



# Agency Benefits Coordinator Meeting

Zendesk

August 2019

# Ticket Optimization and Security

- Here are some helpful tips to help protect member information, to assist us in identifying the correct Benefits staff to work your request, and to help us solve your issues faster.
- First, as a matter of security:
  - **Never include a member's name, SSN, or Edison Employee ID in the Subject of a ticket.**
  - **This includes tickets sent to us by email and submitted via the “Submit a Request” feature on our Help Center. The Subject field will become the subject line of email responses to your ticket.**
  - **The body of emails sent through Zendesk are secure, however the Subject Lines are not.**

Your email address \*

Subject \*

Description \*



# Ticket Optimization

- For Document Uploads:
  - Please include BOTH the Head of Contract's Social Security Number **and** Edison Employee ID, if they have one.
  - This will help us identify the member and locate documents faster while working the tickets.
  - Our primary search method when looking up a member is by Edison Employee ID. The SSN is only required to transfer the documents from Zendesk into Edison.

**Edison Employee ID**

Enter the Edison Employee ID of the employee this is about.

**SSN \***

Enter the employee's Social Security Number, without dashes.

# Ticket Optimization

- Use keywords in the Subject to help us route tickets faster and serve you better!
  - For Billing questions, use words like Billing, LOA, FMLA, Suspend coverage, etc.
  - For Active questions, use words like SQE, Newborn, Death, Annual Enrollment, Appeal, etc.
- This helps us identify tickets that need to be routed to specialists for handling and will reduce response time!

# Zendesk Search Optimization

- BA has a Help Center with a wealth of information on various topics.
- The Help Center is located here: <https://benefitssupport.tn.gov>
- You can also search our Help Center from the ParTNers From Health site, just look for and click our friendly Web Widget floating on the bottom left of your screen:



# Zendesk Search Optimization

- Either Way you access the Help Center, the search results will be the same.
- With that said, here are some tips that can help you find relevant information when searching.

Annual Enrollment

Search

[State of Tennessee - Benefits Administration](#) > Search results

**38 results for "Annual Enrollment"**



# Use Two Or More Words

- I need to know if I can invest my HSA contributions into a mutual fund, and if so, how.
  - I search for **HSA**. There are 99 results, and the correct article is not obvious.
  - I search for HSA investment, and the first result is the one I need!

State of Tennessee - Benefits Administration > Search results

## 99 results for "HSA"

Knowledge base

[Does the Flexible Spending Account\(s\) \(FSA\) have a beneficiary designation form in case of an employee's death? What happens to the contributions left in the account in the event of the employee's death?](#)

by Admin 2 years ago in [Employees > Payflex](#)

The Health Savings Account (HSA) has a beneficiary designation form but there is no beneficiary form for the FSA – this differs

[I will be eligible for Medicare next July and will be enrolling in Medicare. I am currently on the CDHP plan. Do I need to change my plan during Annual Enrollment or will that be a special qualifying event in July?](#)

by Heather 1 year ago in [Employees > CDHP/HSA and Local CDHP/HSA](#)

The federal HSA limit for Jim is \$4,450 (\$3,450 individual HSA limit plus a \$1,000 catch-up).

State of Tennessee - Benefits Administration > Search results

## 100 results for "HSA investment"

Knowledge base

[Can the funds in a HSA be invested?](#)

by Admin 3 years ago in [Employees > CDHP/HSA and Local CDHP/HSA](#)

Yes, you can *invest* the funds in your *HSA* once the balance in your account reaches \$1,000.

# Use quotation marks to search a phrase

- I have questions about the State's supplemental medical insurance for retirees.
  - I search for tennessee plan and I get 192 results, which includes all articles with either the word Tennessee, or plan, or both, in any order.
  - If I instead search "tennessee plan" I only get results that include the phrase "Tennessee Plan" in that order.

tennessee plan **Search**

[State of Tennessee - Benefits Administration > Search results](#)

**192 results for "tennessee plan"**

Knowledge base

"tennessee plan" **Search**

[State of Tennessee - Benefits Administration > Search results](#)

**10 results for ""tennessee plan""**

Knowledge base



# Do Not Search for Personal Information

- Searches for Zendesk ticket numbers, Edison employee IDs, etc., will not return any results.

