VA ServiceNow Customer Service Management (CSM) Application User Guide
Case Submission and Management

November 2020
Department of Veterans Affairs
Office of Information and Technology (OI&T)
### Revision History

NOTE: The revision history cycle begins once changes or enhancements are requested after the document has been baselined.

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<th>Author</th>
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<td>Jacki Frazer</td>
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<td>Jacki Frazer, Brett Porter, Berkley Jenkins</td>
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1. Introduction

1.1. Purpose
As of November 19, 2020, VA will be migrating all help desk and support services to the ServiceNow Customer Service Management (CSM) application. Users that access the following VA applications will now report all Technical and Policy inquiries directly into the ServiceNow tool.

- WebLGY (FFPS and SAH)
- LGYHub
- VA Loan Electronic Reporting Interface (VALERI)
- VALERI Servicer Web Portal (SWP)

This user guide will provide information on how to navigate the ServiceNow CSM application.

1.2. Document Orientation
This section describes the orientation of the document.

1.2.1. Organization of the Manual
This guide supports the following user types:

- VA Employees that possess a Personal Identification Verification (PIV) Card
- Non-VA Employees that access VA systems using ID.Me/AccessVA
- Guest Users

1.2.2. Assumptions
In creating this guide, we assumed the following experience/skills of the audience:

- User has basic knowledge and access to the following systems:
  - WebLGY
  - LGYHub
  - VALERI
  - VALERI Servicer Web Portal
  - FFPS
  - SAH

1.2.3. Disclaimers
We provide the following standard VA disclaimers “as written.”

- This user guide is not intended to diagnose system issues or problems in any of the VA applications that will integrate with ServiceNow.
1.2.3.1. Documentation Disclaimer

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of VA.

1.2.4. Documentation Conventions

Various symbols are used throughout the documentation to alert the reader to special information. The following table gives a description of each of these symbols:

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
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<tr>
<td>🔄</td>
<td>Contains supplementary information about a step or process.</td>
</tr>
<tr>
<td>🚫</td>
<td>Contains cautionary information about a step or process; usually a clarifying statement to assist a user with step execution.</td>
</tr>
<tr>
<td>⚠️</td>
<td>Indicates highly important information that is critical to a step or process.</td>
</tr>
</tbody>
</table>

1.2.5. References and Resources

The documents associated with this software are maintained on the VA website: https://yourit.va.gov/va

2. System Summary

ServiceNow will provide the following benefits to VA system users:

- Access to external users – Previous help desk tools have limited case submissions to only internal VA resources. ServiceNow will allow external users to submit case, eliminating the need to utilize e-mail or other workaround processes.
- Improved communication – Help desk technicians will be able to directly communicate with end-users via the ServiceNow tool.
- Improved customer experience – End-users will be able to view status and progress of their cases. User can now get real time data and see the status of their case.
- Improved reporting – ServiceNow will allow VA to set up dashboards with live data to provide real time performance metrics.
- Improved operations – ServiceNow allows us to automate more processes, allowing a streamlined process for managing help desk requests.
2.1. User Access Levels

<table>
<thead>
<tr>
<th>User Type</th>
<th>Characteristics</th>
<th>Specific Permissions</th>
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<tbody>
<tr>
<td>Registered User (VA Employee)</td>
<td>User can access VA applications via their PIV Card</td>
<td>▪ Can access ServiceNow while logged into a VA application</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Can submit a case</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Can log in to view and respond to submitted cases</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Can respond to a case via e-mail</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Can submit a case on someone else’s behalf</td>
</tr>
<tr>
<td>Registered User (non-VA Employee)</td>
<td>User can access VA applications via their ID.Me/AccessVA account</td>
<td>▪ Can access ServiceNow while logged into a VA application</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Can submit a case</td>
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<tr>
<td></td>
<td></td>
<td>▪ Can submit a case on someone else’s behalf</td>
</tr>
<tr>
<td>Guest User</td>
<td>User logs into LGY applications not using ID.ME/AccessVA or does not have access to VA applications</td>
<td>▪ Can submit a case on the ServiceNow website as a guest user</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Can submit a case on someone else’s behalf</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Can respond to a case via e-mail</td>
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3. System Access

This section provides a general walkthrough of the system. The logical arrangement of the information is intended to assist users to understand the sequence and flow of the system.

