



### Information for all Child Welfare Staff using Trails and the OIT Service Desk

- The Office of Information Technology (OIT) self-service help desk portal and call-in help desk are available to assist staff with technology related issues
- Before calling the help desk or entering a help desk ticket for Trails issues, please review this document. Understanding the difference between Incidents, Change Orders and TFS Defects will help route your ticket appropriately.
- Clearly documenting your issue appropriately with as much information and detail as possible will help the analyst assigned to work your ticket.
- Not all Trails issues need to be submitted to the help desk - please identify the type of concern you have and take the steps related to that topic. Utilizing your Super Users, your [CTUG representatives](#), and your [DCW intermediaries](#) may help to avoid a ticket.
- Classifying an issue correctly will help your issue get resolved more quickly!

<p>What are Incidents?</p>	<ul style="list-style-type: none"> <li>• An Incident is any behavior of an IT system which is different from the norm; a deviation in look, feel, or response of a utilized service. Examples of Incidents are:             <ul style="list-style-type: none"> <li>○ Password Resets</li> <li>○ Application outages - Trails is down</li> <li>○ Response time – Trails is slow</li> <li>○ System accessibility issues – can’t access a certain button or window in Trails; requested and was provisioned Trails access, but can’t access needed functionality</li> <li>○ Error messages – receiving error messages in Trails when trying to perform certain functions</li> <li>○ Local workstation issues – can’t print from Trails</li> <li>○ Break/fix – expected functionality in Trails is broken</li> <li>○ Adverse effects/unexpected behavior in Trails after a hot fix, service pack or new release, that prevent the application from functioning normally, or not performing as expected</li> </ul> </li> </ul>
<p>What are Change Orders?</p>	<ul style="list-style-type: none"> <li>• A Change Order is a request to perform a certain action that is not considered an Incident. Examples of Change Orders include:             <ul style="list-style-type: none"> <li>○ Provision, modify, or deprovision a network, portal and/or Trails account (access, affiliations and profiles for Trails)</li> <li>○ Request a change/fix to an existing application</li> <li>○ Request a change/fix to an existing Trails report</li> <li>○ Request to modify data – the majority of Trails Data Analyst Fixes fall into this category, requests such as a client merge, a date change, a request to delete data</li> <li>○ Order a new laptop, desktop or other equipment – any new equipment requests</li> <li>○ Install software – if a user needs specific software like Crystal Reports or Trails UAT</li> </ul> </li> </ul>
<p>What are TFS bugs/defects?</p>	<ul style="list-style-type: none"> <li>• TFS is an acronym for Team Foundation Server and is a software tool used to manage code, requirements management, release management, etc. This application houses all of the user stories, test cases, features, epics, code, and bugs/defects.</li> <li>• A few DCW users have access to this system for the Modernized Trails project to pull data from and to add defects to. We are in the process of creating an export so that county and state users will have access to check the status of a particular bug/defect.</li> <li>• A TFS bug or defect is entered when the User Story and Acceptance Criteria are not working as designed or intended. A User Story is a very high-level definition of a system requirement, containing</li> </ul>

