




General Information Memorandum

ISD GI 19 - 06

TO: ISD Employees 
FROM: Karmela Martinez, Acting Division Director
RE: Protocol for Submission of Clarifications and Cherwell Tickets
DATE: February 26, 2019

This GI rescinds GI 18-14 and supersedes any previous GI's regarding the protocol for submission of Policy Clarifications (PCs) and requesting Cherwell Tickets. This GI is to inform the field staff about the new clarification process that is being implemented for SNAP, Cash Assistance, Medicaid, Medicare Savings Program, LIHEAP, and ASPEN functionality.

This GI introduces a new process for submitting clarifications and defines staff authorized to submit a Cherwell Ticket.

Procedures for submitting a Clarification Request:

- 1) Review all previous General Information (GI), Manual Revisions (MR), Interim Policy and Procedures (IPP's), Interim Business Processes (IBP), Job Aids, Release Notes and previous Policy Clarifications.
- 2) If the search **does not** yield any helpful clarifications, review the topic with a Supervisor to determine if a Clarification Request is required.
- 3) Complete the Clarification Request (ISD013) ASPEN, SNAP, Cash Assistance, Medicaid, Medicare Savings Program, LIHEAP.
- 4) The following individuals are authorized to submit a Cherwell ticket request (any requests received from anyone other than the list below, will result in the ticket being returned to the Bureau Chief/County Director for review):
 - Regional Operations Managers
 - County Directors
 - Trainers
 - Bureau Chiefs
 - FAA Supervisor
- 5) Clarification Requests should be uploaded as an attachment to a ticket through the Cherwell Self Service Portal. Procedures for submitting a Cherwell Ticket are included as an attachment to this GI.

Clarification Request		
ASPEN, SNAP, Cash Assistance, Medicaid, Medicare Savings Pro... AP		
Use <input type="text"/>	Clarification # ASPEN - 19 - XX	Date: <input type="text"/>
Request Subject: ASPEN <input type="text"/>		
Policy Citation (if Applicable): <input type="text"/>		
Question: <input type="text"/>		
Response		
Clarification/Answer: <input type="text"/>		
By: <input type="text"/>	Phone: <input type="text"/>	Date: <input type="text"/>

- A. **Clarification #:** Will be assigned by Policy and Program Development Bureau.
- B. **Date:** Enter the date of the request.
- C. **Request Subject:** Select the category from the drop down box for clarification.
- D. Space allowed if Request Subject is Other (please list).
- E. **Policy Citation (if applicable):** Provide the NMAC Citations used in attempting to resolve the topic in question and the exact policy NMAC citation that you are requesting clarification for.
- F. **Question:** Detail the questions separately if there are more than one; be as clear and specific as possible. If the Clarification Request is case specific, provide the Case Number only; **DO NOT INCLUDE** Social Security Numbers or Names. Please also provide clear and concise information about the case that needs clarification.

Response: The ticket is managed through the ASPEN Help Desk. The ASPEN Help Desk POC will distribute the Clarification Request information to the appropriate Bureau for review and response.

- G. **Clarification/Answer:** Will be completed by the appropriate Bureau.
- H. **By:** The staff member completing the response.
- I. **Phone:** Direct number of the staff member completing the response.
- J. **Date:** Date the Clarification Request is completed.

All Clarification Requests will be answered in the order in which they are received. Every effort will be made to provide a response within five working days of submission. Depending upon the complexity of the request some requests may be addressed sooner than others. If the response is going to exceed the five working days, the requestor will be notified. Once the answer to the clarification has been completed, it will be attached to the Cherwell ticket and distributed through email to the individual requestor to include all HSD staff and others, as necessary.

If you have any questions regarding this GI, please contact Maria Ghahate at (505) 827-7754 or via e-mail at Maria.Ghahate@state.nm.us.

Attachments: ISD013 Clarification Request
Instructions on how to create a Cherwell Ticket

