



National Finance Center  
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# National Finance Center Business Service Management ServiceNow Customer Service Portal User Guide







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## Welcome Statement

Welcome to the National Finance Center (NFC) Business Service Management (BSM) ServiceNow Customer Service Portal User Guide. This guide is for Customer Support Portal External Users. Included is guidance for basic ServiceNow ticket management features and navigating the Customer Service Portal as well as following the progress of a ticket from submission to closure. This user guide is strictly, for Customer Service Portal authorized users.





# Chapter 1 - Introduction - Overview of Customer Service Portal View

This section includes the following topics:

<b>Purpose of Customer Service Portal</b> .....	1
<b>Difference between an Incident and a Service Request</b> .....	1

## Purpose of Customer Service Portal

The National Finance Center's (NFC) Business Service Management (BSM) ServiceNow Customer Service Portal (CSP) is the automated ticket tracking system for NFC.

The NFC BSM ServiceNow CSP provides access for authorized users to submit tickets for one-time incidents and regularly requested services. It also provides access for those same authorized users to track the status of their submitted tickets and tickets submitted on their behalf.

Details and examples for each area of the NFC BSM ServiceNow CSP are included in this guide.

## Difference between an Incident and a Service Request

In the definitions in *Appendix A - Definitions* (on page 25): an **Incident** is an event where something that was working before is now not working, and a **Service Request** is a normal day-to-day task.

### Examples of Incidents:

- Security Incident
- Receiving an Error Message
- Insight, webTA, or other application issue.

### Examples of Service Requests:

- Requesting new access to an application
- Modifying existing access
- Requesting assistance with resetting a password



- Submitting insurance changes
- Identifying a missed retirement contribution.

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Note: Not everyone will see all of these examples, and these examples are not all encompassing. If an authorized user is unsure about which type of ticket to submit, check the available Service Request options before submitting an Incident.

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## Chapter 2 - Administration

This section includes the following topics:

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### To Log In (for Federated Users):

A user is considered a Federated user if they login via eAuthentication.

1. Enter the url for *ServiceNow for Federated Users* <https://nfcerp.service-now.com> into the Web browser.

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Note: Users should operate NFC BSM ServiceNow using Google Chrome, Mozilla Firefox, or Microsoft Edge. NFC BSM ServiceNow does work using Internet Explorer, but images identifying buttons will not be visible.

---

The website will redirect you to the eAuthentication login page.



Figure 1: eAuthentication Login Page



2. Enter your eAuthentication User ID and Password.

**OR**

Select the PIV login icon that allows the user to login by entering their eAuthentication personal identification number (PIN).

Once successfully logged in, the NFC BSM ServiceNow CSP home page is displayed.

## To Log In (for Non-Federated Users):

A user is considered a Non-Federated user if they login by using a user name, password, and confirm that they are not a robot.

1. Enter the url for *ServiceNow for Non-Federated Users* <https://nfcerp.service-now.com/ess/> into the web browser. The Accessing Federal Owned Systems page is displayed.

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Note: Users should operate NFC BSM ServiceNow within Google Chrome, Mozilla Firefox, or Microsoft Edge. NFC BSM ServiceNow does work within Internet Explorer, but images identifying buttons will not be visible.

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### ACCESSING FEDERAL OWNED SYSTEMS

You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only. Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the government may for any lawful government purpose monitor, intercept, search and seize any communication or data transiting or stored on this information system. Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose. Your consent is final and irrevocable. You may not rely on any statements or informal policies purporting to provide you with any expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, except USDA's Chief Information Officer.

The screenshot shows a login form with the following elements:

- A text input field labeled "User name".
- A text input field labeled "Password".
- A checkbox labeled "I'm not a robot".
- A CAPTCHA icon with the text "CAPTCHA" and "Privacy Terms" below it.
- A blue "Login" button.

**Figure 2: Accessing Federal Owned Systems Page**

2. Enter your User name and Password.
3. Select the checkbox.



The checkbox confirms that the user is not a robot and will display a page containing pictures to identify as instructed. Once successfully logged in, the NFC BSM ServiceNow CSP home page is displayed.