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	<p>enough information for the developers to adequately capture the needed feature from an end user perspective. The Acceptance Criteria is the</p> <ul style="list-style-type: none"> <li>● Often times, an Incident may be turned into a Change Order and/or a Defect if a problem needs to be written up in TFS for a Defect.</li> </ul>
<p>How are Incidents managed?</p>	<ul style="list-style-type: none"> <li>● Incidents are managed by OIT with a Service Level Agreement (SLA) <ul style="list-style-type: none"> <li>○ P1 – Service Outage – Goal is to resolve in 4 hours</li> <li>○ P2 – Critical Impact – Goal is to resolve in 24 hours but no more than 3 business days</li> <li>○ P3 – Measurable Impact – Goal is to resolve within 5 business days but nor more than 14</li> </ul> </li> <li>● If you have an incident that you need prioritized or escalated, please reach out to any of the following individuals: <ul style="list-style-type: none"> <li>○ <a href="#">Lorendia Schmidt</a>, Trails Product Owner</li> <li>○ <a href="#">James Sleeger</a>, Data Management Supervisor</li> <li>○ <a href="#">Caitlin Smith</a>, Operational Analyst</li> </ul> </li> </ul>
<p>How are Change Orders managed?</p>	<ul style="list-style-type: none"> <li>● When Change Orders are worked, there is not a governing Service Level Agreement. They are typically worked in the order they are received. If you have a change order that you need prioritized or escalated, please reach out to any of the following individuals: <ul style="list-style-type: none"> <li>○ <a href="#">Lorendia Schmidt</a>, Trails Product Owner</li> <li>○ <a href="#">James Sleeger</a>, Data Management Supervisor</li> <li>○ <a href="#">Caitlin Smith</a>, Operational Analyst</li> </ul> </li> </ul>
<p>How are TFS post-production bugs managed?</p>	<ul style="list-style-type: none"> <li>● TFS post-production bugs for the Modernized Trails project are prioritized in semi-weekly Hot Fix Prioritization calls</li> <li>● Once an issue has been identified as a bug/defect and is written up in TFS, it goes onto a list for the next planned release or hot fix</li> <li>● On Thursday afternoons during ModSquad meetings, with state and county participants, the defects are prioritized for the next hot fix</li> <li>● Typically bugs with a Severity of 1 or 2 are discussed and prioritized first</li> </ul>
<p>How are new requests for Legacy Trails being managed?</p>	<ul style="list-style-type: none"> <li>● New requests for Legacy Trails development will be taken under advisement by the Trails Product Owner, however most Legacy requests for new development will be deferred for implementation in Modernized Trails</li> <li>● If you have urgent legislatively required changes to the system, please add the issue to a CTUG agenda so it can be prioritized as a CCB (Enhancement) for Modernized Trails</li> </ul>
<p>How are new requests for Modernized Trails being managed?</p>	<ul style="list-style-type: none"> <li>● New requests for Modernized Trails functionality are identified via many sources - help desk tickets, County Trails User Group (CTUG), ModSquad (a subgroup of CTUG), Trails users, Subject Matter Experts (SMEs) (County, DCW, DYS, SB94, ARD, etc.).</li> <li>● If the missed functionality is identified during user acceptance testing, it is triaged and determined if it is considered essential.</li> <li>● If essential, a Change Control Board (CCB) bug (enhancement) is entered into TFS</li> <li>● The Trails Product Owner reviews CCB items at regularly scheduled meetings. SMEs are offered the opportunity to present why the missed essential functionality can't be addressed in a way other than adding scope to the Trails Modernization project</li> <li>● If scope is added SMEs participate in defining requirements for the associated user stories and then in user acceptance once development is complete for the added scope</li> </ul>

**Mod Squad Sessions for Modernized Trails Assistance:**

The ModSquad is available to assist users with Modernized Trails questions and issues, and will host county support sessions during each of the ModSquad meetings for the foreseeable future. These support windows will be from 9-12 each Tuesday/Thursday and will last as long as users have issues to discuss, so please call in early (call in as close to 9:00 a.m. as possible). To join the ModSquad meetings, please use the information below:

<https://zoom.us/j/868959240>

US: +1 669 900 6833 or +1 929 436 2866

Meeting ID: 868 959 240

**These issues can be fixed within your county; do not enter a help desk ticket:**

TOPIC	EXAMPLES	ACTION NEEDED
Trails Access/Profile Issues	<ul style="list-style-type: none"> <li>● Change needed in your profile/level of access in Trails</li> <li>● Can no longer do tasks you previously could</li> </ul>	Do not submit an OIT help Desk ticket. First work with your Trails County Security Administrator. If they are unable to address your need, they can contact the Trails State Security Administrator Team for assistance, <a href="#">Renee Amador</a> or <a href="#">Caitlin Smith</a> .
Delete a client from a Modernized Trails Referral  Remove a client from a Legacy Assessment or Case.	<ul style="list-style-type: none"> <li>● Delete a client entered by mistake or a duplicate client added to a Referral</li> <li>● Remove a client from an Assessment or a Case</li> </ul>	Do not submit a help desk ticket if the Referral has not yet been accepted or screened out. Caseworkers can do this themselves in Modernized Trails.  Workers can also "remove" (not delete) a client from a Legacy Assessments or Cases depending on if there are allegations, findings, contacts or other documentation on that client.
Needing a client added for a Safety Assessment	<ul style="list-style-type: none"> <li>● Client does not appear for selection in the Safety Assessment</li> </ul>	Do not submit a help desk ticket. Caseworkers can add a client themselves in the Referral in Modernized Trails, however, when an Assessment is closed, and the worker is trying to complete a Safety Assessment at the case level, users cannot add or remove clients from an Assessment. <i>At this point the worker will need a help desk ticket.</i>
Restrictions and Unrestriction requests	<ul style="list-style-type: none"> <li>● Restricting or unrestricting a Referral/Assessment, or a Case with an associated Referral</li> </ul>	Do not submit a help desk ticket. Caseworkers can do this themselves in Modernized Trails. Do a Hotline and Referral search for your referral or for one of the Referrals associated to the assessment and case you wish to restrict. Click the red Restrict Referral button in the upper right corner of the Referral. Then a window will appear with all of the associated Referrals, Assessments and Cases. Select the ones you wish to restrict. If you have difficulties with this task, you may contact <a href="#">Samuel Warren</a> . You can always call into a

