



How to Use Zendesk

The Arc's Customer Service Help
Ticket System

What is Zendesk?

Zendesk is The Arc's online customer service help ticket system as of March 8, 2023.

Employers, employees, support brokers, CCS's, vendors, and other team members can create help tickets whenever they have a problem or question.

When a ticket is created, an Arc employee responds to the ticket and works with the ticket creator to resolve the issue.



What is Zendesk?

Zendesk is a great way for you and your team to have a written record of when your problem or question started and when it was resolved.

Creating tickets in Zendesk not only helps you keep track of things—it helps The Arc, too.

When everyone creates tickets in Zendesk, our team can notice and track trends in real time and make sure we are working where we're needed most.

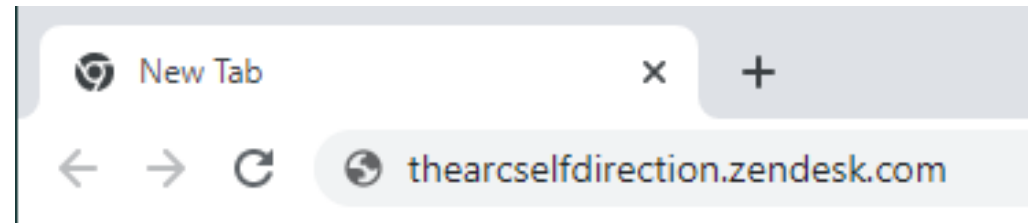


This presentation will show you how to:

- Create your Zendesk account
- Log in to Zendesk
- Submit a customer service help ticket
- Check on the status of a ticket
- Reply to a ticket response
- Use the Knowledgebase

Create Your Zendesk Account

Go to thearcselfdirection.zendesk.com using your preferred internet browser (Chrome, Firefox, Safari, etc.).



Create Your Zendesk Account

You are now on the Zendesk login screen. This is where you will come to login. But first, you must sign up.

Zendesk Auth

thearcselfdirection.zendesk.com/auth/v2/login/signin?return_to=https%3A%2F%2Fthea...

Sign in to The Arc Central Chesapeake Region

Email

Password

Sign in

[Forgot password?](#)

New to The Arc Central Chesapeake Region? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

Click the blue
“Sign up” link.

Create Your Zendesk Account

This page is the Sign up screen. Enter your full name and email address. Ideally, your email address should be the one we have on file for you in FMSE if you use FMSE.

Sign up to The Arc Central Chesapeake Region

Please fill out this form, and we'll send you a welcome email so you can verify your email address and sign in.

Your full name *

Your email *

[Sign up](#)

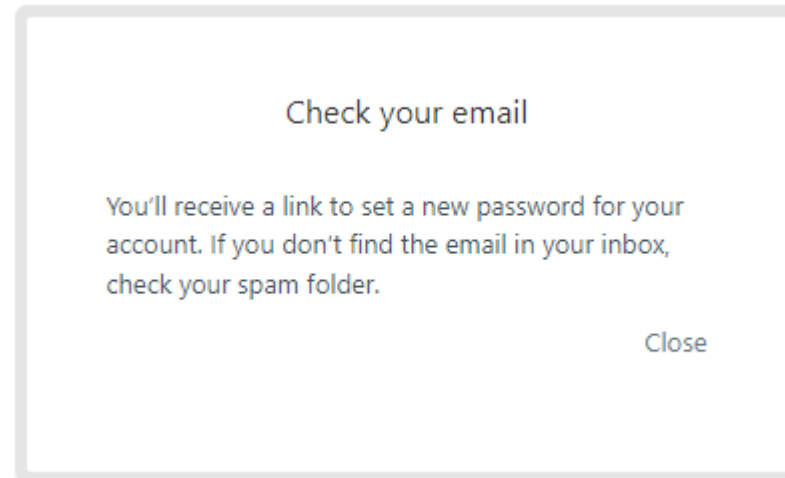
[Cancel](#)

When finished, click the blue “Sign up” button.

Create Your Zendesk Account

You will be prompted to check your email to create the password for your account.

If you can't find the email in your inbox, check your spam/junk/promotions/quarantine folder.

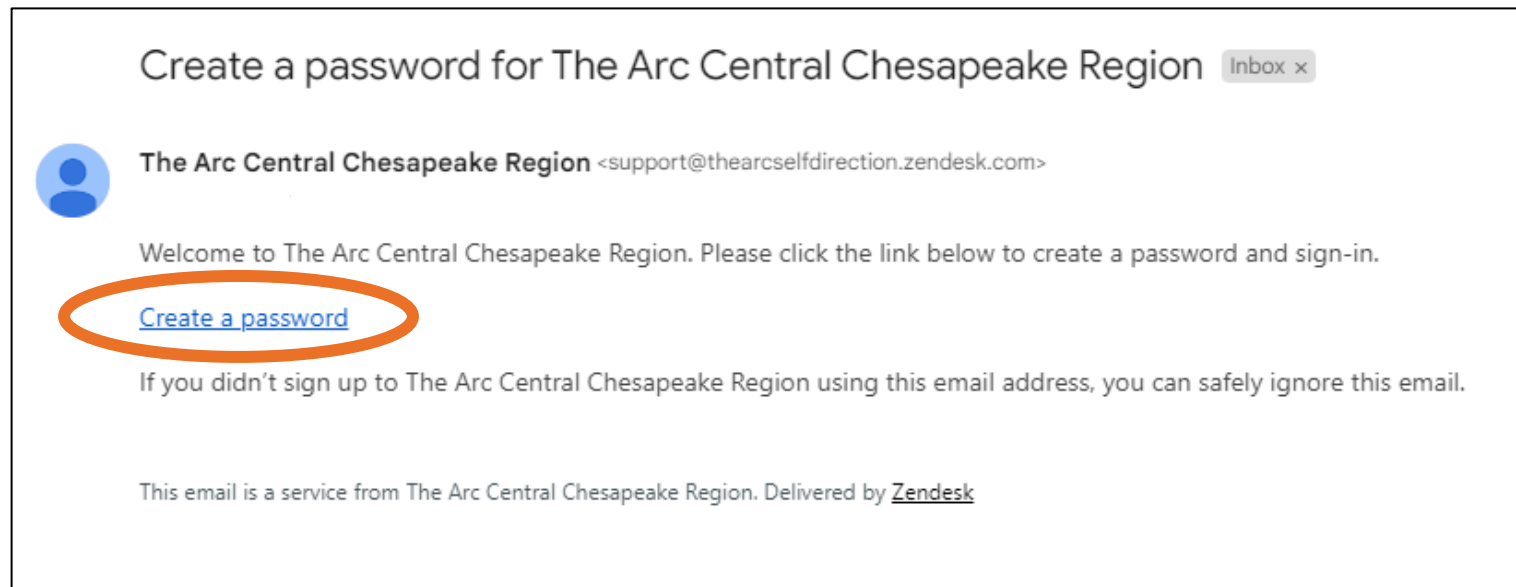


Create Your Zendesk Account

The email will come from support@thearcselfdirection.zendesk.com

The subject line will be: Create a password for The Arc Central Chesapeake Region

Click the blue “Create a password” link in the email.



