

## CoActiveSoft Service Requests

### CoActiveSoft Service Requests

Service requests in CoActiveSoft can be thought of as help tickets. If a client would like to request that a caregiver modify their shift for their care, this would be a service request.

Service requests are created for a specific user by going to their profile. All service requests are shown to the administrator and can be resolved and assigned to caregivers or other employees.

### Accessing Profile Service Requests

In a profile, the service requests section is located under the 'Operations' tab:

The screenshot displays the CoActiveSoft interface for a user profile. On the left is a navigation sidebar with items like 'My Profile', 'Dashboard', 'Messaging', 'Profiles', 'Manage profiles', 'Scheduling', 'Administration', 'Accounting', 'Reporting', and 'Settings'. The 'Manage profiles' item is highlighted with a red '1'. The main content area shows the profile for 'Sue Adler' (marked with a red '2'), including a profile picture, contact information (Address, Phone, Email: ryan.olmstead@coactivesoft.com, Category: Client), and a 'Tags' field. Below this is a tabbed interface with 'Operations' selected (marked with a red '3'). Under the 'Operations' tab, there is a 'View invoices' button and a 'Requested service requests' section (marked with a red '4'). This section shows a date range from 'Wed 6/13/18' to 'Wed 6/20/18' and a list of requests. One request is visible: '000031 - Shift Change: Victoria Chan start earlier?' with a status of 'Requested' and a timestamp 'Opened on Wed 6/20/18 10:16 AM by Sue Adler'. Action buttons for 'Close', 'Complete', and 'Show details' are present for this request. A pagination control at the bottom shows '1' of 1 items.



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To get to a user profile, click on the 'Profiles' section under the main menu followed by 'Manage Profiles'. Next, use the search box and filtering methods to find the correct user (2). The 'Service requests' section is under the 'Operations' tab.

## Viewing Service Requests

After accessing the service requests section, there are many options and configurations:

The screenshot shows a web interface for 'Requested service requests'. At the top, there is a header 'Requested service requests' with a red circle '1' above it. Below the header, there is a date range filter: 'From Wed 6/13/18' to 'Wed 6/20/18', with a red circle '3' above the 'From' field and a red circle '1' above the date range. To the right of the date range are three buttons: 'Set state' (with a red circle '9'), 'Delete' (with a red circle '10'), and '+ New' (with a red circle '11'). Below the date range, there is a list of service requests. The first request is '000031 - Shift Change: Victoria Chan start earlier?' with a red circle '4' above it. Below the title, it says 'Requested' and 'Opened on Wed 6/20/18 10:16 AM by Sue Adler'. To the left of the request is a checkbox with a red circle '2' below it. To the right of the request is a 'Show details' link with a red circle '12' above it. Below the request are five buttons: 'Close' (with a red circle '5'), 'Complete' (with a red circle '6'), and three icons: a calendar icon (with a red circle '7'), a pencil icon (with a red circle '8'), and a trash icon (with a red circle '10'). At the bottom right, there is a pagination control showing '< 1 >'.

### 1 – Date range

The date range shows all the service requests within the specified dates.

### 2, 3 – Select service request(s)

Select one (2), many (2), or all (3) service requests.

### 4 – Service request type and title

In the example above, the service request type is 'Shift Change' and the title is followed by that. The types of service requests available to choose from are 'Care setup', 'General', 'Agency Internal', and 'Shift Change'. When a client is logged in, only the last two are visible. The service request type is set when creating a new service request.

Refer to the 'Customizing Service Request Types' section later in this manual for more



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information.

The service request state is displayed below the title.

#### 5 – Close the service request

This button is only visible to admins and supervisors.

Once a service request is abandoned, or it has been established that it does not need to be fully completed, the status of the service request can be closed.

#### 6 – Complete the service request

This button is only visible to admins and supervisors.

Once a service request is completed, the service request can be marked as complete.

#### 7 – Add log to service request

When adding a log to a service request, the log will be shown as an addition to the request with time and date of creation and creator of log listed.

#### 8 – Edit service request

This button is only visible to admins and supervisors.

Use this button to edit a service request.

#### 9 – Set state of service request

This button is only visible to admins and supervisors.