## Password Resets or Lock Outs

For Federated Users, the user must follow eAuthentication password reset procedures. On the login page, there are two available links for this purpose: ***I forgot my Password*** and ***Change my Password***. If neither of these links provide the needed assistance, the eAuthentication help desk can be reached at **1-855-632-4468**.

For Non-Federated Users, the user has two options to have their password reset. Users can select the ***Reset your password here*** link, or they can contact the National Finance Center's Operations and Security Center (OSC) at **1-800-767-9641**.

If after attempting to login and the user is still unable to access NFC BSM ServiceNow, they can contact OSC at **1-800-767-9641**. If the user is new to NFC BSM ServiceNow, the process may require their ASO to submit an access request.

## Personally Identifiable Information (PII) Violations, Warning Notifications, and Encryption of Documents

Upon login, and when attaching documentation, users will see warning notifications reminding of the protocol concerning PII and that it should not be included without encryption.

### Management of PII violations:

In accordance with USDA Incident Response (IR) procedures and Departmental Agriculture Security Operations Center (ASOC) policy, NFC Security Practices adhere to these regulations:

- USDA DM 3505-000 – USDA Computer Incident Response Procedures Manual
- NFC Title VII, Chapter 11, Directive 77 – NFC Incident Response Procedure Manual
- NFC Title VII, Chapter 14 Directive 7 – Personnel Security and Suitability Program

Therefore, the policies and procedures enforced at NFC apply to all systems, which includes NFC BSM – ServiceNow application.

### Notification to IRT:

Should any of our service desk representatives or agents receive either an Incident or Service Request with visible PII, then the representative and/or agent must report the violation to the Incident Response Team (IRT). The agent will submit an IRT ticket and identify the Incident or



Service Request that was submitted in violation. The ticket can also be related to the submitted IRT ticket. The incident report will include the following information:

- Ticket number
- Reporting Service Desk agent
- Description of where PII was visible; (i.e., unencrypted attachment or in the details description).
- Information on which agency submitted the unfiltered PII.

Once the IR Team, reviews the records submitted in violation, they will notify the Service Desk agent and manager of actions taken to mitigate the exposure. Updates to user's records will include recording any submitted unencrypted PII based on a monthly report.

**Three strikes – Removal of access:**

Should an end user have three violations within a 90-day period, then the NFC IRT manager will notify the submitter's Agency Security Officer (ASO) or Security Coordinator of repeated violations. It will be determined between both Agencies what actions to take. Types of actions are remove access, give a warning, or retake Security Awareness training determined on a case-by-case basis.

Upon completion of the mitigating actions, each ASO or Security Coordinator will be required to reinstate the end user's access. Then, the Access Management Branch will restore the user's access.



## Chapter 3 - Customer Service Portal (CSP) Functional Overview

This section includes the following topics:

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### Account Settings

The NFC BSM ServiceNow CSP home page has links to multiple pages.

