

## Tickets Screen

### Overview

The Tickets screen is used by Human Resource (HR) staff to create a non-urgent ticket (case) without calling the People First Service Center (PFSC). Through the Tickets screen, HR staff can view tickets they have submitted (My Tickets) as well as tickets submitted by other HR staff within their own agency (Agency Tickets). **Tickets created by the PFSC are not visible on the Tickets screen.**

The PFSC has up to five business days to complete tickets. All urgent and time-sensitive requests (e.g., emergency insurance reinstatements, payroll impacting actions) should be handled by calling the PFSC instead of using the Tickets screen.

### Definitions

*The following fields are included in the Tickets Overview section:*

- Ticket Number – System generated ticket number assigned when the ticket is created.
- Requestor – Name of the HR user who created the ticket.
- Subject – Short title for the ticket.
- Status – Status of the ticket.
  - New
  - Open
  - Pended
  - Resolved
  - Closed
- Due Date – Projected resolution date for the ticket.
- Agent – Name of the PFSC representative assigned to the ticket.

*The following fields are included in the Details section:*

- Ticket Number – System generated ticket number assigned when ticket is created.
- Subject – Short title for the ticket.
- Description – Summary of the reason for the ticket.
- Solution – Resolution description for the ticket.
- Attachments – Documents HR user uploaded related to the ticket.

*The following are the categories to select from in the Category dropdown box on the Details screen, along with examples of the appropriate category to use when a ticket is being created. Once the ticket is created, the category field is no longer shown. **When creating a ticket, the appropriate category should be selected based on the reason for creating the ticket.***

- Fiscal Administration – An example of when this category would be used is when *making benefit refund requests.*

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- Multiple refund requests can be submitted on a single ticket; however, the requests must be limited to 10 individual requests per ticket. An excel file should be submitted when there are multiple refund requests. Separate tickets must be created for each Excel file.
- Insurance Benefits – Examples of when this category would be used is when *an employee's insurance benefits are cancelled in error or if there are errors with dependent information*. **The Tickets screen should not be used when submitting supporting documentation for an employee.** The employee must complete this using the Upload (icon) functionality found on the People First system header menu bar.
- Org Management – Examples of when this category would be used is when *there are position issues such as the system not allowing a specific effective date change for update/reclassification, or HR action form requests*.
- Payroll Info – Examples of when this category would be used is when *employee's pay is incorrect, or payroll deductions*.
- Performance Management – An example of when this category would be used is when *there are issues with the employee's performance evaluation (e.g., employee has not been placed into a new performance evaluation plan following an appointment action)*.
- Personal & Work Info – Examples of when this category would be used is when *the employee's appointment status information is incorrect, needing to delete information entered incorrectly on the Employment Screening or Licenses and Certification screens*.
- Personnel Action Request (PAR) – Examples of when this category would be used is when *a PAR needs to be changed (e.g., hire date change, request to back an action out), when a PAR cannot be created due to unexpected errors received upon entry or when updates are needed to an employee's record because of a settlement agreement*.
- Public Records Exemption – Category is only used when submitting a notarized Public Records Exemption Request Form for an employee with a new employee-specific public records exemption marked in the People First system, on or after July 1, 2021.
- Recruiting Management – An example of when this category would be used is when *there are issues with the position requisition (e.g., requisitions not opening after request on My Team page)*. If you have questions regarding a requisition already opened, you will work directly with your assigned staffing specialist.
- Time and Attendance – Examples of when this category would be used is when *there is a timesheet issue that HR cannot correct, issues with leave balance overview screen, or leave accruals*.

*The following are views on the Tickets screen:*

- Agency Tickets – Displays tickets created by all HR staff within the HR user's own agency.
- My Tickets – Displays tickets the HR user has created. The My Tickets screen is the default view.

### **Authorization**

Only HR users with a security role code of A, H, U, S, X and Y have access to the Tickets screen.

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## Process Steps

Follow these steps to create a ticket.



**Step 1:** Select Tickets from the People First system header menu bar (where Logoff icon is located).



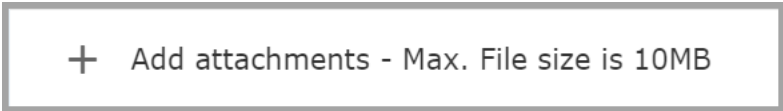
**Step 2:** Select New

**Step 3:** Select the appropriate Category from the dropdown.

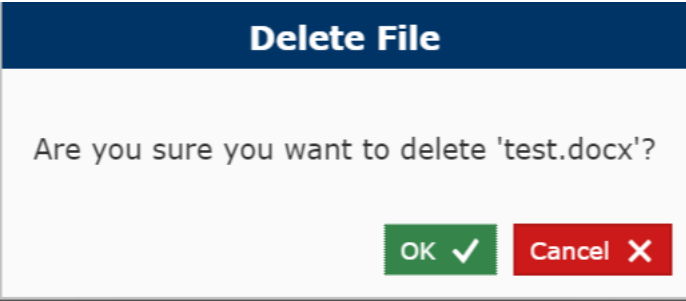
**Step 4:** Enter the Subject (up to 128 characters) for the ticket.

