



# PSI HiSET Support

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# Agenda



1. Meet Your PSI HiSET Support Team



2. Department Roles and Responsibilities



3. Discussion and Demo of PSI Case Management Tool

# Your PSI HiSET Support Team



**Heather Richards**

Vice President,  
Client Success



**Tanya Haug**

Senior Director,  
Client Relations



**Adam Springwater**

Senior Client Relationship Manager,  
Client Relations



**Adriana Wells**

Senior Director, Product  
Operations Management



**Jo Anne Wingate**

Vice President,  
Client Services



**Roger Creek**

Manager,  
Client Services



**Jenny Dejmal Schmidt**

Senior Client Services Specialist,  
Client Services



**Neal Baer**

Global Director,  
Channel Operations



**Chris Maddox**

Senior Manager,  
Test Taker Services

# Department Roles and Responsibilities

PSI Contacts are available to assist with questions, problems, and/or concerns.



# Test Center Support

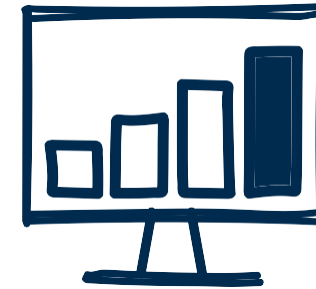
- **Site Administration** is responsible for providing test day support for operational needs, including general test center questions, TCA password reset, requests for Paper Based Testing materials, and any questions on policy or procedure.
- **Test Center Recruitment and OnBoarding** provides a dedicated team that supports test center development opportunities by ensuring sites meet test center requirements, supporting contracting, and assisting with site setup and TCA training. They should be contacted with staff changes or new test center approvals.
- **Help Desk** should be contacted any time technical issues arise throughout the testing experience.
- **Channel Management** provides geographic support throughout regions of the US and consists of Regional Operations Managers and Regional Site Supervisors responsible for relationship management.
- **Session Management** supports site schedule maintenance and capacity management.



# Test Taker Services



- **PSI's CSR Team** is dedicated to supporting test takers with scheduling, payment, and exam information or concerns.
- **Exam Accommodations Team** is committed to serving test takers with disabilities or health-related needs by providing services and reasonable accommodations.
- **Live Online Proctoring Support** is available via phone or chat any time a test taker is scheduled to take a test.



# Account Management



**Account Management** can assist with account related needs. Examples of issues for which you may reach out to your assigned Account Manager include:

- Interpreting state MOUs and/or policies
- Questions regarding invoices, fees, remittances, or other accounting needs
- Any concerns that Client Services is unable to resolve



# Client Services



**Client Services** will be the State Representatives' first point of contact for most issues. Using your custom email or logging into Salesforce Community is the most effective way of reporting issues or seeking assistance.\*

Examples of issues Client Services can assist are:

- State HiSET dashboard support including issues with passwords, logins, or functionality
- Ordering paper/pencil examinations or additional supplies, e.g. envelopes, incident reports, etc.
- Problems with retrieving reports or receiving automated reports
- Voucher support
- Questions regarding test taker results
- Test taker appeals or escalations reported to the state



***\*NOTE: this case management system is for use only by the State Representatives and should not be shared with Test Centers, Adult Education Centers, or Test Takers.***



# Escalation Process

If you require assistance, please use the following process for a speedy and satisfactory resolution.



# Salesforce Community

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# Welcome to Salesforce Community

Client Services has established a “Community” for HiSET States. This will allow members with access to view urgent messages, submit new cases, and display all Client Service's cases for your organization.

On or about September 23, 2022, State Representatives will receive a 'Welcome to Salesforce Service Cloud' email that will provide log-in information to access the Community.

When you receive the email, the first item of business is to navigate to <https://psicomunity.psonline.com/s/> where you will use the log-in from the email and create a password for your account.

When you have successfully logged into Salesforce Community, you will see the following:

## Major Announcements

### Welcome to the PSI Online Community

A place where you can easily create new cases, and view the status of existing cases.

**Example - Atlas Cloud is currently down for maintenance.**

Test - we are aware of this outage and development is investigating.





# While in the Community you can

Create a case by:

Submit New Client Services Case

For System Outage/System Down, create a Severity 1 Case.

Submit Severity 1 Case

Provide the following information:

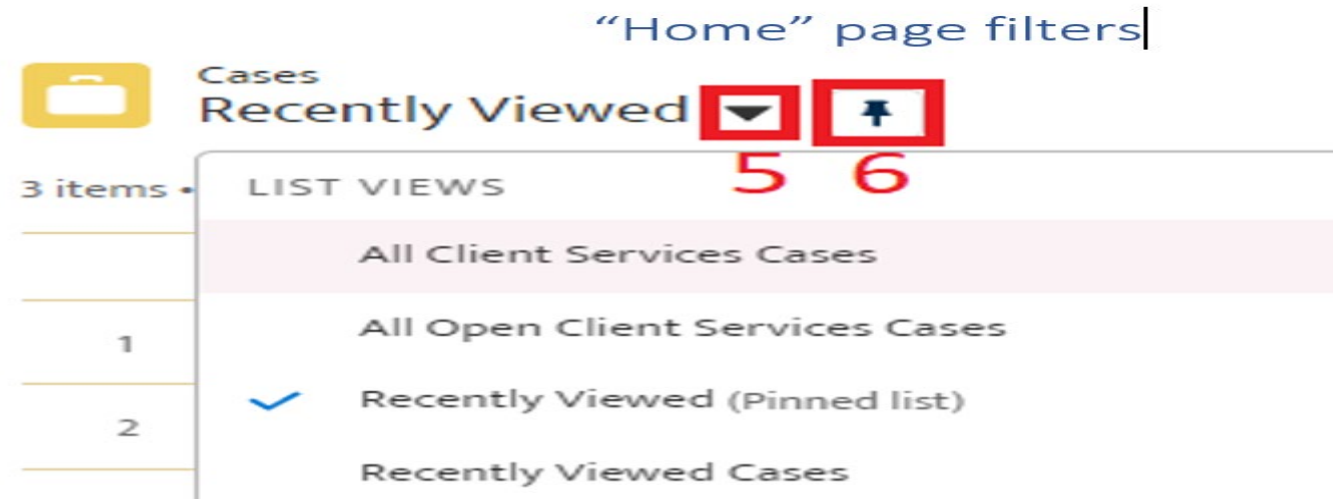
**Create New Case**

Subject	Test Taker Name ⓘ
Description	Test Taker ID ⓘ
Action Needed	Exam Name ⓘ

Confirm

# While in the Community you can

- Update your view of you community by:



You can change the filter by selecting the arrow (see screenshot above) next to the currently selected filter and then selecting the preferred filter (5).


To make this filter your default, select the “Pin” icon (6)

# While in Community you can

Viewing an open case

	Case Number	Subject
1	00018766	Support
2	00018767	This is a t
3	00018760	Susan's S

Select Case Number or Subject to view an individual cases submitted by you or your team


Case Open

[+ Follow](#)
[Clone](#)
[Printable View](#)

Case Number	Type	Date/Time Opened
00018766	Support	7/20/2022 3:07 PM

**Case Number**  
00018766

**Subject**  
Support Process (Sev2)

**Description**  
Checking the "status update" process for the life of a ticket.

**Additional Information**

**Contact Name**  
Andrew haste - Internal NALA Testing

**Contact Email**  
ahaste@psio.com

**Contact Phone**

**Test Information**

**Test Taker Name**

**Test Taker ID**

**Date/Time Opened**  
7/20/2022 3:07 PM

**Status**  
Open

**Case Origin**  
Email

**Type**  
Support

**Type Option**

**Client Services**

**Support Type Details**  
Vouchers

**Action Needed**

**Exam Name**

**Date/Time Closed**

**10** **Emails (1)**

Subject	From Address	To Address	Message Date
Support Pr...	ahaste@psio...	unclaimedou...	7/20/2022 3:...

[View All](#)

**9** **Case Comments (3)**

User	Public	Created Date	Comment
Andrew has...	<input checked="" type="checkbox"/>	7/22/2022 1:5...	Hi
User165789...	<input checked="" type="checkbox"/>	7/21/2022 9:1...	test!
mdrew	<input checked="" type="checkbox"/>	7/20/2022 3:1...	GIBBERISH

[View All](#)

**8** **Attachments (0)**

[Upload Files](#)

[Upload Files](#)

Or drop files



# While in Community you can

- Attach supporting screen shots, emails or documents to your case.
- Utilize case comments to provide additional information or observations, ask questions or update the case.
- Client Services will respond within the case using the email functionality. This will allow all communications to be attached to the case for easier visibility to the HiSET State and Client Services
- When view a case, you will be able to observe the stage resolution that the case is:
  - a. New – Brand new ticket that we have not responded to.
  - b. Open – Status occurs when additional questions from the client are sent, such as when a client responded to a “Pending” email.
  - c. On Hold – The ticket is still being investigated, but another team within PSI “owns” that part of the investigation.
  - d. Working on Resolution – We are investigating; the ticket is still open within Client Services.
  - e. Pending – More information from the client is needed to continue investigation.
  - f. Closed – The case is resolved, no more action(s) needed.

# While in Community you can



LIVE DEMO OF SALESFORCE SERVICE CLOUD





# Next Steps

## CASE MANAGEMENT SYSTEM

- Salesforce Case Management System will be open to State Representatives on September 23, 2022.
- On or about September 21, 2022, you will be provided a short video and supporting training documentation, to walk through the case management system
- On the morning of September 23, 2022, you will have a 'Welcome to Salesforce Community email (remember to check your spam if you do not see the email). Please read the email and follow the instructions to log-in to the case management system.

## TEST CHANNEL

- MOU transfer – sites to be notified of process (no new contract needed)
- Platform training – HiSET sites to be introduced to PSI's GPS deliver system, issued credentials, and receive training & support documentation
- Collection of site operating hours and schedules for test taker scheduling

## TEST TAKER Experience

- Transition of 1-855-MyHiSET Number - This test taker support phone number will be ported from ETS to PSI and is scheduled for September 23, 2022.
- The Exam Accommodations process is being finalized will be available for review on August 19, 2022.