Clarification Request

**ASPEN, SNAP, Cash Assistance, Medicaid,
Medicare Savings Program, LiHEAP**

Central Office Use	Clarification # ASPEN - 19 - XX	Date:
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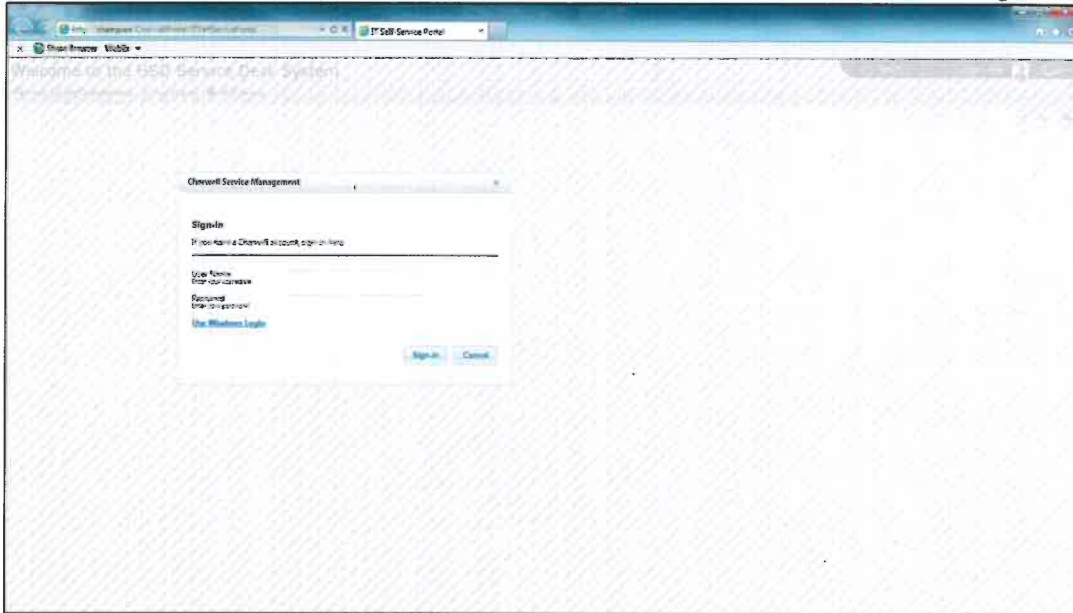
Request Subject: ASPEN
Policy Citation (if Applicable):
Question:

Response

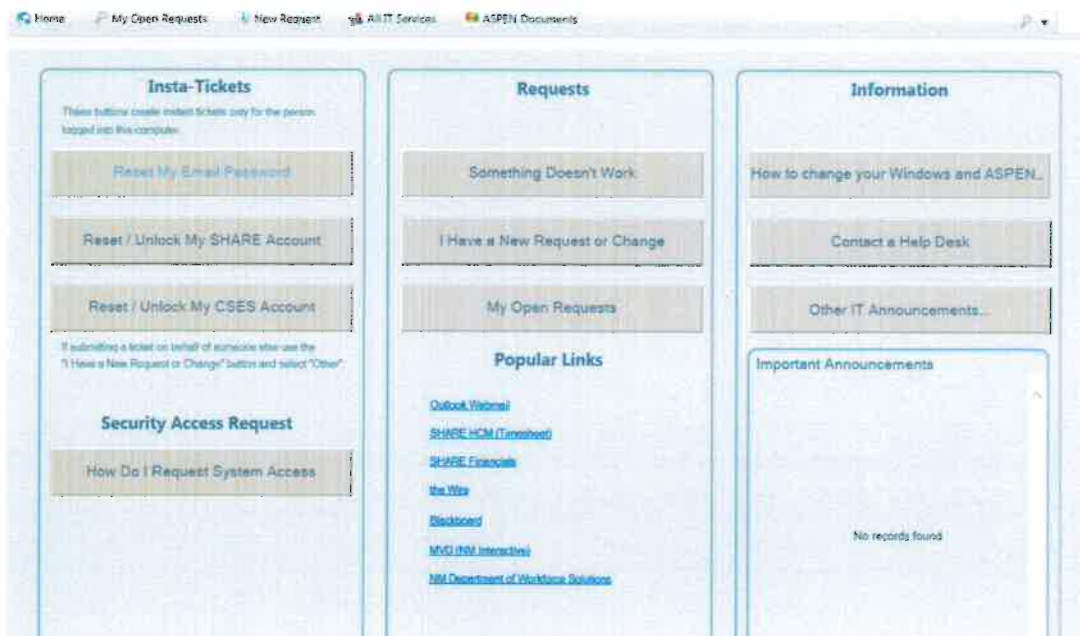
Clarification/Answer:		
By:	Phone:	Date:

Instructions on how to create a Cherwell Incident.

- 1) Click on the portal link: <http://champion/CherwellPortal/itselfservice>
 *Note: only authorized individuals may submit a Cherwell Ticket request (see GI 19-06).
- 2) Click “Use Windows Login” or enter your User Name and Password, click Sign-In



- 3) Under **Requests**, select **Something Doesn't Work**



- 4) Fill in the contact details if you are calling on behalf of someone else. Include email and a phone number.

- 5) Under “What are you having a problem with?” select Software. Under the drop-down menu for “What software or application?” select ASPEN.

