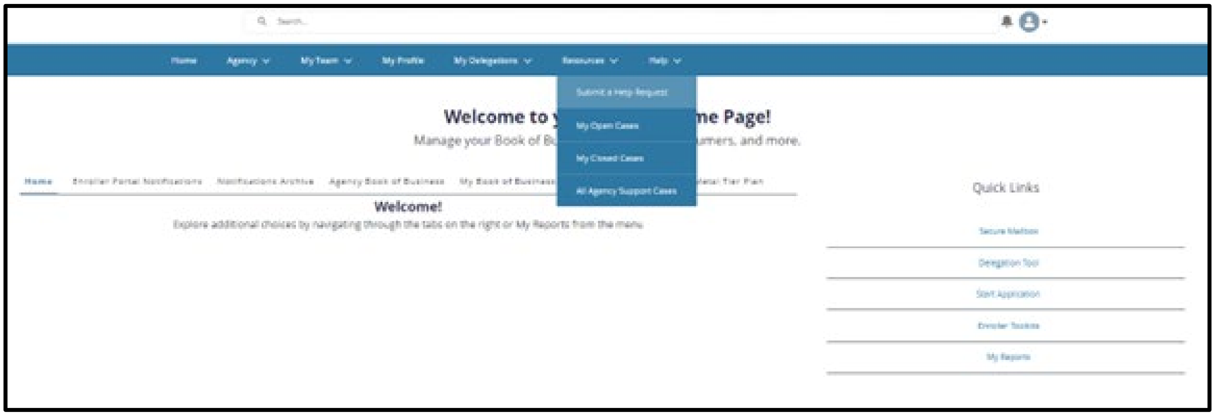
Enroller Portal Submitting a Help Request and Live Chat Guide

Overview

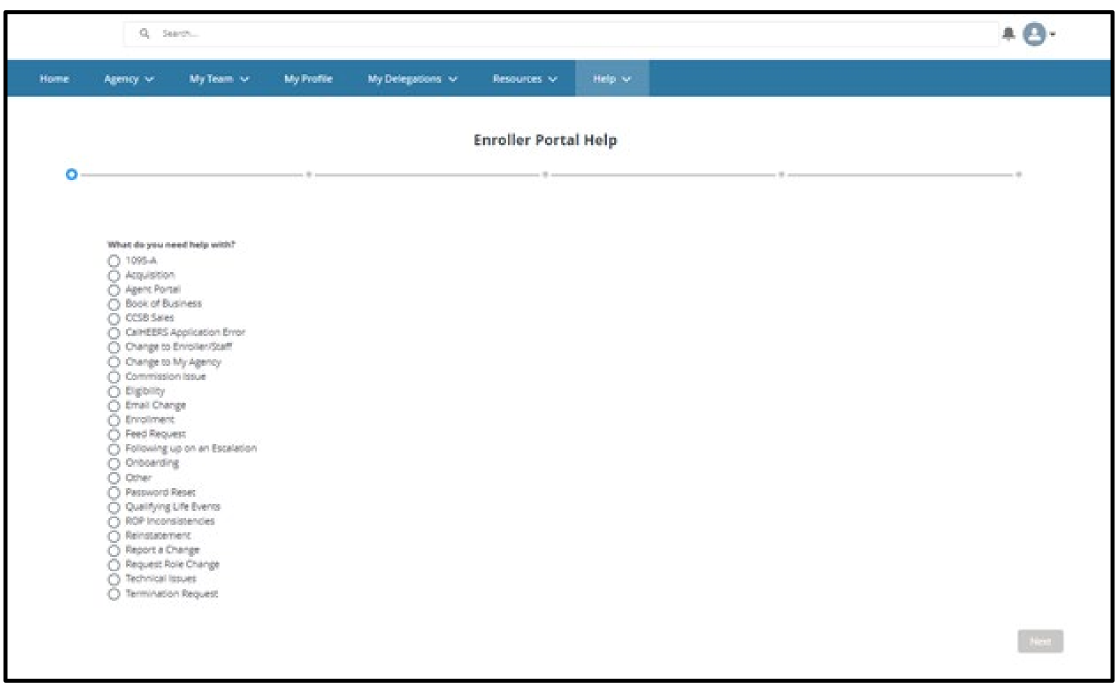
This guide documents the steps to submit a help request and view cases. Depending on the help topic selected, a help request will either generate a case to be distributed to the appropriate department or open a live chat with the Agent Service Center.

Submitting a Help Request for Agencies

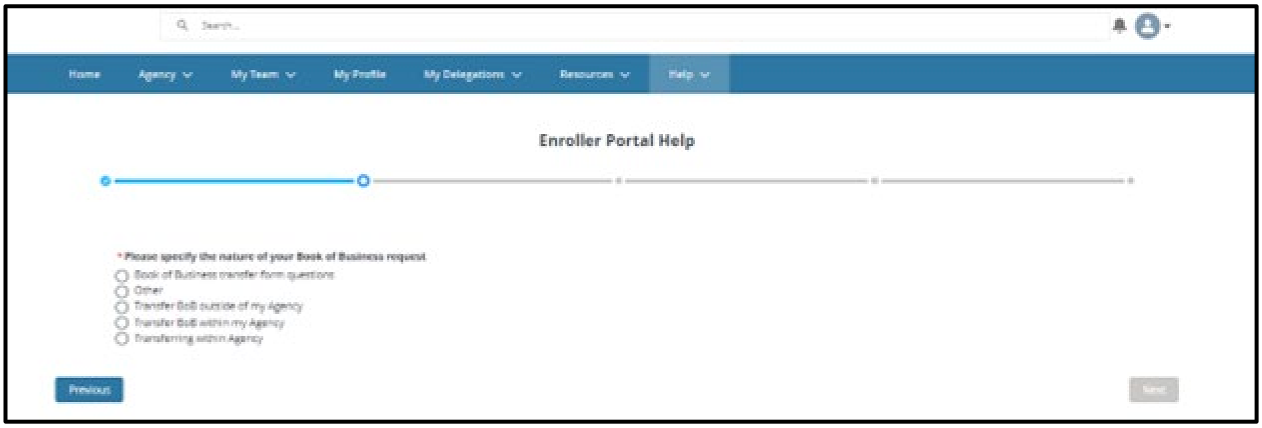
1. From the Home page, navigate to the *Help* dropdown. Select **Submit a Help Request**.