After selecting a service request, you can set the state as 'Requested', 'Assigned', 'In progress', 'Pending', 'Complete', 'Closed, and 'Canceled'. 'Requested' service requests have been created but have not been addressed yet. 'Assigned' service requests have been given an employee to handle the situation. 'In progress' service requests are currently being worked on. 'Pending' implies that the request is being worked on, but has stalled for one reason or another. 'Complete', 'Closed', and 'Canceled' refer to how the service request finished.



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## 10 – Delete

This button is only visible to admins and supervisors.  
Delete the service request(s) with this button.

## 11 – New service request

See the next section to learn about how to create service requests.

## 12 – Show details

Click on this button if you would like to see more information about the service request that was created, along with the actual body of the request.

## Creating Service Requests

Service requests look different depending on what type of user is signed in. Agents have a longer version that shows the 'State', 'Requested by', and 'Assigned to' fields in addition to the usual ones:



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## Create new service request ✕

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**Service request type** 1

**Title** 2

**State** 3

**Client** 4

**Requested by** 5

**Assigned to** 6

**Details** 7

### 1 – Service request type

The types of service requests available to choose from are 'Care setup', 'General', 'Agency Internal', and 'Shift Change'. When a client is logged in, only the last two are visible. Refer to the 'Customizing Service Request Types' section later in this manual for more information.

### 2 – Title

This is the title to be displayed to whoever views the service request.

### 3 – State



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The 'State' section is only shown to users with admin and supervisor privileges. You can set the state as 'Requested', 'Assigned', 'In progress', 'Pending', 'Complete', 'Closed, and 'Canceled'. 'Requested' service requests have been created but have not been addressed yet. 'Assigned' service requests have been given an employee to handle the situation. 'In progress' service requests are currently being worked on. 'Pending' implies that the request is being worked on, but has stalled for one reason or another. 'Complete', 'Closed', and 'Canceled' refer to how the service request finished.

#### 4 – Client

In the 'Client' field, specify which client / profile the service request applies to – it automatically fills in as yourself if you create it.

#### 5 – Requested by

As an admin or supervisor account, it is possible to specify who the service request was requested by.

#### 6 – Assigned to

As an admin or supervisor, you can assign other users to service requests in order to delegate tasks more effectively. This can be useful for home care agencies that have different departments for dealing with different situations.

#### 7 – Details

This is where the request body is entered in. It can be formatted like any other detail field. To see all the capabilities of the formatting this section is capable of, consult the end of the [CoActiveSoft Documents and Contracts](#) user manual.

