked completed requests.

Options	Steps
If there are no similar or linked completed requests	Select **Mark as Complete**.
If there are similar or linked completed requests	Review them to see if any are relevant to the current request.

5. Estimate the fees associated with this request by using the fee estimator.
   The fee estimator can only be run once.
6. Enter details on the fee estimate in the work notes, then select **Request Fee Approval**.
   If the requester qualifies for a fee waiver, enter that information here. The fee estimate is now sent to billing to be approved. Once the fee estimate has been approved, mark the step as complete.
7. Select **Send for Requester Approval** to send the fee estimate to the requester.

   This activity will automatically be marked complete once the requester has approved the fee, and the case will be moved to the Process Payment activity.

8. Verify the payment has been sent, and select **Move to Process**.
   The Review stage is now complete and the case is moved to the Process stage.

Complete the Process stage in License and Permit Playbook

Complete the Process stage as your third step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Upload the documents needed to fill this request by selecting **New Document** or **Link Document**.
2. Move to the next activity by selecting **Prepare for Review**.
3. Enter any additional work notes or details needed for legal review, and then select **Send for Legal Review**.
   A case task is now created and assigned to the Legal Review assignment group for approval. If the uploaded documents are rejected during the legal review, you may need to make changes and request a review again or move the case directly to the Decision stage.

4. After the legal review is complete, select **Mark as Complete**.
   The case is moved to the Final Review Pre-release activity, where the documents and details of the request are reviewed by the Final Review Team assignment group.
5. After the documents have been approved by the Final Review Team, select **Move to Decision**.
   The Process stage is complete and the case is moved to the Decision stage.

Complete the Decision stage in License and Permit Playbook

Complete the Decision stage as your last step in resolving a case using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.relationship_agent, sn_gsm.government_service_manager, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, sn_gsm.agency_manager, sn_gsm.agency_agent

Procedure

1. Enter any work notes for the customer or other users on the case watch-list, and then select **Release** to release the information to the requester.
2. Optional: If the requester has opted to be notified by mail, in the work notes, verify that the notice has been sent by mail and select **Mark as Complete**.
3. Optional: If the requester has opted to be notified by phone, in the work notes, verify that the notice has been sent by phone and select **Mark as Complete**.
4. Review the resolution code and resolution notes, and select **Propose solution**.
   All case tasks must be closed before an agent can propose a solution to the case.
   A notification is sent to the constituent that lets them know that the request is completed. The constituent can either accept or reject the proposal. If the constituent accepts the proposal, the case is automatically closed. If the constituent rejects the solution, the case is reopened, and the agent must propose another outcome.

Track license and permit requests by using License and Permit Playbook

Track all the license and permit requests that are assigned to you or other agents in your government agency by using the License and Permit Playbook.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, and sn_gsm.service_manager, sn_gsm_lic_prmt.case_task_agent, sn_gsm_lic_prmt.case_task_agent, sn_gsm_lic_prmt.government_service_manager

About this task

When you select a case, a form opens with the following sections:

- A record of activity on the case, including added attachments or any interactions between the requester and the license and permit request case agent.
- Tasks or actions that need to be taken on the user's part, such as accepting or rejecting a case outcome.
- The case details, including contact information, the case number, and the case's stage and status.
- Any attached files.

Procedure

1. Open the License and Permit Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **License and Permit Requests** list and select **All**.
3. In the License and Permit Requests section, select a list that is described in the following table.

License and Permit Request Lists

List	Description
All	All license and permit request cases that the agent has access to.
My Cases	All license and permit request cases assigned to the agent.
My Open	Open cases assigned to the license and permit request case agent.
Unassigned for my group	Cases that belong to any of the license and permit request case agent's groups but haven't been assigned to an agent.

Create a License and Permit request on behalf of a constituent or business

Government service agents can create requests on behalf of constituents or business from the Government Service Portal. Constituents can also create and submit license/permit requests on behalf of someone else through the Government Service Portal.

Before you begin

Role required: admin

Procedure

1. In the CSM Configurable Workspace, navigate to **Lists** > **License & Permit Requests** > **All**.
2. Select **New** to create a case.
3. Select **General License/Permit** under the Service dropdown, and **New License/Permit Request** under the Case Type dropdown.
4. Select **Create Case**.
   The License and Permit Playbook opens and initiates the first activity for collecting the request details.
5. On the Enter Application Details activity card, confirm the applicant's eligibility and select **Continue**.
6. On the form, fill in the fields with the requester's contact information and details of the request.
7. Under Representation, select the checkbox for **Requesting on behalf of someone else**.
8. Enter the name of the constituent or business that the requester is submitting the application on behalf of, and select **Save**.

   Note: All license/permit co-applicants must have a business contact account associated with your business to be included on a license/permit application. Each contact can create an account by registering on the Government Service Portal, or a government service agent can create a business contact record for them. For information on how agents can create a business contact record from information entered in a License and Permit application, see Create a business contact account from license or permit application data.

9. Optional: Select any add-ons, such as permit endorsements.
   You may add more than one. The pricing of the license or permit varies with each selection or combination of selections.
10. Review the fees associated with the requester's choices.
    The fee total changes dynamically based on the options selected. If the constituent or requester is fee exempt, select the **Fee Waiver** checkbox and enter a justification to claim an exemption for them.
11. Select **Submit** to move to the next activity.
12. Add any additional related parties.
    Related parties may include business partners, managers, or any business contact who may need access to this license/permit. They must be contacts already registered on the Government Service Portal and associated with your business.
13. Select **Mark Complete**.

Result
A case is created with the license or permit request information and all related parties, and is now routed to the constituent via the Government Service Portal, where they can upload any applicable identity documents, credentials, or supporting documentation required for this license/permit request. The case continues once the constituent has uploaded these documents.

Using the contextual side panel in Public Sector Digital Services License and Permit Playbook

The contextual side panel provides you with the tools that can help you to research and resolve problems about your cases.

The contextual side panel in the CSM Configurable Workspace gives you access to information that can help you resolve license and permit request cases.

It includes a column of icons that you can select to access different types of information.

The following table shows you the tabs that you should see on the contextual side panel in the License and Permit Playbook.

Contextual side panel tabs

Field	Description
Record information icon	Relevant information about a record. In License and Permit Playbook, the ribbon displays the record information, constituent details, the case timeline, and the active and inactive service level agreements (SLAs). For more information on how to view information about the ribbon in playbooks, see Viewing the ribbon information in License and Permit Playbook.
Activity stream icon	Ability for you to communicate with requesters and make internal notes about the work that is done on a record.

Contextual side panel tabs (continued)

Field	Description
Attachments icon ( )	Ability for you to attach knowledge base content to a response to the requester in the activity stream.
Dynamic Related Records icon ( )	Related records in the contextual side panel that dynamically change based on the context of the current record or playbook activity.
Email template icon ( )	Reusable messages that you can copy and paste into the cases and case tasks. For more information on using and creating response templates, see Use response templates in License and Permit Playbook.
Template icon ( )	Standard content that is related to resolving the issue. To create a template, select the template icon Create.

Use response templates in License and Permit Playbook

Respond to cases by using the response templates in the contextual side panel in CSM Configurable Workspace. Good templates save you time by eliminating repetitive work. Response templates replace the static text with details from the license/permit application.

Before you begin

Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager, sn_gsm.case_task_agent

About this task

Selecting the response templates icon shows the reusable messages that you can copy and paste into cases and case tasks.

In License and Permit Playbook,Response Templates replace the static text with details from the license/permit application, such as:

- Constituent or Business Contact Name
- License/permit application Number
- License/permit application submission date
- Short description
- Address Information
- Assigned to

For information on how to create response templates, see Create or modify a response template.

Procedure

1. In the CSM Configurable Workspace, open an information request task.
2. In the contextual side panel, select the response templates icon to display a list of the available templates.

3. In the Response Templates side panel, search for a template.
4. Select a template and then select **Copy** to copy the template to the clipboard.
   Paste the template text into the **Work notes** field or the **Additional comments** field.

Using the activity stream in License and Permit Playbook

You can access the activity stream in the contextual side panel in CSM Configurable Workspace after you create an license and permit request record using the License and Permit Playbook. The activity stream enables you to communicate with requesters and make internal notes about the work that is done on a record, making it easier to relay and track information.

Using the activity stream

You can use an activity stream to communicate with requesters and track information on a record. The activity stream updates when the current activity in the playbook is updated.

You can access the activity stream by selecting the activity stream icon (☰▯) in the contextual side panel.

Agent tasks in the activity stream

The following table lists the tasks that you can do in the activity stream.

Agent tasks

Task	Description
View posts for the case or case task	Current activity in the playbook work area that determines the information that is displayed in the activity stream. Scroll through the posts in the Activity section to view the case or task information. At the top of the activity stream, select **Case** or **Task** to switch views.
Add work notes or comments	In the Compose section: 1. Select the **Work notes** or **Comments** activity. 2. Add the information to the text field. 3. Select **Post Work Notes** or **Post Comments**. The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.
Filter or search posts	At the top of the Activity section, select the filter icon (⛛) to display the filter selections:

Agent tasks (continued)

Task	Description
	• **Post types:** Select the types of posts to view, such as the work notes or attachments. • **Field changes:** Select the fields that you want to view the posts for in only those fields. • **Flagged:** Enable this button to view the posts that have been flagged as important. • **Filter sets**: Select two or more filters in this list. Search all activity posts by selecting the search icon ( ).
Sort posts	Sort the posts by the newest to the oldest or the oldest to the newest posts by selecting the sort icon ( )
Expand and collapse posts	Expand and collapse posts by selecting the more options icon ( ): • **Expand all posts**: Expands the posts to view additional details. • **Collapse all posts**: Returns the posts to their previous state.

Viewing the dynamic related records in License and Permit Playbook

You can view the dynamic related records in the playbook contextual side panel in CSM Configurable Workspace. These records dynamically change based on the current record or playbook activity.

Using related records in License and Permit Playbook

You can view, search, and sort the records in the **Related Records** tab in the contextual side panel after you create an license and permit request record.

The **Related Records** tab displays the related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the **Related Records** tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

Different related records appear based on each playbook stage and step. At the Intake and Review stages, the agent should see similar Closed License/Permit Requests, so they can compare the outcome of similar requests. At the Process and Decision stages, agents should see any Open Case Tasks that are preventing the case from moving to the next step, or being resolved and closed.

Types of related records

The related records appear in the list as a read-only card. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list. Depending on the related record configuration for the source record or playbook activity, you can see the following types of related records:

- SLAs
- Escalations
- Blocked By
- Open Case Tasks
- Similar License/Permit Requests
- Emails
- Draft Emails
- Documents
- Approvals
- Knowledge Gaps
- Install Base
- Attached Knowledge
- Requests
- Interactions
- Related Cases
- Special Handling Notes
- Appointments
- Related Parties

Customizing the related records view

The following table lists the customization options for the related records view.

Customizing the Related records view

Task	Description
View the related records in the contextual side panel	Related Records icon (☰) that you can select to view the Related Records list. Related records appear as a card format in the list. The initial set of records that display in the list is determined by the record type that you select in the filter at the top of the list.
Select the type of related record to view	Filter at the top of the Related Records list where you can select the type of related records to view. You can also use the filter to see the current selection. For

Customizing the Related records view (continued)

Task	Description
	more information, see Customizing the related records view in Service Request Playbook.
Search the related records list	Search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. For more information, see Customizing the related records view in Service Request Playbook.
Open a related record in a subtab	Card in the Related Records list that you can use to open the record in a subtab under the parent record. In the subtab, you can view the record details and perform the available actions.
Open the related record list in a list view in a subtab	List view icon () to display the related records in a list view in a subtab under the parent record.
Create a new record for the selected related list	New record for the record type that is currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record.

Viewing the ribbon information in License and Permit Playbook

You can view the information about the ribbon in the contextual side panel in CSM Configurable Workspace. The ribbon displays the important information about the case, such as the information request record information, constituent contact details, and the case timeline.

Select the record information icon () in the contextual side panel to view the information about the ribbon.

You can see the information about the fields in the contextual side panel in the following table.

Contextual Side Panel Ribbon fields

Field	Definition
Record Information	Case record number, short description, stage, state.
Requester Overview Card	Details about the constituent and contact for the case.
Timeline	Chronological summary of the case activities, including the case state changes and interactions between the agent and the constituent/business. You can also see how much time that the agent and user spent on the case.
SLAs	Active service level agreements (SLAs) for the case, including the time remaining, the SLA state, and any breaches.

Add Multiple Parties to a record in License and Permit Playbook

As a government agent, you can add other business contacts or constituents to a license or permit application.

Before you begin

Role required: admin

Procedure

1. Open the License and Permit Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **License and Permit Requests** list and select **All**.
3. Open the License or Permit Request case you wish to add multiple related parties to.

   Note: Related parties can only be edited if the case is in the **Intake** or **Review** stage.

4. Navigate to the **Add related parties** activity in the Intake stage of License and Permit Playbook.
5. Select **Add Related Party**.
6. Select the Type and Responsibility of the related party in the dropdown, then enter their contact name in the Contact field to look up existing contacts that match this name.

   Note: All license/permit co-applicants must have a business contact account to be included on a license/permit application. Each contact can create an account by registering on the Government Service Portal, or a government service agent can create a business contact record for them. For information on how agents can create a business contact record from information entered in a License and Permit application, see Create a business contact account from license or permit application data.

7. Select **Save**.
8. Repeat steps 5-7 to add as many related parties as needed.
9. Select **Mark as Complete**.

Create a business contact account from license or permit application data

Use the contact information for related parties entered on a license or permit application to create new business contact accounts.

Before you begin

Role required: admin

Procedure

1. Navigate to the CSM Configurable Workspace and select **Interactions** > **All**.
2. Select the interaction number to open an existing interaction record, or select the new icon New to create an interaction.
3. Select the interaction type and assign the interaction to a user.
4. Optional: Enter a short description of the interaction.
5. Select **Save**.

6. Select **Create Business** and fill in the fields.
7. Select **Submit**.

Edit or remove a business contact or related party from a License and Permit Application

Additional business contacts can be edited or removed by a government service agent before a license or permit case reaches the Process stage.

Before you begin
Role required: admin

Procedure

1. Open the License and Permit Playbook by navigating to Lists in the CSM Configurable Workspace.
2. Navigate to the **License and Permit Requests** list and select **All**.
3. Open the License or Permit Request case you wish to remove a business contact from.

   Note: Related parties can only be edited if the case is in the **Intake** or **Review** stage.

4. Navigate to the **Add related parties** activity in the Intake stage of License and Permit Playbook.
5. Select the delete icon next to the business contact you wish to delete, or the edit icon next to the business contact you wish to edit.
6. Select **Save** once you are finished editing the related party information.
7. Select **Mark Complete** to save the activity.

Mobile Agent experience for Public Sector Digital Services

If you're a government agent, you can use the Mobile Agent on your mobile device to create, update, and monitor non-emergency requests in the Public Sector Digital Services application. You can also get an overview of your case load, including your new and active service request cases.

Use the Mobile Agent to review your case details and complete your case tasks. With a government service agent role, you can use the app to do the following tasks:

- Get a quick overview of your case load.
- Add comments or work notes to cases.
- Review your case details, activity stream, and related information, such as the service level agreements (SLAs), case tasks, and related cases.
- Edit case information.

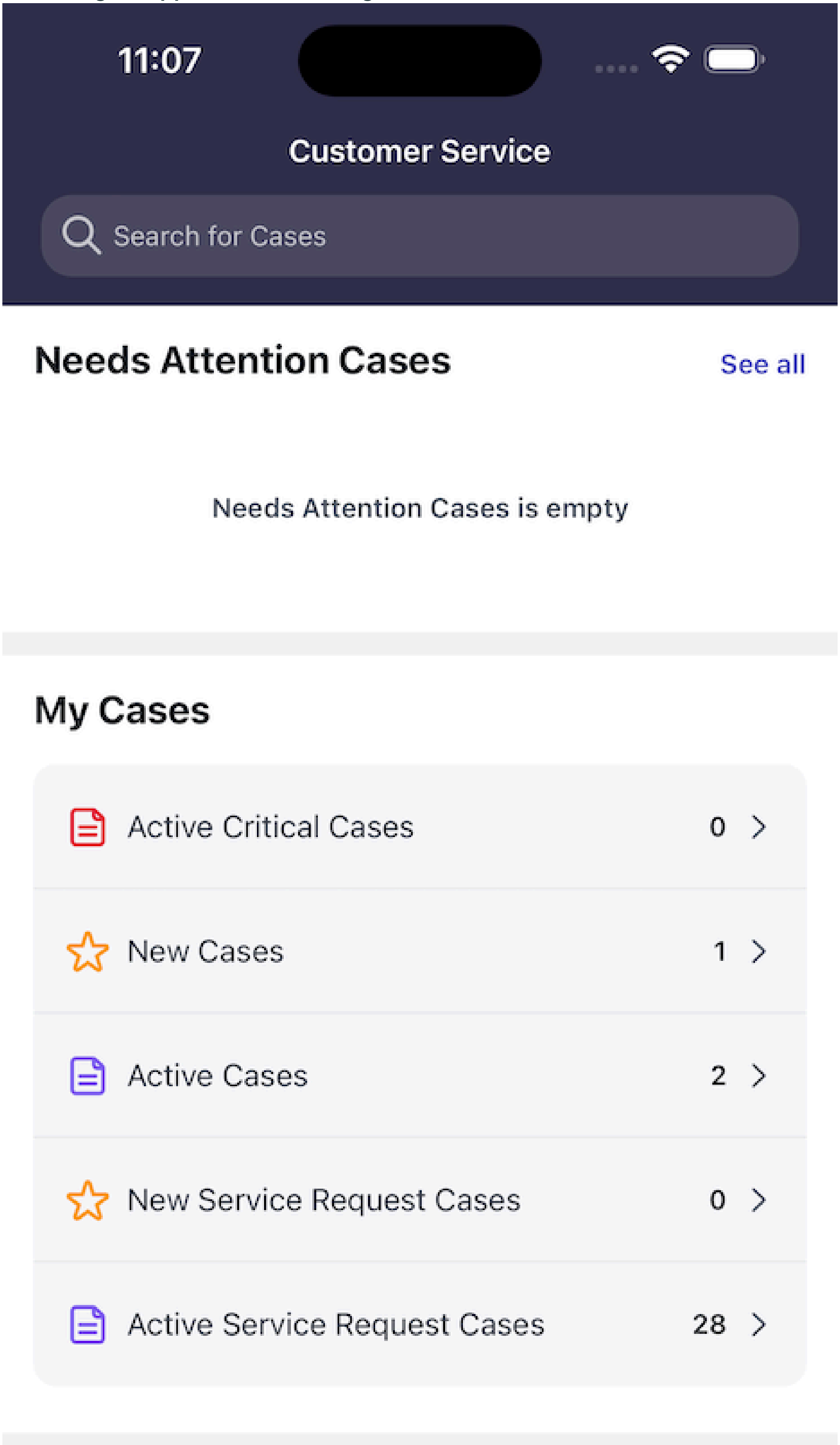
Note: To use the Mobile Agent, the required plugins must be enabled by an administrator. If you're an administrator, see Configure Mobile Agent for Service Request Playbook to get the information on configuring the Mobile Agent. For instructions on how to get started with the app after an administrator configures these settings, see Get started with the Customer Service mobile application.