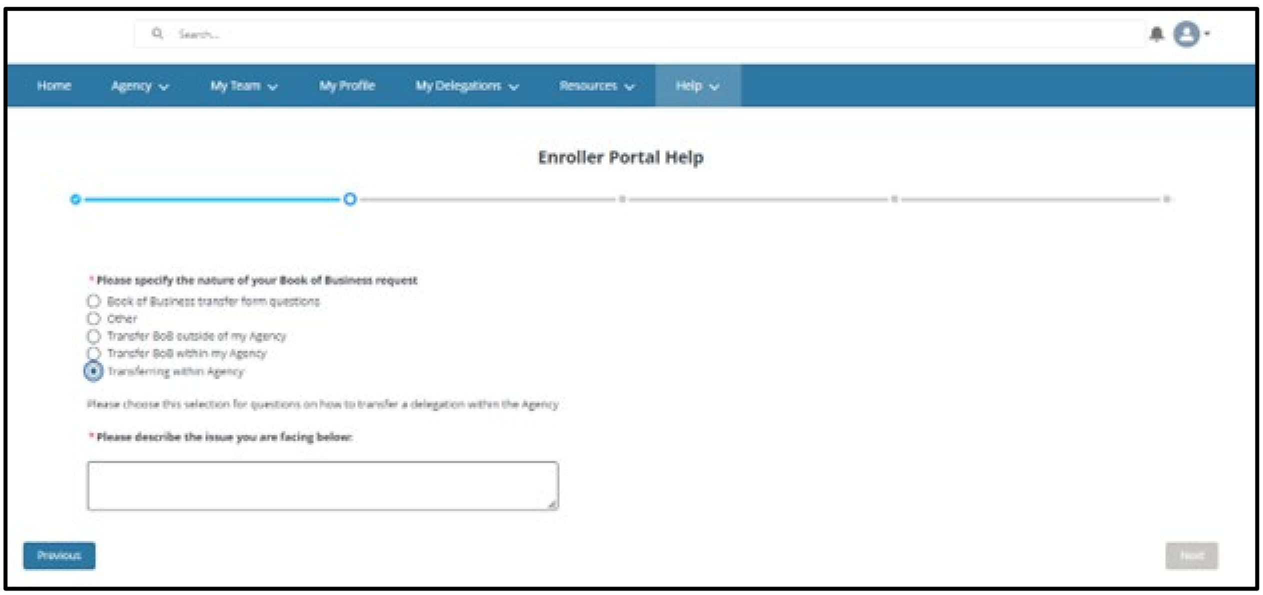
2. A list of topics is provided for the Enroller to select. Topics will be populated based on the logged-in user (i.e., Agency Manager vs. Agent). Select the radio button that relates to the topic for which you are seeking help.



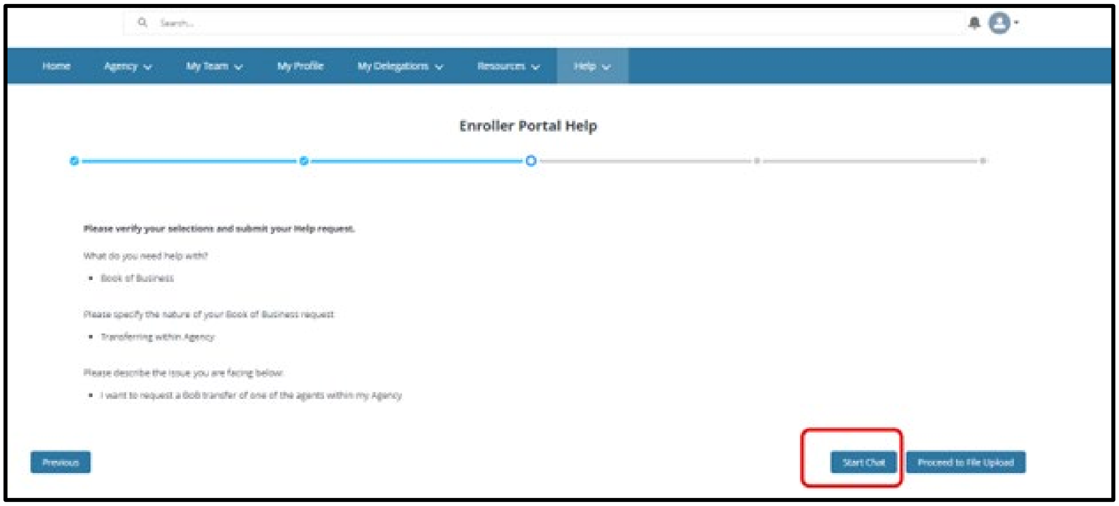
3. Select a reason from the *Please specify the nature of your [category] request* section.



4. After selecting a reason, enter a description of the issue in the provided text box.



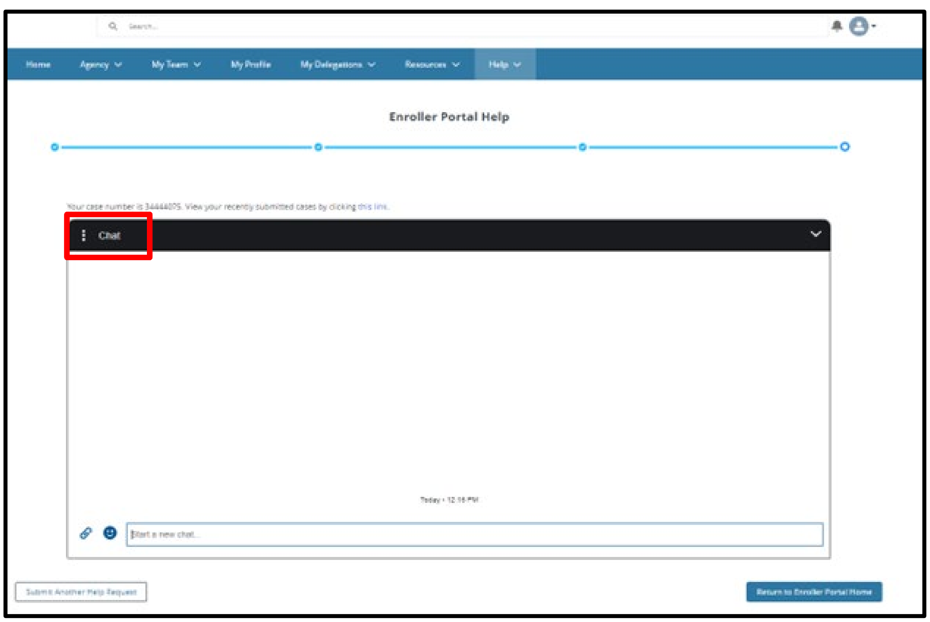
- A summary of the help request is shown.



  - Depending on the options selected on the previous screens and the availability of an Agent Service Center Representative, the Enroller will be presented with **Start chat**, which navigates the user to a live chat with a Pinnacle Service Center Representative. Once the chat has begun, there is a 3-minute timeout time.