Create Your Zendesk Account

Create a password for your account.


- If your password meets the requirements, there will be green checkmarks next to the password requirements.
- If your password does NOT meet the requirements, there will be red X's. You will have to adjust the password.

Choose your secret password

You'll use this password to sign in to The Arc Central Chesapeake Region.

Your name

Your password

Password requirements:

- ✓ must be at least 5 characters
- ✓ must be fewer than 128 characters
- ✓ must be different from email address


[Set password](#)

Choose your secret password

You'll use this password to sign in to The Arc Central Chesapeake Region.

Your name

Your password

Password requirements:

- ✗ must be at least 5 characters
- ✓ must be fewer than 128 characters
- ✓ must be different from email address

[Set password](#)

Create Your Zendesk Account

If you would like to double-check the characters of the password, click the “eye” symbol.

Save your password somewhere secure and click the blue “Set password” button.

Choose your secret password

You'll use this password to sign in to The Arc Central Chesapeake Region.

Your name

Test User

Your password

TheArc1234!

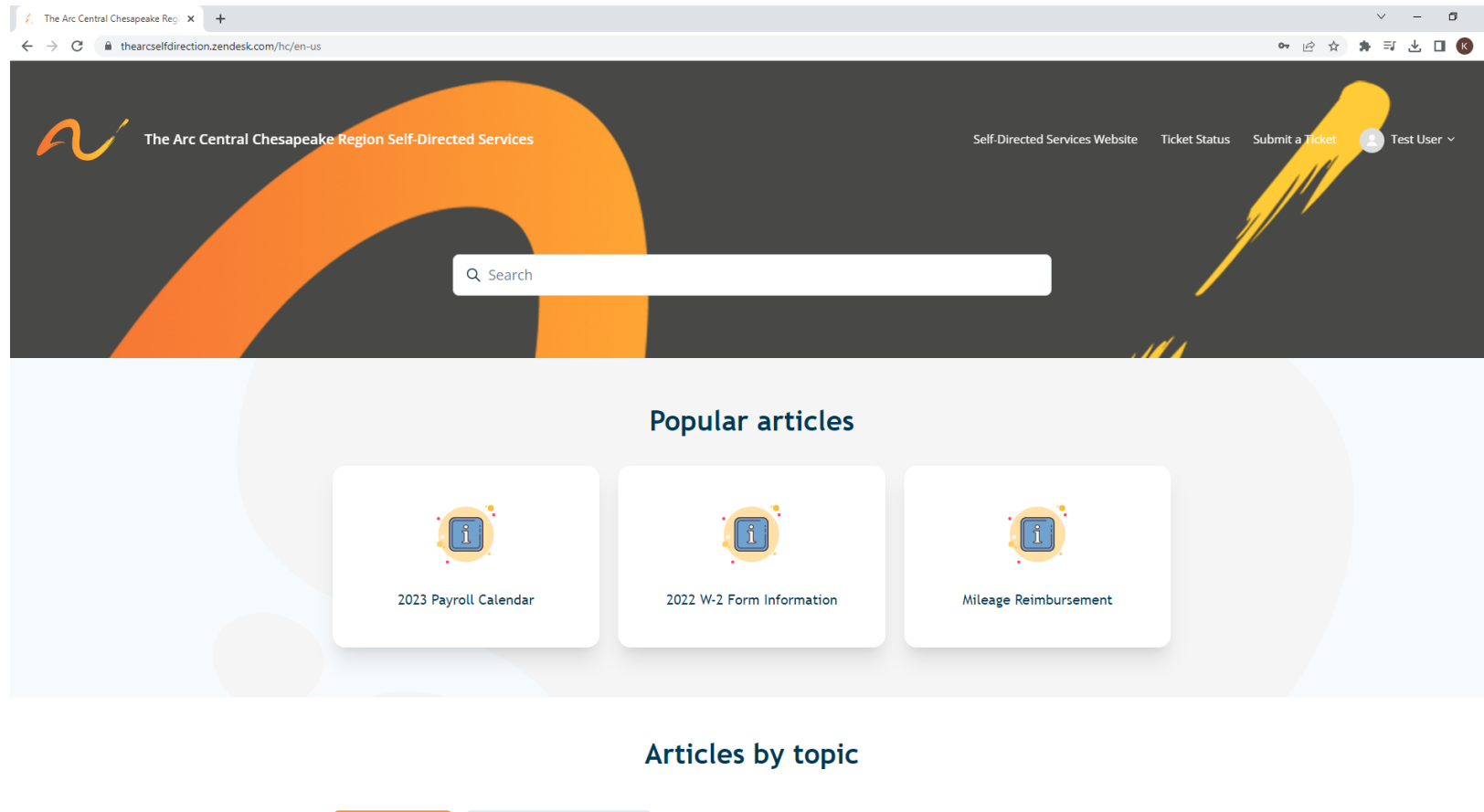
Password requirements:

- ✓ must be at least 5 characters
- ✓ must be fewer than 128 characters
- ✓ must be different from email address

Set password

Create Your Zendesk Account

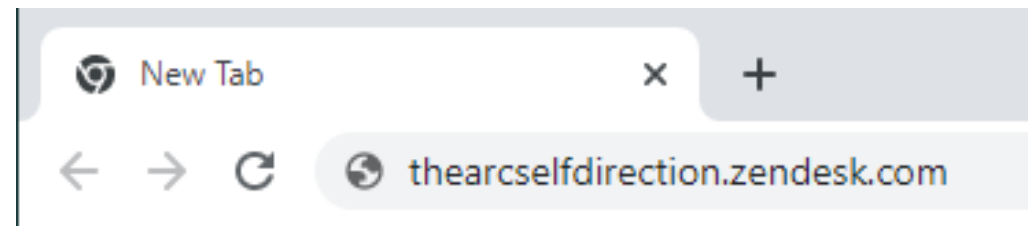
You are now on the Zendesk home page.