Mobile Agent homepage

When you open the Mobile Agent and log in, an applet launcher is displayed with all the applets that are configured to that launcher.

The following example shows the homepage of the Mobile Agent, which displays an overview of cases.

Mobile Agent applet launcher for agents



The applet launcher includes all the applets that you need to address or resolve the service request cases. You have access to the following applets:

New Service Request Cases

All service request cases that are assigned to you in the **New** state.

Active Service Request Cases

All service request cases that you have access to but haven't been resolved or cancelled, including the cases in the **Open**, **Awaiting Info**, and **Resolved** states.

New Information Request Cases

All service request cases that are assigned to you in the **New** state.

Active Information Request Cases

All information request cases that you have access to but haven't been resolved or cancelled, including the cases in the **Open**, **Awaiting Info**, and **Resolved** states.

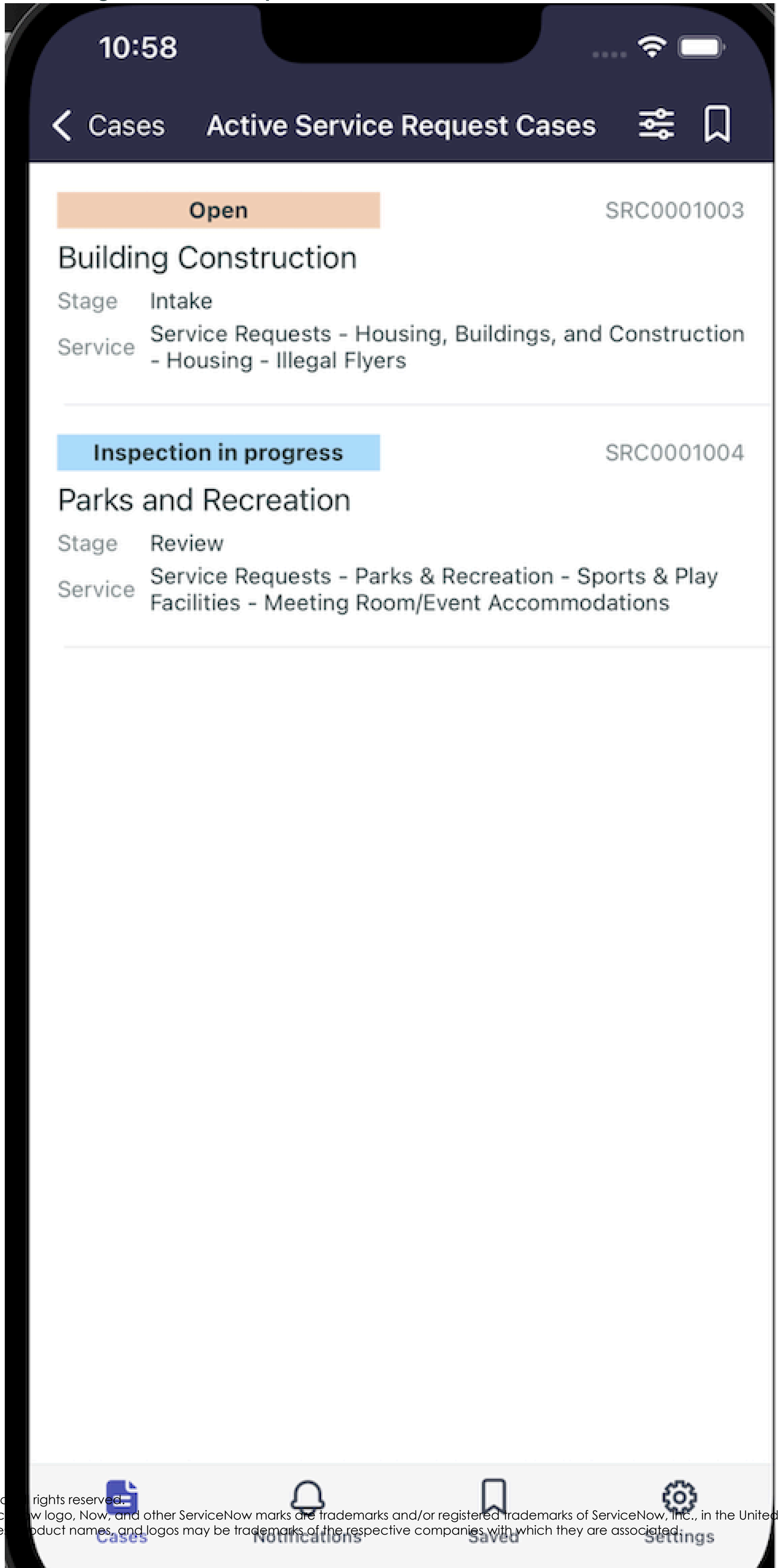
To launch an applet, select it in the app.

Applets and cards

Each applet on the applet launcher screen displays the records that correspond to the applet function. The Active Service Requests applet, for example, when tapped, displays a list of all the active service request case records.

The following example shows a service request card view with a list of all active service request case records.

Mobile Agent Service Request Case card list



The cases in the list are displayed as cards, and the state of the case is displayed at the top of the card. For more information on the case states, see Life cycle of a government service request case.

Select a card to see the case record details. For example, you can see the case activity, related lists, and case escalations, if any.

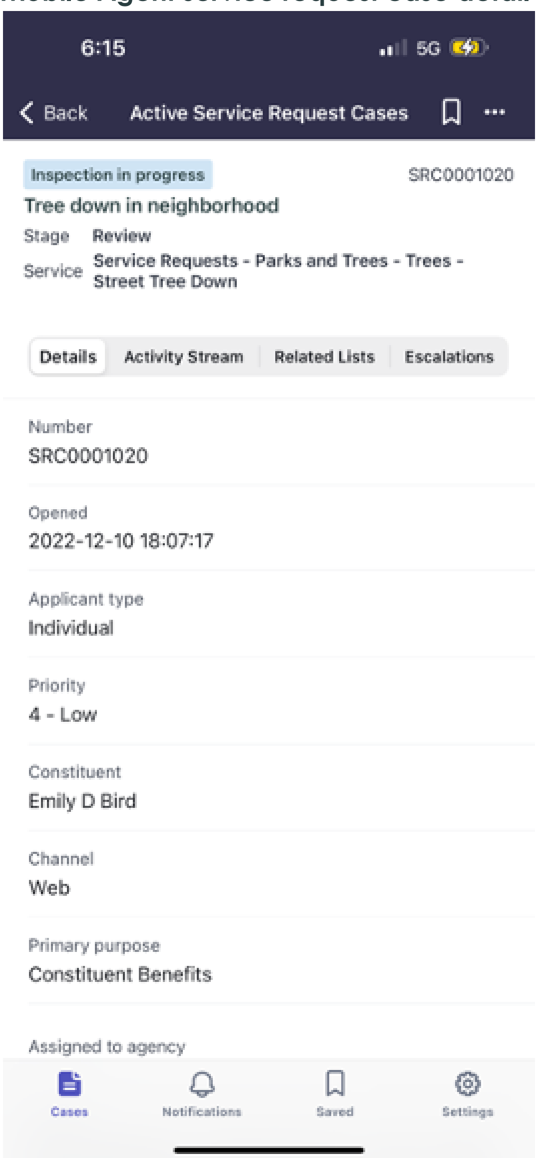
You can narrow down or sort the list of cases by using the filter icon ().

Service Request case cards in the Mobile Agent

The case cards in the Mobile Agent display information that is similar to what you would see if you were viewing a case in the CSM Configurable Workspace. For a full list of service request case fields and their descriptions, see Service Request case form.

The following example shows the case details card view. In this view, you can see the case number, case opened date, application type, priority, constituent, channel, primary purpose, and which agency is assigned to the case.

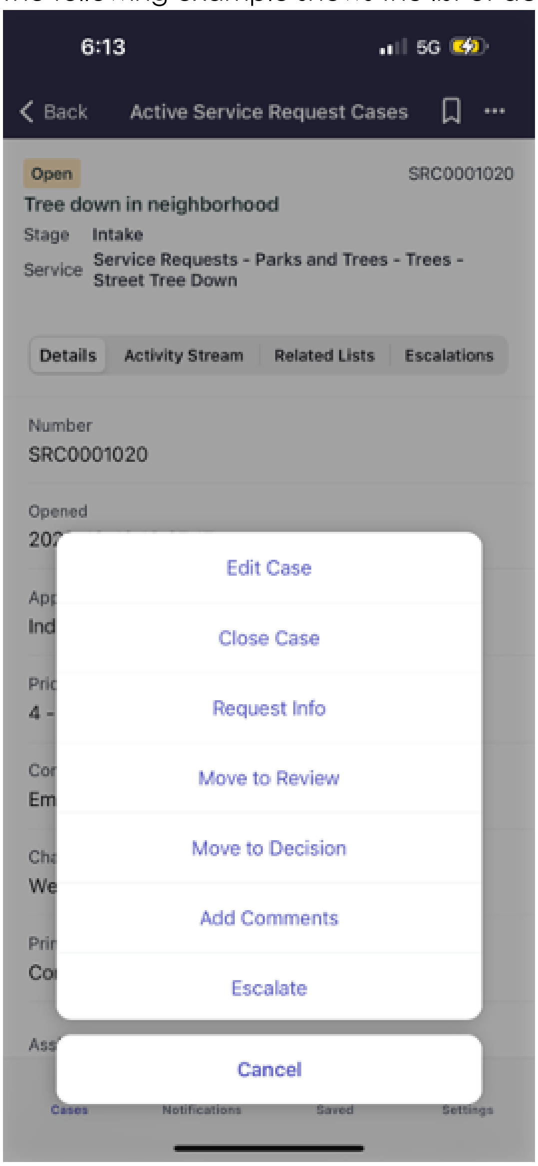
Mobile Agent service request case detail card



As an agent, you can take several actions on service request cases in the Mobile Agent from within the case cards. In the case detail view, you can select the More Actions icon ( ) to see a list of actions, and select the back button to return to the record list. These actions include:

- Editing the case.
- Closing the case.
- Requesting more information from the constituent or contact.
- Moving the case to review.
- Moving the case directly to a decision.
- Adding comments.
- Escalating the case.

The following example shows the list of actions that you can take for a service request case.



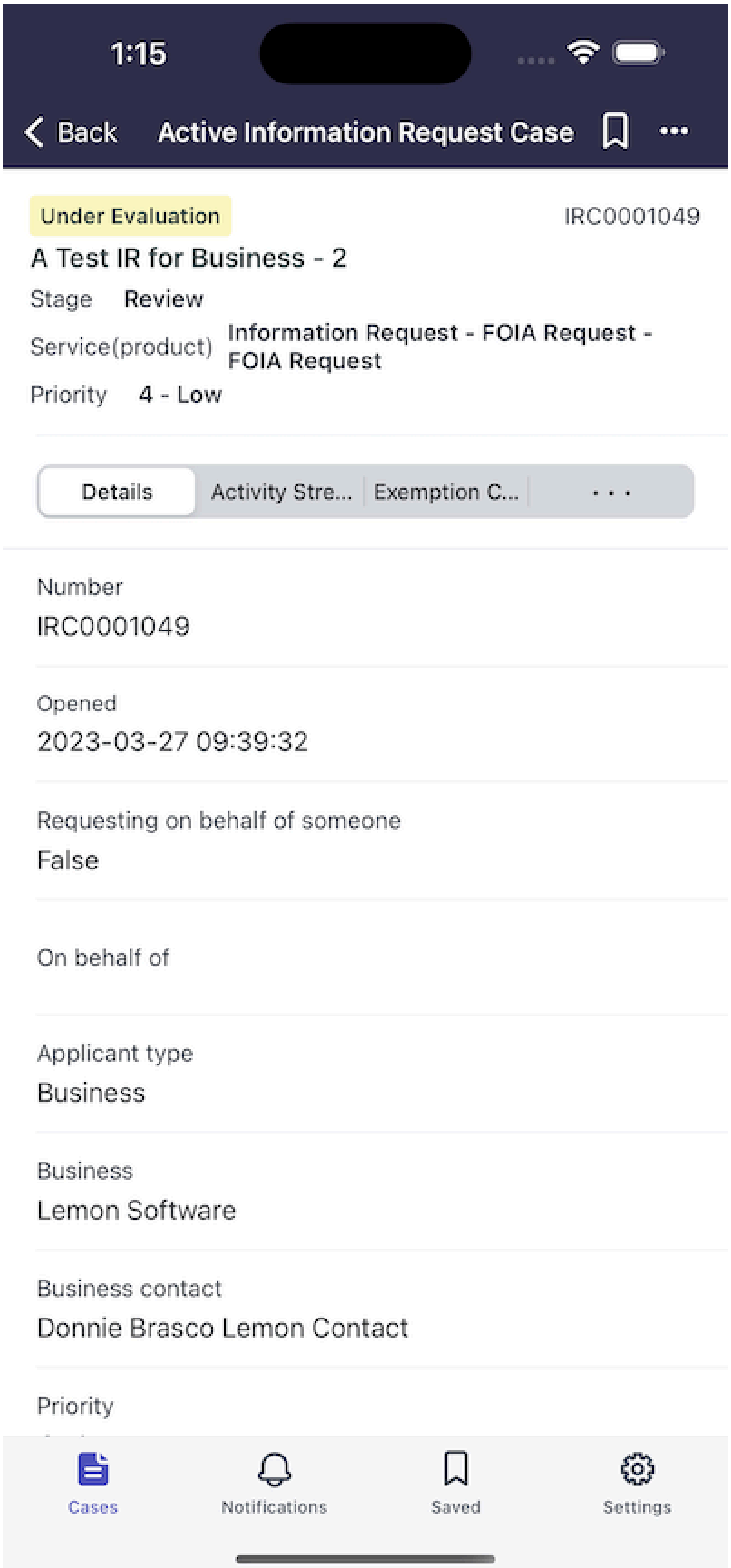
For more information on the agent tasks in the Mobile Agent, see Using the Mobile Agent to perform agent tasks.

Information Request case cards in the Mobile Agent

The case cards in the Mobile Agent display information that is similar to what you would see if you were viewing a case in the CSM Configurable Workspace. For a full list of information request case fields and their descriptions, see Information Request case form.

The following example shows the case details card view. In this view, you can see the case number, case opened date, application type, priority, contact, channel, primary purpose, and which agency is assigned to the case.

Mobile Agent information request case detail card

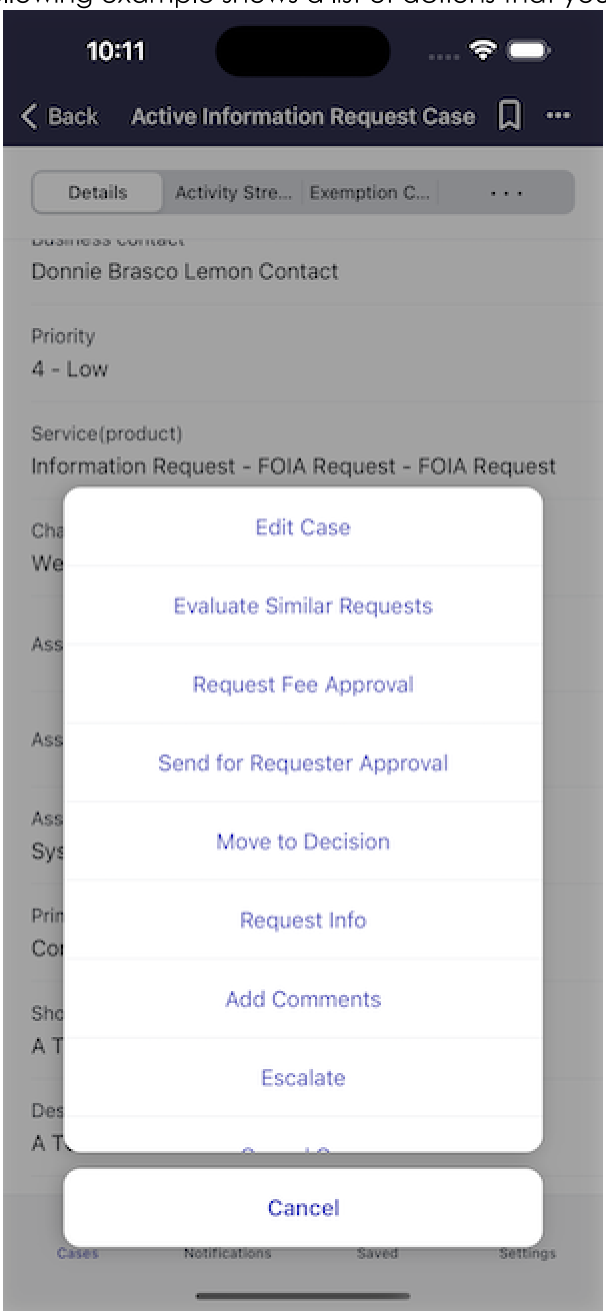


As an agent, you can take several actions on information request cases in the Mobile Agent from within the case cards. In the case detail view, you can select the More Actions icon

() to see a list of actions, and select the back button to return to the record list. These actions include:

- Editing the case.
- Closing the case.
- Requesting more information from the requester.
- Requesting fee approvals.
- Evaluating similar information requests.
- Moving the case directly to a decision.
- Adding comments.
- Escalating the case.