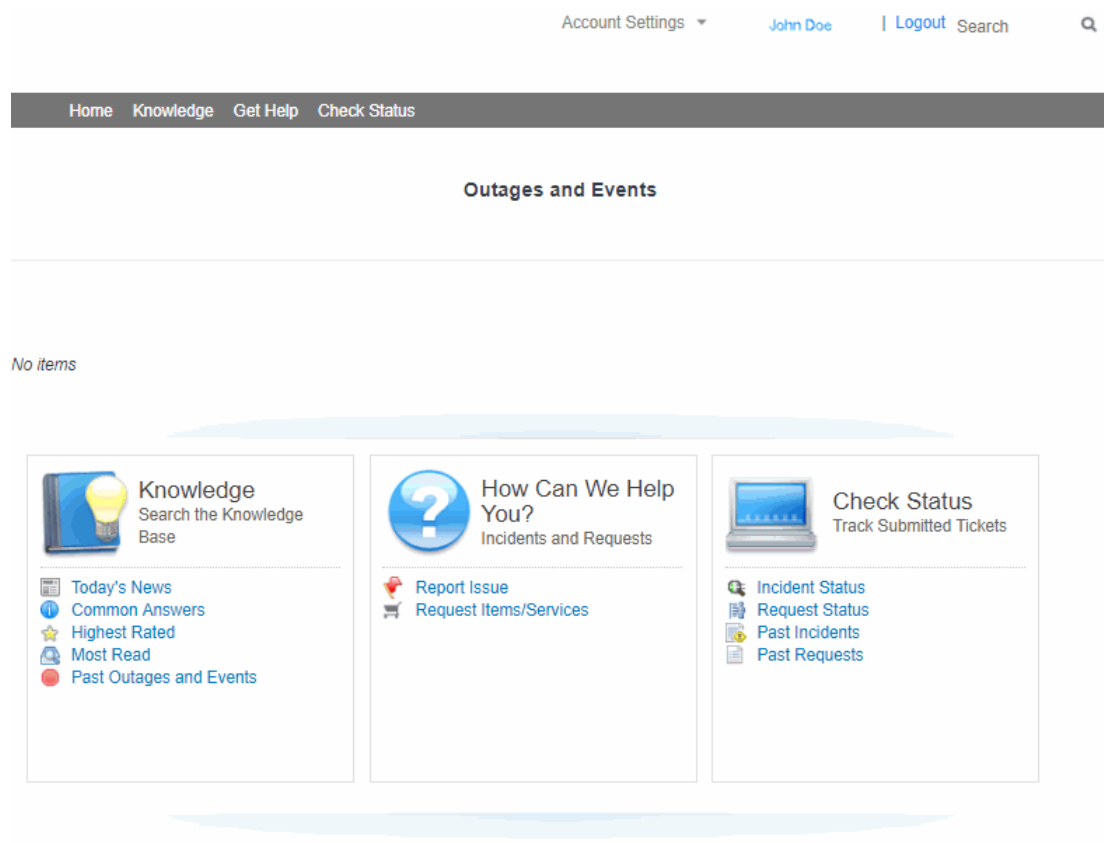


Figure 3: ServiceNow CSP Home Page



## Account Settings

On the NFC BSM ServiceNow CSP home page, there is a dropdown menu labeled **Account Settings - Important Tasks at Your Fingertips**. This menu consists of three pages.

### Open Orders

This page provides a listing of open Service Request tickets where the user is the customer.

### Get Help Status

This page provides a listing of open Incident tickets where either the user is the customer or the user was the originator of the ticket.

### My Profile

This page provides what NFC has identified as the user's contact information. It also displays whom the user has delegated to act on their behalf. This information is not editable, but the user may contact OSC at **1-800-767-9641** to have the adjustments completed. OSC will update the user's profile information as identified.

When opening each of the three choices, a listing of some Common Answers that may provide guidance for issues, negating the need for a ticket, is available. Also there is a listing of Current Issues and recently updated tickets.

## Service Banner

This banner is available on all pages of the NFC BSM ServiceNow CSP and can connect the user to pages otherwise accessed from the NFC BSM ServiceNow CSP home page.

The Service Banner is displayed.



**Figure 4: Service Banner**

*Home*

This option returns the user to the NFC BSM ServiceNow CSP home page.



### *Knowledge*

This menu matches the options in the **Knowledge** area of the Content on the NFC BSM ServiceNow CSP home page. All menu options will bring the user to the same pages that the NFC BSM ServiceNow CSP home page Content does, without the need to return to the home page in between tasks.

At this time, only the **Common Answers** link will bring users to an active page, as the others are reserved for future use.

### *Get Help*

This menu matches the options in the **How Can We Help You?** area of the Content on the NFC BSM ServiceNow CSP home page. **New Incident** matches **Report Issue**, and **New Request** matches **Request Items/Services**. Both menu options bring the user to the same pages that the NFC BSM ServiceNow CSP home page Content does, without the need to return to the home page in between tasks.

### *Check Status*

This menu matches the options in the **Check Status** area of the Content on the NFC BSM ServiceNow CSP home page. All options will go to the same pages that the NFC BSM ServiceNow CSP home page Content does, without the need to return to the home page in between tasks.

## Newsfeed

The Newsfeed is a scrolling feed of information as displayed.

### Outages and Events

*No items*

**Figure 5: Newsfeed Page**

Here, the users will see if there are any known issues affecting applications they may use, when those issues are resolved, and any other immediate information for the users. The Newsfeed may also broadcast any planned outages or upcoming release notes. The Newsfeed does not replace email notifications.