|00345678

Search

[State of Tennessee - Benefits Administration](#) > Search results

**No results for "00345678"**

Knowledge base

# Search By Keywords, not Complete Sentences

- This search did not return any useful results:

i have a new employee who is on her fathers insurance. she h

**Search**

[State of Tennessee - Benefits Administration](#) > Search results

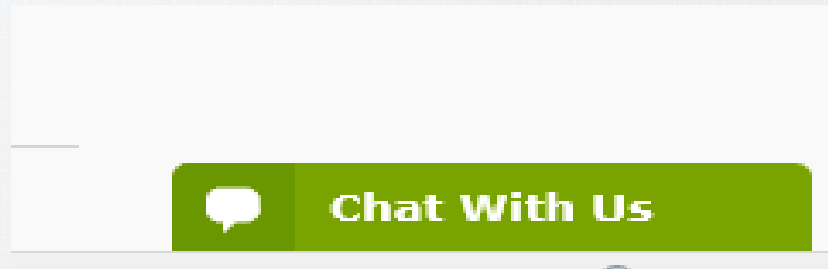
**75 results for "i have a new employee who is on her fathers insurance. she has a son so she is also going to enroll in the states health insuracne. my question is, will the states insurance be primary or secondary for her?"**

# Questions?



# Live Chat

- During Business Hours, the Service Center is available to answer questions via Live Chat.
- The Live Chat service is staffed by the Benefits Administration Service Center.
- The Live Chat service uses modern encryption protocols to ensure security of the content discussed in the chat.
- You can find the Live Chat feature on our Help Center, by clicking the “Chat With Us” Icon in the lower-right of the screen.



# Live Chat

support

Welcome to Benefits Administration Chat.  
Please tell us about your issue, and an analyst will be with you shortly.

**Introduce yourself \***

**Message \***

**Start Chatting**

zendesk

support

Welcome to Benefits Administration Chat.  
Please tell us about your issue, and an analyst will be with you shortly.

**Introduce yourself \***

**Message \***

**Start Chatting**

# Live Chat

The screenshot shows a chat window titled "support" with a bell icon and the name "Sheila Howard" (Customer support). A message from "Ian Harris" asks about Annual Enrollment. Status messages indicate the chat started and Sheila Howard joined. A typing indicator is visible at the bottom.

**support**

**Sheila Howard**  
Customer support

**Ian Harris**  
I have a question about Annual Enrollment.

Chat started

Sheila Howard joined the chat

Sheila Howard is typing...

This screenshot shows the same chat window as the previous one, but now with two responses from Sheila Howard. The first response thanks the customer for contacting Benefits Administration, and the second asks how she can assist.

**support**

**Sheila Howard**  
Customer support

**Ian Harris**  
I have a question about Annual Enrollment.

Chat started

Sheila Howard joined the chat

**Sheila Howard**  
Thank you for contacting Benefits Administration, this is Sheila.

**Sheila Howard**  
How can I assist you?

# Live Chat

- Chatting Live with BA will open a ticket. After your chat, you should receive an email with full transcript of what you discussed.
- You can use this email to continue the conversation, should you need to follow up.

##- Please type your reply above this line -##

Your request (234470) has been updated. To add additional comments, reply to this email.



**Ian Harris**

Jul 30, 13:23 CDT

Chat started: 2018-07-30 06:20 PM UTC

(06:20:27 PM) Ian Harris: I have a question about Annual Enrollment.

(06:20:38 PM) \*\*\* Sheila Howard joined the chat \*\*\*

(06:20:58 PM) Sheila Howard: Thank you for contacting Benefits Administration, this is Sheila.

# Live Chat

- The Live Chat feature is currently staffed by the analysts on our Active Team.
  - Retirement, COBRA, Billing, and FSA inquiries will be forwarded on to the appropriate staff to handle
- Live Chat is great for quick or general questions!
  - Account specific inquiries will require identity verification, just as with phone calls.




# Questions?



# Answer Bot

- Answer Bot is an automated answer suggestion service, using content from our Help Center.
- Answer Bot will suggest articles for you to read.
- Answer Bot will suggest answers to tickets you submit via the “Leave a Message” feature, via email, or via Submit a Request (except Document Uploads).