Log in to Zendesk

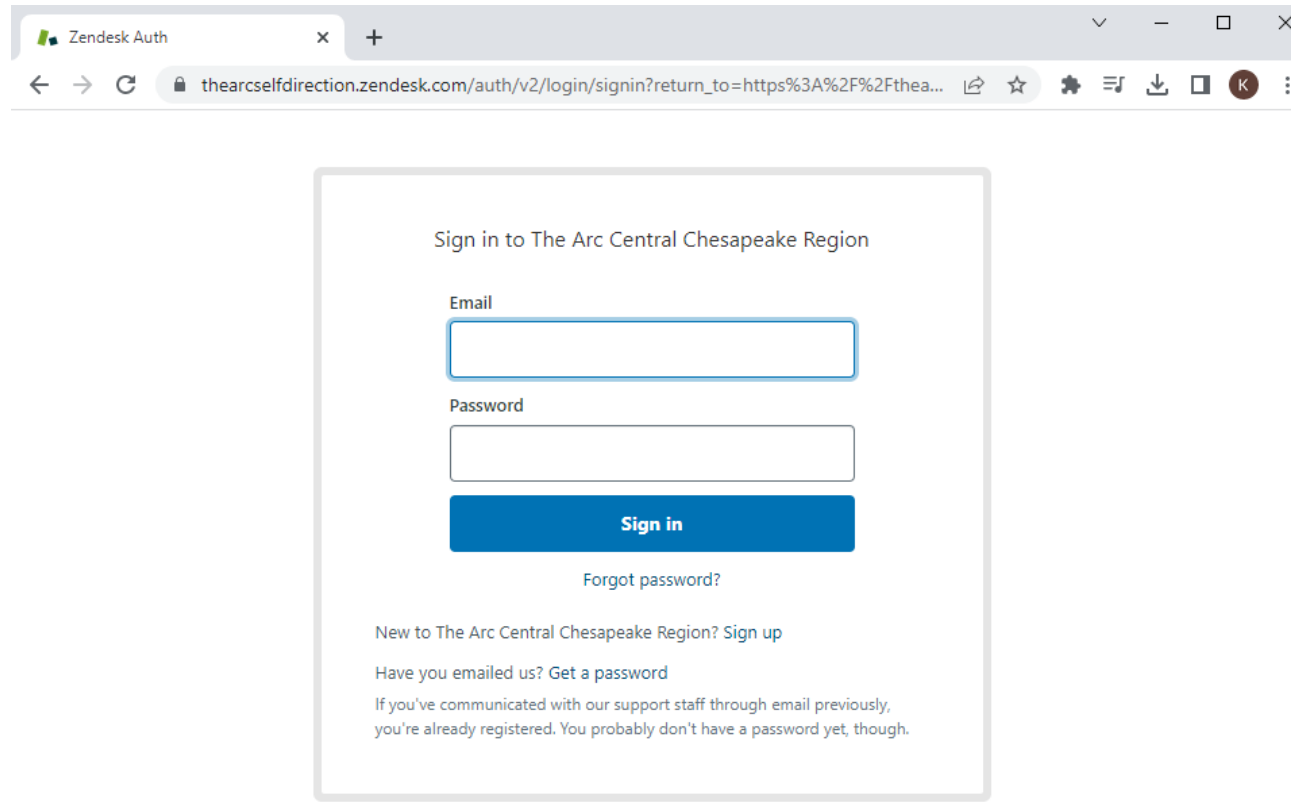
After you have created your account, you can log in to Zendesk by going to thearcselfdirection.zendesk.com using your preferred internet browser (Chrome, Firefox, Safari, etc.).

We highly recommend bookmarking this page.



Log in to Zendesk

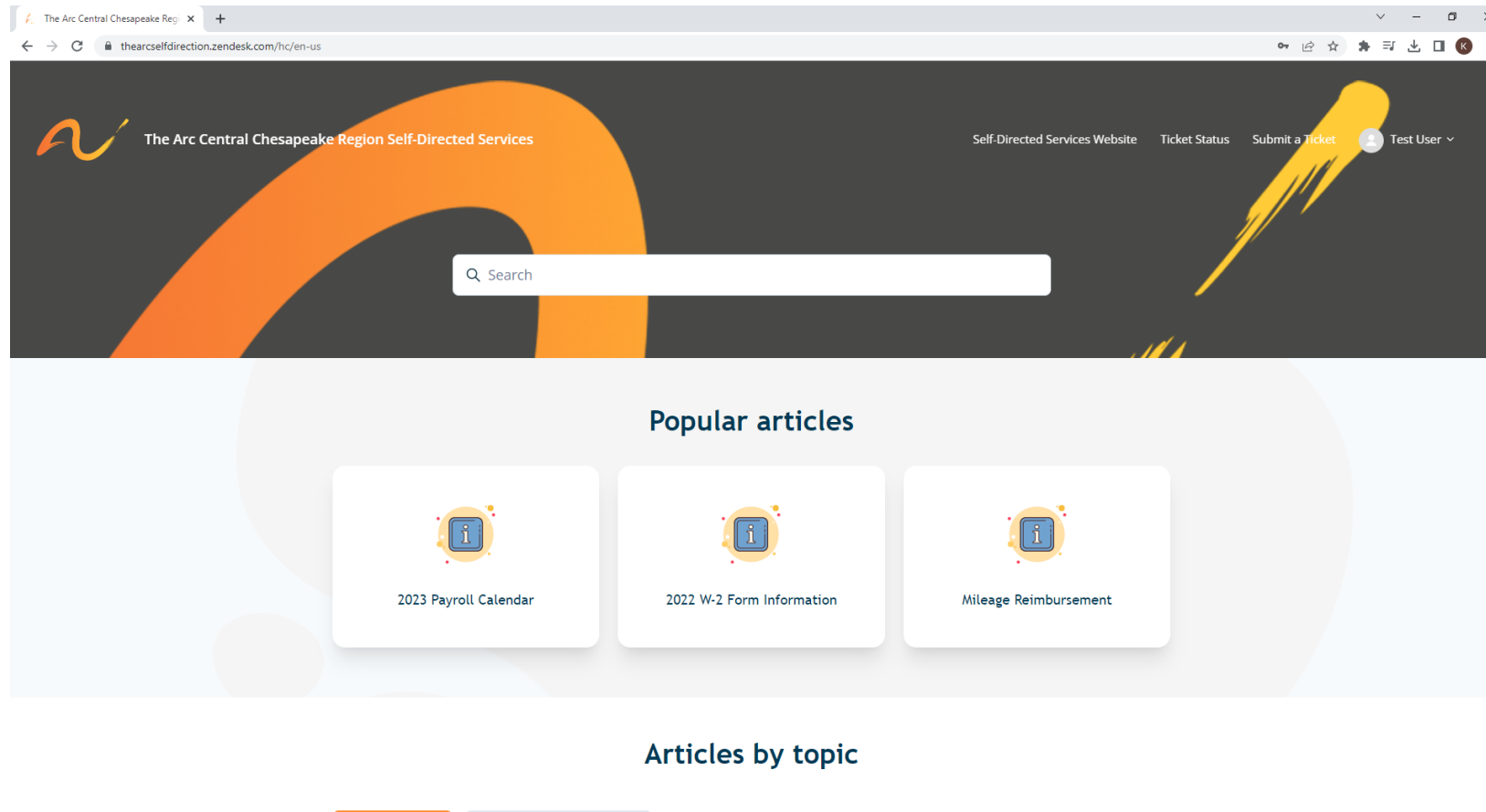
This page is the Zendesk login screen. Enter your username and password. Click the blue “Sign in” button.



The screenshot shows a web browser window with the title "Zendesk Auth". The address bar contains the URL: `thearcselfdirection.zendesk.com/auth/v2/login/signin?return_to=https%3A%2F%2Fthea...`. The main content area is a login form titled "Sign in to The Arc Central Chesapeake Region". It features two input fields: "Email" and "Password". Below the "Password" field is a blue "Sign in" button. Underneath the button is a link for "Forgot password?". At the bottom of the form, there are three lines of text: "New to The Arc Central Chesapeake Region? Sign up", "Have you emailed us? Get a password", and "If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though."

