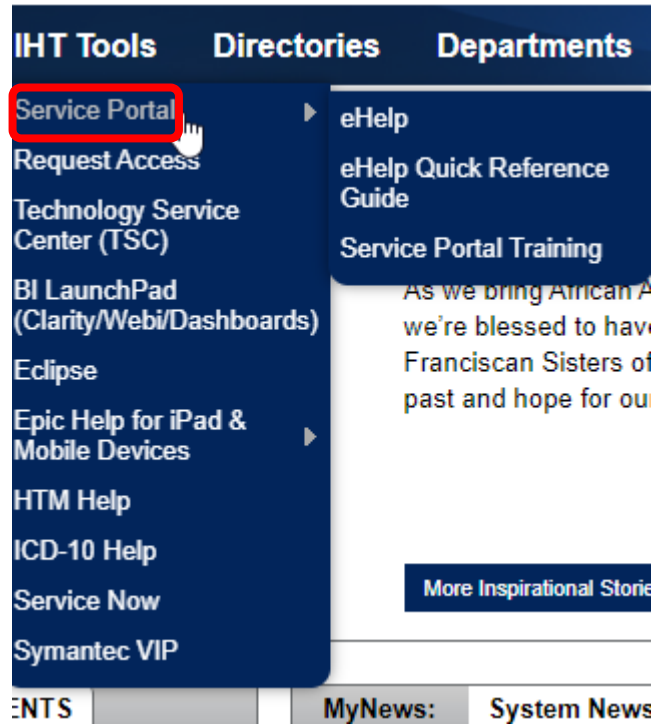# Service Portal Training

SSMIHT ITSM DEPARTMENT – MARCH 2021

How to get to the Service Portal

From your intranet home page

1. Click on IHT Tools

2. Click on Service Portal

Service Portal

Report an Issue

Report an Issue

Your Tickets

Your Tickets

"Your Tickets" will also display any open or closed, HR Cases, Changes, Problems you may have opened.

HR On-Demand

HR On-Demand

Search

AskHR

844-SSM-MYHR (844-776-6947)

? Submit an AskHR Question

✔ Check the Status of My Requests

Q Frequently Asked Questions (FAQs)

HTM (Health Technology Management)

HTM (Health Technology Management)

Search for a Solution

Search for a Solution

| All ▾ | 🔍 Search (minimum 3 characters) | | ⊞ Import Articles | 📄 Create an Article |

Search (minimum 3 characters)

Knowledge Bases

Human Resources General Kn...	IHT Knowledge	Incident Knowledge Submissions	Problem News/Knowledge	SSMH Epic Tip Sheets
156 Articles	821 Articles	0 Articles	5 Articles	975 Articles

SSMH Non-Epic
118 Articles

Featured Content

Epic Updates as of February 2021 for Providers
Epic Updates as of February 2021 for Ambulatory Clinical Staff
Epic Updates as of February 2021 for Inpatient Clinical Staff
Epic Updates as of February 2021 for Revenue Cycle

Most Useful

SSM- Skype- Online Meeting Pin reset/request
SSM- Microsoft Office- Outlook- Email Distribution List / Shared mailbox request
SSM- Epic- Security- How to use the User Snapshot
SSM- TSC- PolicyTech Reference

Most Viewed

IHT- Change Control- Clinical & Revenue Cycle Applications- List of Routine Changes-
Epic
SSM- ServiceNow- Impact / Urgency Guidelines and the associated SLA requirements
IHT- TSC- Remote Access Work from Home Process during COVID -19
SSM- Symantec MFA- Multi-Factor Authentication- Self Service Registration
SSM- New Hire- Access Provisioning Process

End of general user training

Request Access

Request Access

Request Access

Describe Needs Page:

1. Type user's name in the "Requested for" field. (verify it is the correct user by userid or email address)

2. Userid, Requested for's Physical entity and Pay entity populate according to the user's HR record, or current non-employee record.

3. Requested by is prepopulated with the user logged in entering the request.

Request Access

Describe Needs Page:

The user's current access (if any) is listed.

