January 23, 2023

RE: Transitioning Operational Support Team, Medicaid Policy Questions to the Service Now Portal (SNOW)

Dear County Director of Social Services,

This is to notify the local agency of important changes to the Medicaid Operational Support Team (OST) **policy question submission process**. The Division of Health Benefits (DHB) is transitioning OST into the Service Now (SNOW) portal, for the purpose of managing local agency Medicaid policy questions.

This new process will provide a more effective structure and platform and ensure that we monitor and track all questions for response. This will also aid the Medicaid policy team in identifying areas of policy that may require clarification and/or training that may be needed to assist the local agency staff.

On January 9, 2023, DHB began a pilot of the new process with the following local agencies: Buncombe, Cherokee, Clay, Graham, Haywood, Jackson, Macon, Madison, Swain, Transylvania, and Yancey. The pilot has been a success and will continue through January 31, 2023. Therefore, effective **February 1, 2023**, all Medicaid policy questions **must** be submitted, via the Help Center OST Support Portal. The user will complete all the required fields in the question template. The local agency will receive an email response, advising that the policy question has been received and will include a ticket number.

The Medicaid question will be assigned to the Medicaid OST assigned to support your agency. Any correspondence between the local agency and the OST staff, will be via the Help Center OST Support portal. The local agency should ensure only individuals designated by the local agency submit policy questions to OST via the Help Center OST Support Portal.

Any Medicaid policy questions emailed directly to Medicaid OST on or after February 1, 2023, will be returned advising the local agency to follow the new process and submit the Medicaid policy question via the OST Support SNOW portal. It is critical that the local agency follows this process, so that there are no delays in response time. Any current pending policy questions submitted to the Medicaid OST, will be completed following the current process.

**Attached** are the user-friendly, Help Center OST Support Portal User Guides to assist you and your staff with accessing the portal and submitting OST Medicaid policy questions. Local agency staff will log in using their NCID and password. Please have designated staff to review the documents and familiarize themselves with the Help Center OST Support portal prior to February 1, 2023.

If you have questions concerning these new procedures or have questions or issues submitting policy questions, please contact your assigned Medicaid OST Representative.

Sincerely,

[Signature]

Dave Richard

Cc: Medicaid OST Staff
Eva Fulcher

Attachments
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Login and Navigating the Portal

Navigate to the OST Portal:

https://ncgov.servicenowservices.com/ost_support

1. Click “Login” in the top right of the screen.
   a. You will be redirected to the NCID Login Page.

   ![NCID Login](image1)
   
   Figure 1: NCID login

2. Input your NCID credentials.
   a. You are redirected to the Portal Home Page
3. From this page (Figure 2) you can:

   ![Portal Home Page](image2)
   
   Figure 2: Logged in view–Portal Home Page

   a. Submit an OST support case via the “OST Support Form” link (red).
   b. Access open support cases assigned to the logged in user via the “Support Cases” link in the navigation bar (blue).

All existing privacy and security practices related to PHI/PII apply.
c. Quickly view and access open cases in the “My Open OST Support Cases” module

d. Log out of a signed in user by clicking on the user’s name in the navigation bar, then “Logout”

Submitting an OST Support Case to the Help Center

1. From the Help Center Portal – Home Page:
   a. Click “OST Support Form” (Figure 3)

   ![Figure 3: “OST Support Form” button](image)

2. The “Help Center – OST Support Form” (Figure 4) will load.
   a. Populate all required fields. Description for each field is found on Table 1.
      i. Additional Notes:
         IV. Any field with “*” is a required field.
         V. For the “County” field, if “State Organization” is chosen, an additional field titled “State Organization” will appear. From here, you can select the appropriate state organization. Selecting a different option for the “County” field will make the “State Organization” field disappear.
         VI. The “HD Ticket Number” field will appear as a field if “Yes” is selected. Selecting “No” will make that field disappear.

   b. Click “Submit”
3. After submitting the form, the page reloads to show the “ticket” view.
4. From the Ticket View (Figure 5), you can:
   a. Write comments to the Agent who will work the case (red). The Agent’s response will appear after your comment in a chronological order.
   b. If there is an attachment, you can download and view from the top right column (blue).
   c. Review the background of your ticket in the column to the right (green) (extending all the way down).

5. After submitting a case, you can re-open them from the Home Page:
   a. Click the case name matching the case you just created in the “My Open OST Support Cases” Box (Figure 6) on the Home Page.
   b. You can also view all open support cases from the “Support Cases” button in the header. Figure 7 shows the result of clicking on this button.
All existing privacy and security practices related to PHI/PII apply.

Figure 7: all Command Center Cases assigned to the logged in user