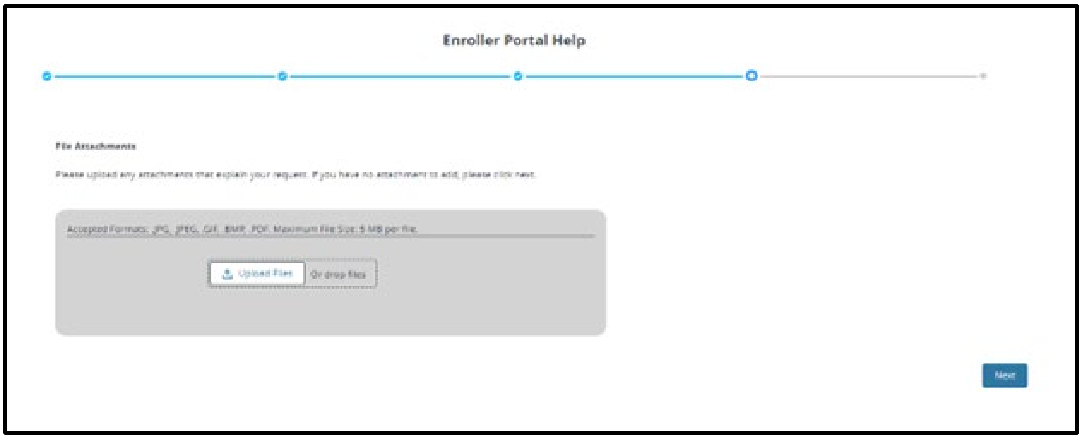
Note: When a chat is started, the case number is displayed above the chat window.

- Discontinue the chat by clicking the three dots located in the top left corner of the chat window.
- After clicking the three dots, select the option to leave the chat.



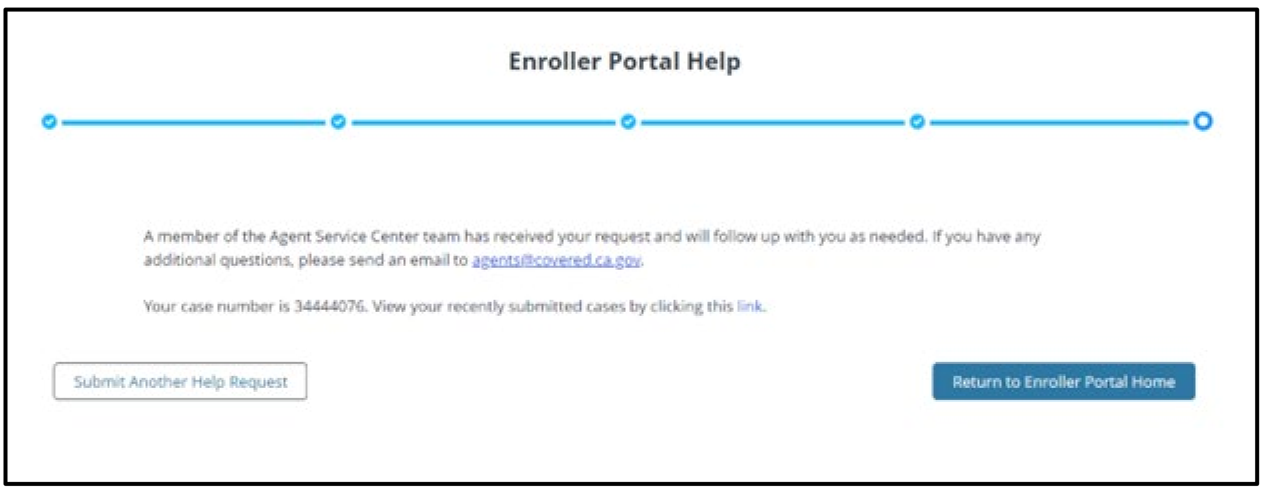
Note: The **Start Chat** function is **not** available during non-office hours. (Office hours are Monday through Friday 8 a.m. to 6 p.m.)

- **Proceed to File Upload** – navigates the user to a page to upload supporting files or documents for the help request. The user can bypass this screen by selecting **Next** if they do not have anything to upload.

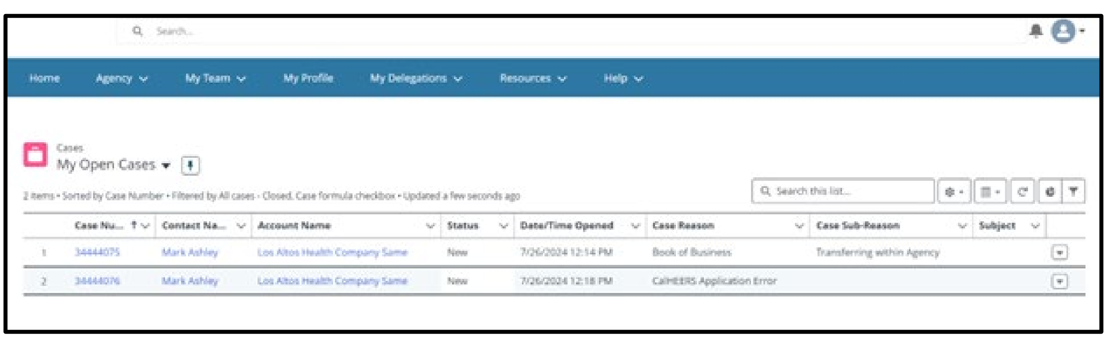


- **Previous** – navigates the user to the previous page.

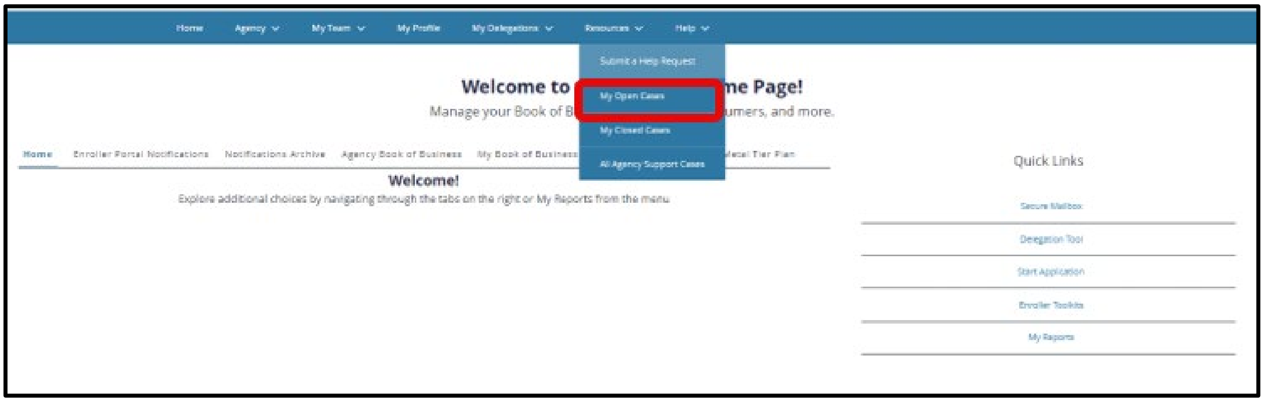
5. Once the help request is submitted and the chat option is not selected, a confirmation displays with an assigned case number. The case is directed to the appropriate department for further review of the help request.