Welcome to the HSD Service Desk System

Home My Open Requests New Request All IT Services

Save Abandon Lookup Record 1 of 1

Your Incident Reference Number is 16055

Your Contact Information: Name: Marquez, Mayra; Name (L, F): Aspen, Worker; Phone: 512-954-5537; Email: maymarquez@deloitte.com

Are you calling on behalf of someone else? Is there another way we should contact you? Phone: 505-555-1234

This change is permanent; please update my profile

Something's Not Working

What are you having a problem with? Hardware Software Network Other

What software or application? ASPEN

The issue is: Adobe Acrobat, Adobe Photoshop/CES, Adobe Reader

How many people are impacted? [Dropdown]

How urgent do you think this is? [Dropdown]

Please describe your issue: * Required

Attachmate, CLAIMS, CSES, CTS, Dameware, Development Tools, FAMS, FH, IRU, ISDZ

Click here to attach additional information

- 6) From the drop-down menus make selections for what The Issue Is, How many people are impacted, and how urgent do you think the issue is.

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Home My Open Requests New Request All IT Services

Save Abandon Lookup Record 1 of 1

Your Incident Reference Number is 16055

Your Contact Information: Name: Marquez, Mayra; Name (L, F): Aspen, Worker; Phone: 512-954-5537; Email: maymarquez@deloitte.com

Are you calling on behalf of someone else? Is there another way we should contact you? Phone: 505-555-1234

This change is permanent; please update my profile

Something's Not Working

What are you having a problem with? Hardware Software Network Other

What software or application? ASPEN

The issue is: [Dropdown]

How many people are impacted? [Dropdown]

How urgent do you think this is? [Dropdown]

Please describe your issue: * Required

Click here to attach additional information

- 7) Select **Click here to attach additional information** to attach the completed [Issue Resolution/Cherwell Ticket Template](#) and add screenshots of your issue.

Taking a screenshot of an entire window

Click on the window you want to capture. Press **Ctrl + Alt + Print Screen** to capture just this window. If you only press Ctrl + Print Screen, you'll capture all of your computer screen (including the 2nd monitor) instead of just the window you need.

Taking a screenshot using the Snipping Tool

Open the Snipping Tool by going to **Start** in the lower left-corner, then **Accessories**, and then **Snipping Tool**. Select the pull-down menu next to **New** and select **Rectangular Snip** to only select a portion of your window. Click on **New**. A white crossbar tool will appear. Hold down and form a rectangle over the area you want to capture. In the window that pops up with your captured image, select **Edit** and then **Copy** so that you can then **Paste** the image into the template as needed.

- 8) Under **Please describe your issue:** include the text from the Issue Resolution/Cherwell Ticket Template **Detailed Issue Description Section**.
- 9) Fill out the **User Name, Case ID, Case Name,** and **Additional Details** from your ticket template.

Your Incident Reference Number is 16055

Your Contact Information Are you calling on behalf of someone else? Is there another way we should contact you?

Name: Marquez, Maya Name (L. F.): Aspen, Worker Phone: 505-555-1234
 Phone: 512-854-5537 Email: aspenworker@state.nm.us
 Email: maymarquez@deloitte.com This change is permanent; please update my profile

Something's Not Working

What are you having a problem with? Hardware Software Network Other

What software or application? ASPEN
 The issue is: Eligibility EDBC
 How many people are impacted? Me
 How urgent do you think this is? Medium

Please describe your issue: *Required* [Click here to attach additional information](#)

ASPEN Case information

User Name:
 Case ID:
 Case Name:
 Additional Details:

10) Submit the ticket by clicking the **Save** button on the upper left hand corner

The screenshot shows the HSD Service Desk System interface. At the top, there is a navigation bar with links for Home, My Open Requests, New Request, and All IT Services. Below this is a toolbar with buttons for Save, Abandon, and Lookup. The main content area displays the user's contact information and a form for submitting a ticket. The 'Save' button is highlighted with a red box.

Welcome to the HSD Service Desk System

Home My Open Requests New Request All IT Services

Save Abandon Lookup (0) Record 1 of 1

Your Incident Reference Number is 16055

Your Contact Information Are you calling on behalf of someone else? Is there another way we should contact you?

Name: Marquet, Mayra Name (L. F.): Aspen Worker Phone: 505-555-1234
 Phone: 512-854-5537 Email: aspenworker@state.nm.us
 Email: maymarquez@deloitte.com This change is permanent; please update my profile

Something's Not Working

What are you having a problem with? Hardware Software Network Other

What software or application? ASPEN
 The issue is: Eligibility EDBC
 How many people are impacted? Me
 How urgent do you think this is? Medium

Please describe your issue: **Required** [Click here to attach additional information](#)

Editing a ticket:

If you need to edit a ticket or provide additional information, go to **My Open Requests** in Cherwell. Click on the ticket number to go to the ticket. Click the **Edit** pencil and enter additional information as needed. Click **Save** to include this information.

Follow up and/or Re-opening a ticket:

If you need to reopen a ticket, email the ASPEN Help Desk @ HSD-ASPENHD@state.nm.us

Replying to the resolution email from the Service Desk will not reopen the ticket.

Once a resolution is received, it will be closed automatically in 5 days.