**Step 5:** Enter the Description (up to 128 characters). The description should include specific information (e.g., employee's Appt ID, name, position number) clearly explaining the issue or error message received. Attach examples and/or include screenshots of error messages received.

**Step 6:** To add an attachment, select the plus sign located in the Attachments section.



- Browse to select the file from your personal computer and click to add the attachment(s). Acceptable file types are BMP, PNG, JPG, GIF, JPEG, GIF, PDF, XLS, ZIP, TXT, DOC, HTM, CSV, WAV, TIF, BMP, RAR, XML, MSG, PPT, DOCX, XLSX, PPTX, TIFF, and DAT.
- Review the attachment(s) to ensure the correct file will be uploaded. The maximum file size is 10 megabytes (MB). The file name cannot exceed 55 characters.
- To delete an attachment(s), click the attachment and press the delete key on your keyboard. An overlay will appear asking if you are sure you want to delete the document. Click OK to remove or cancel to keep the attachment. **Attachments can only be deleted prior to submitting a ticket.**



**Step 7:** Select Submit to create the ticket. A system generated ticket number will be assigned and will be presented in an overlay window.

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**The only updates that can be made once a ticket is created is to add an attachment or send a message.**

- Add Attachment – To add an attachment after a ticket is created, select Edit and add the attachment by selecting the plus sign located in the Attachments section. Once the attachment has been added, select Save.
- Create Message – Refer to the My Tickets Messages steps below to create (or review) a message.

## My Tickets

*Follow these steps to view My Tickets (tickets you have created):*

**Step 1:** When viewing Agency **Tickets**, select My Tickets .  
**Note:** The default is the My Tickets screen when selecting the Tickets icon.

**Step 2:** All tickets that you have created will be displayed in the Overview section. Select a record to view the details of the ticket.

**Step 3:** Filter or sort the data presented within the Overview section by clicking on a column heading.

## My Tickets Messages

*Follow these steps to view or add messages to previously created Ticket:*

**Step 1:** Select My Tickets .

**Step 2:** All tickets that you have created will be displayed in the Overview section. Select a record to view the details of the ticket.

**Step 3:** Select Messages .

**Step 4:** A messages box will be displayed to view previously added messages and/or add a new message.

## Agency Tickets

*Follow these steps to view and search for Agency Tickets that HR staff in your agency have created:*

**Step 1:** Select Agency Tickets .

**Step 2:** Search for tickets by a specific HR user or by date created:



The search form consists of a text input field labeled 'Requestor Login ID', followed by a 'From' label, a date input field with a calendar icon, a 'To' label, another date input field with a calendar icon, and search icons (magnifying glass and refresh).

- Requestor Search – enter the Requestor Login ID.
- Date Range Search (Date Created) – enter the From (MM/DD/YYYY) and To (MM/DD/YYYY) dates.
- Requestor and Date Range (Date Created) Search – enter the Requestor Login ID and the From (MM/DD/YYYY) and To (MM/DD/YYYY) dates.


**Step 3:** Search for tickets only in the Public Records Exemption category:


- Public Records Exemption checkbox – select to restrict search to only tickets in the category.

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- Employee Search – enter the Employee Login ID (or Appointment ID).
- Date Range Search (Date Created) – enter the From (MM/DD/YYYY) and To (MM/DD/YYYY) dates.
- Employee and Date Range (Date Created) Search – enter the Employee Login ID (or Appointment ID) and the From (MM/DD/YYYY) and To (MM/DD/YYYY) dates.

**Step 4:** Enter the search criteria and select the search icon . Search results will be limited to 100 records. If your search results in more than 100 records, you will be required to refine your search criteria.

- To reset/clear search criteria, select the  icon.

**Step 5:** All open tickets will be displayed in the Overview section. Only closed tickets for the previous six months will be shown (six months of history for closed tickets at any given time). Select a record to see the details of the ticket.

**Step 6:** Filter or sort the data presented within the Overview section by clicking on a column heading.

**Step 7:** Search results can be exported (Excel format) by selecting the  icon.

### Special Notes

- Tickets created by the PFSC will not be visible on the Tickets screen.
- If you contact the PFSC and a ticket is created for you by the PFSC, you may request an email with the ticket number be sent to you.
- When one of your tickets (created through the Tickets screen or based on a case opened by a PFSC agent because of your call to the PFSC) is closed, you will be sent an email confirming the ticket was closed with a high-level resolution reason.
- When a message is added to a ticket by a PFSC agent, they will trigger an automated email which will alert the ticket requestor to log in to the People First system and view the message.
- Messages can only be added to tickets in an open or pending status. Messages remain viewable once a ticket is closed, but no new messages can be added.
- Messages should only be used for the current ticket request to provide additional clarification and should not be used for adding additional requirements or for creating a new ticket.