The following example shows a list of actions that you can take for an information request case.



For more information on the agent tasks in the Mobile Agent, see Using the Mobile Agent to perform agent tasks.

Navigation bar

The navigation bar appears at the bottom of the mobile application screen. This bar includes the following tabs:

Cases

Displays the main case page. Use this applet launcher to access the case management functionality.

Saved

Displays the saved cases or case lists.

Settings

Manages settings for the mobile application.

Related lists in the Mobile Agent

You can access the related lists that are listed in the following table from within the case details.

Related lists in the Mobile Agent app

Related list	Description
Work Orders	List of work orders that were created for this case. You must install the Field Service Management plugin (com.snc.work_management) to view the work orders.
Case Tasks	Displays a list of case tasks. You can view the following information for the case tasks in this list: • State • Number • Subject • Assigned to • Priority
SLAs	Displays a list of the service level agreements (SLAs) for a case. The following information for SLAs is included in this related list: • Task • SLA Stage • SLA Definition • Actual Elapsed Percentage • Actual Elapsed Time

Related lists in the Mobile Agent app (continued)

Related list	Description
Blocked Tasks	List of blocking tasks that have been created for this case. A blocking task is something that prevents you from making progress toward a case resolution.
Related Parties	List of related parties, such as the contacts or constituents that were added to the case.
Related Cases	Displays a list of the related cases for a case. You can view the following information for the related cases that are included in this list: • Case number • State • Short description • Contact Select a related or child case to view the additional details on the Case form.
Attached Knowledge	Knowledge articles that were attached as a proposed solution to the case.
Documents	List of attached documents for the case.

Using the Mobile Agent to perform agent tasks

If you're a government service agent, you can manage your cases and receive real-time updates on your mobile device with the Mobile Agent.

With the Mobile Agent, you can perform routine actions and approvals from your mobile device anytime and anywhere. The following table describes the tasks that you can perform with the Mobile Agent

whether you're triaging a service request case, or fulfilling an information request.

Government service agent tasks

Agent task	Steps
View a case	View the details of a case and determine if you need to make any changes or take any actions. 1. In the bottom navigation bar, select **Cases**. 2. Select **New** to create a case or select **Active** to see a list of the active service request cases. 3. Select a case to view its details. 4. Determine if you need to make any changes or take other actions. If so, perform any of the tasks in this table.

Government service agent tasks (continued)

Agent task	Steps
	For details on viewing a case in the Mobile Agent, see Track government service requests with the ServiceNow Mobile Agent app.
Edit a case	**1.** From the Service Requests list, open a case. **2.** Tap the More actions icon () and select **Edit Case**. For details on the case fields, see Service Request case form.
Add comments to a case	**1.** From the Service Requests list, open a case. **2.** Tap the More actions icon () and select **Add Comments**. **3.** In the**Work Notes** or **Additional Comments** fields, add your work notes or comments about the case. You can also add comments through the activity stream related list. For more information, see Using the activity stream in the Mobile Agent.
Propose a solution for a case	**1.** Tap the More actions icon () and select **Propose Solution**. **2.** In the **Resolution Code** and **Resolution Notes** fields, add the code and notes that you propose as a solution to resolve the case and then select **Submit**.
Request more information	**1.** Tap the More actions icon () and select **Request Info**. **2.** In the **Additional Comments** field, add more comments about the request.
Escalate a case	**1.** Tap the More actions icon () and select **Escalate**. **2.** In the **Escalations** dialog box, fill in the details of the escalation.

Government service agent tasks (continued)

Agent task	Steps
View escalations	1. From the applet launcher, select the **Escalations** applet. 2. View a list of escalations for that case, if any.
Close a case	1. Tap the More actions icon (...) and select **Close Case**. 2. In the **Resolution Code** and **Resolution Notes** fields, enter the code and your notes about how the case was resolved.

Information request agent tasks

Agent task	Steps
View a case	View the details of a case and determine if you need to make any changes or take any actions. 1. In the bottom navigation bar, select **Cases**. 2. Select **New** to create a case or select **Active** to see a list of the active service request cases. 3. Select a case to view its details. 4. Determine if you need to make any changes or take other actions. If so, perform any of the tasks in this table. For details on viewing a case in the Mobile Agent, see Track information requests with the Mobile Agent.
Edit a case	1. From the Information Requests list, open a case. 2. Tap the More actions icon (...) and select **Edit Case**. For details on the case fields, see Information Request case form.

Information request agent tasks (continued)

Agent task	Steps
Add comments to a case	1. From the Information Requests list, open a case. 2. Tap the More actions icon (...) and select **Add Comments**. 3. In the **Work Notes** or **Additional Comments** fields, add your work notes or comments about the case. You can also add comments through the activity stream related list. For more information, see Using the activity stream in the Mobile Agent.
Propose a solution for a case	1. Tap the More actions icon (...) and select **Propose Solution**. 2. In the **Resolution Code** and **Resolution Notes** fields, add the code and notes that you propose as a solution to resolve the case and then select **Submit**.
Request more information	1. Tap the More actions icon (...) and select **Request Info**. 2. In the **Additional Comments** field, add more comments about the request.
Escalate a case	1. Tap the More actions icon (...) and select **Escalate**. 2. In the **Escalations** dialog box, fill in the details of the escalation.
View escalations	1. From the applet launcher, select the **Escalations** applet. 2. View a list of escalations for that case, if any.
Evaluate similar requests	1. Tap the More actions icon (...) and select **Evaluate similar requests**. 2. In the **Escalations** dialog box, fill in the details of the escalation.

Information request agent tasks (continued)

Agent task	Steps
Send for Requester Approval	1. Tap the More actions icon (…) and select **Send for Requester Approval**. 2. In the **Send for Requester Approval** dialog box, fill in the details of the escalation.
Request Fee Approval	1. Tap the More actions icon (…) and select **Request Fee Approval**. 2. In the **Escalations** dialog box, fill in the details of the escalation.
View Exemption Checklist	1. From the applet launcher, select the **Exception Checklist** applet. 2. Review the list of exemptions under the Freedom of Information Act (FOIA) or Public Records Act, and select one or more exemptions if applicable.
Close a case	1. Tap the More actions icon (…) and select **Close Case**. 2. In the **Resolution Code** and **Resolution Notes** fields, enter the code and your notes about how the case was resolved.
Cancel a case	Tap the More actions icon (…) and select **Cancel Case**.

Using the activity stream in the Mobile Agent

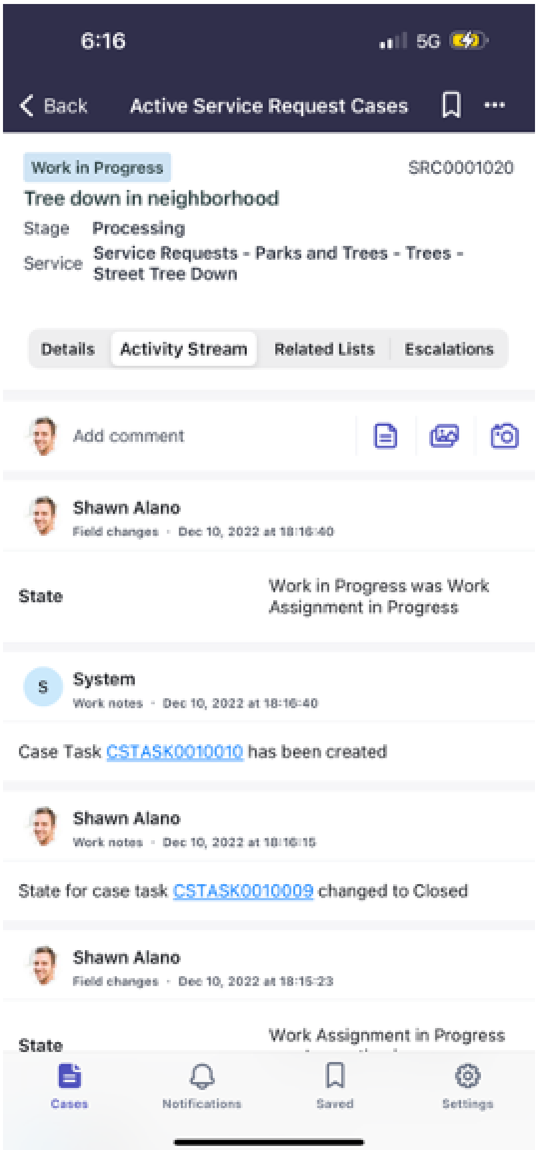
If you're a government service agent, you can access the activity stream from within the case card in the Mobile Agent. You can also communicate with requesters and make internal notes about the work on a record, which means that you can relay and track information more efficiently.

Using the activity stream

As an agent, you can use the activity stream to communicate with constituents and track the information on a record. You can access the activity stream by selecting the activity stream related list.

The following example shows the activity information view for a record in the Mobile Agent.

Mobile Agent activity stream



Agent tasks in the mobile activity stream

The following table lists the tasks that you can do in the activity stream in the Mobile Agent.

Agent tasks

Task	Description
View comments, attachments, or case tasks for the case	Scroll through the Activity Stream section to view all comments, attachments, and case tasks that are associated with the service or information request case.
Add work notes or comments	1. Select **Add comment**. 2. In the Compose section, add the information to the text field.

Agent tasks (continued)

Task	Description
	3. (Optional) Select the check box to make the comment or work note publicly visible. **4.** Select **Post**. The post is added to the Activity section. Internal work notes are private and are only visible to other agents. External comments are visible to agents and requesters.
Add photos or attachments	• Select the document icon ( ) to attach a document to the case. • Select the camera icon to take a photo to attach to the case. • Select the gallery icon ( ) to attach an existing photo to the case.

Track government service requests with the ServiceNow Mobile Agent app

Track and view the details of all the service requests that are assigned to you by using the ServiceNow Mobile Agent app.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

About this task

When you select a case in the Mobile Agent application, a form opens with the following sections:

- The case details, including the case number, priority, and status.
- A record of the interaction between the user and the government service agent.
- The action that must be taken on the user's part, such as accepting or rejecting a solution.
- Any attached files.

Procedure

1. Open the ServiceNow Mobile Agent app.
2. Under **My Cases**, select one of the applets in the following table.

Service Request Applet List

Applet	Description
New Service Request Cases	All service request cases that the agent has access to in the **New** state.

Applet	Description
Active Service Request Cases	All service request cases that the agent has access to that have not yet been resolved or canceled. These cases could be in the **Open**, **Awaiting Info**, or **Resolved** states.

3. Select the service request case that you want to see more details for.
   For a detailed description of the service request case fields, see Service Request case form.

Track information requests with the Mobile Agent

Track and view the details of all the information requests that are assigned to you by using the Mobile Agent on your mobile device.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

About this task

When you select a case in the Mobile Agent app, a form opens with the following sections:

- The case details, including the case number, priority, and status.
- A record of the interaction between the user and the information request case agent.
- The action that must be taken on the user's part, such as accepting or rejecting a case outcome.
- Any attached files.

Procedure

1. Open the ServiceNow Mobile Agent.
2. Under **My Cases**, select one of the applets in the following table.

Information Request Applet List

Applet	Description
New Information Request Cases	All information request cases that the agent has access to in the **New** state.
Active Information Request Cases	All information request cases that the agent has access to that aren't resolved or canceled. These cases could be in the **Open**, **Awaiting Info**, or **Resolved** states.

3. Select the information request case that you want to see more details for.
   For a detailed description of the information request case fields, see Information Request case form.

Using Virtual Agent for Public Sector Digital Services

As an admin, you can use Virtual Agent to create chatbot conversations tailored to public sector use cases.

With Virtual Agent, which is available by subscription, you can build conversation topics that assist your constituents with self-service tasks. For example, you can create Virtual Agent topics that enable constituents to submit government service cases or help them find relevant information on government regulations or benefits.

As admins or topic authors, you can build your own custom, public sector conversation topics. Or, you can use pre-built conversations that are available with the Virtual Agent platform and Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent) and modify them for public sector use cases.

When you're creating or modifying topics, you can also use pre-built components called topic blocks. These blocks are subflows that run conversational elements or common tasks in a conversation, such as adding or retrieving records. Pre-built topic blocks are included with the Virtual Agent platform and Customer Service conversations. Topic blocks enable topic authors to quickly add standard functions to Virtual Agent conversations, simplifying conversation design and maintenance.

The Public Sector Digital Services Core application provides several topic blocks that you can use in public sector conversations:

- Prompt Service for Constituent – Asks constituents to select a type of government service.
- Create Public Sector Additional Members – Prompts constituents to add other persons who have an authorized interest in an issue or case.

To learn more about topic blocks and how to use them in Virtual Agent conversations, see Maximizing code reuse with topic blocks.

Before building Virtual Agent topics for public sector use cases

Before creating Virtual Agent conversations, review the following prerequisites and the basic process for working with pre-built topics and topic blocks in Virtual Agent Designer.

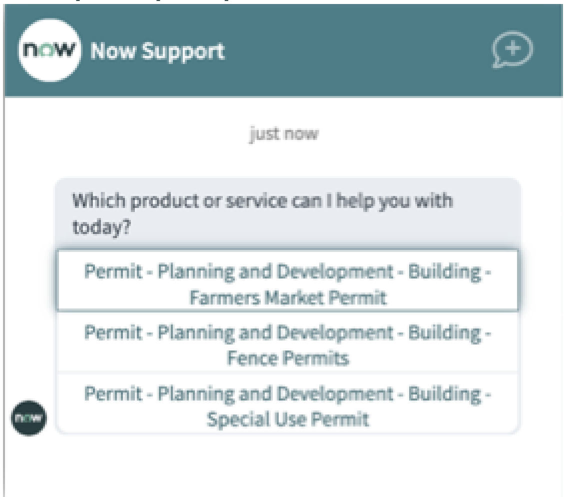
- Activate the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent) to access pre-built Customer Service conversations and topic blocks.
- Determine the public sector use cases for topics to be created.
- In Virtual Agent Designer:
  - Preview (test) pre-built topics and topic blocks, such as the public sector blocks, to see how they work. Use the **Type** filter to sort the list of items, such as topic blocks, in the Topics page.
  - If you want to use a pre-built topic or topic block, duplicate and publish it.
  - Add the appropriate copies of topic blocks, such as the public sector topic blocks, to the originating (calling) topic. To learn more about adding topic blocks to a conversation, see Add a reusable topic block to a calling topic or topic block

Note: You can use both public sector topic blocks in a conversation.

Prompt Service for Constituent topic block

Use this topic block in a conversation to ask constituents to select a service from a list of available government services, for example permits or licenses. Activate the Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

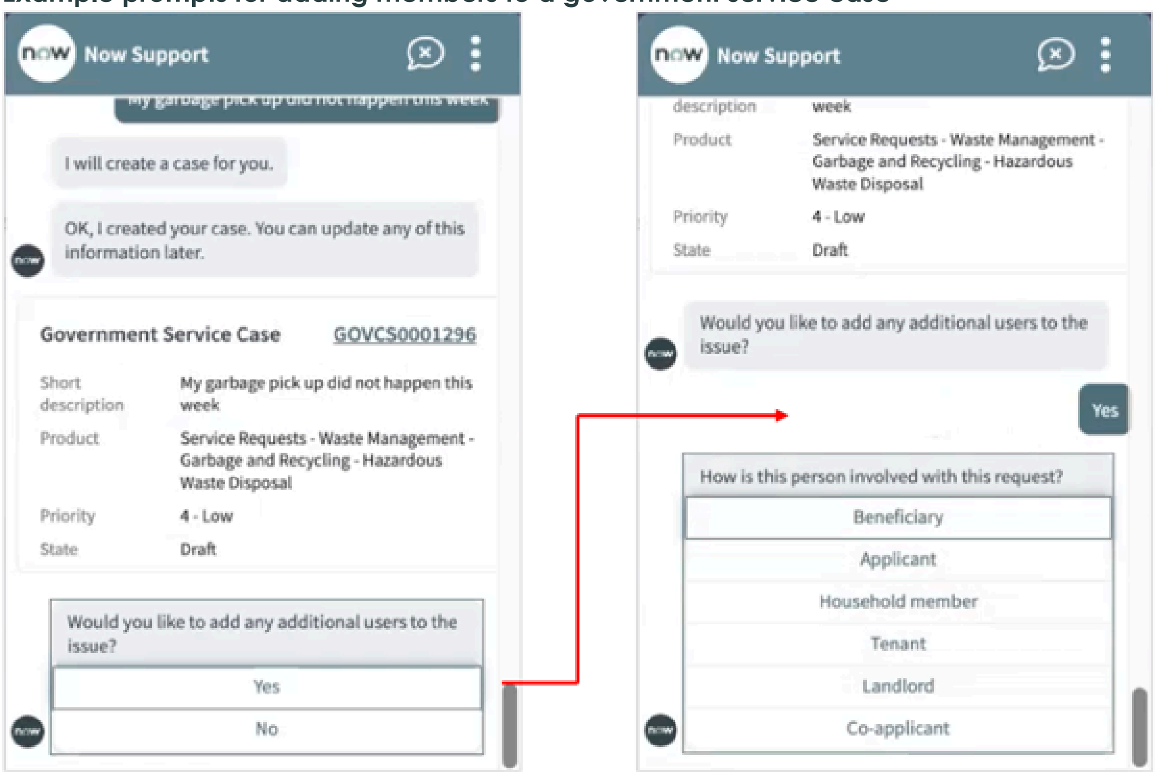
Example of prompt for services



Create Public Sector Additional Members topic block

Use this topic block to let your constituents specify other people, such as family members or other authorized individuals, who can view a case or issue. Activate the Customer Service Virtual Agent Conversations (com.sn_csm.virtualagent) plugin to use this topic block.

Example prompts for adding members to a government service case



When you use this topic block in a conversation, you specify the input parameters from the originating (calling) topic to the topic block.

Public Sector Additional Members input parameters

Parameter	Description
case_id	sys_id of the public sector case record created.
case_type	Extension of the base public sector service.