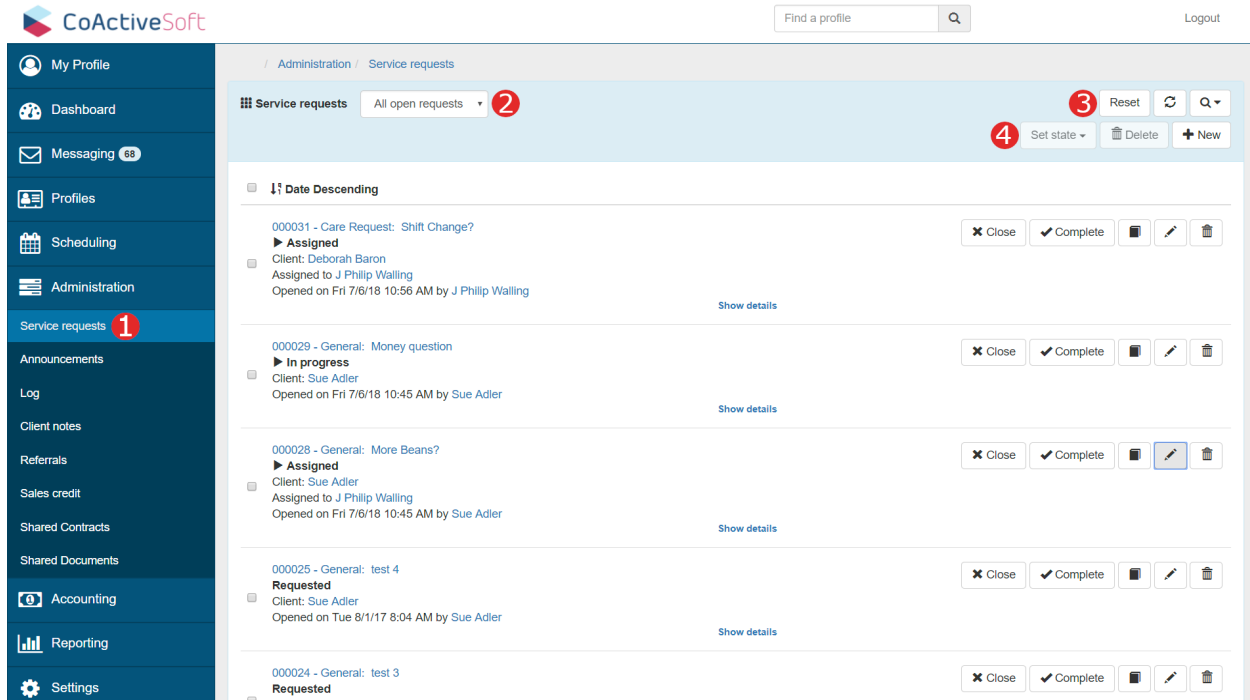


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## Managing Existing / New Service Requests

The management of service requests are handled by admins and supervisors. Service requests for admins to view and manage are located in the main menu under 'Administration' → 'Service requests' (1):



The screenshot displays the CoActiveSoft interface for managing service requests. The left sidebar shows the 'Service requests' menu item highlighted with a red circle (1). The main content area shows a list of service requests with columns for status, client, assigned user, and date. The status column is highlighted with a red circle (4). The assigned user column is highlighted with a red circle (1). The date column is highlighted with a red circle (2). The search bar is highlighted with a red circle (3). The interface also includes a sidebar with navigation options like My Profile, Dashboard, Messaging, Profiles, Scheduling, Administration, Service requests, Announcements, Log, Client notes, Referrals, Sales credit, Shared Contracts, Shared Documents, Accounting, Reporting, and Settings. The top right corner has a search bar and a Logout button.

This is where all the service requests are managed. Here, the state of the service requests (4), the assigned users to a request, are all customized by an admin or supervisor. Refer to the earlier 'Viewing Service Requests' section for more information.


In this section, all service requests are ordered in descending order, so the most recent ones come first. To switch to ascending order, click on the arrow icon. By default it will only show the open requests, but that can be changed using the drop down (2). To filter the results further, you can use the advanced search (3) next to the refresh button. This enables you to search by a date range and specific profile.




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For all employees that you want to be up to speed on service requests, add them to the 'Service request update' or 'Service request supervisor' messaging subscription in their profile.

To update a user's messaging subscriptions, navigate to their profile in CoActiveSoft. Next, click on the edit button in the top right (  ) of their profile. At the bottom of the editing window, there is a section to add messaging subscriptions for a user:

 <b>Messaging subscriptions</b>		
<b>Message category</b>	<b>Delivery method</b>	
Marketing	Internal	
Service request update	Internal	
<input type="text"/>		

To add them to the 'Service request supervisor' or 'Service request update' messaging subscription, click on the drop down (1) and select it from the list of items. The users will be notified of any new service request and can act accordingly to them.

More information related to the messaging functions of CoActiveSoft can be found in the [CoActiveSoft Messaging user manual](#).

## Customizing Service Request Types

The customization of service requests are handled by admins and supervisors. In CoActiveSoft it is easy to add different types of service requests that are more relevant to your home care service or business.