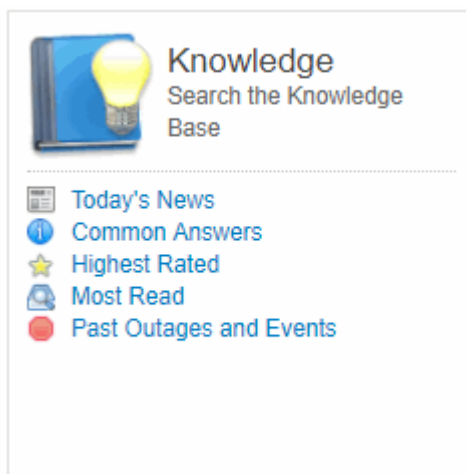


## Knowledge: Search the Knowledge Base

The Knowledge content includes multiple links that bring the user to knowledge articles containing information that may provide answers to questions, and eliminate the need to submit a ticket; however, users are encouraged to submit a ticket if they are unable to find an answer or know that their request requires one.

At this time, only the **Common Answers** link is accessible; the others are reserved for future use.

The Knowledge: Search the Knowledge Base page is displayed.



**Figure 6: Knowledge: Search the Knowledge Base Page**

### *Common Answers*

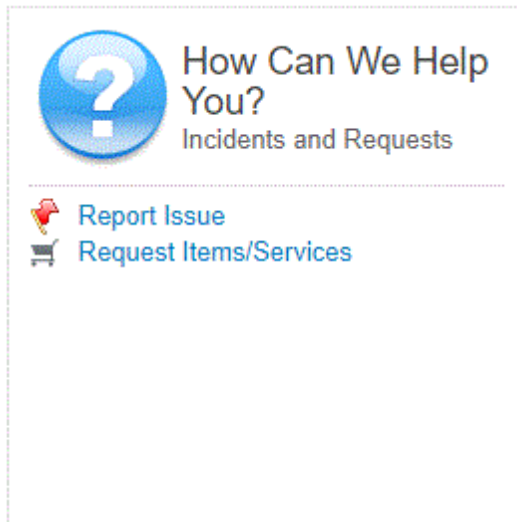
Allows customers to search and view articles posted by NFC. These articles contain information relating to known issues, workarounds to allow work to continue, and process steps that users can follow for well-known tasks.





## How Can We Help You?: Incidents and Requests

The links under How Can We Help You? allow the user to submit two different kinds of tickets, as displayed.



**Figure 7: How Can We Help You? Incidents and Requests Page**

### *Report Issue*

The link an authorized user uses in order to submit an Incident. An Incident is an event or issue that is stopping the user (or whom they are submitting the ticket on behalf of) from being able to work.

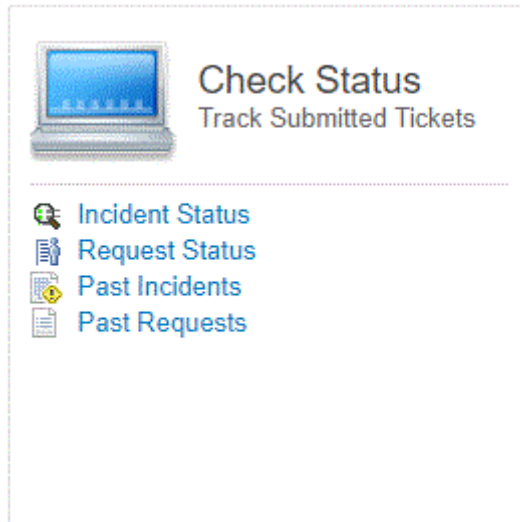
### *Request Items/Services*

The link an authorized user uses in order to submit a Service Request. A Service Request is a regular task that is not stopping work.



## Check Status: Track Submitted Tickets

The four links available under **Check Status** all relate to viewing the status of an Incident or Service Request ticket, dependent on whether the ticket is currently active or inactive, as displayed.



**Figure 8: Check Status - Track Submitted Tickets Page**

Each link brings the user to a list of tickets (if available) that relate to the following criteria:

### *Incident Status*

Incident tickets that are currently active, and have the user listed as either the customer of the ticket (also known as the Contact) or the person who opened the ticket.