Current Access

Application	Physical Entity	Epic Template	Epic Template2	Epic Template3	Date Granted
Phone Setup	0009 - MO-SSM Health Integrated Health Technologies				2020-04-20 11:35:06
Badge Access	0009 - MO-SSM Health Integrated Health Technologies				2020-03-23 09:51:26
SSM User Access	0009 - MO-SSM Health Integrated Health Technologies				2020-03-17 10:48:37
Email - Outlook	0009 - MO-SSM Health Integrated Health Technologies				2020-03-17 10:17:12
Instant Messaging	0009 - MO-SSM Health Integrated Health Technologies				2020-03-17 10:16:49

Request Access

Describe Needs Page:

7. In the *Select an entity/ministry for access* field, select or search for the entity you need access associated.

8. Region and Role are used to select pre-selected bundles of applications.

9. Search Criteria is used to select applications in specific areas, such as telecom or hardware.

10. Display non-core applications is used to display applications at other facilities.

11. Select desired applications is used to type the application name in and search for the application by name.

Request Access- Quick Select

Describe Needs Page:

7. Region and Role are used to select pre-selected bundles of applications.

8. Search Criteria is used to select applications in specific areas, such as telecom or hardware.

9. Display non-core applications is used to display applications at other facilities.

10. Select desired applications is used to type the application name in and search for the application by name.

Optional Application Bundles - Use to pre-select applications required for new users holding common roles in your region.

Region

-- None --

Role

-- None --

Search Criteria

Search Category: (if desired)

-- None --

☐ Display alternate non-core Applications:

Select desired Applications: ❓

Use the wildcard (*) before entering desired application (e.g. *Email, *Epic)

✕

✕ SSM User Access - 0009   ✕ Service Now - 0009   ✕ New User/Reenable Network Access (Active Directory) - 0009

Request Access – Bundle Selection

Describe Needs Page:

12. In this example we have chosen Region SSM St. Louis and Role Admission – Registration Rep. This pre populated Epic Clinical End User – 0009, Email – Outlook – 0009 and Instant Messaging – 0009.

13. We can add additional applications by typing them in the Select Desired Applications area and selecting them.

14. Click Next to move to the Choose Options page.

Optional Application Bundles - Use to pre-select applications required for new users holding common roles in your region.

Region

SSM St. Louis Region

Role

Admission - Registration Rep

Search Criteria

Search Category: (if desired)

-- None --

☐ Display alternate non-core Applications:

Select desired Applications:

× Epic Clinical End User - 0009 | × Email - Outlook - 0009 | × Instant Messaging - 0009

Next

Request Access

Choose Options Page:

This list includes all of the Items you have requested.

15. Any Included Item with the * next to the word "options" requires additional information.

16. Click on the word "Options" to open the item's form.

Request Access

Choose Options Page:

17. Complete all fields with the *

18. Complete any other field that is applicable. (be sure to scroll down the form to view all fields)

19. Click on the word "Options" to close the item's form.

Request Access

Choose Options Page:

20. Click on the next application with the * next to options.

21. Complete all fields with the *.

22. Complete any other field that is applicable. (be sure to scroll down the form to view all fields)

23. Click on the word "Options" to close the item's form.

24. Continue until all applications have the word "options with no *.

25. Click Next.

Search

3. User Change Request
Use this process to transfer an employee; or to add, change or remove specific access for existing users.

Describe Needs   Choose Options   Summary

Included Items :   * Mandatory Fields

Epic Clinical End User	Manage access to Epic Clinical End User	Options
Email - Outlook	Manage access to Email - Outlook	Options
Instant Messaging	Manage access to Instant Messaging	Options

Previous   Next

Request Access

Summary Page:

26. Review all applications ordered are listed.

27. Click Order Now.

Search

3. User Change Request
Use this process to transfer an employee; or to add, change or remove specific access for existing users.

| | Describe Needs | | Choose Options | | Summary |

Order Guide Details	Quantity	Total Price	Recurring
Epic Clinical End User	---	$0.00	$0.00
Email - Outlook	---	$0.00	$0.00
Instant Messaging	---	$0.00	$0.00

Total : $0.00   Edit Options   **Order Now**

Request Access

This shows your request number and the details of each item ordered.

Add or Change Service Catalog Item

Add or Change Service Catalog Item

This request is used to add or change an application for selection in the Request Access category of the IHT Service Catalog

1. Fields with an * must be completed.

2. Select the desired action (request new catalog item, modify existing item, or retire catalog item) in the "Action" field.