Clicking the link navigates the user to *My Open Cases.*

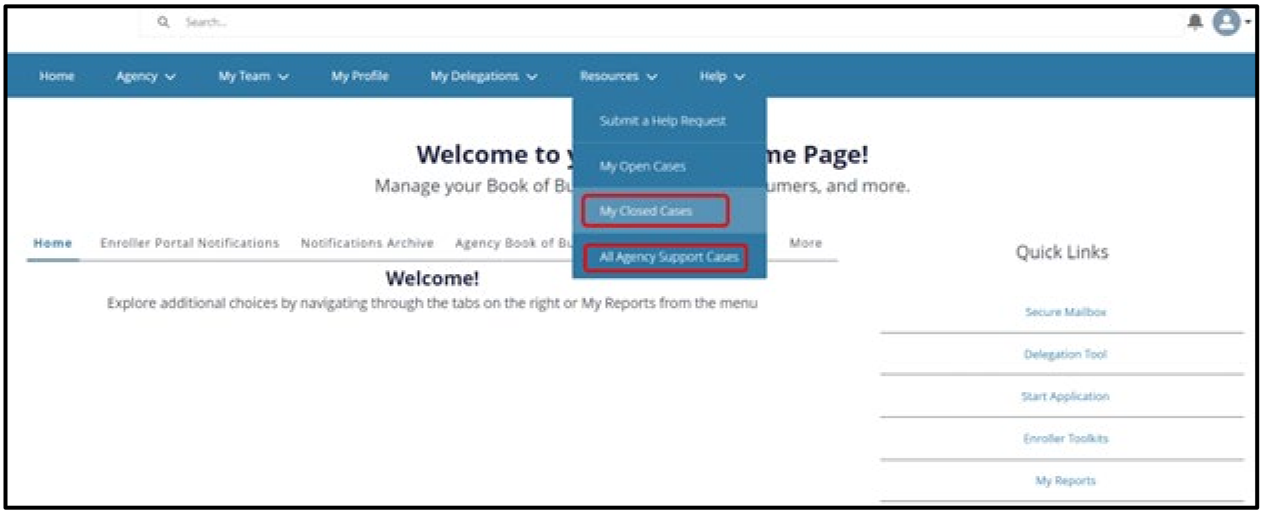


This page can also be accessed by selecting **My Open Cases** from the *Help* dropdown.



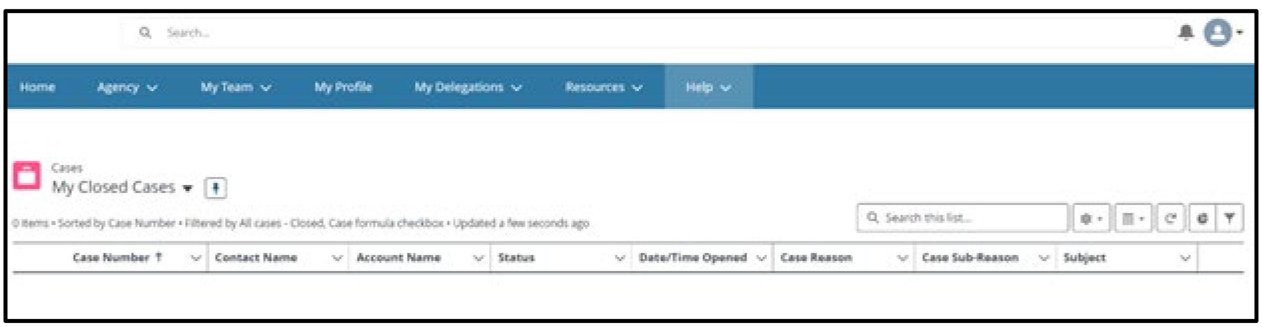
Accessing Previously Closed Cases & All Agency Support Cases

From the Home page, navigate to the *Help* dropdown.



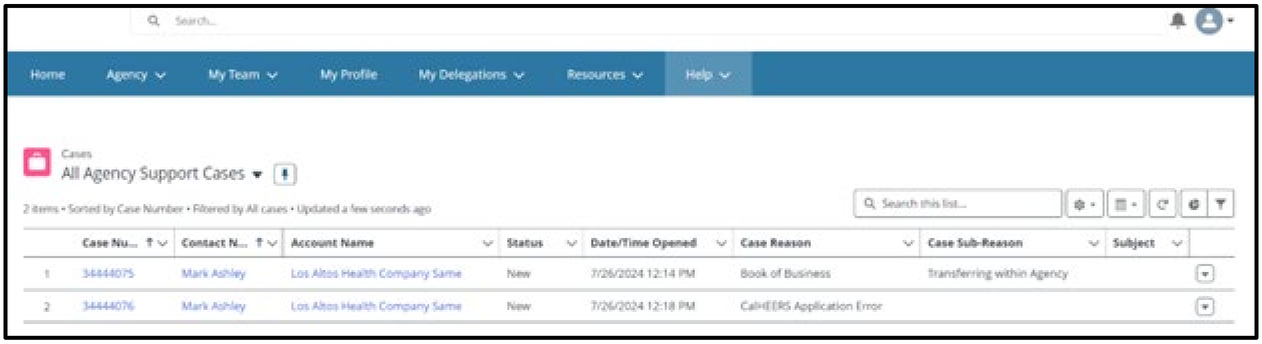
My Closed Cases

The user can see their closed cases and their Agency's support cases (The *All Agency Support Cases* option is available to Agency Managers, Authorized Signers, Agent 2, and Approved Administrative Staff 2).