Creating and resolving case tasks as a government service agent in CSM Configurable Workspace

Service request case tasks in Public Sector Digital Services are automatically created and assigned to agents as each service request case moves through its life cycle. Government service agents can view and complete these case tasks (or even create their own tasks) in the CSM Configurable Workspace.

View existing service request case tasks in CSM Configurable Workspace

View a list of the case tasks that are associated with a service request case, regardless of whether the case task was created automatically or manually, in the CSM Configurable Workspace.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

Procedure

1. From the Lists menu in the CSM Configurable Workspace sidebar, navigate to **Service Requests** > **All**.
2. Open the service request case by selecting the case number.
3. In the Related List header, open the Tasks related list by selecting **Case Tasks**.
   All the tasks that are associated with this service request case are displayed.

What to do next

To view a list of every service request case task that has been assigned to an agent in your agency, navigate to **Lists** > **Government Service Case Tasks** > **All**.

Create a service request case task in CSM Configurable Workspace

Manually create case tasks from information that you gathered from a service request case in CSM Configurable Workspace.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

About this task

When an agent creates a service request case task, the system uses information from the service request case to automatically fill in the fields on the Case Task form. Agents can use auto-filled information, as well as the data collected from the end user, to create service request case tasks. After the agent creates and saves a case task, it appears in the Case Tasks related list on the Service Request Case form.

Procedure

1. Open the case.
2. From the Case Tasks related list, select **New**.
3. On the form, fill in the fields.
   For more information on the fields, see Service Request Case Task form.
4. Select **Save**.

Resolve a service request case task in CSM Configurable Workspace

Resolve a service request case in CSM Configurable Workspace. After all information has been added to the comments or work notes of a service request case task, you can mark the case task as resolved.

Before you begin

Role required: sn_gsm.agency_manager, sn_gsm.government_service_manager, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_constituent_agent, or sn_gsm.agency_agent

Procedure

1. Navigate to the Lists menu in the CSM Configurable Workspace sidebar.
2. From the Lists menu in CSM Configurable Workspace, navigate to **Service Requests** > **All**.
3. Open the service request case by selecting the case number.
4. From the Tasks related list, select the task number.
5. Add any additional work notes or comments.
   The case task can't be resolved without added work notes or comments.
6. Select **Save**.
7. Select **Close**.

Add related parties to items received

Add related parties to an item received in the Public Sector Digital Services application so that the contacts, businesses, constituents, or agencies can get the correct access level to perform the actions that they need for a case.

Before you begin

Role required: admin, sn_gsm.constituent, sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

Procedure

1. Navigate to the CSM Configurable Workspace and select the Lists icon in the sidebar.
2. Navigate to **Item Received** > **All**.
3. Select the record that you want to add the related parties to.
4. From the Related Parties related list, select **New**.
5. On the form, fill in the fields.

Related Parties Record form

Field	Description
Type	Related party type. The related party type can be a contact, consumer, or a contributor user. You can select from the list of related party configurations for the cases that are provided with the base system: ◦ Authorized Business ◦ Authorized Contact ◦ Authorized Constituent ◦ Authorized Household ◦ Authorized Agency ◦ Authorized User ◦ Listed Constituent ◦ Listed Agency
Case	Auto-generated case number.
Business, constituent, household, or user	Contact responsible for the case.
Responsibility	Access level to the case information. When you select the related party type, the associated responsibility gets added by default. If the related party type is changed, the responsibility that corresponds with the related party type gets updated accordingly. **Note:** If the related party type is selected but the responsibility field isn't automatically filled in, your contacts don't have access to the sold product (service received) and associated case.

6. Select **Submit**.
   The related parties are added to the case.

Result

After a related party is added to the case as an authorized representative with a functional role, the related party can perform the following actions:

- Close a case.
- Create a case for service received (sold product).
- Receive notifications on case updates.
- Update the customer-visible case tasks.
- Add additional comments and attachments.
- Accept or reject a solution.

Create a business record in CSM Configurable Workspace

If you're a government service agent, create a business record in CSM Configurable Workspace directly from a service request, interaction, or case when an incident is reported by a constituent, business, or business contact.

Before you begin
Role required: sn_gsm.constituent_agent, sn_gsm.business_agent, sn_gsm.agency_agent, sn_gsm.relationship_agent, or sn_gsm.service_manager

Procedure

1. Navigate to the CSM Configurable Workspace and select **Interactions** > **All**.
2. Select the interaction number to open an existing interaction record, or select the new icon New to create an interaction.
3. Select the interaction type and assign the interaction to a user.
4. Optional: Enter a short description of the interaction.
5. Select **Save**.
6. Select **Create Business** and fill in the fields.
   For more information on the fields, see Business Profile form.
7. Select **Submit**.
   The business is now linked to the interaction, and a new tab opens with the business details.

Set a default view in the Public Sector Digital Services platform

Customize the default view in the Public Sector Digital Services platform workspace so that the Items Received related list is displayed under a business, constituent, or agency record.

Before you begin
Role required: none

Procedure

1. Navigate to a business, constituent, or agency record in the Public Sector Digital Services platform.
2. Select the list controls icon (≡), and point to **View**.
3. Select **PSDS** from the dropdown.

Result
The user view is changed, and the Items Received related list is viewable.

Analytics and Reporting Solutions for Public Sector Digital Services

Platform Analytics Solutions contain prepackaged Platform Analytics content for use with other Now Platform products. This Platform Analytics Solution provides KPIs and benchmarks to measure the government services provided to constituents.

Required roles

The following roles and tasks are associated with this Solution:

- Now Platform administrator (admin): Install and activate this Analytics and Reporting Solution and make any necessary changes to system properties.
- Platform Analytics administrator (pa_admin): Review the indicators, breakdowns, widgets, and dashboards. Set up and start data collection. Share the dashboards with appropriate stakeholders.

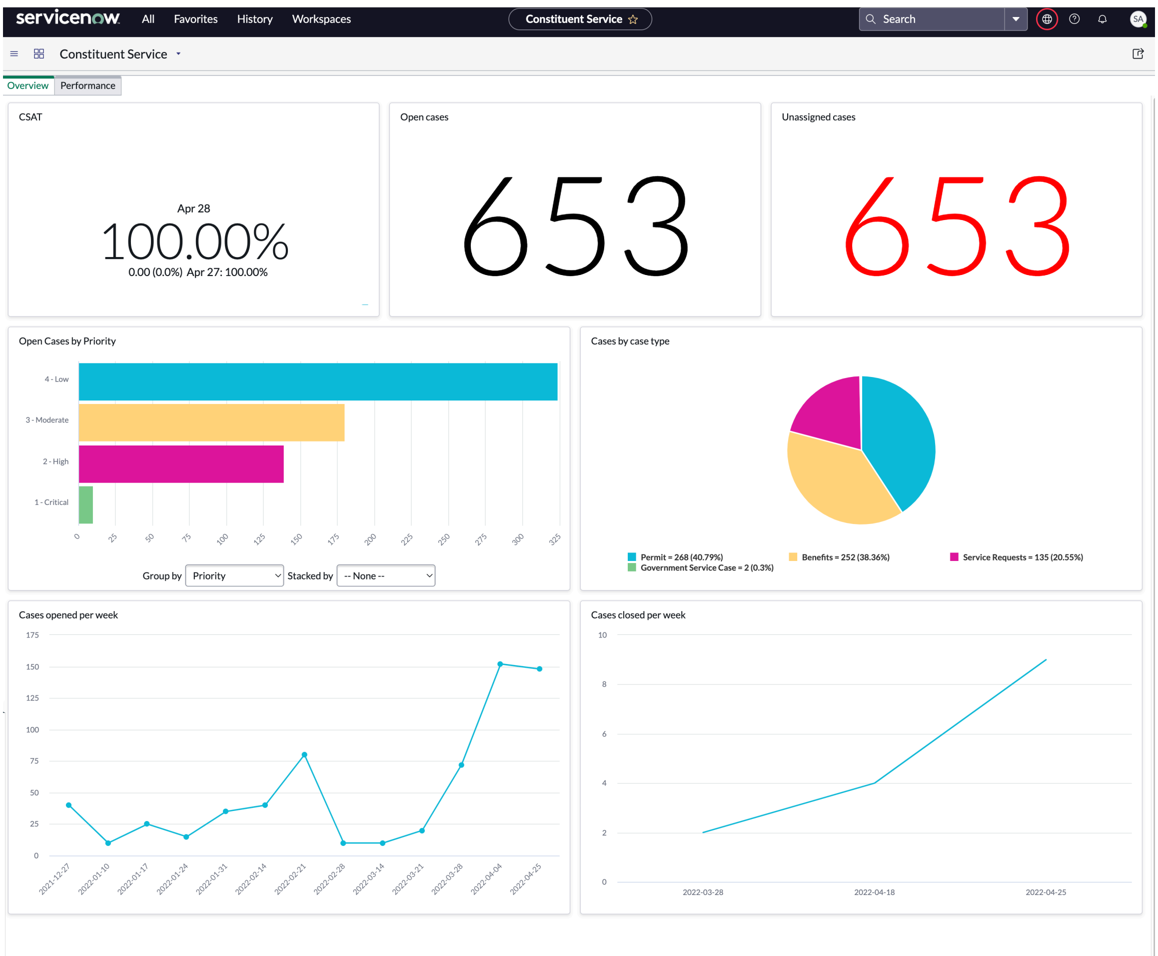
Related topics

Analytics and Reporting Solutions

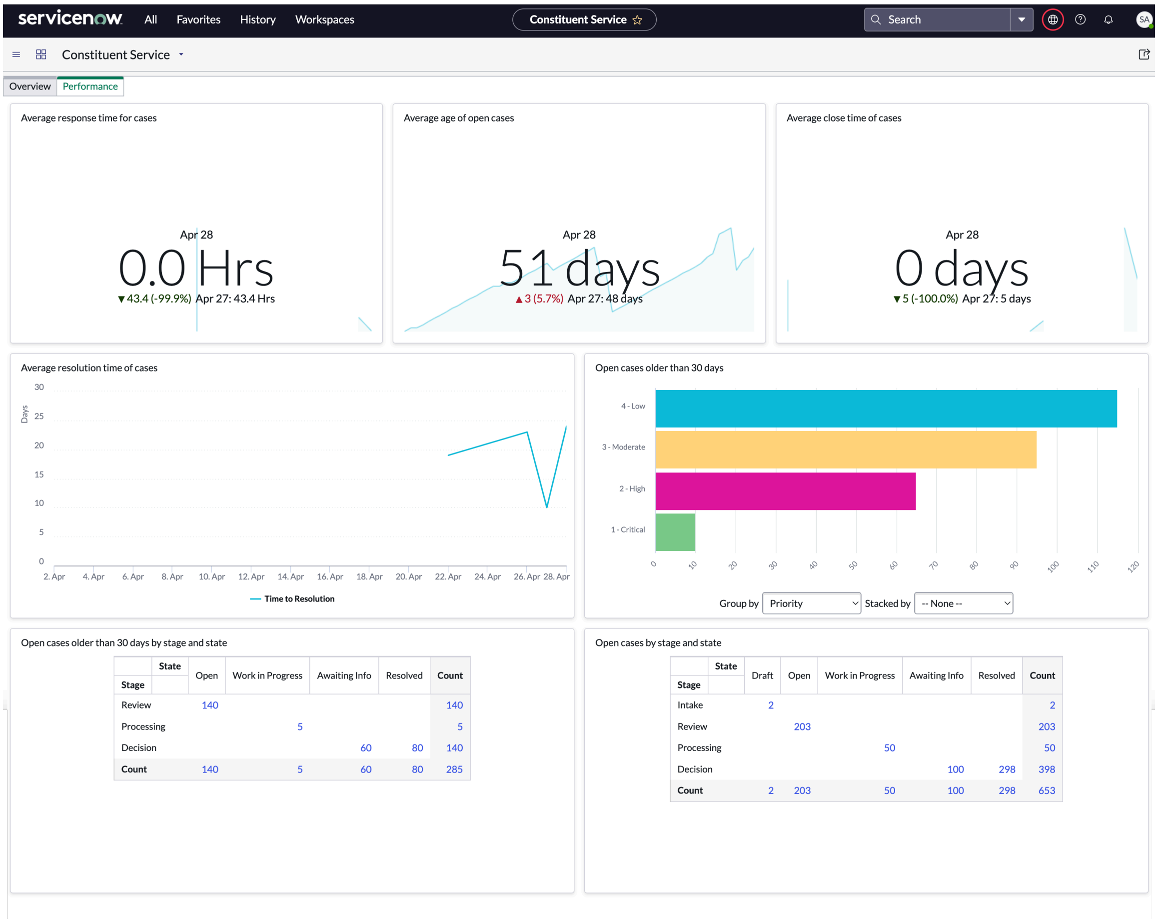
Constituent Service dashboard

Use this dashboard to monitor the health of citizen services, gain insights on how efficiently government cases are handled, and assess the overall performance of services offered.

Constituent Service Dashboard Overview tab



Constituent Service Dashboard Performance tab



Required Now Platform roles

- sn_gsm.constituent_agent, required to view the dashboard widgets and data.
- sn_gsm.constituent_admin, required to edit the dashboard.

Access the Constituent Service dashboard

To open the dashboard, navigate to **All** > **Self-Service** > **Dashboards** > **Constituent Service**.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Constituent Services Dashboard Use cases

User	Dashboard use
Admin or agent	Creates and monitors cases from constituents to accelerate case resolution and increase customer satisfaction. Does the following:

Constituent Services Dashboard Use cases (continued)

User	Dashboard use
	• Tracks cases that have been open for a period of time. • Monitors the number of cases for a certain type of service type. • Reviews the average closing time of cases for each service type. • Drills down into details of cases for specific service types.
Government service manager	Monitors the health of government services. Tracks case resolution to drive improvements in service delivery processes and agent performance.

Indicators

Average response time for cases

Average hours for agents to respond to a new government case. This score is calculated by using this formula: [[GSM-Summed duration of FirstResponseTime]] / [[GSM-Number of Responded Cases]]

GSM-Number of Open Cases

Number of open cases created daily.

GSM-CSAT

Customer satisfaction score based on survey results. The score is calculated by using this formula: [[GSM_Number of satisfied customers (CSAT)]]/[[GSM_Number of CSAT survey respondents]]*100.

GSM-Average close time of cases

Average number of days to close cases. This score is calculated by using this formula: [[GSM-Summed duration of closed cases]] / [[GSM-Number of closed cases]] / 24.

GSM-Average age of open cases

Average number of days that cases remain open. The score is calculated by using this formula: [[GSM-Summed age of open cases]] / [[GSM-Number of Open Cases]] / 24.

Average resolution time of cases

Average number of days to resolve cases. The score is calculated using this formula: [[GSM_Summed duration of resolved cases]] / [[GSM_Number of resolved cases]] / 24

GSM-Case Average Response Time

Average length of time for an agent to respond to a case. The score is calculated using this formula: [[GSM-Summed duration of FirstResponseTime]]/ [[GSM-Number of Responded Cases]].

GSM_Number of resolved cases

Daily count of government cases resolved. The goal for this indicator is to maximize the count.

GSM-Number of closed cases

Daily count of closed cases.

GSM-Number of Responded Cases

Daily count of cases to which agents responded.

The following indicators are not shown directly on the dashboard but are used in calculating formulas:

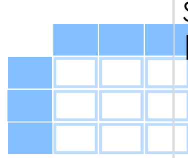
- GSM-Summed duration of closed cases (hours)
- GSM-Summed duration of FirstResponseTime (hours)
- GSM-Summed age of open cases
- GSM-Summed duration of resolved cases (hours)

Breakdowns

- GSM-Account
- GSM-Age
- GSM-AssignedTo
- GSM-AssignmentGroup
- GSM-Category
- GSM-Channel
- GSM-Contact
- GSM-Priority
- GSM-Product
- GSM-State

Data visualizations

Constituent Services Dashboard Data visualizations

Title	Type	Source table	Description
Open cases older than 30 days by stage and state	 Pivot	Government Service Case [sn_gsm_government_service_case]	Detailed summary of open cases older than one month, arranged by stage and state.
Open cases	 Score	Government Service Case [sn_gsm_government_service_case]	Total number of unresolved government cases in the system.

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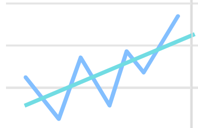
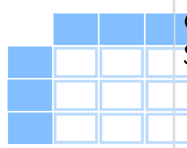
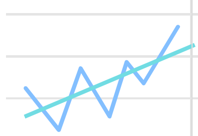
Constituent Services Dashboard Data visualizations (continued)

Title	Type	Source table	Description
Cases opened per week	 Line	Government Service Case [sn_gsm_government_service_case]	Weekly trend of new government cases opened.
Open cases older than 30 days	Horizontal bar	Government Service Case [sn_gsm_government_service_case]	Distribution of government open cases older than 30 days.
Unassigned cases	 Score	Government Service Case [sn_gsm_government_service_case]	Total number of government cases not assigned to agents.
Cases by case type	Pie	Government Service Case [sn_gsm_government_service_case]	Percentage of government cases by case type.
Open cases by stage and state	 Pivot	Government Service Case [sn_gsm_government_service_case]	Detailed summary of open government cases, arranged by stage and state.
Cases closed per week	 Line	Government Service Case [sn_gsm_government_service_case] Line	Weekly trend in government cases closed by agents.
Open Cases by Priority	Horizontal bar	Government Service Case [sn_gsm_government_service_case]	Distribution of unassigned government cases by priority.

Public Services Performance Overview dashboard

Use the Public Services Performance Overview dashboard to assess key performance indicators and data visualizations on public services offered to and requested by constituents, businesses, and agencies.