# Answer Bot – Submit a Request

 Your request was successfully submitted. ✕

While you wait, do any of these articles answer your question?

[I am over 65 and enrolled on the Tennessee Plan Medicare supplement. Am I eligible to enroll in coverage on the retiree vision plan?](#) ^

No. You must be covered on the retiree group health plan to enroll on the retiree vision plan. If you were covered on the vision plan as an active employee you should receive a COBRA notification...

[Am I eligible for The Tennessee Plan \(Medicare supplement\)?](#) v

[I would like information about The Tennessee Plan \(Medicare supplement\).](#) v

Does this article answer your question?

# Answer Bot – Submit a Request



Nice! Your request has been closed.

# Answer Bot – Via Email

Here are some great articles that may help:

Do any of these articles answer your question?



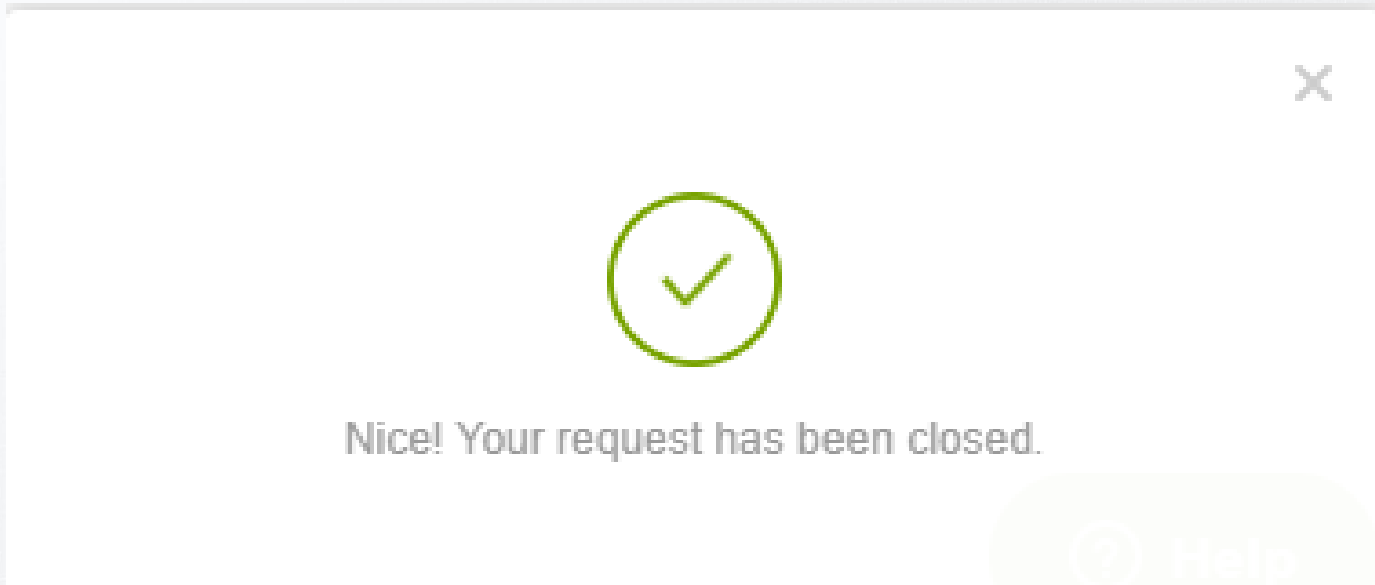
If I work for a Tennessee Board of Regents (TBR) institution can I enroll in the state EyeMed Vision Program? Yes, you may choose to enroll in the EyeMed plan offered by the state by using Edison Employee Self Service (ESS).... [Read more](#)

Yes, close my request



I would like information about The Tennessee Plan (Medicare supplement). The Tennessee Plan is a

# Answer Bot – Via Email



# Answer Bot

- If you click “Yes, Close my Request,” Answer Bot will **resolve the ticket without any action taken by the BA Service Center.**
- Answer Bot does not have access to any personal information and cannot resolve account-specific questions (However, if you click “Yes” to a suggested answer, the ticket is still marked as solved).
- **Answer Bot can offer general information, such as enrollment requirements.**