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		ModSquad session at 9:00 on Tuesdays and Thursdays for assistance with Modernized Trails.
Unsure how to complete a task in Modernized Trails	<ul style="list-style-type: none"> <li>● Unsure how to complete a task in Modernized Trails or stuck trying to do so.</li> </ul>	Do not submit a help desk ticket. Contact a Super User, a <a href="#">CTUG member</a> , or use existing Job Aids to help you with the task. If your Super Users are not available or do not know how to complete a task, you may contact <a href="#">Samuel Warren</a> . You can always call into a ModSquad session at 9:00 on Tuesdays and Thursdays for assistance with Modernized Trails.
A worker is not appearing in Send To lists or in lists for assignment of work in Modernized Trails	<ul style="list-style-type: none"> <li>● Cannot assign work to a user</li> </ul>	Do not submit a help desk ticket. Check with the County Security Administrator first to see if the worker has the correct profiles and affiliations. Contact <a href="#">Kathy Clark</a> to see if the worker has an active certification and work with <a href="#">Caitlin Smith</a> or <a href="#">Renee Amador</a> to ensure all relevant profiles/affiliations have been added to the user. Please Note: an enhancement to Modernized Trails will be to display (read-only) the worker's training certification on the Employee details page.
Legacy "How to" questions	<ul style="list-style-type: none"> <li>● How do I certify a County Adoption provider?</li> <li>● How do I do a Fiscal Claim/Recovery?</li> </ul>	Do not submit a help desk ticket. Reach out to your Super Users, your <a href="#">DCW Intermediaries</a> , and/or your <a href="#">CTUG Liaisons</a> .
Need a ticket escalated	<ul style="list-style-type: none"> <li>● Escalation or prioritization</li> </ul>	Reach out to <a href="#">Lorendia Schmidt</a> , <a href="#">James Sleeper</a> or <a href="#">Caitlin Smith</a> .
Accidentally open a case	<ul style="list-style-type: none"> <li>● In the Case Connection, case connection needs to be reset</li> </ul>	Do not submit a ticket if a case was open by mistake and was a county error. Please remove the clients and close the case the same day it was opened. This will not "count" as a case against the family because there are no clients in the case.
Delete a Framework	<ul style="list-style-type: none"> <li>● Entered a Framework on the wrong family.</li> </ul>	Do not submit a ticket if you need a framework deleted. Please reach out to your <a href="#">DCW Intermediary</a> and if they approve the request, <a href="#">Caitlin Smith</a> can delete the Framework.
Requested changes to a Trails report	<ul style="list-style-type: none"> <li>● Desired changes to reports</li> </ul>	Do not submit a help desk ticket. Reach out at a ModSquad meeting, to your <a href="#">CTUG Liaison</a> or <a href="#">DCW Intermediary</a> and have them prioritize the issue for the next meeting.
Enhancements to Trails	<ul style="list-style-type: none"> <li>● Desired changes to functionality</li> </ul>	Do not submit a help desk ticket. Reach out at a ModSquad meeting, to your <a href="#">CTUG Liaison</a> or <a href="#">DCW Intermediary</a> and have them prioritize the issue for the next meeting