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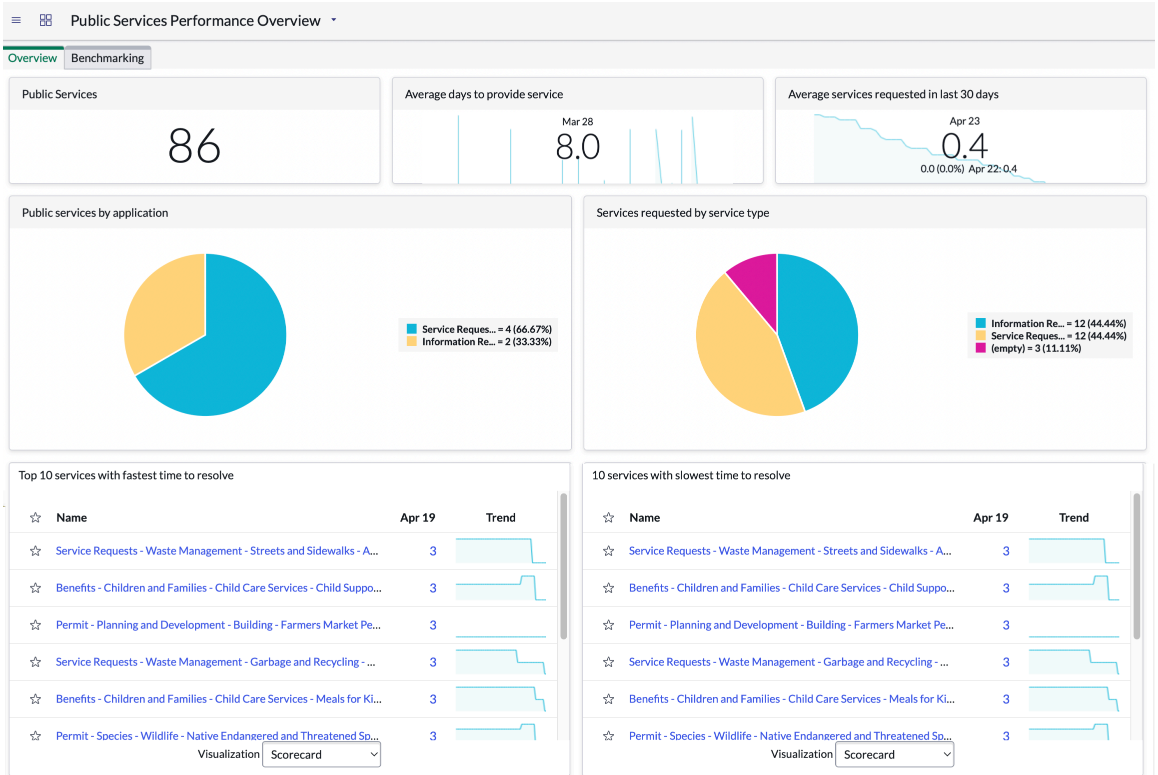
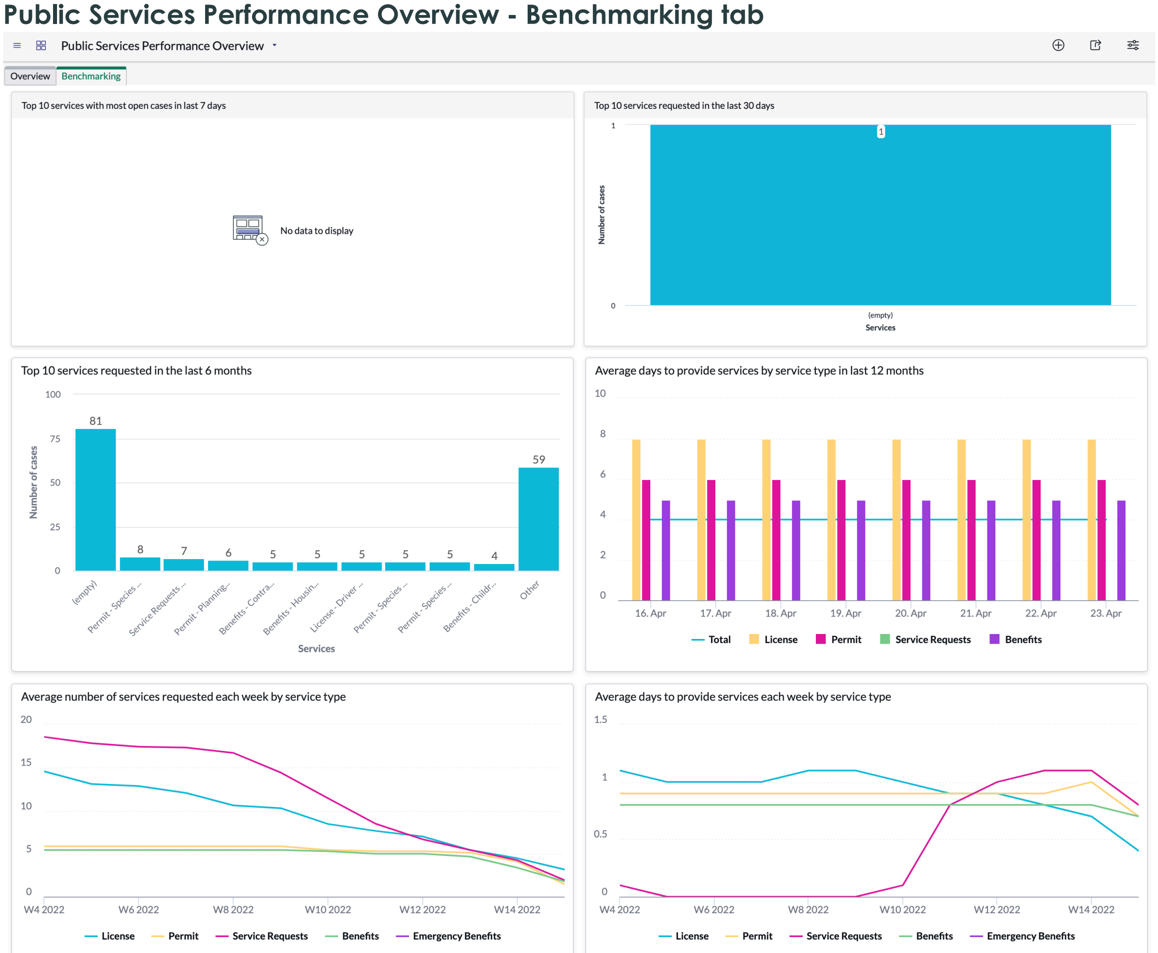
Public Services Performance Overview - Overview tab



Public Services Performance Overview - Benchmarking tab



Required Now Platform roles

- sn_gsm.service_offered_viewer, required to view the dashboard widgets and data.
- sn_gsm.service_offered_admin, required to edit the dashboard.

Access the Public Services Performance Overview dashboard

To open the dashboard, navigate to **All** > **Self-Service** > **Dashboards** > **Public Services Performance Overview**.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Public Services Performance Overview dashboard Use cases

User	Dashboard use
Admin	Reviews benchmarking information to track the public services offered to and requested by constituents, businesses, and agencies.
Government service manager, service viewer,and owner	Monitors the public services offered to and requested by constituents, businesses, and agencies. Does the following: • Observes short and long-term trends and patterns in service delivery. • Identifies opportunities to improve case resolution, agent performance, and the service experience.

Indicators

GSM-Government Case Count for Services requested

Daily number of government services requested by constituents, businesses, and agencies.

GSM-Average of Government Case for Services requested

Daily average of government cases for services requested by constituents, businesses, and agencies. The average is calculated by using this formula: [[GSM-Government Case Count for Services requested]]/30.

GSM-Average resolution duration of Government Cases

Average number of days to resolve government cases.

GSM-Average number of services provided each week by service type

Average count of government services requested each work, by type of service. The count is calculated by using this formula: [[GSM-Average days to provide services by service type]]/7.

GSM-Average resolution duration of Government Cases in last 365 days

Average number of days to resolve government cases in the last 12 months.

GSM-Avg number of services requested each week by service type

Average count of government services requested weekly by service type. The count is calculated by using this formula: [[GSM-Count of services requested each week by service type]]/7.

GSM-Count of services requested each week by service type

Average number of government services requested each week, by service type. Measured daily.

GSM-Average days to provide services by service type

Count of government services provided each week by type of service. Measured daily.

GSM-Government Services with fastest/slowest time to resolve

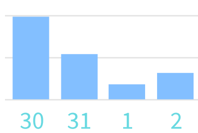
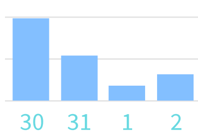
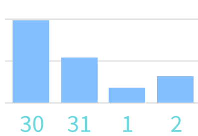
Government services that have the quickest and slowest resolution times.

Breakdowns

- GSM-AssignmentGroup
- GSM-Government.ServiceOffered.Type
- GSM-Product
- GSM-State

Data visualizations

Public Services Performance Overview dashboard Data visualizations

Title	Type	Source table	Description
Top 10 services requested in the last 30 days		Government Service Case [sn_gsm_government_service_case]	Top 10 requested services over a 30-day (monthly) period.
Top 10 services with most open cases in last 7 days		Government Service Case [sn_gsm_government_service_case]	Top 10 requested services over a seven-day (weekly) period.
Top 10 services requested in the last 6 months		Government Service Case [sn_gsm_government_service_case]	Top 10 requested services over a 6-month period.
Services requested by service type	 Pie chart	Government Service Case [sn_gsm_government_service_case]	Distribution (percentage) of government services requested by constituents,

Public Services Performance Overview dashboard Data visualizations (continued)

Title	Type	Source table	Description
			businesses, and agencies.
Public Services		Service Definition [sn_gsm_government_service_model]	Total number of all government services available in the system.
Public Services by application	 Pie chart	Service Definition [sn_gsm_government_service_model]	Distribution (percentage) of government services available in the system.

Public Sector Digital Services reference

Reference topics provide additional information about Public Sector Digital Services.

Components installed with Public Sector Digital Services Core

Several types of components such as tables, user roles, and flows are installed when you activate the Public Sector Digital Services Core plugin.

The following plugins are activated when you enable the Public Sector Digital Services Core plugin (com.sn_public_sector_digital_services_core):

- UI Components for Customer Portals (com.sn_ciwf_ui_cmpnt)
- Agency Support Model (com.sn_agency_support_model)
- Customer Service Case Types (com.snc.csm_case_types)
- Customer Service Portal (com.glide.service-portal.customer-portal)
- Customer Service Install Base Management (com.snc.install_base)

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Note: For information about the roles installed when you activate the Public Sector Digital Services Core plugin, see Roles installed with Public Sector Digital Services Core.

Tables installed with Public Sector Digital Services

Tables installed with Public Sector Digital Services

Table	Description
Government Service Case	Government service case table

Tables installed with Public Sector Digital Services (continued)

Table	Description
[sn_gsm_government_service_case]	**Note:** This table is an extension of the Case [sn_customerservice_case] table.
Constituent Profile [sn_gsm_constituent_profile]	Constituent profile table
Service Definition [sn_gsm_government_service_model]	Service-definition table **Note:** This table is an extension of the Product Model [cmdb_model] table.
Business Registration Request [sn_gsm_business_registration]	Table for a new business registration request

Flows installed with Public Sector Digital Services

Flows installed with Public Sector Digital Services

Flow	Description
Create blocked by record if Case Task is associated with government case [create_blocked_by_record_if_case_task_is_associated_with_government_case]	Creates a blocked by record if the Case Task is associated with a government case.
Create blocked by record if Government case needs customer information [create_blocked_by_record_if_case_needs_customer_information]	Creates a blocked by record if the Government case needs more customer information.
Resolve blocked by record if Case Task is closed and associated with Government Case [resolve_blocked_by_record_if_case_task_is_closed_and_associated_with_government_case]	Removes the blocked by record for the associated Government case if the Government case is resolved.
Resolve blocked by record if user information is provided for Government case [resolve_blocked_by_record_if_user_information_is_provided_for_govt_case]	Removes the blocked by record if the case task is closed.

Roles installed with Public Sector Digital Services Core

The Public Sector Digital Services Core application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between users.

servicenow

Core Roles

Constituent roles

Role title [name]	Description	Contains roles
constituent [sn_gsm.constituent]	Enables constituents to request services and manage their information, government service cases, and services received.	• sn_install_base.sold_product_authorized_consumer • sn_gsm.service_received_read_granular • sn_customerservice.consumer • sn_gsm.case_write_granular
constituent_agent [sn_gsm.constituent_agent]	Enables agents to perform the following actions: • Read, write, and update government service cases for all constituents. • Read, write, and update constituent records.	• sn_gsm.report_viewer • sn_gsm.case_writer • sn_gsm.service_offered_writer • sn_customerservice.consumer_agent • sn_gsm.constituent_writer • interaction_agent
constituent_contributor [sn_gsm.constituent_contributor]	Enables users to request services and raise government service cases on behalf of any constituent.	• sn_customerservice.consumer_contributor • sn_gsm.contributor_creator • sn_customerservice.case_authorized_contributor
constituent_admin [sn_gsm.constituent_admin]	Provides agents with admin access and enables them to create, read, update, and delete constituent records.	sn_gsm.constituent_writer
constituent_writer	Provides agents with	sn_gsm.constituent_viewer

Constituent roles (continued)

Role title [name]	Description	Contains roles
[sn_gsm.constituent_writer]	access to create, read, and update constituent records.	
License & Permits Install base writer [sn_gsm_lic_prmt.ib_writer]	Provides create, read and write access to Install base items.	sn_gsm_lic_prmt.ib_writer
constituent_viewer [sn_gsm.constituent_viewer]	Provides agents with read-only access to constituent records.	sn_customerservice.customer_data_viewer
License & Permits Install base Item viewer [sn_gsm_lic_prmt.ib_viewer]	This role provides read access to Install base items	sn_gsm.report_viewer

Business roles

Role title [name]	Description	Contains roles
business_contact [sn_gsm.business_contact]	Enables business stakeholders to request services and manage information, government service cases, and services received.	• sn_customerservice.consumer • sn_install_base.sold_product_authorized_consumer • sn_gsm.service_received_read_granular • sn_gsm.case_write_granular
business_contact_admin [sn_gsm.business_contact_admin]	Provides a business stakeholder with admin access to a business account. This role has access to all the data within the	• sn_customerservice.customer_admin • sn_gsm.business_contact

Business roles (continued)

Role title [name]	Description	Contains roles
	business account.	
business_case_manager [sn_gsm.business_case_manager]	Enables a business stakeholder to manage government service cases for a business account and associated child accounts. This role can perform the following actions: • Create a case on behalf of another business contact. • View a list of cases belonging to the business. • Edit cases belonging to the business.	• sn_customerservice.customer_case_manager • sn_gsm.business_contact
business_contributor [sn_gsm.business_contributor]	Enables business stakeholders to request services and raise government service cases on behalf of any business.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator • sn_customerservice.case_authorized_contributor
business_partner [sn_gsm.business_partner]	Enables business partners to create, view, and edit government service cases	• sn_customerservice.partner • sn_gsm.business_contact

Business roles (continued)

Role title [name]	Description	Contains roles
	from their own account or from a business account that they are associated with.	
business_partner_admin [sn_gsm.business_partner_admin]	Provides a business stakeholder with admin access to a partner account. This user can access all the data within the partner account and the government service cases created by the partners.	• sn_customerservice.partner_admin • sn_gsm.business_partner • sn_gsm.business_contact • sn_gsm.business_contact_admin
business_agent [sn_gsm.business_agent]	Enables agents to perform the following actions: • Read, write, and update government service cases for all business accounts. • Read, write, and update business records.	• sn_gsm.report_viewer • sn_gsm.case_writer • sn_gsm.service_offered_writer • sn_customerservice.consumer_agent • sn_gsm.business_writer • interaction_agent

Agency agent roles

Role title [name]	Description	Contains roles
agency_agent [sn_gsm.agency_agent]	Enables agency agents to create and fulfill government service cases for the	sn_customerservice.svc_

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Agency agent roles (continued)

Role title [name]	Description	Contains roles
	businesses and business contacts associated with the agency.	
agency_constituent_agent [sn_gsm.agency_constituent_agent]	Enables agency agents to create and fulfill government service cases for constituents and households associated with the agency.	sn_customerservice.svc_
License & Permit Constituent Agent [sn_gsm_lic_prmt.constituent_agent]	Enables users to work on License & Permit cases for all constituents. It includes the ability to read/write/update all License & Permit cases and constituent records	• sn_gsm.constituent_ag • sn_gsm_lic_prmt.case_ • sn_gsm_lic_prmt.report
agency_contributor [sn_gsm.agency_contributor]	Enables agency agents to request services and raise government service cases on behalf of the agency.	• sn_customerservice.se • sn_gsm.contributor_cre • sn_customerservice.co
License & Permit Agency Contributor [sn_gsm_lic_prmt.agency_contributor]	Enables users to request service and raise License & Permit cases for their service organization (business location). This role is agnostic to internal and external.	• sn_gsm.agency_contri • sn_gsm_lic_prmt.contri
agency_manager [sn_gsm.agency_manager]	Enables an agency manager to perform the following actions: • Create and update government service cases for constituents, households, business, and business contacts. • Manage data for constituents and households associated with the agencies within the agency hierarchy. • Manage data for businesses and business contacts associated with the agencies within the agency hierarchy.	• sn_customerservice.svc • sn_gsm.agency_agent • sn_gsm.agency_consti

Agency agent roles (continued)

Role title [name]	Description	Contains roles
License & Permit Agency Manager [sn_gsm_lic_prmt.agency_manager]	Enables users to manage data for agencies in the manager's agency hierarchy.	• sn_gsm.agency_mana • sn_gsm_lic_prmt.agenc • sn_gsm_lic_prmt.agenc
agency_manager_contributor [sn_gsm.agency_manager_contributor]	Enables users to create, update, view, and approve cases. Allows them to register and remove staff across all agencies they manage.	• "sn_gsm.business_contr • sn_gsm.government_a • sn_gsm.constituent_co • sn_gsm.government_a • sn_gsm.agency_mana • sn_customerservice.svc
License & Permit Agency Manager Contributor [sn_gsm_lic_prmt.agency_manager_contributor]	Enables users to create, update, view, and approve cases. They can also register and remove staff across all agencies they manage.	• sn_gsm_lic_prmt.busine • sn_gsm_lic_prmt.gover • sn_gsm_lic_prmt.consti • sn_gsm_lic_prmt.agenc • sn_gsm_lic_prmt.agenc • sn_gsm.agency_mana
relationship_manager [sn_gsm.agency_relationship_manager]	Enables users to view cases across all the external agencies where they have location_relationship_manager responsibility.	• sn_bus_loc.location_re • sn_gsm.agency_mana
License & Permits Agency Manager Core [sn_gsm_lic_prmt.agency_manager_core]	Granular role to manage agency staff registrations and staff relationships with businesses, constituents, and households for all the agencies within the hierarchy.	• sn_gsm.agency_mana • contract_manager
License & Permit Agency Relationship Manager [sn_gsm_lic_prmt.agency_relationship_manager]	Enables users to view cases across all the external agencies where they have location_relationship_manager responsibility.	• sn_gsm.agency_relatio • sn_gsm_lic_prmt.agenc
service_manager [sn_gsm.service_manager]	Enables a service manager to perform the following actions:	• sn_gsm.service_offerec • sn_gsm.service_offerec • sn_gsm.constituent_ag