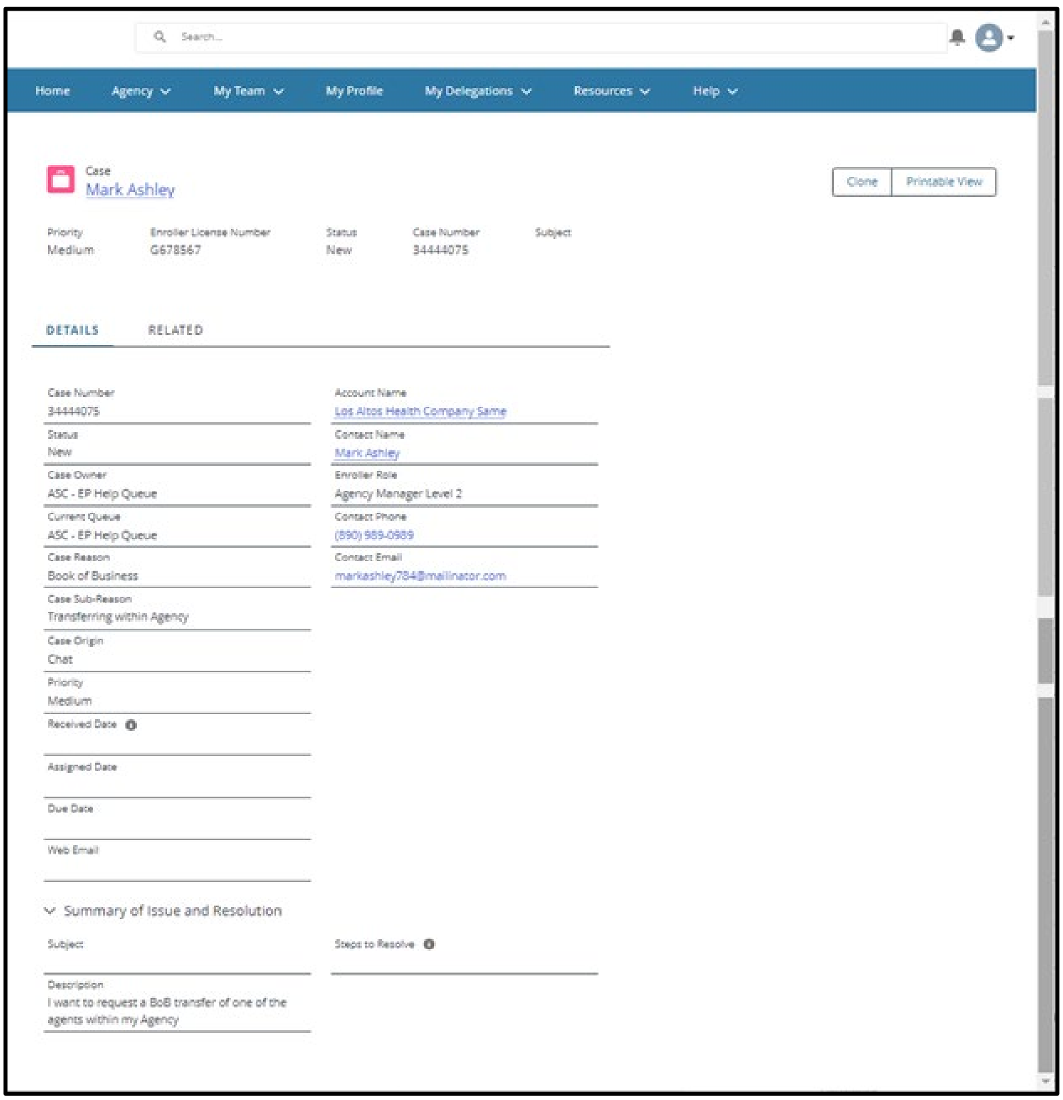


All Agency Support Cases

Agency Managers, Authorized Signers, Agent 2, and Approved Administrative Staff 2 can see all the cases that staff in their Agency have created.