## Using the OIT Self-Service Help Desk

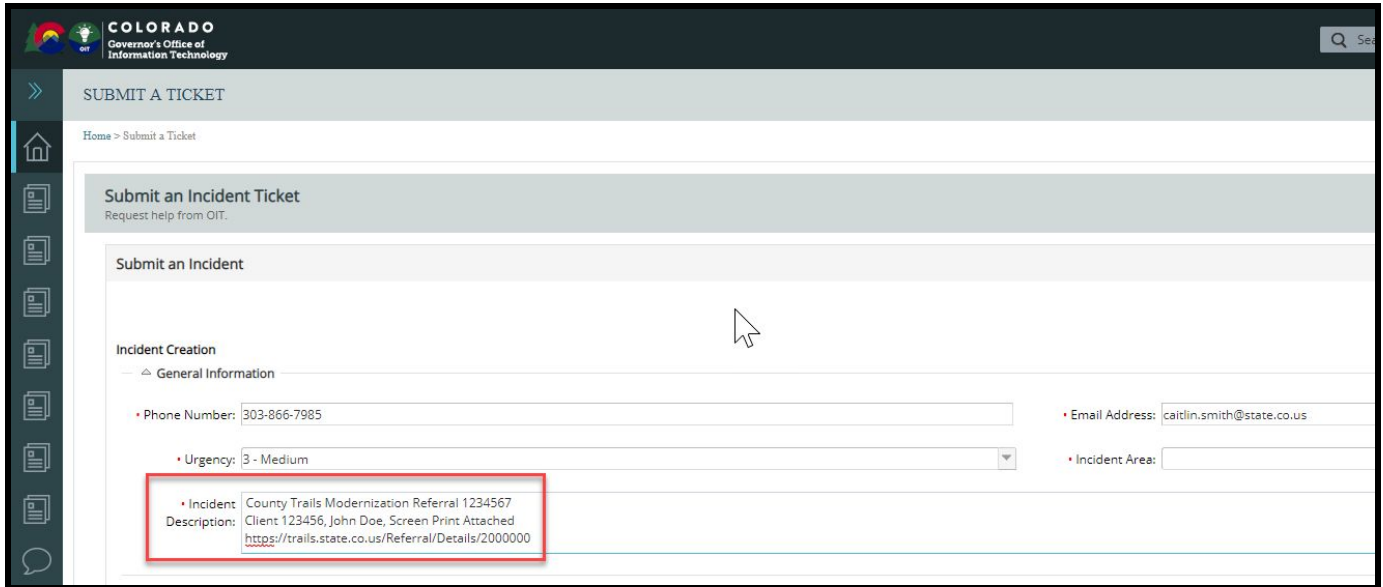
Have an issue not listed above? Most likely you will need to enter the information into the [OIT Customer Self-Service Portal](#), or [email](#) the Service Desk, or call 303-239-HELP (4357). Here is an easy reference [flyer](#) on the three ways to get help from OIT.

Please do not submit requests for Trails Enhancements and/or New Reports to the help desk. These requests must be reviewed by the County Trails User Group and the Division of Child Welfare first.

In order to ensure that help-desk tickets get routed to the correct OIT analyst, please use the following formats listed below when using the self-service help desk. We are also in the process of creating “services” for Trails tickets. This will allow for tickets to be sent directly to the proper analyst group and the end user to be able to see the ticket information from the Customer Service Portal (currently users are not able to see their change order tickets updates).

Always put the following information at the beginning of the Incident Description section (depicted above):

1. Agency (ie County, DCW, OEC, ARD)
2. Trails (Modernization or Legacy)
3. Functional Area in Trails you are having an issue with such as: FSP, Dev Screening, Adopt, CARR, etc. Here is a link to [common functional areas](#) on which workers report issues
4. Referral, Assessment or Case ID
5. Client ID and Name
6. If the issue is occurring in Modernized Trails, copying the URL into the ticket is extremely helpful
7. If the issue is occurring in Legacy Trails, indicating the Window name or screen name is helpful
8. If you have an error occurring, it is helpful to screen print and attach a picture of the error



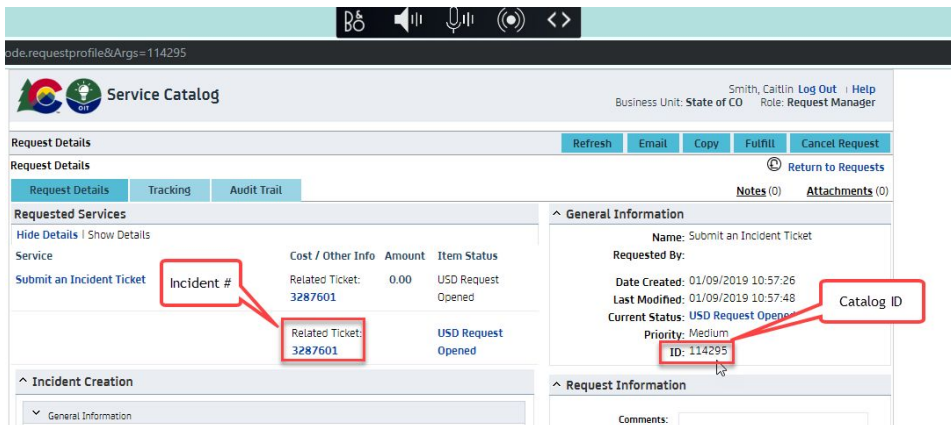
Topics that DO need to go to the Help Desk