3.1. Accessing ServiceNow (Registered User)

3.1.1. Access ServiceNow via VALERI

⚠️ The following instructions assume that the user is able to log into the VALERI application using a Personal Identification Verification (PIV) card. If the user unable to log into the VALERI application, please see section, Access ServiceNow as a Guest User.

1. Log into the VALERI application.
2. Navigate to the VALERI Home page.
3. In Announcements, locate the message regarding the implementation of ServiceNow.
4. Select the link in the message to open the ServiceNow application.
5. ServiceNow will authenticate the user and profile information will be displayed in the corner of the home screen.

3.1.2. Access ServiceNow via VALERI Servicer Web Portal

⚠️ The following instructions assume that the user is able to log into the VALERI Servicer Web Portal application using their ID.Me/AccessVA account. If the user is unable to log into the VALERI Servicer Web Portal application, please see section, **Access ServiceNow as a Guest User**.

- 6. Log into the **VALERI Servicer Web Portal** using ID.Me/AccessVA.
- 8. In Announcements, locate the message regarding the implementation of ServiceNow.
- 9. Select the link in the message to open the ServiceNow application.
- 10. ServiceNow will authenticate the user and profile information will be displayed in the corner of the home screen.

3.1.3. Access ServiceNow via WebLGY or LGYHub (Internal VA Employees)

⚠️ The following instructions assume that the user is able to log into the WebLGY application using a Personal Identification Verification (PIV) card. If the user unable to log into the WebLGY application, please see section, **Access ServiceNow as a Guest User**.

- 11. Log into WebLGY or LGYHub.
- 12. From the Home page, select Help.
- 14. Select Submit a Case.

3.1.4. Access ServiceNow via WebLGY or LGYHub (Non-VA Employees)

⚠️ The following instructions assume that the user is able to log into the LGYHub application using their ID.Me/AccessVA account or a Personal Identification Verification (PIV) card. If the user is unable to log into the LGYHub, please see section, **Access ServiceNow as a Guest User**.

- 15. Log into the LGYHub using either ID.Me/AccessVA or a PIV card.
- 16. From the Home page, select Help.
- 17. Navigate to the bottom of the Help page.

3.1.5. Access ServiceNow as a Guest User

⚠️ The following instructions assume that the user is not able to log into any VA applications (WebLGY, LGY Hub, VALERI, and VALERI Servicer Web Portal) using their ID.Me/AccessVA account or a Personal Identification Verification (PIV) card.

19. Select the link to access the ServiceNow application.

4. Report an Issue (Submit a Case)

The instructions below will guide users on how to reach out to the VA Help Desk using the ServiceNow CSM application.

1. Users that are able to log into the desired application (VALERI, VALERI Servicer Web Portal, WebLGY or LGY Hub) will submit a case as a Registered User. These users include the following:
   - VA Internal Users logging in via Access VA
   - External VA partners logging in via Access VA
2. If the user is having trouble logging in or does not currently have access to any of those VA applications, the user will submit a case as a Guest User.

4.1. Submit a Case (Registered Users)

To submit a case as a Registered User, the user must be logged into ServiceNow through one of the following VA applications via PIV card or ID.Me/AccessVA:

- VALERI
- VALERI Servicer Web Portal
- WebLGY
- LGYHub

⚠️ For specific information on how to access ServiceNow, please see: Accessing ServiceNow.

3. From the ServiceNow Home Page, select Get Help.
4. The system will display the **Registered User LGY Support** form.

**Figure 4-2: Registered User LGY Support Form**
5. The system will auto-populate the following fields:
   - Name
   - Email
   - Phone
   - Affiliate ID (Only if provided in LGYHUB)
   - Role Type (Only if provided LGYHUB)

![Figure 4-3: Submit a Case - Auto-Populated Fields](image)

6. User must complete the following fields:
   - Are you having trouble logging in or registering for a VA LGY Product? *(Drop-down list of options)*
   - Role *(This will be a required field if it did not auto-populate)*
   - Affiliate ID *(Optional free text if it did not auto-populate)*
   - Organization *(Free Text)*
   - Is there sensitive information? *(Drop-down list of options)*
     - No Personal Identifiable Information (PII) should be entered into a case.
   - What product are you trying to access or have experienced a problem with? *(Drop-down list of options)*
     - Depending on the selection in the question above, a second required field, Category, may display.
   - Description *(Text field, max 4000 characters)*

7. Select Add Attachments *(optional)* to upload any supporting documentation.
8. Select **Submit**.

The system will accept the case submission and display a confirmation message.
4.2. Submit a Case (Guest Users)


Figure 4-6: Link to Create a Case on the ServiceNow Home Page

10. The system will display the Customer Service Case Form.
11. User must complete the following fields:

- **First Name** *(Required Text field)*
- **Last Name** *(Required Text field)*
- **Email** *(Required Text field)*
  
  Users should ensure that contact information is accurate as technicians will use the contact information provided for case resolution.

