**Communication Escalation Workflow**

This document is to be used as a guide for users when they are seeking assistance and are not sure of the process or who to reach out to for help.

**Bitfocus Help Center Articles**

* This may be a user’s first step in attempting to understand where to go within the system or how to use a certain feature in the system. Help Center Articles contain information on some of the Canned Reports in Clarity and how to use email, calendar, and correct certain errors.

**ICA Help Desk**

* ICA is meant to act as a mediator between the users and the vendor. If the user is not finding any Bitfocus Help Center Articles on their topic, or need further assistance with an issue, then they may reach out to the ICA Help Desk.
* The ICA Help Desk should be the go-to for the following:
  + Anything the Help Center Articles cannot assist with
  + New User Trainings
  + Issues with Errors in Reporting
  + Merging Client Records
  + Provider Configuration (Services, programs, etc.)
  + Creating a new agency/program to Clarity
  + Questions on migrating SP to Clarity data
  + Workflow/data entry questions
  + Data Quality (can also reach out to MACCH depending on the question)
  + Clarity system errors/issues (system being slow, client information not appearing, reports not being able to be run or saved, etc.)
  + Logging in issues/rest password/locking accounts for time away
  + Submitting HUD reports including ESG CAPER, APR, PIT/HIC, and any data quality reports unless otherwise stated.
  + Security Trainings
  + Coordinated Entry – Data, Clarity configuration

When requesting assistance from the helpdesk, it is important to provide as much information as possible. Below you will find a list if frequent helpdesk related submission and what type of information is needed to troubleshoot those helpdesk submissions.

**New User Training**

Who: New users of your agency and those who have not been active in the system in the last 30 days.

What: Need to complete the License Request Form

When: 1st and 3rd Tuesday of the month

Where: Training is conducted via Go To Meeting

How: Submit request, new user is added to class, new user must have screen viewing capabilities

**Client Record**

Who: Client ID

What: What are the issues you are experiencing?

When: When the issue started

Where: Where in the database is the issue occurring

How: List the steps in the workflow you followed

Why: Helpdesk response on why the issue is occurring

**Reports**

Who (Which): Which report are you running

What: What issue are you experiencing

When: When did you experience the issue

Where: Where is the location of the report in the database

How: List the parameters that you selected to run this report

Why: Helpdesk response on why the issue is occurring

**Merge Request**

When: When notice a duplicate record

Who: All the duplicate client ID’s

What: What record contains the correct information

How: Submit duplicate ID’s or Client merge request form to helpdesk.

**MACCH**

* CoC leads for the Omaha/Council Bluffs area. MACCH should be the go-to for the following:
  + NOFA questions/submissions
  + Certain Data Quality reports (TBD)
  + HUD/Federal/ MACCH required Trainings
  + Coordinated Entry – Community Queue, Enrollment, Assessments, Workflow, Referrals, and Data
  + CE ROI
  + CoC community meetings
  + PIT/HIC planning

**NMIS**

* **STOP for users**. The Interim Governing Board that include representatives with CoCs, state agencies. NMIS holds the contract with the vendor, Bitfocus and develops statewide HMIS policies and procedures. They also work with the System Administrators (ICA and CCFL) to set and jointly approve an annual budget, work plan, priorities, and policies.
  + NMIS ROI
  + Sharing
  + HMIS Policies and Procedures
  + HMIS budget
  + HMIS vendor/software selection

**Vendor**

* **STOP for users**. If users have questions regarding Clarity and how it functions, the data pulled from it, errors or issues, they are to reach out to ICA Help Desk or MACCH.