3. Complete any other field that is applicable. (be sure to scroll down the form to view all fields)

Add or Change Service Catalog Item

This is the confirmation page.

Your request number and request details can be found on this page.

Delegate Management

Delegate Management

This can be used to add, change, or remove a delegate.

1. Choose the desired action in the "What type of change is this?" field.

Delegate Management

2. Complete all fields with the *.

3. Select the desired modifications underneath the "Delegations" options.

4. Submit.

Delegate Management

5. A warning message will appear at the top of the screen.

6. Select OK and you will be directed back to the Request Access page.
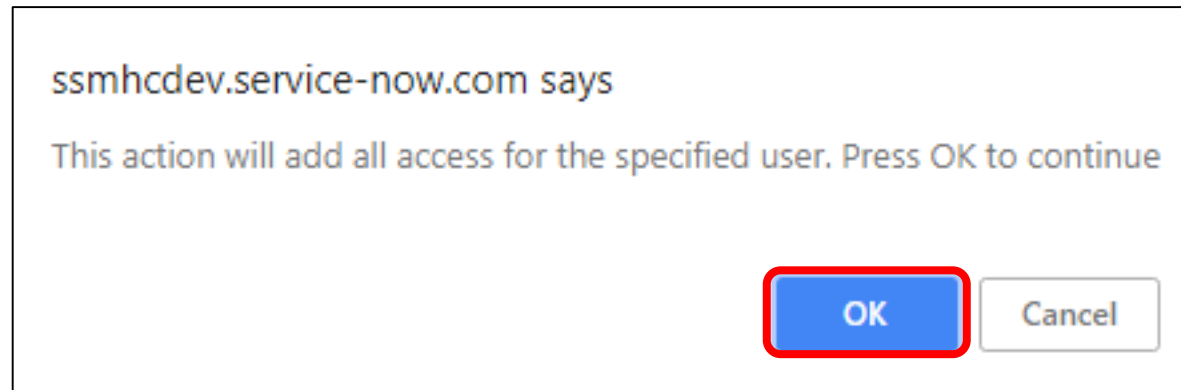
Manager Approvals

Navigate to the Service Portal.

1. Click on the word "Approvals."

2. Click on "View all approvals."

Manager Approvals

3. Your list of approvals opens.

4. Click on the REQ# to review the request you want to review and approve or reject.

Manager Approvals

5. Review the request and click on approve or reject.

6. Reject requires a comment before accepting the rejection. Fill in your comment and click OK.

End of Manager training

Task and Approval Management
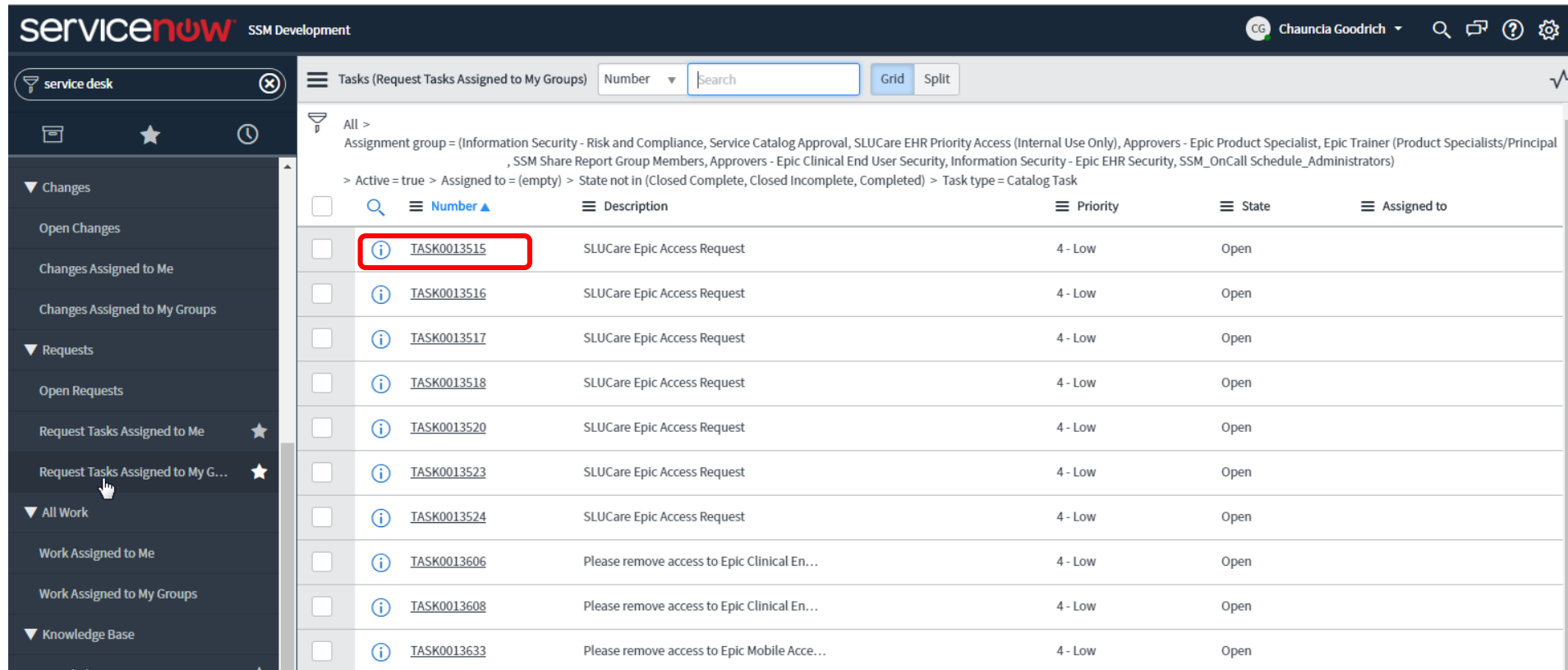
Assign a task to yourself:

1. Type Service Desk in the filter navigator.

2. Click on "Request Tasks assigned to my group."
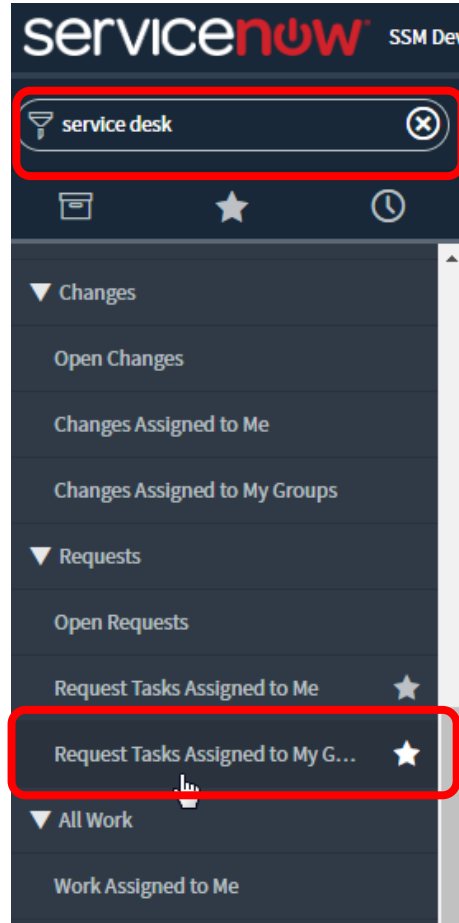
Task and Approval Management

3. A list of tasks assigned to groups you are a member of will open.

4. Click on the task number you wish to look at and assign to yourself.

Task and Approval Management

5. The task opens.

6. Click in the "Assigned to" field and type your name click on your name when it is returned in the look up field.

Task and Approval Management
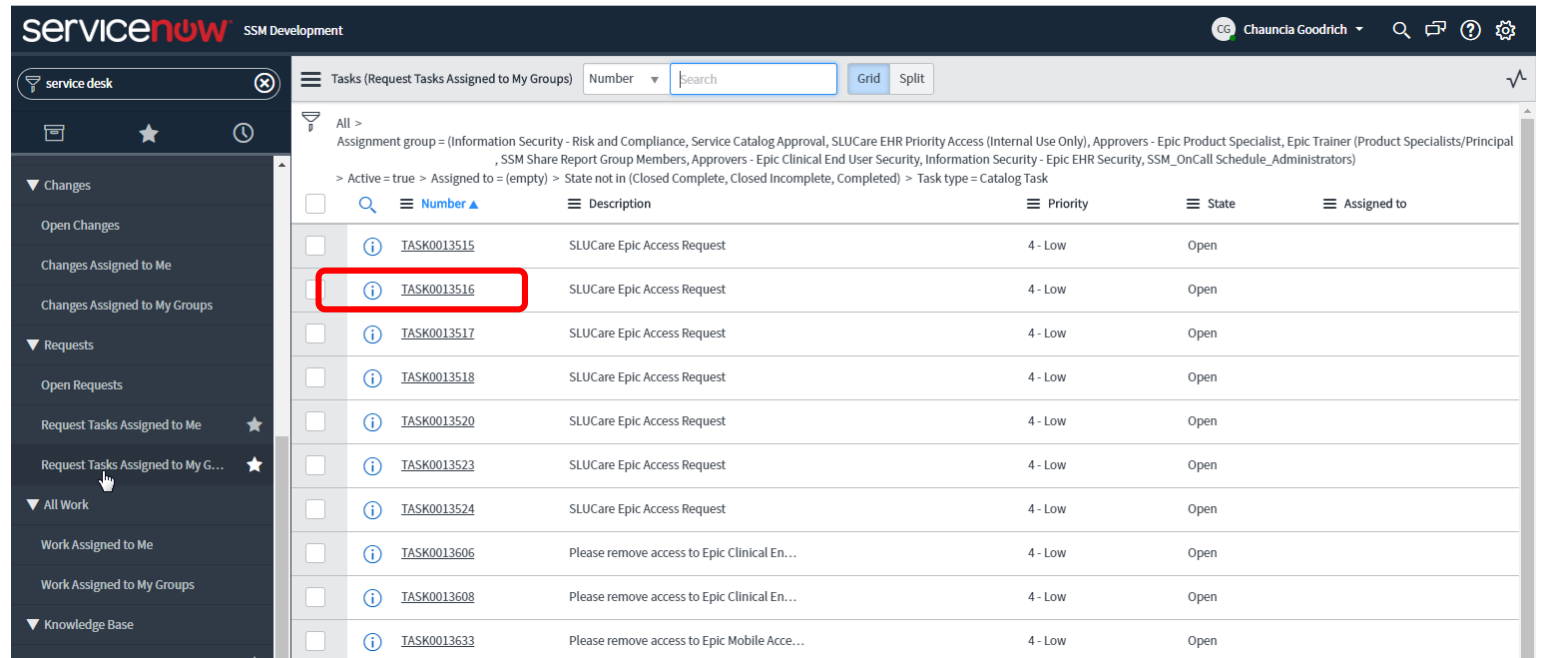
Working a task assigned to you.