- **Phone Number** *(Required Numeric field)*

- **Are you having trouble logging in or registering for a VA LGY Product?** *(Drop-down list of options)*
Users can only select one product. If the user has multiple product issues, then this information should be provided in the detailed description text field.

- **What is your role/affiliation with VA Loan Guaranty Systems?** *(Drop-down list of options)*
  - Users can only select one role/affiliation. If the user has multiple roles, then this information should be provided in the detailed description text field.

- **Organization** *(Optional Text Field)*
- **Affiliate ID** *(Optional Text Field)*
- **What product are you trying to access or have experienced a problem with?** *(Drop-down list of options)*
- **Please select the appropriate product category.** *(Drop-down list of options)*
- **Browser** *(Optional Text Field)*
- **Please give us a detailed description of your issue, so we can get you adequate help.** *(Text field, max 4000 characters)*
  - Users can provide additional details regarding role/affiliation and products in the detailed description text field.

12. Select **Create Case**.

- The system will accept the case submission and display a confirmation message.

  **Figure 4-8: Confirmation Message of Case Submission**
4.3. Exit System

13. Select the User Icon in the corner of any ServiceNow page.

14. Select Log Out or exit the screen.

ℹ️ A logout option will not be available for Guest users.
5. View Previous Case Submissions / Case Management

5.1. Access ServiceNow to View a Case (Registered User)

⚠️ Guest Users will not have access to the functionality outlined in the following section. This section is only applicable to users logged into the VALERI Servicer Web Portal application using their ID.Me/AccessVA account.

1. From the ServiceNow Home page, your open cases will display.

Figure 5-1: Access Cases from the Home Page
2. Select the **Case** link to view the case.

   **Figure 5-2: Select Case Number to View Case Details**

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Description</th>
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<tr>
<td><strong>CS0001571</strong></td>
<td>FFPs (Funding Fee Payment System) - Access Request (VA Employee) for various LGY applications and roles • 10d ago</td>
</tr>
<tr>
<td><strong>CS0001573</strong></td>
<td>VALERI - Policy • 10d ago</td>
</tr>
<tr>
<td><strong>CS0001576</strong></td>
<td>LGYHub/WebLGY - Batch Job Failure • 10d ago</td>
</tr>
<tr>
<td><strong>CS0001581</strong></td>
<td>SAH (Special Adaptive Housing) - Access Request (VA Employee) for various LGY applications and roles • 10d ago</td>
</tr>
<tr>
<td><strong>CS0001585</strong></td>
<td>LGYHub/WebLGY - Batch Job Failure • 10d ago</td>
</tr>
<tr>
<td><strong>CS0001588</strong></td>
<td>FFPs (Funding Fee Payment System) - Access Request (VA Employee) for various LGY applications and roles • 10d ago</td>
</tr>
</tbody>
</table>

3. **Case Details** will display.
5.2. Respond to a Case (Registered User)

4. From the Case Details screen, enter a response in the field, “Type your message here”

⚠️ See section, Access ServiceNow to View a Case to open a case.
To add an Attachment, select the paperclip icon.

5. Select Send.

5.3. Respond to a Case via Email

Both Registered and Guest Users can respond to technicians via email.

6. Users receive automated emails after a case is submitted and whenever a technician updates details about the case.

7. The automated email will be sent from YourIT@va.gov

Watermark – The watermark will be located at the bottom of the email. For each notification, the watermark will be unique.
8. From the e-mail, select **Reply**.

9. Enter the desired response and include the watermark from the original email at the bottom of the message.

10. Select **Send**.

6. **Troubleshooting**

If you experience any issues using the system, please submit cases directly in the [ServiceNow guest portal](#). Otherwise, please contact the email addresses listed below.

- VALERI Users - [VALERI.VBACO@va.gov](mailto:VALERI.VBACO@va.gov)
- LGYHub/WebLGY/FFPS/SAH Users - [VIP.VBACO@va.gov](mailto:VIP.VBACO@va.gov)
## Template Revision History

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