## Creating A New Service Request Type

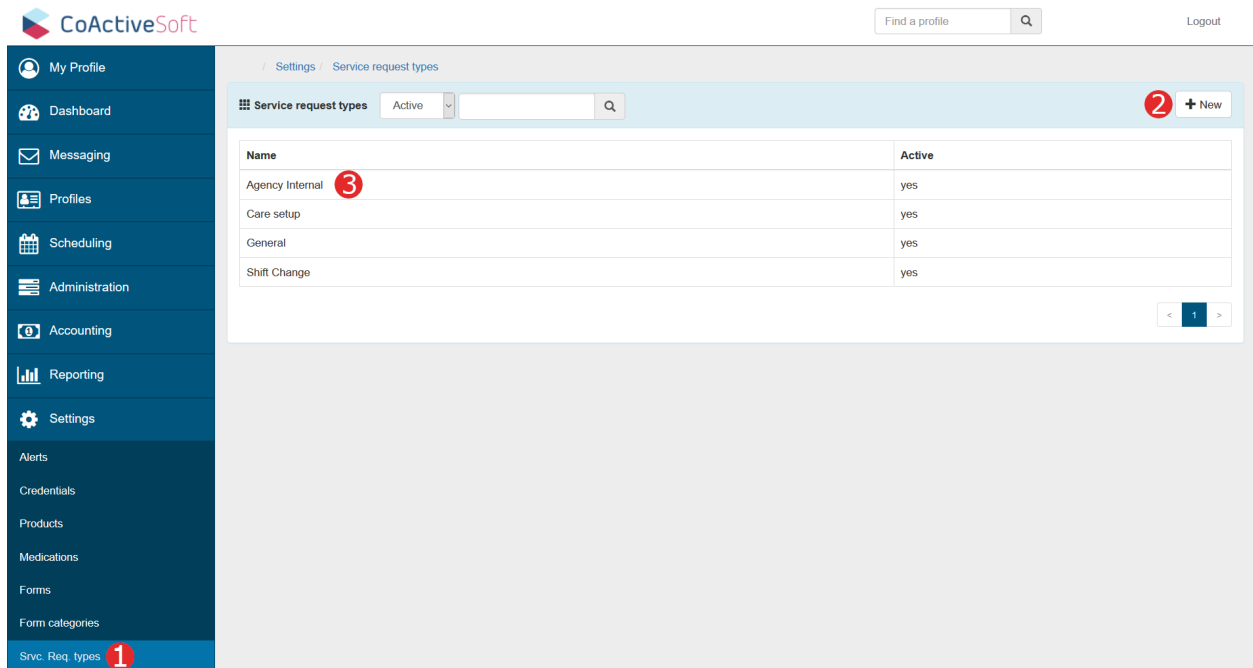


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To create a new service request type, navigate to the main menu followed by the 'Settings' and 'Srcv. Req. types' (1). Next, click on the New button in the top right (2):



The screenshot shows the CoActiveSoft interface. The left sidebar contains a navigation menu with the following items: My Profile, Dashboard, Messaging, Profiles, Scheduling, Administration, Accounting, Reporting, Settings, Alerts, Credentials, Products, Medications, Forms, Form categories, and Srcv. Req. types (1). The main content area is titled 'Service request types' and includes a search bar, a dropdown menu set to 'Active', and a '+ New' button (2). Below this is a table with the following data:

Name	Active
Agency Internal (3)	yes
Care setup	yes
General	yes
Shift Change	yes

After clicking on the 'New' button, you will be presented with the 'Add service request type' page:



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## Add service request type ✕

Active  **1**

Name  **2**

Ext. agents can view  **3**

Ext. agents can create  **4**

Anyone can view  **5**

Anyone can create  **6**

Use for profile categories **7**

Agent	<input type="checkbox"/>	Caregiver	<input type="checkbox"/>
Client	<input type="checkbox"/>	Delegate	<input type="checkbox"/>
Facility	<input type="checkbox"/>	Hospital	<input type="checkbox"/>
Insurance	<input type="checkbox"/>	Nurse	<input type="checkbox"/>
Other	<input type="checkbox"/>	Physician	<input type="checkbox"/>
Prospect	<input type="checkbox"/>	Referral source	<input type="checkbox"/>
Sales rep	<input type="checkbox"/>	Vendor	<input type="checkbox"/>

Cancel

Save

### 1 – Active

If this box is checked, then your new service request type will show up for all the user profile categories determined in the 'Use for profile categories' section (7).

If it is not checked, it will not be visible for anyone.

### 2 – Name

Put the name that you would like users to select for 'Service request type' when creating a new service request.



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3, 4 – External agents can view / edit

Check / uncheck these boxes to determine whether or not external agents (i.e. agent profiles that are not directly employed by your business) can view and/or edit this type of service request.


5, 6 – Anyone can view / create

Check / uncheck these boxes to determine whether or not anyone can view and/or edit this type of service request.

7 – Use for profile categories

In this field, select which profile categories can use this type of service request.

### **Editing an Existing Service Type**

To edit an existing service type, click on the row that it is shown on. From there, you can click on the edit button (  ) in the top right. At this point, refer to the previous image for how to customize it - all of the fields are set up the same way.



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