### *Request Status*

Service Request tickets that are currently active, and have the user listed as either the Requested for or Requester. The difference being the Requester is the individual opening the ticket, and the Requested for is the customer of the ticket. If the user opening the ticket decides to open the ticket **on behalf** of another individual, that individual will be the Requested for and will be whom the NFC representative will contact with the customer support information.

### *Past Incidents*

Incident tickets that are currently inactive, and have the user listed as either the customer of the ticket or the person who opened the ticket. These tickets are no longer active.



### *Past Requests*

Service Request tickets that are currently inactive, and have the user listed as either the Requested for or Requester. These tickets are no longer active.





## Chapter 4 - Navigation

This section includes the following topics:

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<b>Submission of a Ticket</b> .....	18

### Agency Security Officials (ASO)

As an Agency Security Official, it is the ASO's responsibility to create Security Incident tickets, access request tickets, and ensure that they attach the proper documentation.

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Note: For Security Incidents, ASOs must create a new Incident ticket, and select **AMB Security Incidents** from the Summary drop down field.

---

#### For Access Requests, ASOs Must:

1. Select **Request Items/Services** from the NFC BSM ServiceNow CSP home page or Service banner.
2. Select **Operations and Security Center**. The Operations and Security Center page is displayed.

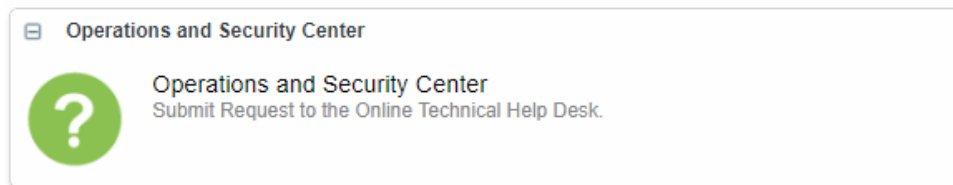


Figure 9: Operations and Security Center Page

3. Select **System Access**.
4. Identify, under System Access, whether it is to:
  - Create
  - Modify
  - Delete



---

Note: ASOs are not able to make changes to their own access. If the ASO must have their own access updated, another ASO must submit the changes.

---

Documentation for these requests is available on the *NFC* <https://www.nfc.usda.gov/> website. Contacting [nfc.aso@nfc.usda.gov](mailto:nfc.aso@nfc.usda.gov) would provide further information and answers to any security related questions.

## Service Personnel Officials (SPO)

As a Service Personnel Official, it is the SPO's responsibility to submit HR/Payroll Services Requests.

### To Submit Requests:

1. Select **Request Items/Services** from the NFC BSM ServiceNow CSP home page or Service banner.
2. Select **HR/Payroll Services**. The HR/Payroll Services page is displayed.



Figure 10: HR/Payroll Services Page

3. Select which type of request to submit.

## Benefits Processing Officials (BPO)

As a Benefits Processing Official, it is the BPO's responsibility to submit FEHB, TSP, and International Organization Requests.

### To Submit Requests:

1. Select **Request Items/Services** from the NFC BSM ServiceNow CSP home page or Service banner.



2. Select **Benefits Processing - FEHB/TSP/Int'l Org**. The Benefits Processing - FEHB/TSP/Int'l Org page is displayed.



Figure 11: Benefits Processing - FEHB/TSP/Int'l Org Page

3. Select which type of request ticket to submit. Each link provides a list of relevant tickets.

## Insurance Service Direct Premium Remittance Web (DPRW), Tribal Benefits Official (TBO), and Tribal Security Official (TSO)

For the insurance and tribal authorized users, it is the user's responsibility to attach completed paperwork. Direct Premium Remittance Web (DPRW) users may submit security access/update requests by following these steps:

1. Select **Request Items/Services**.
2. Select **Insurance Services - DPRS/CLER/TIPS**, as displayed.

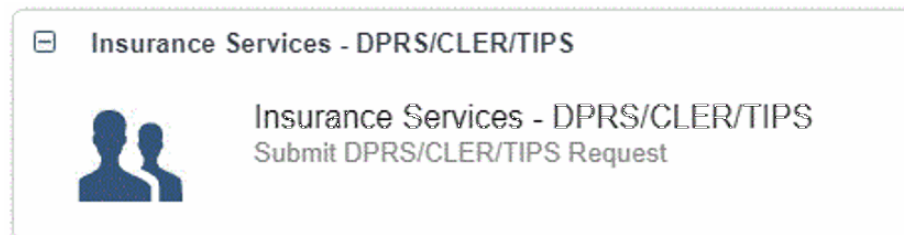


Figure 12: Insurance Services - DPRS/CLER/TIPS Page

3. Select **Security Access/Updates**

The user may have to go to a second page of ticket choices in order to find the correct request type.

TBO users may submit Service Requests by following these steps:

1. Select **Request Items/Services**.
2. Select **Insurance Services - DPRS/CLER/TIPS**.
3. Select which type of request ticket.



TSO users should submit Incident and Service Requests in a similar fashion to ASOs.

## Submission of a Ticket

Prior to a ticket being submitted, it must be determined if the ticket is an Incident or a Service Request. If a user is unsure about which type of ticket to submit, the user can search through the available Service Request options prior to submitting an Incident. Also, please see the differences between the two ticket types in *Chapter 1 - Introduction - Overview of Customer Service Portal View* (on page 1) and the definitions in *Appendix A - Definitions* (on page 25).

For all authorized users, providing as much detail as possible in the ticket submission allows for expeditious processing. If a field on the Incident or Service Request ticket has an asterisk (\*), it is a required field. When the user has provided the required information, the asterisk is grayed out.

For text-entry fields, the user can include details such as:

- The name of the user being affected/adjusted.
- The date an issue started.
- The application that the user was attempting to use.
- The browser used to access the application.
- The steps that have already been taken.
- If there have been any recent known changes to the user's access.

---

Note: For tickets noting an error message, providing a screen print of the message also provides critical information.

---

### To Submit an Incident:

1. From the NFC BSM ServiceNow CSP home page, under **How Can We Help You?**, select **Report Issue**. The new Incident record is displayed. The user's contact information will prepopulate the fields.

The screenshot shows the 'Incident' 'New record' page in ServiceNow. The form includes the following fields and controls:

- First Name**: Required field (marked with a grayed-out asterisk).
- Last Name**: Required field (marked with a grayed-out asterisk).
- E-Mail**: Required field (marked with a red asterisk).
- Phone Number**: Required field (marked with a red asterisk).
- State**: Dropdown menu with 'New' selected.
- Summary**: Required field (marked with a red asterisk) with a search icon.
- Details**: Required field (marked with a red asterisk).
- Urgency**: Dropdown menu with '3 - Medium' selected.
- Additional comments (Customer visible)**: Large text area.
- Submit**: Button at the bottom left.

Figure 13: New Record Page





2. Select the dropdown next to Summary.
3. Select a value.
4. Enter a full description of the incident in the Details field.
5. Select the Urgency dropdown.
6. Select a value.
7. Select the **Submit** button.

If an Incident requires documentation, before step seven identified for the new Incident creation, follow these steps.

1. Select the **paperclip** button.

---

Note: At this time, the colors may hide the button images, but the user can hover the mouse until a paperclip is visible.

---

The message with a reminder that attachments should not include PII appears. If an attachment includes PII, the user must encrypt the document prior to attaching it to the ticket.