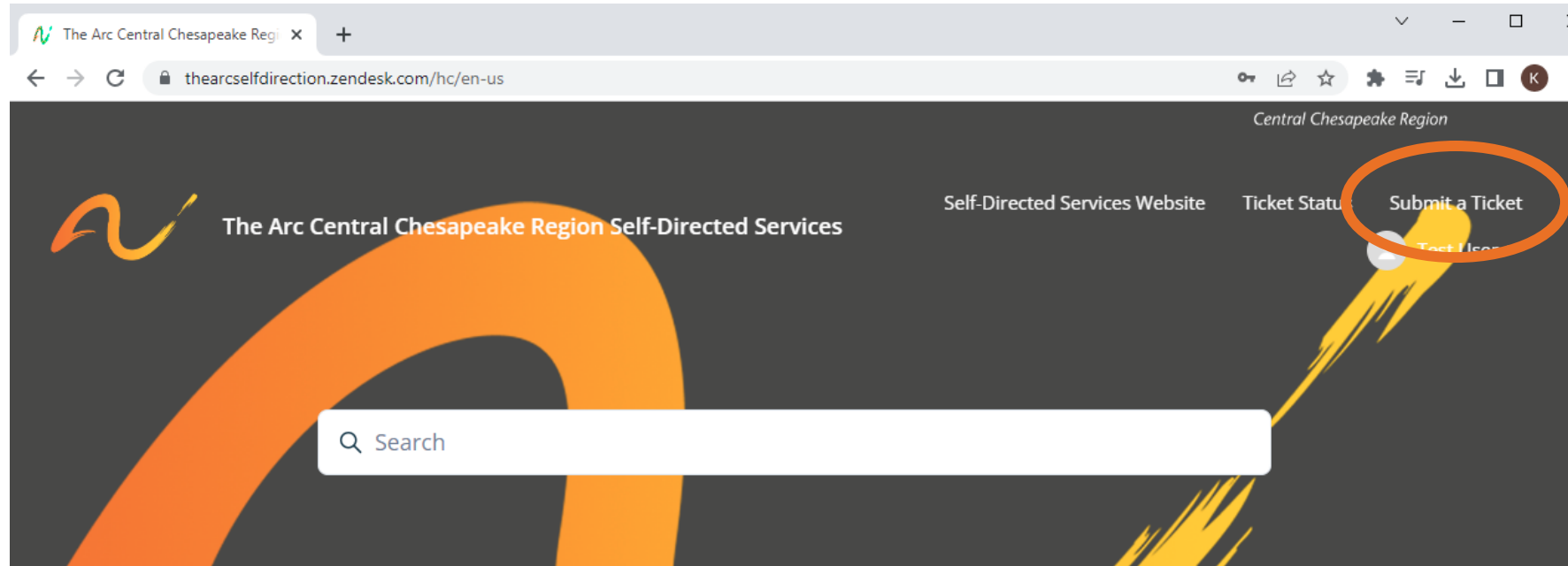
Log in to Zendesk

You are now on the Zendesk home page.



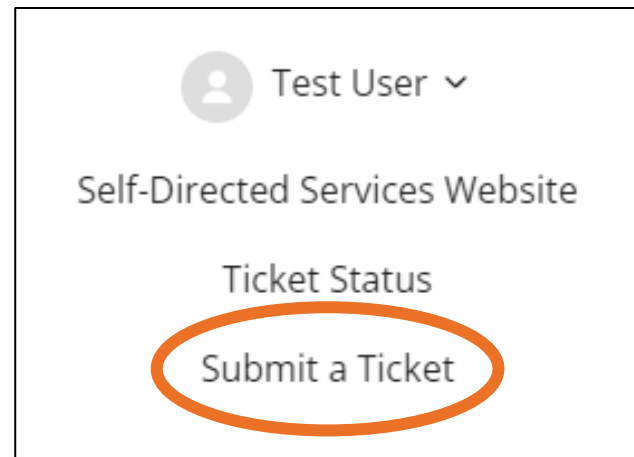
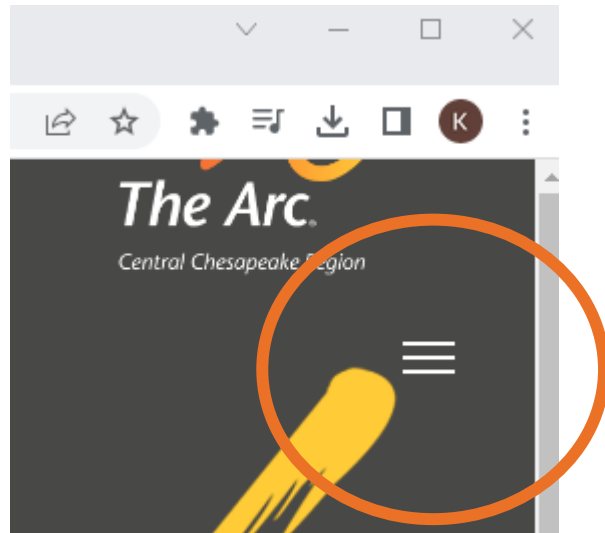
Submit a Customer Service Help Ticket

- To create a Customer Service Help Ticket using a laptop or desktop computer, click “Submit a Ticket” in the top right corner.




Submit a Customer Service Help Ticket

- If you are using a phone or tablet with a smaller screen, you can find the “Submit a Ticket” option by clicking on the hamburger menu (three horizontal bars) in the top right corner. From here, click “Submit a Ticket.”



Submit a Customer Service Help Ticket

Submit a Ticket

 Providing as much information as possible in your request will allow us to help you faster

Please choose a request type below

FMSE Help 

CC(optional)

Add emails

What is your relationship to Self-Directed Services? *

Participant 

Participant Name *

Please Enter Participant's Name


The “Please choose a request type below” field is a dropdown menu you can use to select the category that best describes your ticket.

Categories include FMSE Help, Employee Onboarding, Financial Reporting, Accounts Payable, Payroll, and more.



Submit a Customer Service Help Ticket

Submit a Ticket

 Providing as much information as possible in your request will allow us to help you faster

Please choose a request type below

FMSE Help

CC(optional)

Add emails

What is your relationship to Self-Directed Services? *

Participant


Participant Name *

Please Enter Participant's Name

The “CC” field is for anyone you want to CC or copy on your ticket, just like you might copy someone on an email. You do not have to copy anyone. You can copy up to 48 email addresses.

Submit a Customer Service Help Ticket

Submit a Ticket

 Providing as much information as possible in your request will allow us to help you faster


Please choose a request type below

FMSE Help 

CC(optional)

Add emails

What is your relationship to Self-Directed Services? *

Participant 

Participant Name *

Please Enter Participant's Name

Under “What is your relationship to Self-Directed Services?” select the role that best describes you.