TOPIC	EXAMPLES	Help desk ticket entry format in the Incident Details section
Data Fixes	<ul style="list-style-type: none"> <li>• Wrong date/time entered</li> <li>• Wrong client added to referral</li> <li>• Need an entry deleted or moved</li> </ul>	<p>Always start your ticket with the following text (as mentioned above):  <b>Agency (CW), Trails Mod or Trails Legacy, Data Fix, Functional Area, Referral, Assessment or Case ID, Client ID and Name.</b></p> <p>If the issue is occurring in Modernized Trails, copying the URL into the Change order is extremely helpful. If you have an error message, it is helpful to screen print and attach a picture of the error</p>
IV-E Foster Care and MOE Data Fixes	<ul style="list-style-type: none"> <li>• Adding a new client without adequately searching to find existing client</li> </ul>	<p>Please DO NOT submit a ticket until you speak with <a href="#">Gerri Duran-Wolfe</a> and get her approval. If approved for a data fix, please attach her approval to the ticket when you submit it.</p>
Merge	<ul style="list-style-type: none"> <li>• Adding a new client without adequately searching to find existing client</li> </ul>	<p>Please ask your County Mergers to merge the client. If still an issue, run the Merge Report and submit it along with a help desk ticket (Change Order) <b>Do NOT attempt to make name, D.O.B., or Social Security Number changes once a SIDMOD is attached to a client ID.</b></p>
Trails Access	<ul style="list-style-type: none"> <li>• Provision, modify, or deprovision a network, portal and/or Trails account</li> </ul>	<p>Please work with your County Security Administrator. They must complete submit the <a href="#">Access Request Form</a>. Once this has been completed, the Security Admin will receive notification that they are able to set up the new user in Modernized Trails.</p>

	(access, affiliations and profiles for Trails)	
Trails <b>Legacy</b> DCW Restricted Access Profile	<ul style="list-style-type: none"> <li>Renew or provision new restricted Trails Legacy access</li> </ul>	Please work with your County Security Administrator to submit a Change Order requesting the annual renewal of the DCW Restricted Access profile. The State Security Administrators will review the request and provision the access. New requests for Restricted Access need to be submitted via an OLR or an <a href="#">Access Request Form</a> . Renewal for an extension of DCW Restricted Access can be done via an Incident.
Lock/Unlock Users	<ul style="list-style-type: none"> <li>Renew or provision new restricted Trails Legacy access</li> </ul>	If a user has been locked less than 90 days, contact your CSA. If a user has been locked/inactive for 90 days or more, new paperwork needs to be submitted on OLR requesting Additional Access phrasing the request something like: "this employee has been locked out for 90 days or more inactivity, please unlock the account".

### What Happens Next?

- You will be issued an incident number immediately on the customer self-service portal. That incident is reviewed and next steps to resolve your issue are determined. The Incident number is different from the Catalog number.



- In many cases your incident will be converted to a change order. This is because your request likely requires an analyst fix, which as mentioned above, requires a change order.
- You will receive an email telling you your incident has been resolved. This does not mean the issue has been fixed. At the bottom of the email you see a note that it is resolved *because* it has been converted to a Change Order.
- You will get an email telling you the change order number. Keep track of your change order number.
- Your change order will be put in a list of other change orders that need attention from an OIT analyst.

- If you need to check on the status, you can call the help desk to check on the status. Make sure you have the change order number when you call.

### Trails Resources

There are multiple resources to review for Trails help including the [Child Welfare Training System \(CWTS\) web page](#), the Trails Weekly Newsletters and the Modernized Trails Job Aides (also hosted on the CWTS site).

- **Trails Modernization Newsletter:** Please continue to check the CWTS website for the Trails Modernization weekly newsletter regarding information from all areas of Trails Modernization. The newsletter can be found at <https://coloradocwts.com/trails-resource> for reference.
- **Trails Super User Support:** As we get ready to roll out additional functionality for Modernized Trails, the Training Team is putting together a Super User work group to assist workers. Each county should have at least one Super User (perhaps not in the smaller counties).
- [CTUG Representatives](#) - Colorado Trails User Group
- [DCW Intermediaries](#) and if you don't know who your Intermediary is, please see this [DCW County Assignment Map](#).
- Job Aides., Newsletters, etc. all hosted on the [CWTS Website](#)