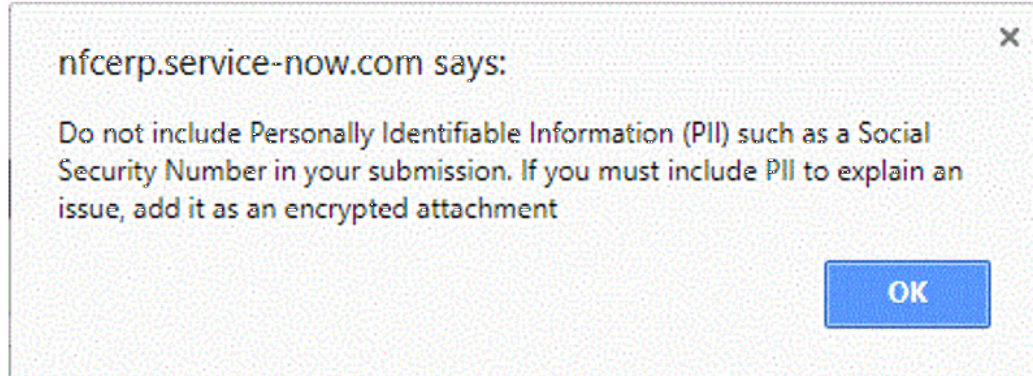


Figure 14: PII Warning Page



2. Select the **OK** button. The Attachments page is displayed.

Attachments X

**ATTENTION: Do not include Personally Identifiable Information (PII) such as a Social Security Number in your submission. If you must include PII to explain issue, add it as an encrypted attachment.**

Choose a file to attach:

Choose Files No file chosen X Attach

Add Another Attachment

Current file attachments:

None

**Figure 15: Attachments Page**

3. Select the **Choose Files** button
4. Scroll through the available files to identify the correct documentation to attach.
5. Select the **Open** button.
6. Once the user sees the file on the Attachments page, they must select the **Attach** button.
7. When the user sees the file on the Attachments page (under Current file attachments), the user can close the Attachments page by selecting the **X**. The user should now be able to see the attachment on the Incident ticket page.

#### **To Submit a Request:**

1. From the NFC BSM ServiceNow CSP home page, under How Can We Help You?, select the **Request Items/Services** option.
2. Select the appropriate Service Catalog based on the type of ticket the user needs to submit.

Based on user access, multiple options may be displayed.

---

Note: In the Benefits Processing Catalog, the user must repeat this step as it splits into three further groups.

---

3. From the list of ticket types, select the most relevant ticket type (Sample of a blank new ticket is displayed).



Depending on the type of ticket, some information may be prepopulated.

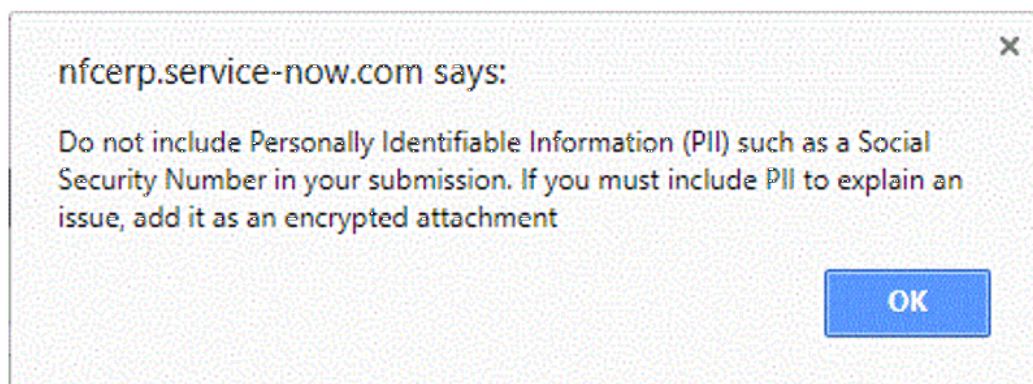
**Figure 16: Request to Reset Password Page**

4. Select the **Yes** or select the **No** from the dropdown menu for the Are you submitting this request on behalf of someone else? See the definitions in *Appendix A - Definitions* (on page 25) for guidance on the answer.
5. Enter the Additional Information with details concerning the Request, and any other fields needed.
6. Select the **Submit** button.

If a Service Request requires documentation, before step six identified above for the new Request creation, follow these steps.

1. Select **Manage Attachments ()** on the Request page.

The message with a reminder that attachments should not include PII appears. If an attachment includes PII, the user must encrypt the document prior to attaching it to the ticket.



**Figure 17: PII Warning Page**



2. Select the **OK** button. The Attachments page is displayed.

Attachments ✕

---

**ATTENTION:** Do not include Personally Identifiable Information (PII) such as a Social Security Number in your submission. If you must include PII to explain issue, add it as an encrypted attachment.