Participant - The person with the disability receiving services (Employer).

Employee - Person hired and paid to support the Participant.


Support Broker - Assists teams in navigating self-direction.

CCS - Coordinator of Community Services

Other - Vendors, team members, etc.

Submit a Customer Service Help Ticket

Submit a Ticket

 Providing as much information as possible in your request will allow us to help you faster

Please choose a request type below

FMSE Help

CC(optional)

Add emails

What is your relationship to Self-Directed Services? *

Participant

Participant Name *

Please Enter Participant's Name

The Participant is the person with the disability receiving services (Employer).

Submit a Customer Service Help Ticket

Top Issue FMSE Help *

Request New FMS Engine Email Login Email

Please Choose a FMSE Help Topic

Department Number (optional)

Department Number

Subject *

Description *

T B I | ☰ ☷ | 📎 🔗 🖼️ 🗨️

Please enter the details of your request. A member of our support staff will respond as soon as possible.

Scrolling down, there are more fields to complete.

You will see a field called “Top Issue _____” with the category you previously selected. In this case, it’s “Top Issue FMSE Help.”

Click on the dropdown menu and select a specific issue.

Submit a Customer Service Help Ticket

Top Issue FMSE Help *

Request New FMS Engine Email Login Email

Please Choose a FMSE Help Topic

Department Number (optional)

Department Number

Subject *

Description *

T B I | ☰ ☷ | 📎 🔗 🖼️ ☰

Please enter the details of your request. A member of our support staff will respond as soon as possible.

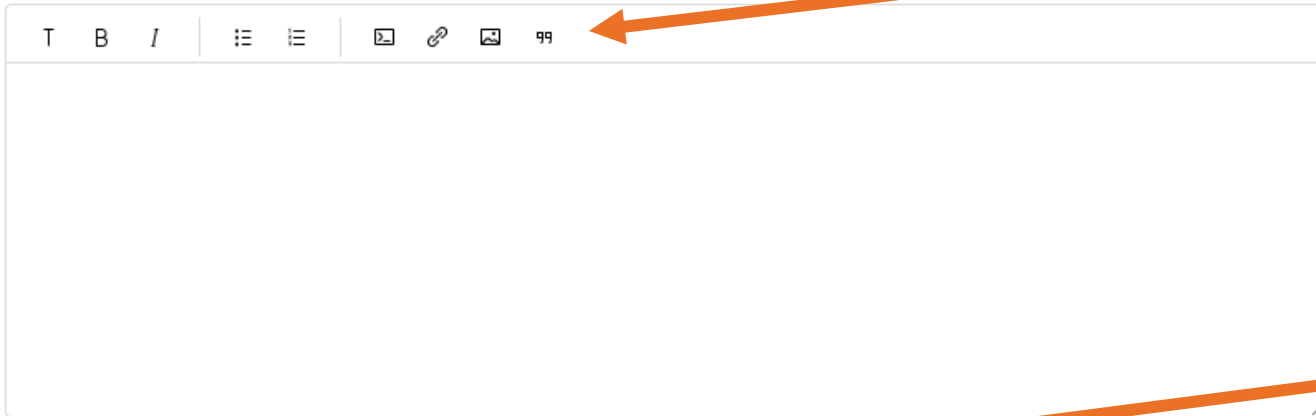
The “Department Number” is a code associated with the Participant’s department. It is optional.

The “Subject” is the topic of your ticket. It might be “Need Welcome Email” or “Need new password.”

The “Description” is where you will put the details. **Please be as specific as possible.**

Submit a Customer Service Help Ticket

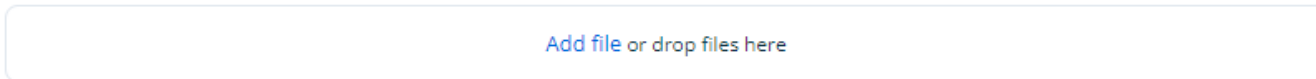
Description*



A screenshot of a rich text editor toolbar. From left to right, the icons are: a 'T' for bold, a 'B' for bold, an 'I' for italic, a bulleted list icon, a numbered list icon, a link icon, an unlink icon, an image icon, and a link icon with a plus sign.

Please enter the details of your request. A member of our support staff will respond as soon as possible.

Attachments(optional)



A rectangular box with a light blue border and a light blue background. Inside the box, the text "Add file or drop files here" is centered in a light blue font.

Please note that you can use bullet points, make numbered lists, add links and even images to the body of your message. Please be as detailed as possible.

If relevant, you can also attach files to your ticket. Each file must be 7MB or less. Each ticket can have a total of 10MB attached.

When finished, click "Submit."

Submit

Submit a Customer Service Help Ticket

Submission success!

Your ticket has been successfully submitted. On business days, please expect a response within 1-2 hours.

Your ticket number is #87. Our team is working hard to resolve your issue.

[Return to the Home Page >](#)

[Check your current ticket statuses >](#)

Test Ticket Open



Test User
in a few seconds

This is a test ticket.



CC Add emails

Rich text editor with toolbar (T, B, I, bulleted list, numbered list, link, unlink, image, video) and a file upload area with the text "Add file or drop files here".

Submit

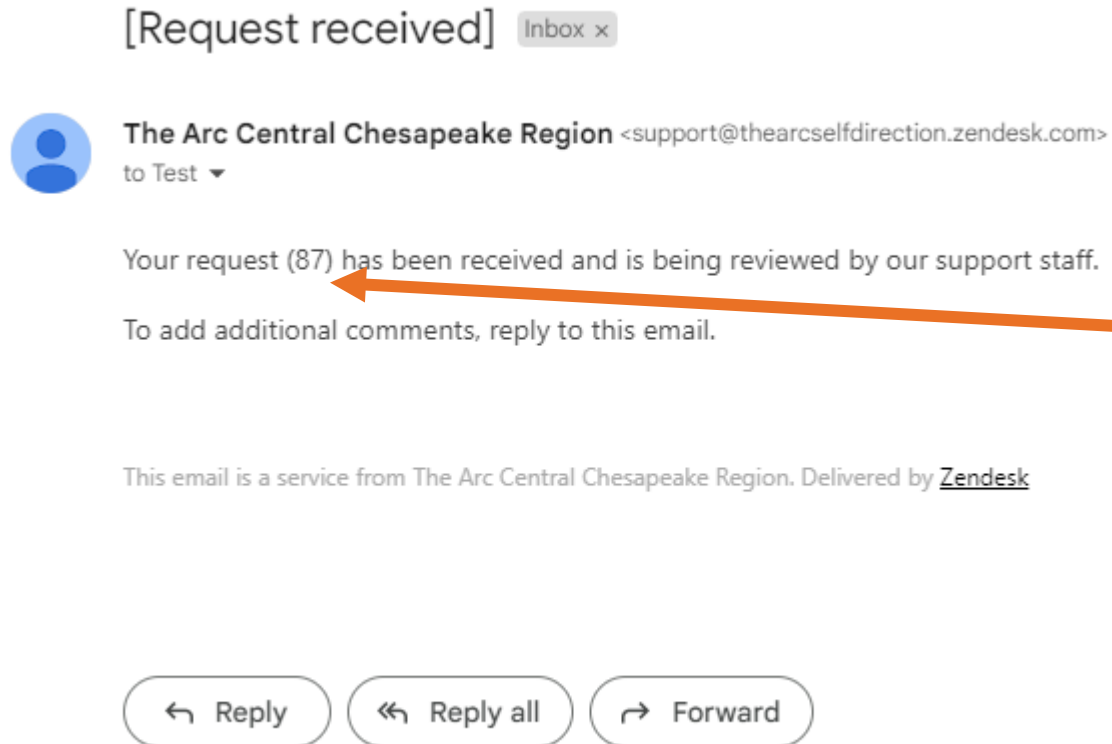
Id	#87
Requester	Test User
Created	Today at 13:34
Last activity	Today at 13:34
Priority	Normal
What is your relationship to Self-Directed Services?	Other
Participant Name	Test Participant
Top Issue FMSE Help	Request New FMS Engine, Email Login Email
Department Number	—