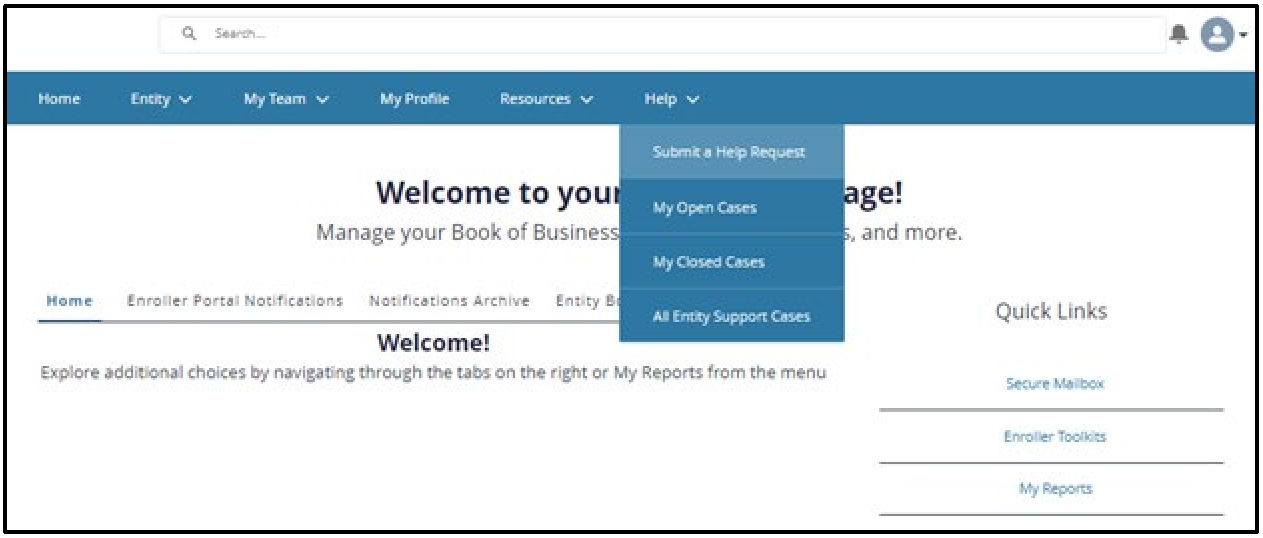


Case Page Layout

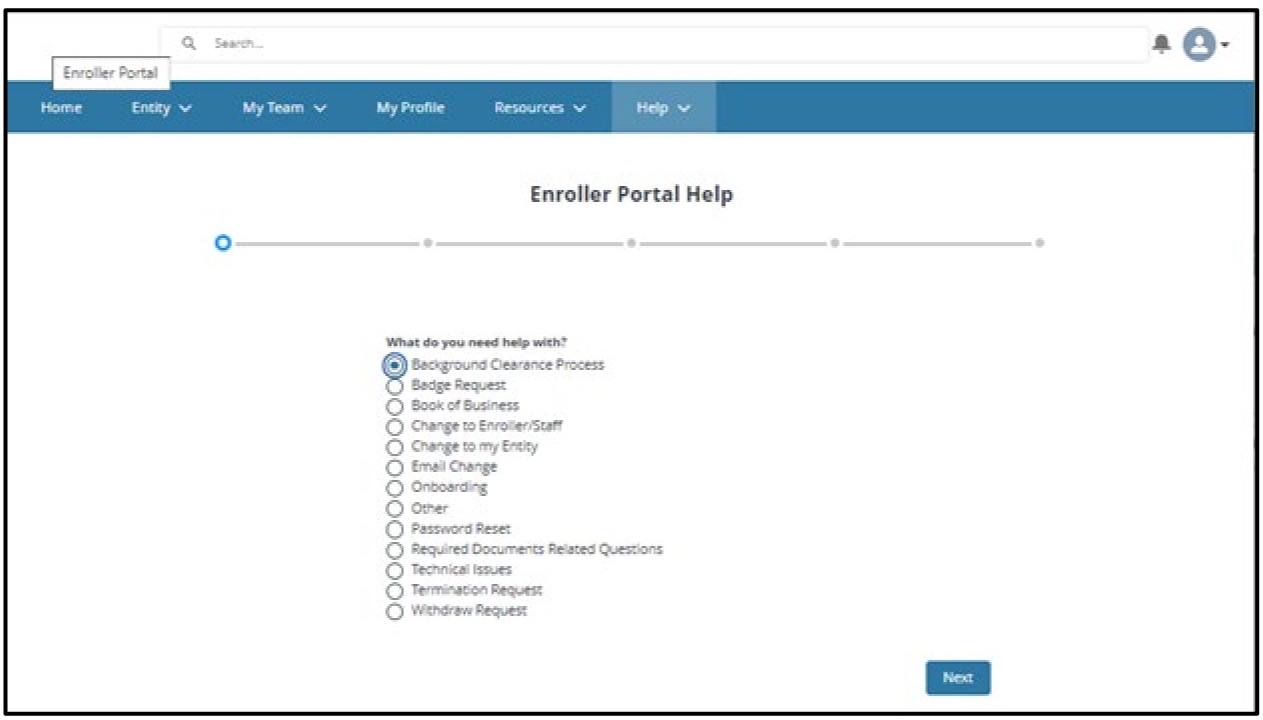


Submitting a Help Request for Entities

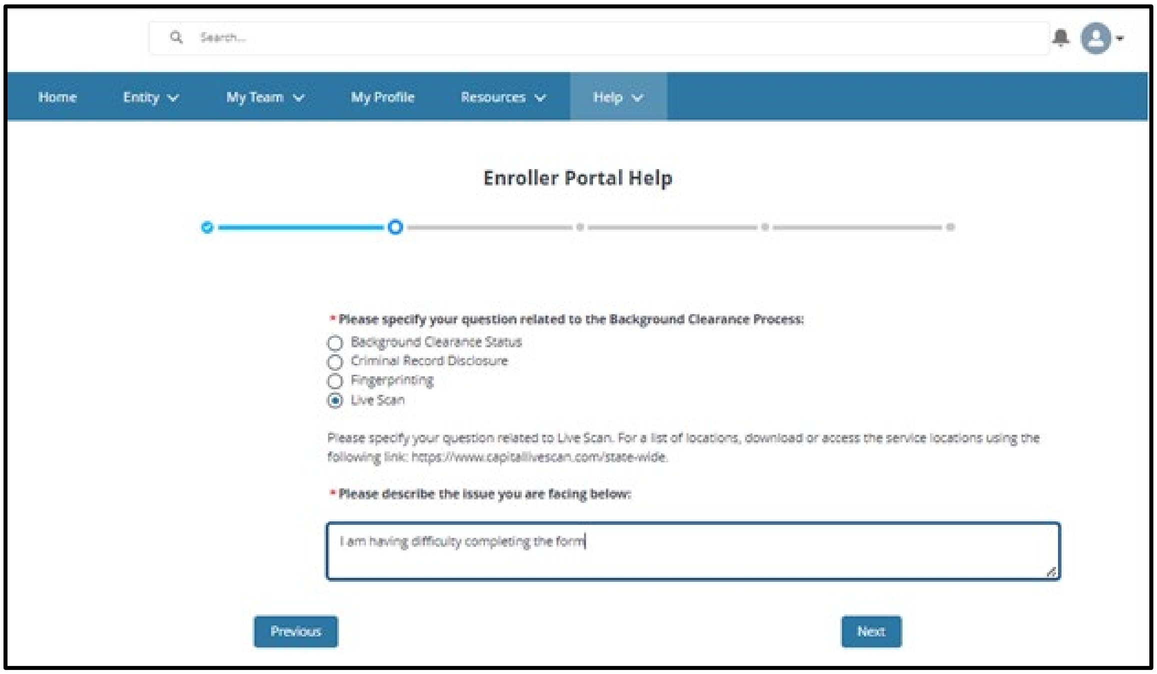
1. From the Home page, navigate to the *Help* dropdown. Select **Submit a Help Request**.



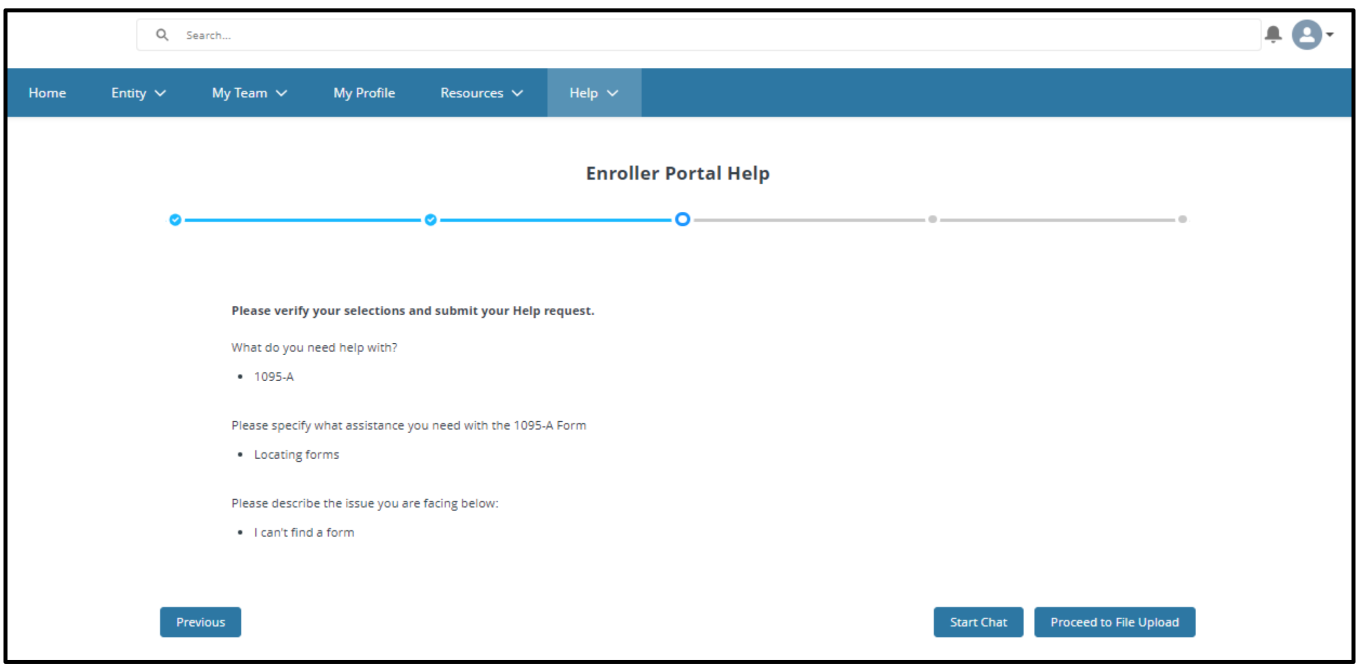
2. A list of topics is provided for the Enroller to select. Topics will be populated based on the logged-in user (i.e. Primary Contact vs. Counselor). Select the radio button that relates to the topic for which you are seeking help.



3. Select a reason from the *Please specify the nature of your [category] request* section. After selecting a reason, enter a description of the issue in the provided text box. Click **Next** to continue. The previous button navigates the user to the previous page.