Agency agent roles (continued)

Role title [name]	Description	Contains roles
	• Manage all work performed by agents working on government service cases. • Read, write, update, and delete all government service cases. • Read, write, update, and delete all constituent, business, and agency records.	• sn_gsm.constituent_ac • sn_gsm.business_agen
License & Permit Case Task Agent [sn_gsm_lic_prmt.case_task_agent]	This role provides users the ability to create and fulfill License & Permit cases for the constituents and households in the agent's agency.	• sn_gsm_lic_prmt.contri • sn_gsm_lic_prmt.case_ • sn_gsm.case_task_age
License & Permit Agency Business Agent [sn_gsm_lic_prmt.agency_agent]	Enables users to create and fulfill License & Permit cases for the accounts and contacts in the agent's agency.	• sn_gsm.agency_agent • contract_manager

Admin and other roles

Role title [name]	Description	Contains roles
admin [sn_gsm.admin]	Provides a user with delegated admin access to scoped applications created on the Public Sector Digital Services platform.	sn_gsm.service_manager
service_offered_admin [sn_gsm.service_offered_admin]	Provides users with admin access and enables them to create, read, update, and delete services-	sn_gsm.service_offered_writer

Admin and other roles (continued)

Role title [name]	Description	Contains roles
	offered records and services-received records.	
license_permit_admin [sn_gsm_lic_prmt.admin]	Enables users to manage all work performed by agents working on License & Permit cases (constituent and business). Users with this role have the ability to read/write/update/delete all License & Permit cases and constituent/business records.	• sn_gsm_lic_prmt.manager • sn_gsm.admin
License & Permits Install base admin [sn_gsm_lic_prmt.ib_admin]		
service_offered_admin [sn_gsm.service_offered_admin]		
service_offered_writer [sn_gsm.service_offered_writer]	Provides users with access to create, read, and update services-offered records and services-received records.	sn_gsm.service_offered_viewer

Admin and other roles (continued)

Role title [name]	Description	Contains roles
service_offered_viewer [sn_gsm.service_offered_viewer]	Provides users with read-only access to services offered records and services-received records.	sn_customerservice.customer_data_viewer
case_writer [sn_gsm.case_writer]	Provides agents with access to create, read, and update government service cases.	sn_gsm.case_viewer
case_viewer [sn_gsm.case_viewer]	Provides agents with read-only access to government service cases.	None
contributor_creator [sn_gsm.contributor_creator]	Enables agents or business stakeholders to create government service cases and is included in the top-level contributor roles. This role can create cases but cannot view other cases.	None
relationship_agent [sn_gsm.relationship_agent]	Enables agents to work on government service	• sn_gsm.report_viewer • sn_customerservice.relationship_agent

Admin and other roles (continued)

Role title [name]	Description	Contains roles
	cases for customers that they have relationship with.	
relationship_contributor [sn_gsm.relationship_contributor]	Enables business stakeholders to raise government service cases on behalf of customers that they have relationship with.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator • sn_customerservice.case_authorized_contributor

Granular roles

You can use predefined functional and granular roles installed with Public Sector Digital Services to establish relationships between users and public sector entities. These functional and granular roles provide different levels of access to public sector data, to help maintain data security.

- Functional roles: A set of roles required to perform a function or meaningful action that requires access on multiple entities.
- Granular roles: Roles that provide access to cases, services used, and related public sector entities. One or more granular roles can be bundled together as a functional role.

A granular model helps protect data by granting the appropriate level of access to the corresponding public sector entities. With this functionality, each role is associated with a set of privileges or responsibilities that determine users' access to certain information. You can have fine-grained access control by setting granular policies that authorize individuals to access the information needed to work efficiently and effectively, ultimately helping improve the constituent experience.

For example, if you extend the Government Service Case table or other tables in the Public Sector Digital Services app, you must replicate the access control lists for the extended tables. You can assign granular roles to public sector users to control access to those extended tables.

Granular roles

Role title [name]	Description	Contains roles
case_create_granular [sn_gsm.case_create_granular]	Provides constituents or business stakeholders with	sn_gsm.case_read_granular

Granular roles (continued)

Role title [name]	Description	Contains roles
	granular create access to government service cases.	
case_read_granular [sn_gsm.case_read_granular]	Provides constituents or business stakeholders with granular read access to government service cases.	sn_customerservice.case_read_granular
case_write_granular [sn_gsm.case_write_granular]	Provides constituents or business stakeholders with granular write access to government service cases.	• sn_gsm.case_create_granular • sn_gsm.case_read_granular
service_received_read_granular [sn_gsm.service_received_read_granular]	Provides constituents or business stakeholders with granular read access to services-received records.	sn_install_base.sold_product_read_granular
License & Permits Install base read granular [sn_gsm_lic_prmt.ib_read_granular]	Provides granular read access to issued License and Permits.	sn_install_base.install_base_read_granular
License & Permits Agency Manager Core [sn_gsm_lic_prmt.agency_manager_core]	Granular role to manage agency staff registrations	• sn_gsm.agency_manager_core • contract_manager

Granular roles (continued)

Role title [name]	Description	Contains roles
	and staff relationships with businesses, constituents, and households for all the agencies within the hierarchy.	
License & Permits Contributor Creator [sn_gsm_lic_perm.contributor_creator]	Enables users to create government service cases and is included in the top-level contributor roles. It only allows record creation but does not allow visibilty to a record on its own.	sn_gsm.contributor_creator

Business Stakeholder Roles

Business Stakeholder for Public Sector Digital Services includes plugins and roles that provide access to business stakeholder features.

Admins with access to Business Stakeholder can provide Business Stakeholder users with the rights to the following actions:

- Create cases on behalf of a business or an agency (service organization)
- View cases, case tasks, and business data.
- Approve requests.

Create cases on behalf of customers

Role	Description	Contains roles	Plugin	User type
Constituent contributor [sn_gsm.constituent_contributor]	Enables users to request services and raise government service cases on	• sn_customerservice.consumer_contributor • sn_gsm.contributor_creator	com.sn_public_sector_digital_services_core	Internal and external

Create cases on behalf of customers (continued)

Role	Description	Contains roles	Plugin	User type
	behalf of any constituent.			
License & Permit Constituent contributor [sn_gsm_lic_prmt.constituent_contributor]	This role enables users to request for service and raise License & Permit cases on behalf of any constituent. This allow business stakeholders to act as a requestor on of behalf of customers.	• sn_gsm.constituent_contributor • sn_gsm_lic_prmt.contributor_creator		
Business contributor [sn_gsm.business_contributor]	Enables business stakeholders to request services and raise government service cases on behalf of any business.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator	com.sn_public_sector_digital_services_core	Internal and external
License & Permit Business Contributor [sn_gsm_lic_prmt.business_contributor]	This role enables users to request for service and raise License & Permit cases on behalf of any business. This allow business stakeholders to act as a requestor on of behalf of customers.	• sn_gsm.business_contributor • sn_gsm_lic_prmt.contributor_creator		
Relationship contributor [sn_gsm.relationship_contributor]	Enables business stakeholders to raise government service cases on behalf of customers with which they have a relationship.	• sn_customerservice.relationship_contributor • sn_gsm.contributor_creator	com.sn_public_sector_digital_services_core	Internal and external
License & Permit Relationship Contributor [sn_gsm_lic_prmt.relationship_contributor]	This role enables users to raise License & Permit cases on behalf of customers		• sn_gsm.relationship_contributors • n_gsm_lic_prmt.contributor_creator	

Create cases on behalf of customers (continued)

Role	Description	Contains roles	Plugin	User type
	with whom they have relationships. This allows business stakeholder access to act as a requestor on behalf of customers.			

Create cases on behalf of agencies

Role	Description	Contains roles	Plugin	User type
Agency contributor [sn_gsm.agency_contributor]	Enables agency agents to request services and raise government service cases on behalf of the agency.	• sn_customerservice.service_organization_contributor • sn_gsm.contributor_creator	Agency Support Model (com.sn_agency_support_model)	Internal and external

View cases, case tasks, and customer data

Role	Description	Contains roles	Plugin	User type
Case viewer [sn_gsm.case_viewer]	Provides agents with read-only access to government service cases.	None	com.sn_public_sector_digital_services_core	Internal
Constituent viewer [sn_gsm.constituent_viewer]	Provides agents with read-only access to constituent records.	sn_customerservice.customer_data_viewer	com.sn_public_sector_digital_services_core	Internal
Business viewer [sn_gsm.business_viewer]			com.sn_public_sector_digital_services_core	Internal
Services offered viewer [sn_gsm.service_offered_viewer]	Provides users with read-only access to services offered records and services received records.	sn_customerservice.customer_data_viewer	com.sn_public_sector_digital_services_core	Internal

View cases, case tasks, and customer data (continued)

Role	Description	Contains roles	Plugin	User type
Government services received viewer [sn_gsm.service_received_viewer]	Provides users with read-only access to services received records.		com.sn_public_sector_digital_services_core	Internal

View reports and dashboards

Role	Description	Contains roles	Plugin	User type
report_viewer [sn_gsm.report_viewer]	Enables users to view reports on the Public Sector Digital Services platform.	None	com.sn_public_sector_digital_services_core	Internal
License & Permit Report Viewer [sn_gsm_lic_prmt.report_viewer]	Enables users to view reports on the Public Sector Digital Services platform.	sn_gsm.report_viewer		

Note: Customers who have purchased a Public Sector Digital Services subscription can provide Business Stakeholder users with rights to actions listed under Business Stakeholder for Customer Service Management.

Persona-based Roles in Public Sector Digital Services

Roles and personas help you to understand the different roles involved in Public Sector Digital Services.

Public Sector Digital Services supports users with the following basic job functions (personas).

Personas are defined as the individual roles that perform different tasks in Public Sector Digital Services.

Public Sector Personas

Job function	Description
Admin	System administrator, who has access to all system features, functions, and data, regardless of security restraints: • Administers specific scoped apps built using different case types. • Manages the information for constituents.
Constituent	End user, such as a citizen, residents, visitors, veterans: • Requests services from government agencies. • Tracks resolution of requests.

Public Sector Personas (continued)

Job function	Description
Business stakeholder	End user, such as business owner, business contact, business partner: • Requests services from government agencies. • Tracks resolution of requests.
Government agent	Fulfiller, such as constituent agent, business agent, agency agent: • Works on government service cases for all constituents. Can read, write, and update all government service cases and profile records. • Can belong to specific teams or agencies. • Can work on specific case types (for example Licenses or Unemployment).
Contributor	Business stakeholder or requester for constituents: • Help constituents or businesses with services that they need. • Submits requests on behalf of constituents and acts as proxy.
Government service manager	Manager of constituent and business services and agents supporting constituent services: • Administers services delivered to constituents, business stakeholders, and agency. • Can read, write, update, and delete all government service cases. • Can read, write, update, and delete all constituent, business, and agency records. • Improves service delivery and constituent satisfaction.

Public Sector Digital Services data model

Learn about the Public Sector Digital Services application by viewing data model and role relationship diagrams. These diagrams show the relationships between the tables and roles within the application and provide an overall picture of how the Public Sector Digital Services application operates.

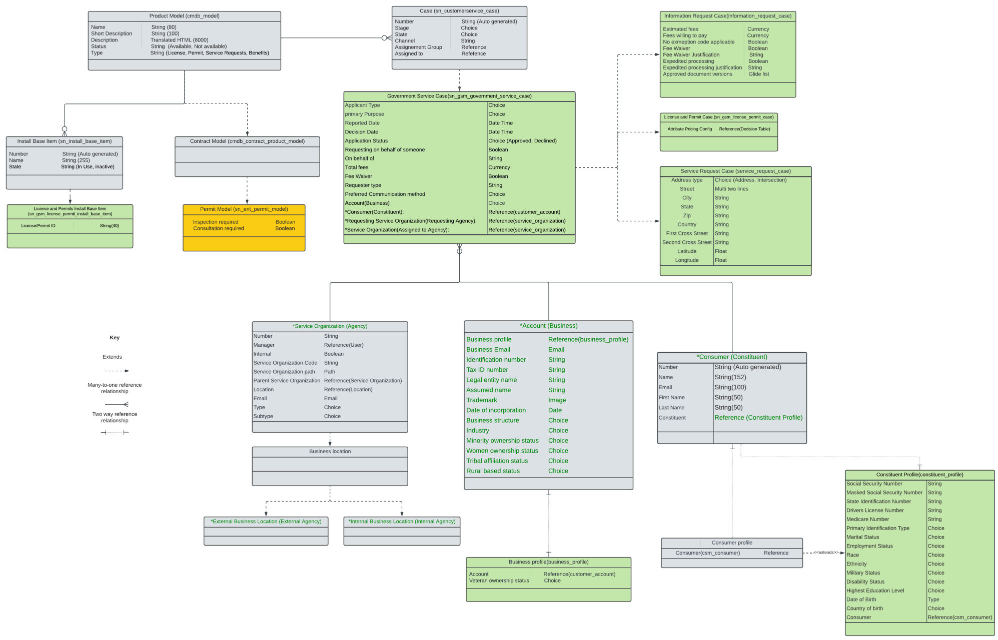
Data model

The following diagram shows the tables and their relationships within the Public Sector Digital Services application.

The flexibility of the Public Sector Digital Services platform provides you with a data model that you can extend and leverage to fit your needs.

Use the enhanced install base data model to provide authorized users with additional roles to access (read or update) cases, agency location items, and all install base items.

Note: In Public Sector Digital Services v8.0, the Services Offered and Services Received tables have been migrated into the Service Definition table. Category-related fields in government service forms are also removed, and the source table of the Service Offered Performance Overview dashboard has been reparented. For more information, see Configure a service definition for Playbooks in Public Sector Digital Services.



Glossary of Terms

A list of terms used throughout the Public Sector Digital Services documentation.

Business Location

The business location enables you to model internal and external organizational structures to support end users and provide agents the right level of visibility into constituent data and requests.

Case

A record that is used to track and manage a specific constituent issue, request, or incident. It is used in resolving issues submitted through the Government Service Portal.

Case Task

Tasks created for additional work that needs to be completed as part of resolving a government service case.

Constituent

An end-user, such as a citizen, resident, visitor, or veteran, that can request services from government agencies and track the outcomes and resolutions of those requests. Constituents are also known as requesters or users.

Decision Table

Decision tables provide a single point where you can create, view, and modify pricing and dependent attributes. Each factor is a decision input in these tables. For more information on decision tables, see Decision Tables.

Install Base Item (IBI)

An install base item is any configuration item that has been made accessible to end-users. Public Sector Digital Services refers to these Install Base Items as Items Received.

Product Model

A specific version or configuration of a public service offered. Product models provide government service agents and users with a common understanding of the public services that are being offered and requested.

Record Producer

A specific type of catalog item that allows end users to create task-based records, such as service request records, from the service catalog. The record producer generates a task record such as a public service complaint, instead of a requested item.

Service Definition

Records used to store the details about a service provided to end users. To learn more on service definitions, see Service definitions for Public Sector Digital Services.

Service Level Agreement (SLA)

An agreement that specifies the time within which service must be provided. SLA definitions are configured to include the necessary information to create and progress SLAs for government service cases.

Service Level Agreement (SLA) definition

A definition that includes the timings, conditions, workflows, and other information required to create and progress task Service Level Agreements (SLAs), enabling you to use an SLA system for your agency's tasks.

Special Handling Notes

Notes, created with the Special Handling Notes application, that bring important information about individual records to the user's attention, and can be assigned a status, a priority, and an expiration date.

Defining the processes and data for a government service case

You can use a government service case, which is based on the Government Service case type, to extend a customer service case. By using a case type, you can define the processes and data that are needed to resolve your government service requests.

Overview of a case type

A case type represents the data and the processes that are needed to resolve a specific type of constituent or business request. In addition to using service definitions, you can use the case types feature to create and configure the different types of government service cases that your agency handles. For more information on service definitions, see Service definitions for Public Sector Digital Services.

The base Government Service case type is called a government service case, and is an extension of the Customer Service case type from the Customer Service Management application. The Public Sector Digital Services application also has a Service Request case type (also known as a 311 service request case type), which is an extension of the base Government Service case type.

For more information on the base Government Service case type, see Government Service Case form. For more information on the Service Request case type, see Service Request Case form.

As an administrator, you can extend this base case type to create additional case types for various government services that your agency offers .

Creating a case type includes creating a table that is an extension of an existing case, or creating an entirely new case type table. Typically, you create roles, modules, workspaces, and other required entities for the case type.

You can use both case types and service definitions to define the data and processes that are needed to resolve a government service request. For more information on service definitions in Public Sector Digital Services, see Service definitions for Public Sector Digital Services.

Case type tasks for administrators

You can configure a case type by creating a table for the new case type that extends the government service base case table. Then, you can set up a series of processes and components for that case type.

- To get an overview of this process, see Government Service Case Types Guided Setup.
- For more details on how to configure case types using Guided Setup, see Configuring customer service case types.

An agent can then use this custom case type to create a case to resolve a constituent or business request. .

Government Service Case Types plugin

The Customer Service Case Types plugin (com.snc.csm_case_types) is activated when you enable the Public Sector Digital Services Core plugin (com.sn_public_sector_digital_services_core).

Activating this plugin adds the Case Types module to the application navigator. You can use this module to create and manage case types, as well as extend the Government Service base case type.

For more information on the plugins that are installed with the Public Sector Digital Services Core application, see Components installed with Public Sector Digital Services Core.

Government Service Case Types Guided Setup

Activating the Customer Service Case Types plugin adds the Case Types section to the Public Sector Digital Services Core Guided Setup.