Your ticket is now submitted. You will see a “Submission success!” screen with information about your ticket including your ticket number.

You will also receive a confirmation email with your ticket information.

If you realize you forgot to include an important detail or attachment, you can still add it on this page.

Submit a Customer Service Help Ticket

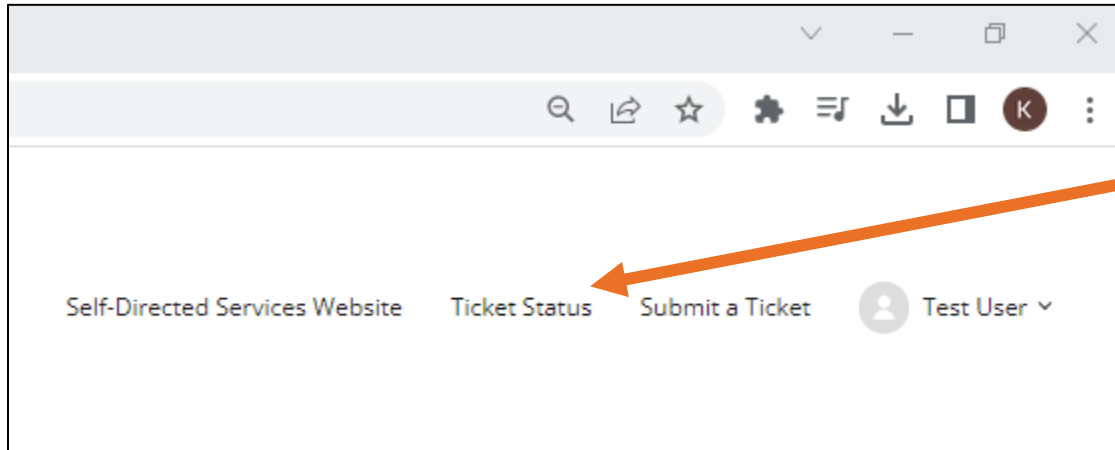


The confirmation email you receive will come from support@thearcselfdirection.zendesk.com with the subject line “[Request received].”

It will display your ticket number.

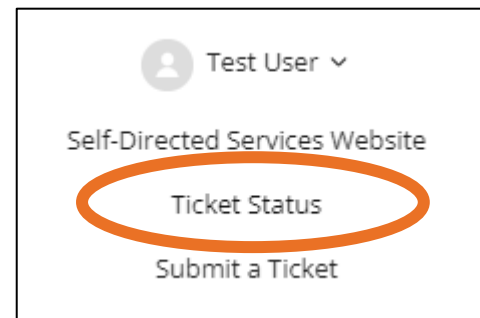
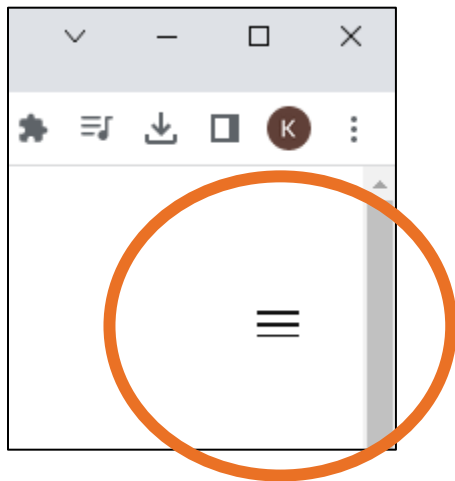
If you do not see the confirmation email, check your junk/spam/promotions/quarantine folders.

Check on the Status of a Ticket



When logged in on a computer, click “Ticket Status” in the top menu bar.

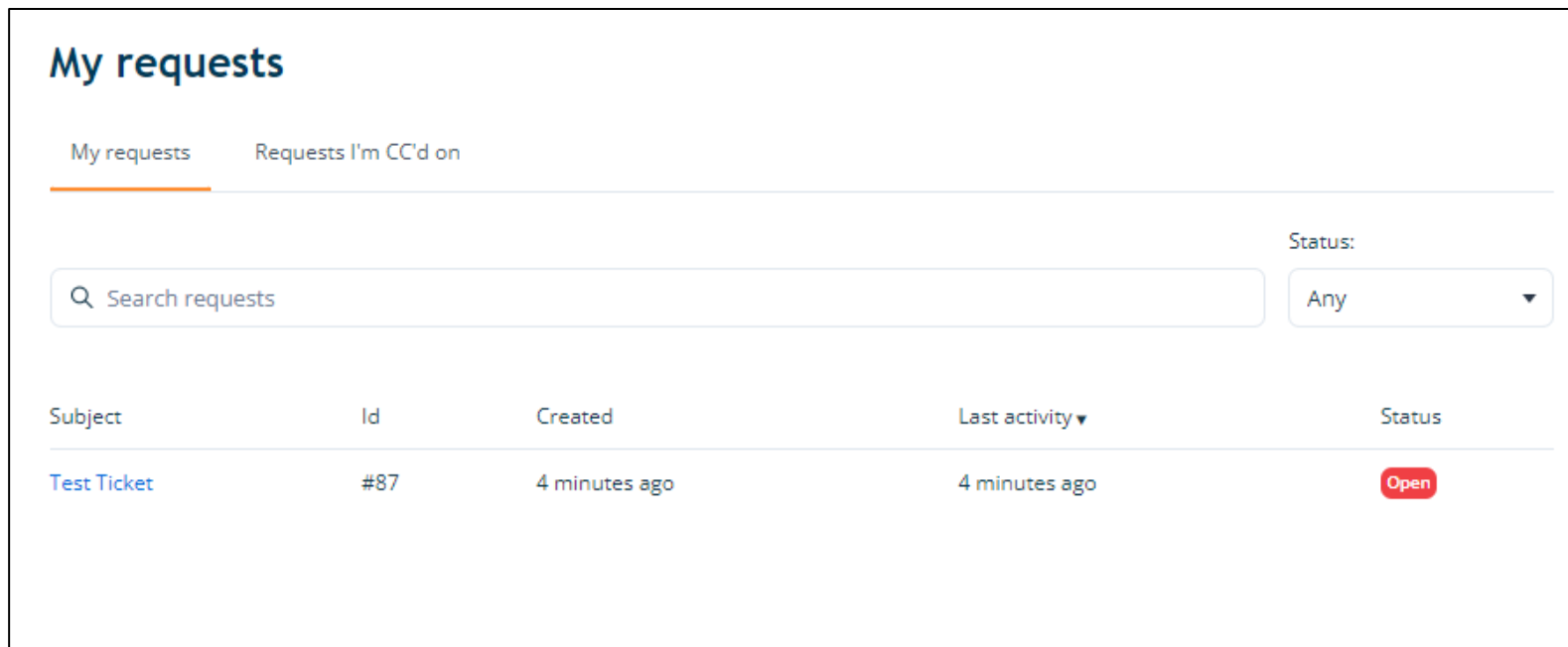
If using a tablet, phone, or a small window, click the hamburger menu (three horizontal bars) in the top right corner. Then click “Ticket Status.”