---

Choose a file to attach:

No file chosen ✕

Current file attachments:

None

**Figure 18: Attachment Page**

3. Select the **Choose Files** button
4. Scroll through the available files to identify the correct documentation to attach.
5. Select the **Open** button.
6. Once the user sees the file on the Attachments page, they must select the **Attach** button.
7. When the user sees the file on the Attachments page (under Current file attachments), the user can close the Attachments page by selecting the **X**. The user should now be able to see the attachment on the Incident ticket page.



## Chapter 5 - Contact Us

For NFC BSM ServiceNow functionality assistance for submitting a ticket, workflow issues, or Passwords, contact the Operational Security Center at **1-800-767-9641** or open an Incident.

Service Request or Incident needing escalation, guidance is available on the *NFC* <https://www.nfc.usda.gov/> website and enter the word **escalation** into the Search field and pressing **Enter**.





## Appendix A - Definitions

The NFC BSM ServiceNow CSP application gives authorized users the access to view several functionalities that allow submission and tracking of work tickets that may require action. Below are key words and phrases within NFC BSM ServiceNow that users should understand.

### **Active=True/False Screen Field**

This is a cumulative State description. When viewing the statuses of tickets, Active=True or Active=False will be displayed near the top left corner.

Active=True identifies tickets that are currently open, though each ticket could be in a different state.

Active=False identifies tickets that have been completed and are waiting closure or have already successfully closed.

### **Are you submitting this request on behalf of someone else?**

This drop down (on Requests) allows the authorized user to submit a ticket on someone else's behalf. However, this also identifies who will be the customer on the ticket and who will receive the email or phone contact pertaining to the ticket. If a user is submitting a ticket to assist another person, but the user wants to receive the related contacts, then the answer should be **No**.

### **Catalog or Service Catalog**

The Catalog is the organization of the data in the **CSP**. It displays links to access the Knowledge Base, to submit tickets, and to review both open and completed tickets.

### **Change Request**

A Change Request, identified as a ticket number starting with **CHG**, is a planning ticket that records approval and work completed when an application or workflow requires adjustment.

### **Incident/Issue**

An Incident ticket, identified as a ticket number starting with **INC**, is an event causing or may cause a disruption to the quality of services and customer productivity. An example would be an application not being available.

### **Knowledge Base or Knowledge Database**

This is a compilation of articles written to support repeating issues and requests. Authorized users are encouraged to search the Knowledge Base prior to submission of a ticket. If an answer or guidance is not available in the Knowledge Base, users are encouraged to submit a ticket for support.



## **Request or Service Request**

A Request, identified as a ticket number starting with **REQ**, is a standard work order, such as requesting access to an application or requesting a correction to a retirement fund.

### **State**

The State is the current standing of the ticket. Examples would be **New**, **Awaiting Information**, **Resolved** or **Complete**, and **Closed**.

### **Status**

The status of a ticket displays (for the applicable tickets) the viewable work activity that is available on a ticket.





## Appendix B - Frequently Asked Questions

### How do I dispute a ticket?

When a ticket moves to either **Resolved** or **Completed** (for the Incident and Request respectively), the user will receive an email notifying them. To dispute a ticket's completion, the customer must either call their supporting contact center, or select the **Dispute** button on the completed ticket. The Dispute button is not available on tickets that have moved to a **Closed** state. If a user must dispute a Closed ticket, they must call their relevant call center.

### How do I request access roles?

ASOs submit all Access Requests, including access to NFC BSM ServiceNow. Guidance is available in the ASO section of **Chapter 4 - Navigation** (on page 15), or by contacting [nfc.aso@nfc.usda.gov](mailto:nfc.aso@nfc.usda.gov).

### How do I attach documents and send password?

Directions for attaching documents are available in the Submission of a Ticket section of **Chapter 4 - Navigation** (on page 15). For documents requiring encryption and password protection, send an email with the ticket number and password to the relevant contact center.

### How do I send requests for enhancements?

NFC BSM ServiceNow is a growing application. If a user identifies an enhancement that would assist in the submission or review of tickets, please send an email to the OSC at [OSC.ETix@nfc.usda.gov](mailto:OSC.ETix@nfc.usda.gov).

### What time zone is used?

The NFC is located in the Central time zone (CT); therefore, all date/times are in the CT. Hours of operation for the contact centers are available at **NFC** <https://www.nfc.usda.gov/>.





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