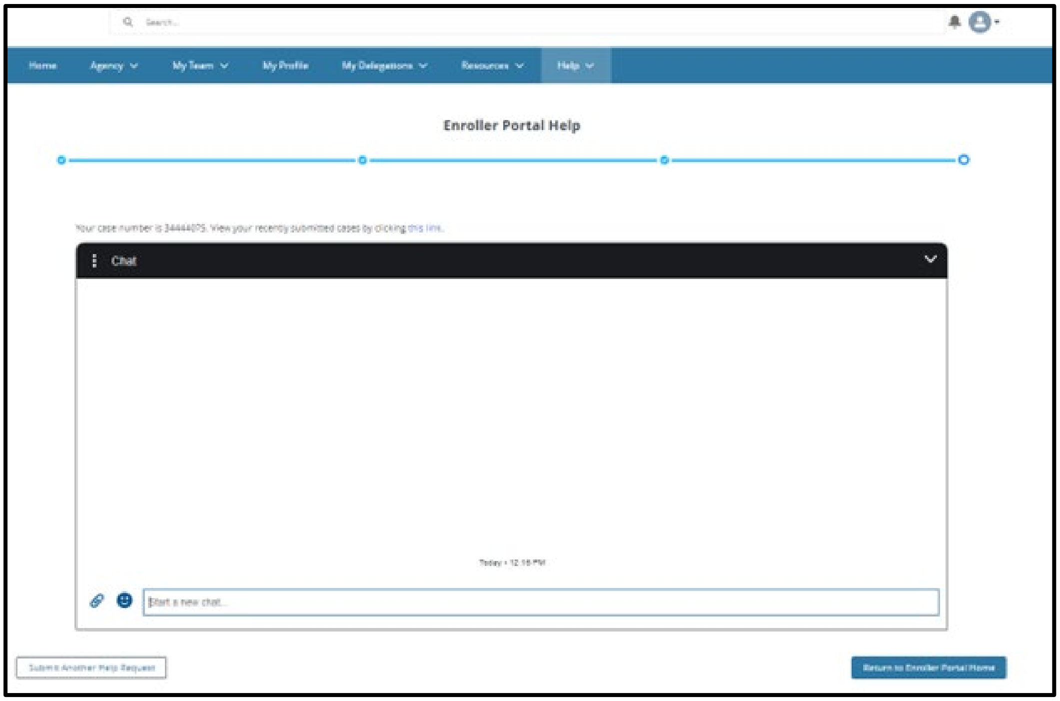


- A summary of the help request is shown.



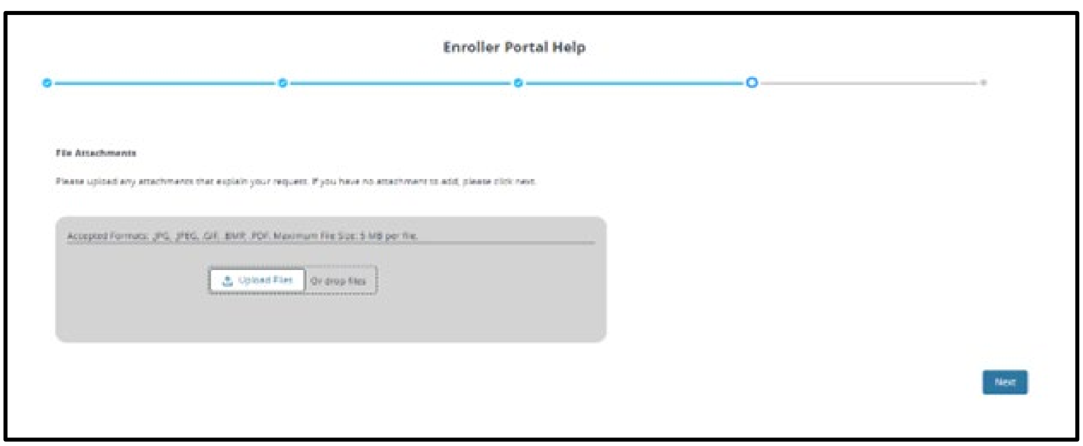
- Depending on the options selected on the previous screens and the availability of an Agent Service Center Representative, the Enroller will be presented with **Start chat**, which navigates the user to a live chat with a Pinnacle Service Center Representative. Once the chat has begun, there is a 3-minute timeout time.

Note: When a chat is started, the case number is displayed above the chat window.



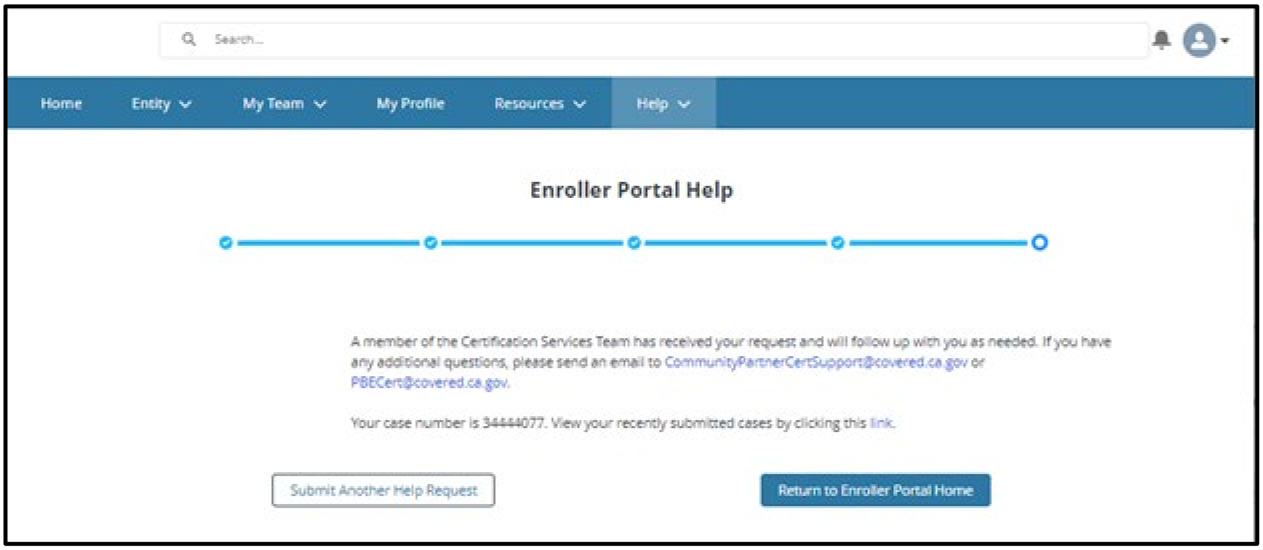
Note: The **Start Chat** function is not available during non-office hours. (Office hours are Monday through Friday 8 a.m. to 6 p.m.)

- **Proceed to File Upload** – navigates the user to a page to upload supporting files or documents for the help request. The user can bypass this screen by selecting **Next** if they do not have anything to upload.