Check on the Status of a Ticket

On the “My requests” screen, you can see all tickets you have created as well as tickets you are CC’d on by toggling to the “Requests I’m CC’d on” tab.

You can see the Subject, ID/Ticket number, when it was created, when it was last active, and what the Status is (Open/Pending/Solved/Closed). You can also search by “Status” or search by keywords in the “Search requests” search bar.



The screenshot displays the 'My requests' interface. At the top, there are two tabs: 'My requests' (selected) and 'Requests I'm CC'd on'. Below the tabs is a search bar labeled 'Search requests' and a 'Status:' dropdown menu currently set to 'Any'. A table below shows the following data:

Subject	Id	Created	Last activity	Status
Test Ticket	#87	4 minutes ago	4 minutes ago	Open

Check on the Status of a Ticket

What do the different ticket statuses mean?

Open

The ticket has been created for The Arc to review. If a “Closed” ticket is reopened, it will also have a status of “Open.”

Pending

An Arc employee is in the process of researching the issue.

Solved

An Arc employee has responded to and resolved the ticket.

Closed

Once a ticket has been “Solved” for 24 hours with no additional replies from the ticket creator or The Arc, the ticket becomes closed.

Closed tickets can be reopened by replying to the ticket.

Reply to a Ticket

When an Arc employee responds to your ticket with a resolution or with a request for additional information, there are two ways you can reply to that message. You can reply via email or through Zendesk.

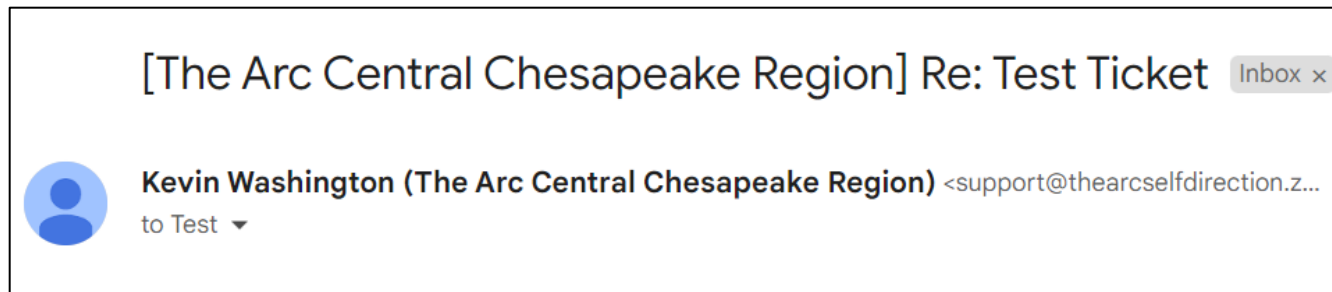
When replying via email, you can reply from your ticket confirmation email or from the email you received from the Arc employee supporting you.

When replying via Zendesk, you will need to login and find your ticket to reply there.

Reply to a Ticket via Email

When an Arc employee responds to your ticket with a resolution or with a request for additional information, you will receive their message in your email inbox.

The email will come from support@thearcselfdirection.zendesk.com and the subject line will be “[The Arc Central Chesapeake Region] Re: Your Ticket’s Subject Line.” It will look like a regular email and show the entire conversation history to date.



Reply to a Ticket via Email

To reply to that message, simply click “Reply” (or “Reply all” if multiple people are CC’d) and write and send your message as you would a typical email.



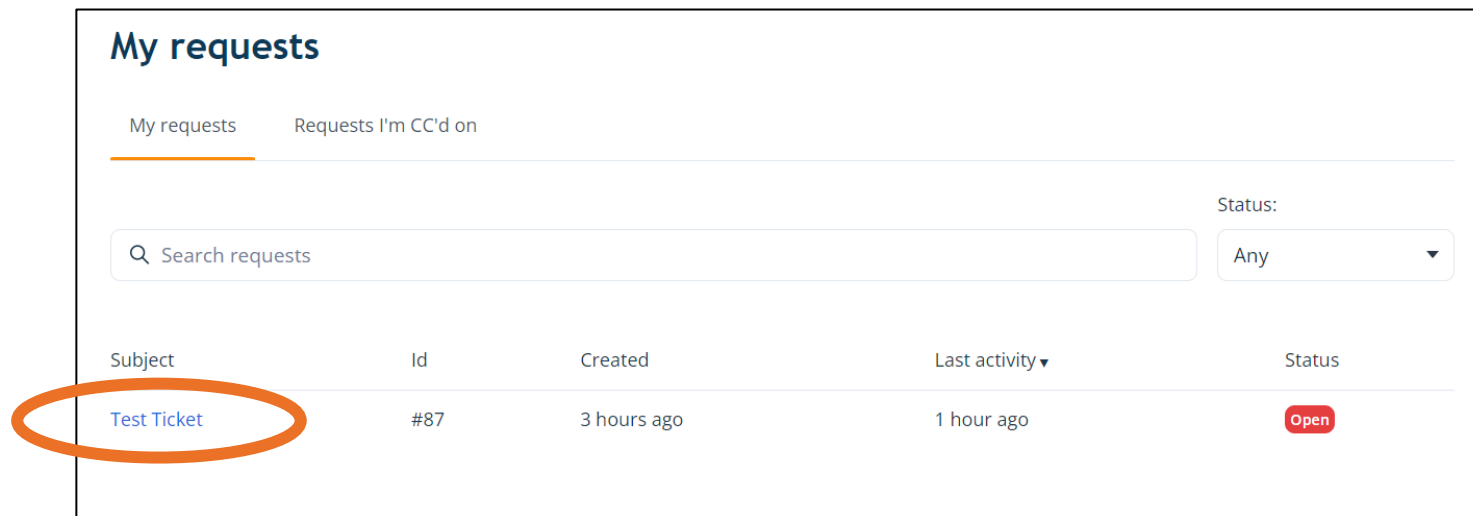
You can attach documents when replying via email as well. Once again, each file must be 7MB or less. Each email can have a total of 10MB attached.