Navigate to **All** > **Constituent Service** > **Administration** > **Guided Setup** and use the tasks in this section to create and configure a case type.

You can configure several different processes and components for a Government Service case type by using guided setup, including the roles, access control lists (ACLs), notifications, actions, and record producers.

To create and configure a case type, do the following tasks.

- Create a table for the new case type that extends the base Case table (sn_gsm_government_service_case).
- Configure the UI actions, UI policies, and client scripts for the new case type.
- Configure the views and view rules, roles and access controls (ACLs), business rules, and more for the new case type.
- Set up the processes for the case type, including the record producers, state flows, and special handling notes.
- Create a case type definition record for the new case type and add it to the Case Type table (sn_case_type).
- Configure the Get Case Types flow and modify the conditions that determine the visibility for a case type.

For more information, see Configuring customer service case types.

For more information on using Guided Setup for Public Sector Digital Services, see Configure Public Sector Digital Services Core using guided setup.

Government Service case type applications

The following table lists the applications available from the ServiceNow Store that use the Government Service case type and its extensions.

Government Service case type applications

Application	Description
Service Request Playbook (sn_gsm_srvc_req)	Playbook that provides step-by-step guidance through the life cycle of a government service request case. This playbook uses the service request case type to capture the details of the requests for the various types of community maintenance. For more information, see Life cycle of a government service request case.
Information Request Playbook (sn_gsm_info_req)	Playbook that provides step-by-step guidance through the life cycle of an information request case. This playbook uses the information request case type to capture the details of a requests for various types of federal, state, and local public records that fall outside of nine exemptions.
License and Permit Request Playbook (sn_gsm_info_req)	Playbook that provides step-by-step guidance through the life cycle of license or permit request case. This playbook uses the license and permit request case type to capture the details of a requests for new permit or license.

Review the Service Request Playbook, Information Request Playbook, or License and Permit Playbook application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Government Service case stages

The government case type moves through the stages that are listed in the following table.

Government service request case stages

Stage	Description
Intake	Default stage for a new case.
Review	Stage when the state is updated from Draft to Open because the case is assigned and has been accepted by the agent named in the **Assigned to** field.
Process	Stage when the state is updated from Open to Work In Progress.
Decision	Stage when the state is updated from Work In Progress to Resolved.

Government Service Case states

The government case type moves through the states that are listed in the following table. For more information, see Life cycle of a government service request case.

Government service request case states

State	Description
Draft	Default state for a new case.
New	Case that moves from Draft to New when the user selects **Submit**.
Open	Case that moves from New to Open when it's assigned and has been accepted by the agent in the **Assigned to** field.
Work in Progress	Case that moves from Open to Work in Progress when the agent selects **Start Work**.
Awaiting Info	Case that moves from Work in Progress to Awaiting Info when the agent selects **Request Info**.
Resolved	Case that moves to the Resolved state when the agent selects **Propose Solution**.
Closed	Case that moves to the Closed state when the requester selects **Accept Solution** or **Close Case**.
Cancelled	Case that is moved to the Cancelled state. This can happen through automatic timeout, or if the requester selects **Cancel**.

Life cycle of a government service request case

A government service request case within the Public Sector Digital Services Service Request Playbook application can be in one of several states as it progresses through the fulfillment cycle.

Service request case stages

A service request has four stages:

- Intake
- Review
- Process
- Decision

As a service request case moves through the stages listed above and toward a resolution, the case status is updated. Stage and status are related to each other as described in the following table.

Service request case stages and status

Case Stage	Case Status	Description
	Draft	The case has not yet been submitted, and the service request case record has not yet been created.
Intake Guides the agent to collect the information needed to create the service request case.	New	The initial status for a new service request case created through the Government Service Portal or the Service Request Playbook. In this state, a Government Service agent can do one of the following: • **Assign to me**: Assign themselves the case. The state changes to **Open**. • **Accept**: If the case was assigned to the agent by a government service manager, the can agent accept or re-assign the case. If accepted, the state changes to **Open**. • **Update**: Update the case. • **Close Case**: Close the case. • **Delete**: Delete the case. In this state, a constituent can do either of the following: • **Update**: Update the case with additional information. • **Close Case**: Close the case.
	Open	A case changes from **New** to **Open** when a Government Service agent assigns the case to themselves (**Assign to me**), or accepts a

Service request case stages and status (continued)

Case Stage	Case Status	Description
		case assigned to them by a Government Service manager. In this state, the agent can do one of the following: • **Update**: Update the case. • **Request Info**: Request additional information from the constituent. The case state changes to **Awaiting Info**. • **Propose Solution**: Propose a solution for the case. The case state changes to **Resolved.** • **Close Case**: Close the case. • **Delete**: Delete the case.
	Awaiting Info	Additional information has been requested from the constituent. In this state, the constituent can do one of the following: • **Update**: Add the requested information to the case. Once that information has been received, the case moves back to **Open**. • **Close Case**: Close the case.
Review Enables the agent to do initial troubleshooting on the case, check for similar or duplicate case requests, and determine what services need to be rendered.	Open	In this state, the agent can do one of the following: • Check to see if there are similar or duplicate requests. If so, the case can be moved to progress directly. • **Request an Inspection**: If an inspection is requested, the case status moves to **Inspection in Progress**
	Inspection in Progress	Inspection of the service location by a field service agent is in progress. Once complete, the case is moved to **Process**.
	Awaiting Info	If an agent requests more information at any time during the Review stage, the status of the case changes to **Awaiting Info**. In this state, the agent can do one of the following: • **Open Case**: Change the case state back to **Open**. • **Update**: Update the case. • **Close Case**: Close the case. • **Delete**: Delete the case.

Service request case stages and status (continued)

<table>
<tr><th>Case Stage</th><th>Case Status</th><th>Description</th></tr>
<tr><td></td><td></td><td>In this state, the constituent can do one of the following:
• Update: Add the requested information to the case. Once the constituent updates the case, the state changes to Open.
• Close Case: Close the case.</td></tr>
<tr><td>Process</td><td>Work in Progress</td><td>The case status changes to Work in Progresswhen the agent selects Start Work. A work order is now in progress to solve the service request.</td></tr>
<tr><td></td><td>Work Assignment in Progress</td><td>A work order is in progress, and the government service agent resolves any open case tasks associated with the case.</td></tr>
<tr><td></td><td>Awaiting Info</td><td>The case moves to the Awaiting Info state when an agent selects Request Info to request more information from the requester. The agent has requested more information during or after work has been done to resolve the case.</td></tr>
<tr><td>Decision

Allows the requester to review the agent's decision and either accept or reject.</td><td>Ready for Decision</td><td>The case is ready for an agent decision.</td></tr>
<tr><td></td><td>Resolved</td><td>Once an agent provides a resolution code, enters resolution notes in the Resolution Information tab, and selects Propose Solution, the case state changes from Awaiting Info to Resolved.

The Resolution code and Resolution notes fields are mandatory for an agent to propose a solution to the case.

In this state, the agent can do one of the following:
• Update: Update the case
• Close Case: Close the case.

A case cannot be closed by an agent or agent manager when it is in this state.

In this state, the constituent can do one of the following:
• Accept Solution: Accept the solution proposed by the agent. The case state changes to Closed and a survey is displayed.</td></tr>
</table>

Service request case stages and status (continued)

Case Stage	Case Status	Description
		• **Reject Solution**: Reject the solution proposed by the agent. The case state changes to **Open**. • **Delete**: Delete the case.
	Closed	After proposing a solution, the agent waits for a constituent response. • If the constituent clicks **Accept Solution**, the case state changes from **Resolved** to **Closed**. • If the constituent clicks **Reject Solution**, the state changes from **Resolved** to **Open**, and the agent must propose another solution. Closing a case as an agent or agent manager requires comments to be added to the **Resolution notes** field. This is not required when a customer closes a case. A case cannot be updated once it is closed.
	Cancelled	The service request is cancelled.

Note: You can't edit a service request case when the state of the case is set to **Closed complete** or **Canceled**.

Public Services Case form related lists

The Case form includes related lists that store case information and that agents can use to perform case-related tasks. Government agents are able to access a service request case, information request case, or license and permit case and view the following related lists.

Government service case form related lists

Related List	Description
Case Tasks	Tasks that have been created for this case by the government service agent or agent manager. When you create a task or change the state of a task, the information is recorded in the case **Activity** field. When you create a case task, the system generates a task number with a prefix. New and existing case tasks, regardless of state, both use the CSTASK prefix.
Related Parties	A list of related parties, such as contacts or constituents added to the case.
Related Cases	A list of cases created for the same account or contact.
Work Orders	A list of work orders created for this case.

Government service case form related lists (continued)

Related List	Description
Interactions	A comprehensive list of interactions created between constituents and government service agent for this case. Interactions use the IMS prefix.
SLAs	The service level agreements that are associated with this case.
Draft Emails	Emails that are unsent.
Emails	The case email log. A list of the emails that are sent or received as part of resolving this case. The government service agent or agent manager can send email from within the case, such as updates and inquiries to constituents or other agents or parties. A change in the state of the case triggers an automatic email to be sent to the constituent. Constituent contacts can create and update cases by email as well as receive updates from government service agents.
Blocked Tasks	A list of blocking tasks that have been created for this case. A blocking task is something that prevents the agent from making progress toward case resolution.
Escalations	A list of escalation records that are related to this case.
Attached Knowledge	Knowledge articles attached as a proposed solution to the case.
Knowledge Gaps	Feedback tasks that are created when a knowledge gap is reported.
Appointments	Appointments that the government agent makes with the constituent or others as part of resolving this case. When you create an appointment, an appointment creation message is recorded in the case **Activity** field. The user selected in the **To** field on the appointment form receives an email with the appointment details.

Government Service Case form

Agents can create a Government Service Case form to display detailed information about questions, requests, and issues that constituents, business stakeholders, or agents have. Constituents, business stakeholders, or agents can also view the form to see the status of their requests and service cases.

Government Service Case form

Field	Description
Number	Auto-generated number for the case. Numbers for cases use the default prefix GOVCS.
Applicant type	Type of applicant:

Government Service Case form (continued)

Field	Description
	• Individual • Business • Agency
Business	Name of the business. If the business does not exist, the agent can create a business record from the case.
Business contact	Name of the business contact. If the business contact does not exist, the agent can create a business contact record from the case.
Channel	Method by which the constituent initiated contact and the case was opened: • Web (default) • Phone • Email • Chat • Social • Community • Alert • Virtual Agent • In Person
Constituent	Name of the constituent. If the constituent does not exist, the agent can create a constituent record from the case.
Requested by agency	Name of the agency that requested the case.
Assigned to agency	Name of the agency that is assigned with the case.
Service	The requested service indicated in the case.
Opened	Date and time that the case was opened.
Priority	The assigned priority: • 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
Assignment group	Assigned government service agent group.
Assigned to	Assigned agent. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.

Government Service Case form (continued)

Field	Description
Primary purpose	The reason that the constituent created the case: • Constituent Benefits: services that constituents can apply for. • Governance Procedures: other types of cases such as Frauds, Appeals, Investigations, Complaints.
Partner	The name of the partner company.
Partner contact	The name of the partner contact for this case.
Short description	Brief description of the question, request, or issue.
Applicant Information	
Primary identification type	The type of document used as a constituent identification: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Identification field	One of the following fields based on the selection in the **Primary Identification type** field: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Email	The email address of the requester.
Street	The street name for the primary address.
City	The city for the primary address.
State/ Province	The state or province for the primary address.
ZIP/Postal Code	The ZIP code or postal code for the primary address.
Country	The country of the requester.
Application Information	
Reported date	The date that the case was submitted. This field defaults to the case creation date but can be changed.
Decision date	The date that a decision about the case was reached.
Application status	The status of the application:

Government Service Case form (continued)

Field	Description
	• Approved • Declined
Description	A description about the case status.
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to **Resolved** or **Closed**. Click the add me icon to add yourself to the watch list.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list. Click the add me icon to add yourself to the watch list.
Additional comments (Customer visible)	Comments for the case that are visible to the constituent.
Work notes	Information about how to resolve the case or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive a notification that Case work notes have been added. You can configure the notification, as required. The notes are viewable by the admin, agent, and agent manager.
Contributors	
Contributor Users	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user is added to the **Contributor Users** field. If this user is removed from the **Assigned to** field on the Case Task form, and this user is not assigned to any other tasks for the case, the user is also removed from the **Contributor Users** field.
Contributor Groups	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user's assignment group is added to the **Contributor Groups** field. If the user is removed from the **Assigned to** field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field. If a group is removed from the **Assignment group** field on the Case Task form, and the group is not assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field.

Government Service Case form (continued)

Field	Description
Resolution Information	
Resolved by	Agent that the case is assigned to when the case is resolved.
Resolved	Date and time that the case was resolved.
Resolution code	List of the resolution states for the case. This field is mandatory when an agent proposes a solution for a case.
Closed by	Name of the user who closed the case.
Closed	Date and time that the case was closed.
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is mandatory if a customer service agent or agent manager closes a case. If a constituent closes a case, it is not mandatory.

Service Request case form

A government service agent can create a case using the Service Request case form to capture detailed information about questions, requests, and issues that constituents, business stakeholders, or agents have. Constituents, business stakeholders, or agents can also view the form to see the status of their requests and service cases.

A government service agent creates a case to identify a constituent's question or issue and to track the activities related to resolving the issue. An agent also uses a case to track communication to and from the constituent, including the communication channels being used.

Case activities include any action that is taken to resolve an issue. This can include phone calls or emails, knowledge base research, conversations with subject matter experts, and dispatch requests to field service agents, as well as other activities.

From the Case form, an agent can associate and store the related information, such as the constituent's name, phone number, and company; account information; product and asset information; service contract and entitlement details, and any associated service level agreements (SLAs).

There are several key features to a case.

- Communication between an agent and the constituent or an agent and other employees within the organization. Details of all internal and external communication are recorded on the Case form.
- Any additional tasks that result from a case, such as a work order. Tasks are tracked from a related list on the Case form. These tasks may be internal to the organization or they may involve the constituent.
- Information from the case that can be included in the knowledge base and used to help resolve other cases.

There are two different Case form views: a detailed view that is available to agents and agent managers in the Public Sector Digital Services application and a simplified view that is available to external constituents from the Government Service Portal.

Agent view

The agent view of the Case form includes the following components:

- A timeline that provides a visual display of case activities.
- Referenced entities for the case including account and contact information, product and asset information, service contract and service entitlement details, and any pertinent SLAs. Except for SLAs, this information exists in the system and can be associated with the case by the agent or agent manager.
- All communication about the case, both external and internal. This information is stored in the **Additional comments** field (external communication), the **Work notes** field (internal communication), the **Resolution notes** field. The **Resolution notes** field stores details about the case resolution, and the **Activity** field, which stores all communication in a chronological list.

Agents and managers can view a Case form in the Public Sector Digital Services application by navigating to **Lists** > **Service Requests** and selecting one of the following menu options:

- **All**
- **My Cases**
- **My Open**
- **Unassigned for my group**

From the Case list, click a case number to display the Case form.

Government Service Case form (agent view)

Field	Description
Number	Auto-generated number for the case. Numbers for cases use the default prefix GOVCS.
Opened	Date and time that the case was opened.
Applicant type	Type of applicant: • Individual • Business • Agency
Business	Name of the business. If the business does not exist, the agent can create a business record from the case.
Business contact	Name of the business contact. If the business contact does not exist, the agent can create a business contact record from the case.
Constituent	Name of the constituent. If the constituent does not exist, the agent can create a constituent record from the case.
Priority	How quickly the agent should address the service request. Priority ranking is as follows: • 1 — Critical • 2 — High

Government Service Case form (agent view) (continued)

Field	Description
	• 3 — Moderate • 4 — Low (default)
Channel	Method by which the constituent initiated contact and the case was opened: • Web (default) • Phone • Email • Chat • Social • Community • Alert • Virtual Agent • In Person
Primary purpose	The reason that the constituent created the case: • **Constituent Benefits**: services that constituents can apply for. • **Governance Procedures**: other types of cases such as Frauds, Appeals, Investigations, Complaints. Defaults to **Constituent Benefits**.
Service	The requested service indicated in the case. By default, this field will show public services with ‘Service type’ = Service Requests.
Assigned to agency	Name of the agency that is assigned with the case.
Requested by agency	Name of the agency that requested the case.
Assignment group	Assigned government service agent group.
Assigned to	Agent(s) the case is assigned to. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Service	Requested service that is indicated in the case.
Short description	Brief description of the question, request, or issue. Users can use the related search results to find a list of knowledge base articles with a possible solution.
Request Location	
Address Type	The type of location where the issue is being reported. **Address** or **Intersection**
Street	The address where the issue is located. This field is only required if **Address**is selected as the Address type.

Government Service Case form (agent view) (continued)

Field	Description
First Cross Street, Second Cross Street	The cross streets where the issue is located. This field is only required if **Intersection**is selected as the Address type.
City	The city where the issue is located.
State/ Province	The state or province where the issue is located.
ZIP/Postal Code	The ZIP code or postal code where the issue is located.
Country	The country where the issue is located.
Latitude, Longitude	The coordinates where the issue is located. This field is required for either address type, and auto-populates based on the address data entered.
Request Details	
Reported date	The date that the case was submitted. This field defaults to the case creation date but can be changed.
Description	A description about the case status.
Applicant Information	
Primary identification type	The type of document used as a constituent identification: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Identification field	One of the following fields based on the selection in the **Primary Identification type** field: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Email	The email address of the requester.
Street	The street name for the primary address.
City	The city for the primary address.
State/ Province	The state or province for the primary address.
ZIP/Postal Code	The ZIP code or postal code for the primary address.
Country	The country of the requester.