1. Type Service Desk in the filter navigator.

2. Click on "Request Tasks assigned to Me."
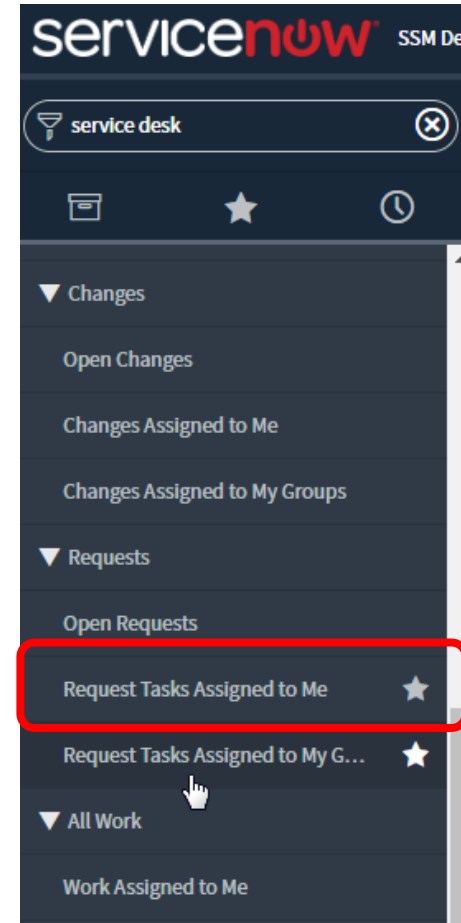
Task and Approval Management

3. A list of tasks assigned to you will appear.

4. Click on the Task you wish to work.

Task and Approval Management

5. Type in the actions you took in work notes field.