Please note: Even though your email account might let you attach files that are larger than 7MB, Zendesk will not allow Arc employees to open files larger than 7MB. Please double check before uploading.

Reply to a Ticket via Zendesk

When an Arc employee responds to your ticket with a resolution or with a request for additional information, you can reply to their message directly through Zendesk.

Login to Zendesk and go to the “Ticket Status” page. From there, you can view all of your tickets and the tickets you are CC’d on. Click on the blue ticket Subject link to open the ticket.

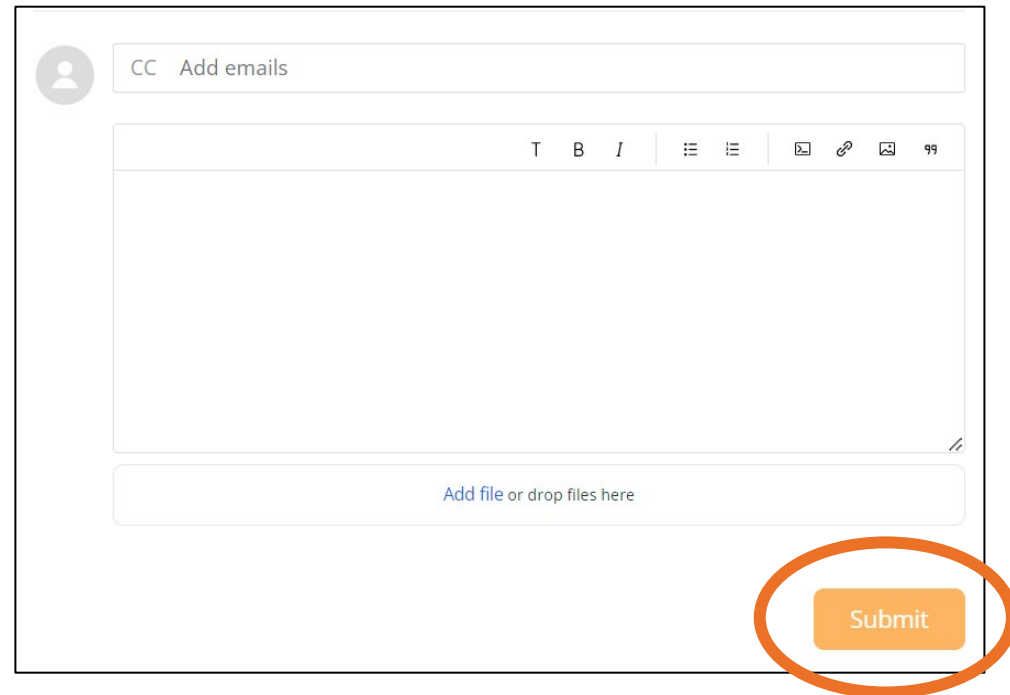


The screenshot shows the 'My requests' page in Zendesk. It features a search bar, a status dropdown menu, and a table of requests. The 'Test Ticket' link in the Subject column is circled in orange.

Subject	Id	Created	Last activity	Status
Test Ticket	#87	3 hours ago	1 hour ago	Open

Reply to a Ticket via Zendesk

On the ticket page, you will see the full conversation history between the ticket creator and the Arc employee responding to the ticket. At the bottom, there is a text box where you can enter your reply. Please be as detailed as possible. When your message is complete, you can click “Submit.” Your new message will appear in the conversation history.

A screenshot of the Zendesk reply form interface. At the top left is a user profile icon. To its right is a text input field containing "CC Add emails". Below this is a rich text editor with a toolbar containing icons for bold (T), italic (I), bulleted list, numbered list, link, unlink, and a "99" icon. The main body of the form is a large empty text area. Below the text area is a file upload section with the text "Add file or drop files here". At the bottom right of the form is an orange "Submit" button, which is circled in orange.

Use the Knowledgebase

The Knowledgebase is a self-help tool for Participants and team members who need quick access to essential forms and resources via Zendesk.

The Knowledgebase is a series of “articles” on the Zendesk home page which link to important resources for self-directing Participants and their teams.

We will continually update the knowledgebase to include relevant information, forms, and resources as Zendesk becomes a fully comprehensive go-to location for important information.



FAQs

Why are we switching to Zendesk?

For several years, The Arc has used Support System as our customer service ticketing system. However, to better assist Participants, Employees, and other stakeholders in this time of growth and change, The Arc is switching to Zendesk, a much more flexible, powerful, and user-friendly ticketing system.

What will happen to my tickets currently open in Support System?

All tickets already placed through Support System will be resolved in Support System. They will not be transferred to Zendesk. As of March 8, no new tickets can be created in Support System.

Where can I access the ticket system?

After March 8, 2023, you will find the link to Zendesk on The Arc's website under Forms and Resources (thearcccr.org/self-directed-services), at the bottom of all email communications from us, and in this PowerPoint. We highly recommend bookmarking the page.

FAQs

I forgot my password.

On the login screen, click the blue “Forgot password” to reset your password.

Who can create a ticket?

Participants, employees, Support Brokers, CCS’s, vendors, and other team members can all submit tickets.

Can I create multiple tickets?

We encourage you to make separate tickets for separate issues. For example, if you have a question about mileage reimbursement and a paycheck you received, you should create two tickets, one for our Accounts Payable department (mileage) and one for our Payroll department (employee paychecks). **Please DO NOT create multiple tickets about the same issue.**

FAQs

What if someone else made a ticket on my behalf?

If you know someone has already made a ticket about your question or issue, please do not submit your own ticket about that same exact topic. Ask the person who created the ticket to CC you on the ticket so you can see the conversation and reply as needed. They can CC you on an existing ticket by either 1) replying to the ticket via email with you CC'd, or 2) logging in to Zendesk, going to the "Ticket Status" page, opening the ticket related to you, and replying to the ticket with you added to the CC line above the text box.

Who answers my ticket once it's submitted?

The Arc has a team of employees and contractors responsible for resolving tickets.

I can't find my confirmation email.

Please check your junk, spam, promotions, or quarantine folders.

FAQs

Why do I have to place a ticket instead of calling or emailing Arc employees directly?

To ensure consistent customer service for all stakeholders, we need to be able to track all incoming inquiries and issues we receive from stakeholders. In order to do so, we must use our ticket system, Zendesk, as our primary method of contact between Arc employees and stakeholders like you. For us to equitably prioritize stakeholder questions and issues as they arise, we ask that you place tickets instead of contacting Arc employees directly. We understand that this is a major change from how things were; however, given the incredible growth of our program and the high volume of inquiries we receive, it is the only sustainable way for us to provide you with resolutions while meeting our own contract requirements.

What if I don't have a computer or phone with internet access to create a ticket?

Internet access is extremely useful for self-directing your services as an employer and for team members navigating the requirements of their employment. If you are unable to place a ticket due to internet access issues, please call us at 1.866.252.6871.