Government Service Case form (agent view) (continued)

Field	Description
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to **Resolved** or **Closed**. Click the add me icon to add yourself to the watch list.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list. Click the **add me** icon to add yourself to the watch list.
Additional comments (Constituent visible)	More information about the issue as needed. All users who can view incidents can also see additional comments.
Work notes	Information about how to resolve the case or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive a notification that Case work notes have been added. You can configure the notification, as required. The notes are viewable by the admin, agent, and agent manager.
Contributors	
Contributor Users	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user is added to the **Contributor Users** field. If this user is removed from the **Assigned to** field on the Case Task form, and this user is not assigned to any other tasks for the case, the user is also removed from the **Contributor Users** field.
Contributor Groups	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user's assignment group is added to the **Contributor Groups** field. If the user is removed from the **Assigned to** field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field. If a group is removed from the **Assignment group** field on the Case Task form, and the group is not assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field.
Resolution Information	
Resolved by	The agent to whom the case is assigned when the case is resolved.
Resolved	Date and time that the case was resolved.
Closed by	Name of the user who closed the case.

Government Service Case form (agent view) (continued)

Field	Description
Closed	Date and time that the case was closed.
Resolution code	List of the resolution states for the case. This field is mandatory when an agent proposes a solution for a case. By default, this field is set to **Resources Not Approved**.
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is mandatory if a government service agent or agent manager closes a case. If a constituent closes a case, it is not mandatory.
Related Records	
Parent	Associated parent incident that makes the current incident a child incident. **Note:** When the parent incident is resolved, the child incident is also marked as resolved.
Problem	Any related problem record.
Change Request	Any related change request.
Caused by Change	Associated change request that prompted the creation of the incident.

Constituent view

Users with the constituent or business contact role can view Case forms by selecting **Your Cases** in the government service portal header, then selecting the case number from the Case list.

The constituent or business contact view of the Case form includes the following components:

- A process flow formatter that indicates the current state of the case.
- The related entity information, including agency and contact information, pending service case task information, and service request information.
- An **Activity** field that stores all communication for the case in a chronological list.

Information Request case form

A government agent can create a case by using the Information Request case form to capture detailed information about public record requests that constituents, business stakeholders, or other agents have. Constituents, business stakeholders, or agents can also view the form to see the status of their information requests.

Information Service Case form

Field	Description
Number	Auto-generated number for the case. The numbers for the cases use the default prefix GOVCS.
Opened	Date and time that the case was opened.
On Behalf Of	Name of the contact for which the record is being requested on behalf of. This field is required if the **Requesting on behalf of someone** check box is selected.
Applicant type	Type of applicant: • Individual • Business • Agency
Business	Name of the business, if the business is selected as the applicant type. If the business doesn't exist, the agent can create a business record from the case.
Business contact	Name of the business contact. If the business contact doesn't exist, the agent can create a business contact record from the case.
Constituent	Name of the constituent, if the individual is selected as the applicant type. If the constituent doesn't exist, the agent can create a constituent record from the case.
Priority	Assigned priority: • 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
Service	Requested service that is indicated in the case.
Channel	Method by which the constituent initiated contact and the case was opened: • Web (default) • Phone • Email • Chat • Social • Community • Alert • Virtual Agent • In Person

Information Service Case form (continued)

Field	Description
Assigned to agency	Name of the agency that is assigned to the case.
Assignment group	Government agent group to which this case is assigned.
Assigned to	Name of the agent that is assigned to this case. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Primary purpose	Reason that the constituent created the case: • Constituent Benefits: Services that constituents can apply for. • Governance Procedures: Other types of cases such as frauds, appeals, investigations, or complaints.
Short description	Brief description of the question, request, or issue.
Applicant Information	
Primary identification type	Type of document that is used as a constituent identification: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Preferred communication method	Preferred communication method of the requester: • None • Email • Mail • Call
Identification field	Field that is based on the selection in the **Primary Identification type** field: • Social Security Number • State Identification Number • Driver's License Number • Medicare ID
Email	Email address of the requester.
Street	Street name for the primary address.
City	City for the primary address.
State/Province	State or province for the primary address.
ZIP/Postal Code	ZIP code or postal code for the primary address.
Country	Country of the requester.

Information Service Case form (continued)

Field	Description
Application Information	
Description	Description about the case status.
Fee waiver	Whether the requester believes the case qualifies for a fee waiver.
Fee waiver justification	Justification for a fee waiver qualification. Certain types of requesters automatically qualify for a fee waiver.
Expedited processing	Whether expedited processing is needed.
Expedited processing justification	Justification for requesting expedited processing.
Requester type	Type of requester: • Representative of the news media • Educational Institution • Non-commercial scientific institution • Commercial use requester • All other requesters
Fees willing to pay	Estimate of the fees that the requester is willing to pay to have this request fulfilled.
Estimated fees	Estimate of the fees required to fulfill this request.
No exemption code applicable	Box that is selected if none of the nine exemptions from the exemption checklist apply to this case.
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to **Resolved** or **Closed**. Select the add me icon to add yourself to the watch list.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list. Select the add me icon to add yourself to the watch list.
Additional comments (Customer visible)	Comments for the case that are visible to the constituent.
Work notes	Information about how to resolve the case or steps taken to resolve it, if applicable.

Information Service Case form (continued)

Field	Description
	Internal users who have been added to the Work notes list receive a notification that Case work notes have been added. You can configure the notification, as required. The notes are viewable by the administrator, agent, and agent manager.
Contributors	
Contributor Users	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user is added to the **Contributor Users** field. If this user is removed from the **Assigned to** field on the Case Task form, and this user isn't assigned to any other tasks for the case, the user is also removed from the **Contributor Users** field.
Contributor Groups	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user's assignment group is added to the **Contributor Groups** field. If the user is removed from the **Assigned to** field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field. If a group is removed from the **Assignment group** field on the Case Task form, and the group isn't assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field.
Resolution Information	
Resolved by	Agent that the case is assigned to when the case is resolved.
Resolved	Date and time that the case was resolved.
Resolution code	List of the resolution states for the case. This field is required when an agent proposes a solution for a case.
Closed by	Name of the user who closed the case.
Closed	Date and time that the case was closed.
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is required if a customer service agent or agent manager closes a case. If a constituent closes a case, it isn't required.

Information Request Case form related lists

The Case form includes related lists that store case information and that agents can use to perform case-related tasks.

Information request case form related lists

Related List	Description
Related Parties	A list of related parties, such as contacts or constituents added to the case.
Documents	Agents can: • Add documents to the information request without making them visible to the requester • View a list of documents added to the Information Request • View documents approved to be published to the requester • Publish approved documents to the requester To view the Documents related list, you must first install the Document Management plugin.
Escalations	A list of escalation records that are related to this case.
Attached Knowledge	Knowledge articles attached as a proposed solution to the case.
Knowledge Gaps	Feedback tasks that are created when a knowledge gap is reported.
Appointments	Appointments that the information request case agent makes with the constituent or others as part of resolving this case. When you create an appointment, an appointment creation message is recorded in the case **Activity** field. The user selected in the **To** field on the appointment form receives an email with the appointment details.

Service Request Case Task form

Service Request case form displays detailed information about a service request cae task.

The Service Request Case Task form displays information about service request case tasks, which are created and assigned to agents to complete the work to resolve service request cases.

The case task form includes the following fields.

Service Request Case Task form

Field	Description
Number	Automatically assigned case task number.
Priority	Assigned priority: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low (default)

Service Request Case Task form (continued)

Field	Description
Parent	Case that this case task was created for. This can be a case from the Case table (sn_gsm_government_service_case) or any child tables of the Case table.
State	Current state of the case task: • Open • Awaiting Info • In Progress • Closed
Associated Table	Table associated with this task.
Associated Record	Records that are associated with this task.
Assigned to	Assigned user.
Subject	Subject of the case task.
Description	Description of the work that needs to be done in order to complete the case task.
Work Notes List	Customizable list of agents that can view the work notes.
Work notes (Private)	Free-form private work note text viewable to assigned agents only.
Additional comments	Notes that are visible to the constituent. Agents can use this field to request more information from the constituent.

Government Service Portal service catalog list

The following services are base system catalog items offered with the Government Service Portal.

These services display automatically for logged in users, and using one of these catalog items to create a case automatically maps the item to certain pre-built requests.

A user can go to the service catalog and create a case using the categories and sub-categories outlined in the following table.

311 Service Request Catalog Items

Category	Subcategory		Description
Animal		Aggressive Animal	Report truly aggressive animals as opposed to animals that are merely barking or running at large

311 Service Request Catalog Items (continued)

Category	Subcategory		Description
		Abused and Neglected Animal	Report an injured, abused, neglected or, otherwise, in danger domestic animal.
		Injured Animal	Report any non-owned animal in the public way, public place, city park, on a pole, electrical wire, or train tracks that is injured or sick.
		Wildlife, Stray or Dead Animal Pickup	Report and request the removal of a dead wild or stray animal from the public right-of-way
Housing, Buildings, and Structures	Housing	Abandoned Vehicle (Private Property)	Report abandoned vehicles on private occupied property, private vacant property and public vacant lots/property.
		Housing Inspection, Animal	Report residential animal problems such as animal feces, too many animals and/or exotic animals on occupied private property.
		Housing Inspection, Fire Protection	Report damaged or lack of proper fire protection equipment (e.g., fire extinguisher, fire escape, smoke alarms) in residential rental property
		Housing Inspection, Vacant Residential Property	Report a residential property which has become open to casual entry by the public and represents a hazard to the community.

311 Service Request Catalog Items (continued)

Category	Subcategory		Description
		Illegal Flyers	Report illegal flyers posted on private property.
Garbage, Recycling & Graffiti	Garbage	Damaged Garbage Bin Replacement	Submit a request for replacement of a damaged garbage bin
		Public Trash Can Issue	Report overflowing public trash cans to be emptied
		Illegal Dumping	Report report large amounts of trash bags or more, bulk items, or building materials that appeared overnight or a witnessed act of dumping from a vehicle
		Missed Residential Garbage	Report missed residential garbage collection
	Recycling	Missed Recycling	Report missed residential recycling collection
	Grafitti	Graffiti Removal	Report graffiti on private or public property
Parks and Trees	Parks	Park Cans	Request to have overflowing trash cans and trash around cans removed from Recreation & Parks properties
		Park Maintenance	Request maintenance at within public park or at a park structure (e.g., pavilion or gazebo). Typical park maintenance requests include trash on grounds, basketball replacement, tennis/ basketball court repairs, fences

311 Service Request Catalog Items (continued)

Category	Subcategory		Description
			repairs, bench repairs, masonry work, water fountain repairs and other outside water leaks.
	Trees	Street Tree Down	Report a loose or fallen limb from a city street tree that is a hazard to transit or public safety
		Street Tree Inspection	Request an inspection of a City street tree that may need removal or pruning.
		Tree Planting Request	Requests to plant a tree on the City parkway in front of your house.
		Tree Removal Request	Request to remove a dead or diseased tree on the public way.
Public Safety		Equipment Noise Complaint	Report excessive noise coming from air conditioners, compressors, generators, or any other piece of industrial or commercial equipment.
		Spills or Dumping in Natural Water Ways	Report pollution into rivers, lakes, canal, or sewers.
		Water Supply Issues	Report issues with water supply or no water to property
Streets and Sidewalks	Streets	Street Cleaning Request	Request for curb to curb sweeping the debris off the street by a street sweeping machine
		Water On Street	Report water that remains on the street due to broken fire hydrants, drains etc.

311 Service Request Catalog Items (continued)

Category	Subcategory		Description
		Remove Obstruction in the Right of Way (ROW)	Report items such as concrete poles, wood, tools, car parts, etc., that are obstructing the Right of Way (ROW)
		Potholes	Report a pothole (surface level damage to a street or a depression/ hollow in a road surface caused by wear or subsidence.)
	Sidewalks	Sidewalk Inspection Request	Report the condition of City sidewalks or accessibility (ADA) ramp issues
Traffic and Parking	Parking	Broken Parking Meter	Report a broken parking meter
		Parking Complaint	Report suspected illegal parking
	Traffic	Damaged or Missing 'Do Not Enter' signs	Report maintenance issues to damaged or missing "Do Not Enter" signs.
		Damaged or Missing Stop Signs	Report maintenance issues to damaged or missing "Stop" signs
		Damaged or Missing Street Name Sign	Report a damaged or missing street name sign in need of replacement or repair
		Traffic Signal Out	Report traffic signals and/or pedestrian crosswalk signals that are not working or are flashing
Water & Sewer	Sewer	Sewer Investigation	Report any sewer related issues such as sewer/sanitary manhole cover damage/missing, an odor of sewage with no visual evidence, or maintenance of tree roots in a sewer

311 Service Request Catalog Items (continued)

Category	Subcategory		Description
			drain which could cause a backup.
	Water	Sewer Overflow	Report sewer water leaking or overflowing from outside pipes.
		Water Meter Cover Missing or Damaged	Report a missing or damaged water meter cover.
		Water Odor or Bad Taste	Report any unusual smell or taste associated with a dwelling's tap water.
		Open Hydrant	Report water flowing from a hydrant nozzle.

Business Profile form

Use the Business Profile form in Public Sector Digital Services to capture and display the details about a business. You can add the name and address of the business owner, trademark status, industry information, partner records, or business structure.

The Business Profile form displays detailed information about a business and its contacts. This information is collected on registration for the government service portal.

Business Profile form

The Business Profile form displays detailed information about a business and its contacts that are collected upon registration for the government service portal.

Field	Description
Business	
Name	Name of the business.
Email	Primary contact email for the business.
Street	Street address where the business is located.
City	City where the business is located.
State/ Province	State or province where the business is located.
Zip / Postal Code	ZIP code of the business address.
Country	Country where the business is located.

Business Profile form

The Business Profile form displays detailed information about a business and its contacts that are collected upon registration for the government service portal.

(continued)

Field	Description
Business Phone	Primary contact phone number for the business.
Business Information	
Customer	Customer contact for the business.
Partner	Partner of the business.
Identification Number	Reference number for the business entity.
Tax ID number	Tax ID number.
Business Structure	Details about the structure of the business.
Legal Entity Name	Name of the business owner.
Trademark	Trademark of the business.
Assumed Name	Registered business owner name.
Date of incorporation	Date that the business was incorporated.
Industry	Industry of the business.
Additional Information	
Minority ownership status	Option to indicate that a business is owned by a minority.
Rural based status	Option to indicate that a business is based in a rural area.
Tribal affiliation status	Option to indicate that the business owner is affiliated with a tribe.
Women ownership status	Option to indicate that a business is owned by a woman.
Veteran Ownership Status	Option to indicate that a business is owned by a veteran.
Contact registration information	

Business Profile form

The Business Profile form displays detailed information about a business and its contacts that are collected upon registration for the government service portal.

(continued)

Field	Description
Business registration code	Registration code. If a request is submitted with a valid registration code, the business account information is automatically detected and added to the business record.
Primary Contact Information	
Primary identification type	Type of primary identification: • Social Security Number • State Identification Number • Drivers License Number • Medicare ID
Identification field	Type of identification. This field appears only when an option is selected from the **Primary identification type** field: • Social Security Number • State Identification Number • Drivers License Number • Medicare ID

Agency Profile form

Use the Agency Profile form in the Public Sector Digital Services application to capture and display the details about an agency and the cases that they're involved in.

The Agency Profile form displays detailed information about an agency and its agents.

Agency Profile form

Field	Description
Number	Auto-generated number for the agency.
Name	Name of the agency.
Manager	Name of the agency manager.
Parent Agency	Name of the parent agency.
Street	Mailing street address of the agency.
City	City in which the agency is located.
State/Province	State or province in which the agency is located.
Zip/Postal Code	ZIP or postal code of the agency.
Website	URL of the agency website.

Agency Profile form (continued)

Field	Description
Email	Primary contact email of the agency.
Phone	Primary contact phone number of the agency.
Identification Number	Auto-generated identification number for the agency.
Type	Type that defaults to **Agency**
Subtype	Agency subtype: • Local • County • State • Federal

Agency Service Constituent Profile form

Use the Agency Service Constituent Profile form in the Public Sector Digital Services application to display detailed information about a constituent, such as the name and address, date of birth, contact information, and language choice.

The following table describes the detailed information that you can add to the Agency Service Constituent form.

Agency Service Constituent form

Field	Description
Consumer reference	Reference number for the constituent case.
First name	First name.
Last name	Last name.
Middle name	Middle name.
Number	Phone number of the constituent.
Suffix	Suffix of the constituent name. The suffix may include MD or Jr.
Mobile phone	Mobile phone number for the constituent.
Business phone	Business phone number for the constituent.
Fax	Fax number.
Photo	Photo of the constituent.
Email	Email of the constituent.
Gender	Gender of the constituent.
Date of birth	Date of birth of the constituent.
Country of birth	Country of birth of the constituent.
Age	Age of the constituent.

Agency Service Constituent form (continued)

Field	Description
Identification Information	
Primary identification type	Type of primary identification: • Social Security Number • State Identification Number • Drivers License Number • Medicare ID
Identification field	Type of identification. This field appears only when an option is selected from the **Primary identification type** field. • Social Security Number • State Identification Number • Drivers License Number • Medicare ID
Primary correspondence Information	
Primary address type	Type of primary address for the constituent: • Home address • Business address • Mailing address
Street	Street of the constituent.
City	City that the constituent lives in.
State/Province	State in which the constituent lives.
ZIP/Postal code	ZIP code for the address of the constituent.
Latitude	Latitude of the address of the constituent.
Longitude	Longitude of the address of the constituent.
Primary phone number	Primary phone number of the constituent.
Additional information	
Marital status	• Married • Single • Divorced • Widowed • I do not wish to provide this information

Agency Service Constituent form (continued)

Field	Description
Employment status	• Employed • Unemployed • Self employed • I do not wish to provide this information
Race	• American Indian or Alaska Native • Asian • Native Hawaiian or other Pacific Islander • Black or African American • White • I do not wish to provide this information
Ethnicity	• Hispanic or Latino • Not Hispanic or Latino • I do not wish to provide this information
Military status	• Active duty • Veteran • No military duty • I do not wish to provide this information
Disability status	• Yes, I have a disability • No, I do not have a disability • I do not wish to provide this information
Highest education level	• High school or equivalent • Technical or occupational certificate • Associate degree • Some college coursework completed • Bachelor's degree • Master's degree • Doctorate • Professional • Other

Agency Service Constituent form (continued)

Field	Description
Primary language choice	• English • Spanish
Notes	
Notes	Additional notes about the constituent or the case.

Core role relationships

The following diagram shows the core role relationships within the Public Sector Digital Services application. Use this diagram to understand how each role is related to the other roles within the application.

Core role relationships