Task and Approval Management

6. Change the state of the task to the appropriate state.

7. Click "Update" to return to the previous screen, or "Save" to stay on the current record.
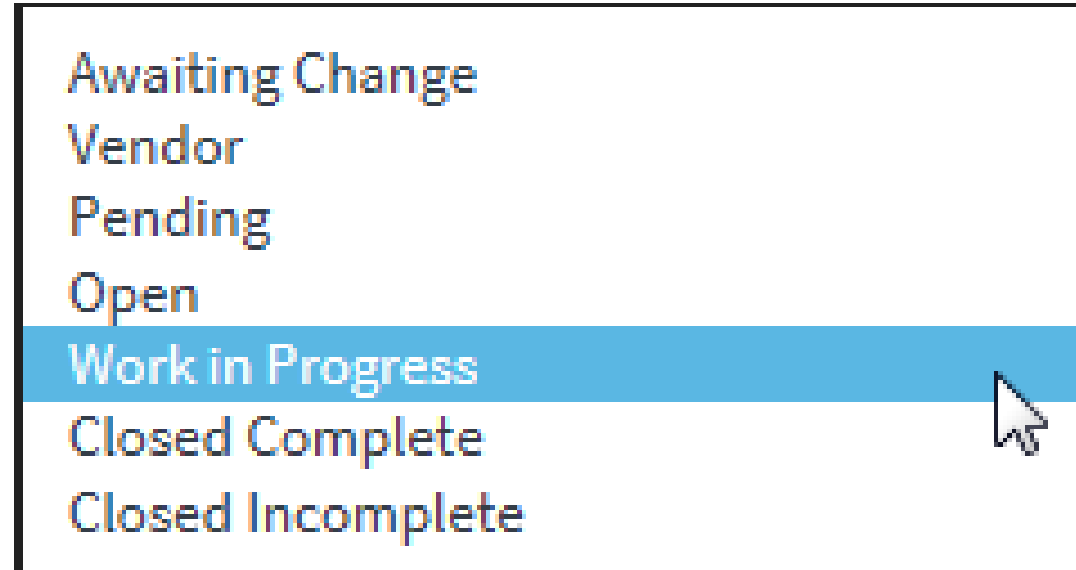
Task and Approval Management
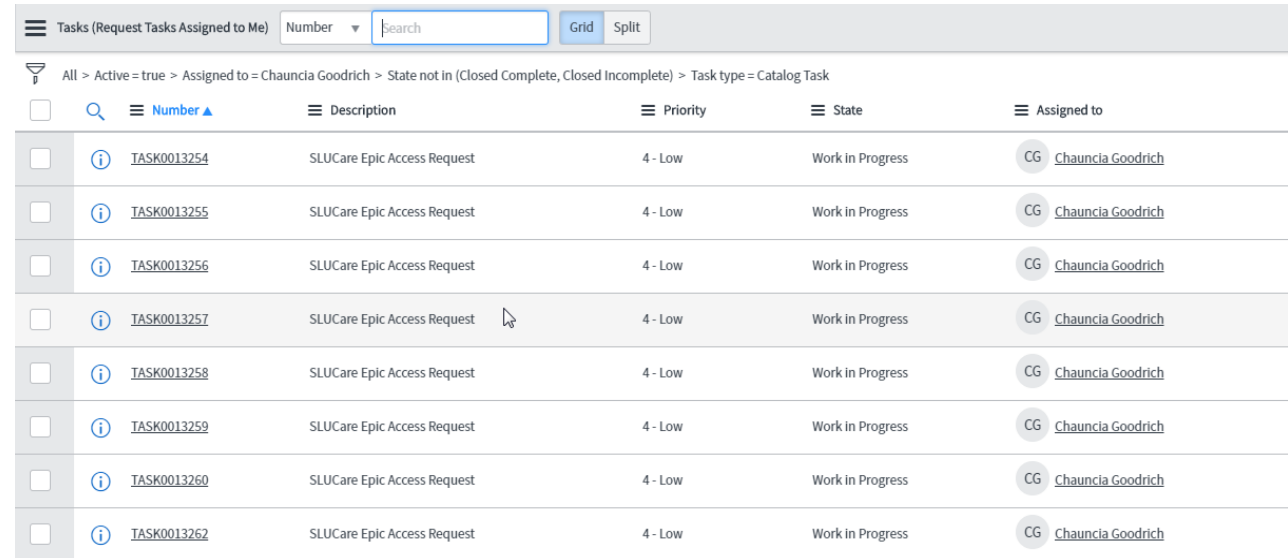
Completing a task assigned to you.