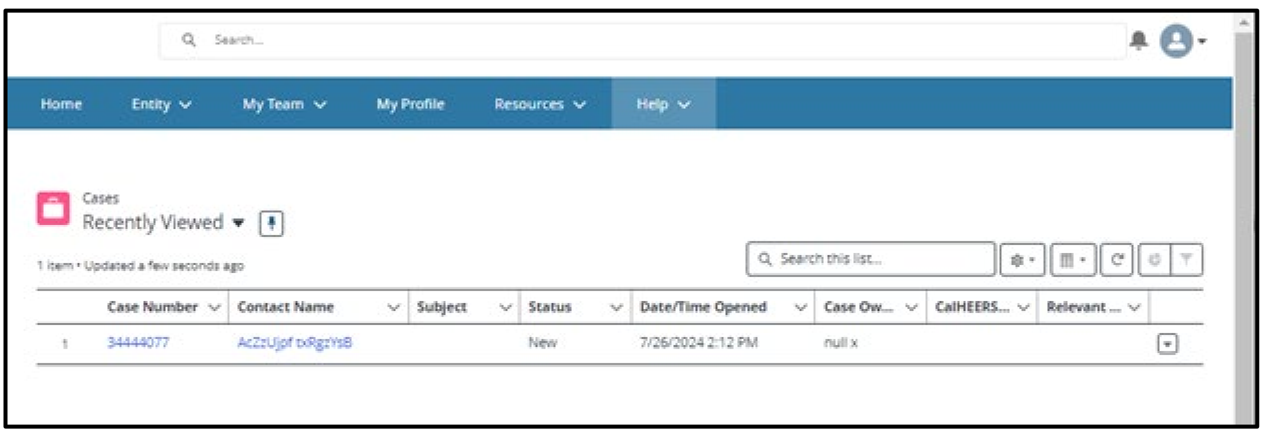


- **Previous** – navigates the user to the previous page.

4. Once the help request is submitted and the chat option is not selected, a confirmation displays with an assigned case number. The case is directed to the appropriate department for further review of the help request.



- Clicking the link navigates the user to *My Open Cases.* This page can also be accessed by selecting **My Open Cases** from the *Help* dropdown.

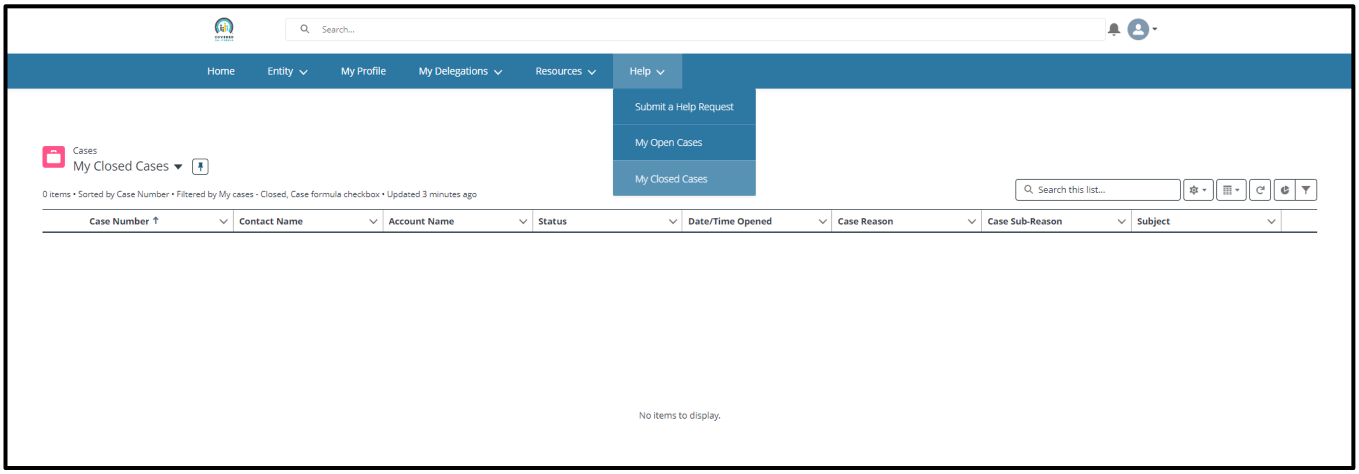


Accessing Previously Closed Cases & All Entity Support Cases

From the Home page, navigate to the *My Open Cases* or *All Entity Support Cases*

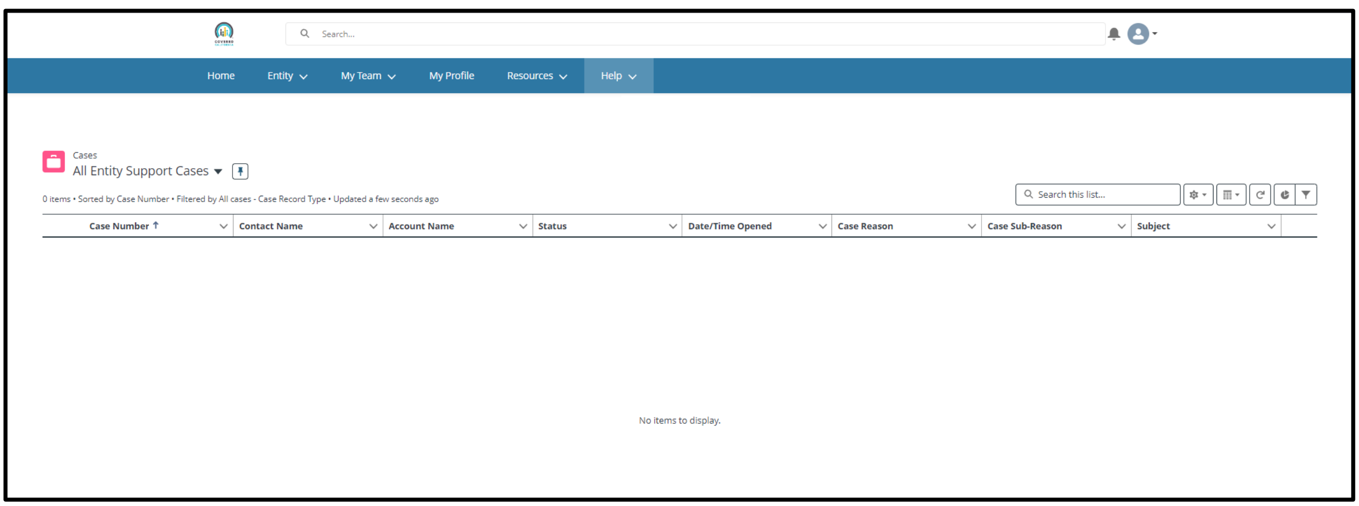
My Closed Cases

The user can see their closed cases and their Entity's support cases (*All Entity Support Cases* is only available to Primary Contacts and Authorized Contacts).



All Entity Support Cases

Only Primary Contacts and Authorized Contacts can see all the cases that staff in their Entity have created.



Case Page Layout