1. In the Filter Navigator type "Service Desk."

2. Select "Requests Tasks assigned to Me" under the "Self-Service" module.
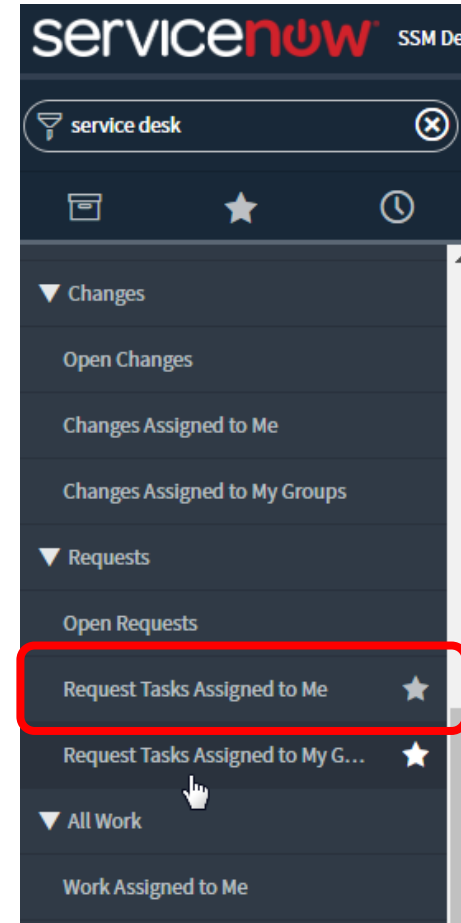
Task and Approval Management

3. A list of tasks assigned to you will open.

4. Click on the task you wish to work.

Task and Approval Management

5. Scroll down to the work notes area and note the steps you have taken to complete the task.

6. Click close task and you are returned to the list of tasks assigned to you.

Application Approval and Provisioning

Application (Item) Approvals
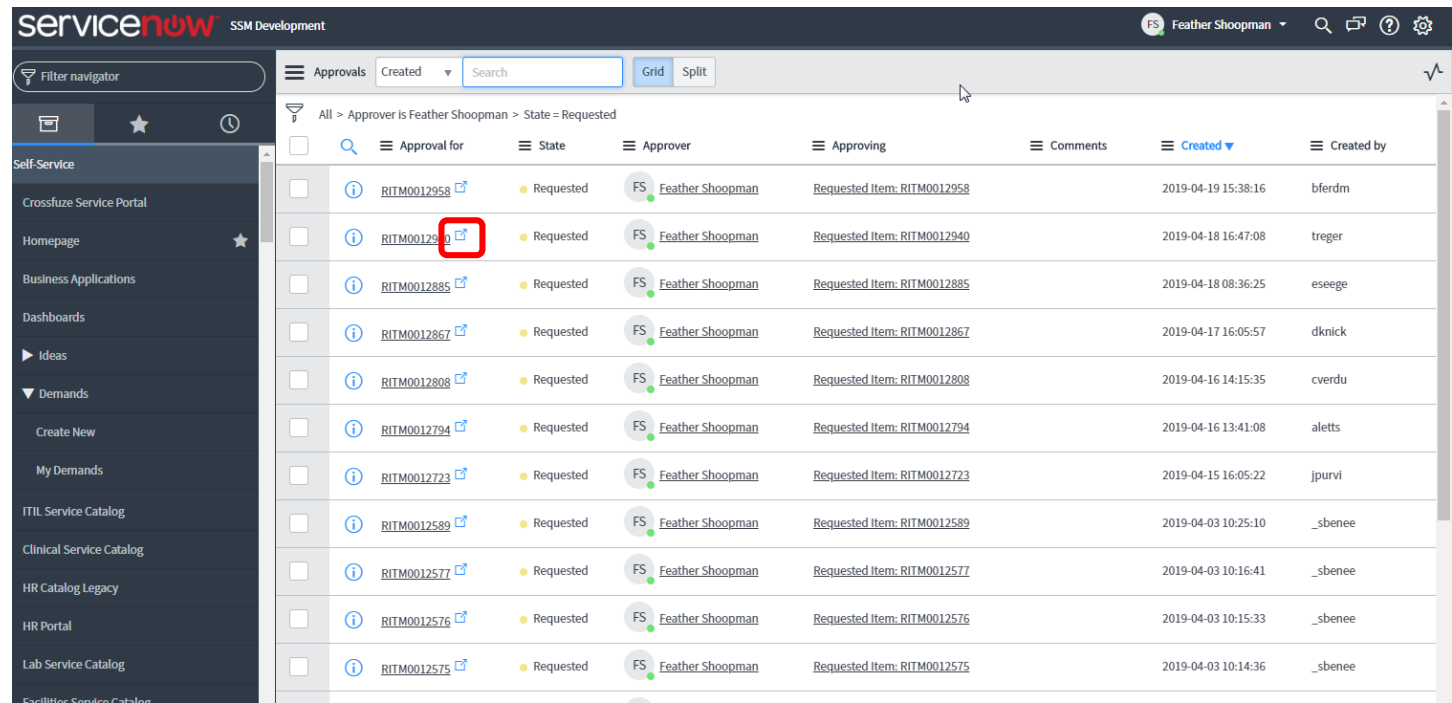
1. If you are working from the ITIL homepage

2. Click on the number inside the "SSM – My Approvals – Action needed" widget.

Application Approval and Provisioning

3. If you are not using the ITIL Homepage, type the words "My Approvals" in the filter navigator and click on "My Approvals below Self-Service.

4. This will bring you to the list of your open approvals.

5. Click on the box with an arrow ⬀ next to the RITM (requested item) you wish to review.
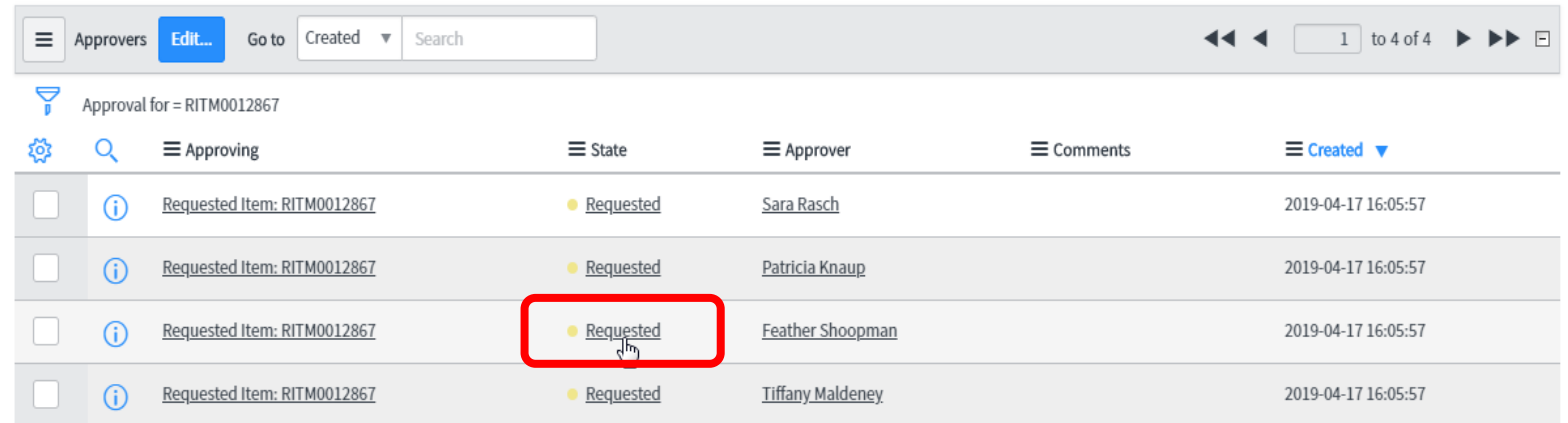
Application Approval and Provisioning

6. Scroll down to the "Approvers" section of the RITM.

7. When you are ready to approve or reject the request click on the word "Requested" next to your name. (Feather, in this case).

8. The Approval will open.

Application Approval and Provisioning

9. Click on the "Approve" or "Reject" button. (If reject, you must enter the reason, or instructions to correct the request in the comments section).

10. You are returned to the RITM where you can see it is now approved.

End of Approver and Provisioner training