EPM Customer Communication Platform

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Our Customer Communication Platform provides customers with an opportunity to log and track queries and gain quick responses to questions. The platform will provide schools and trusts with greater visibility of their queries and status, whilst also supporting our teams in ensuring these are managed quickly and effectively. Our management teams will regularly review outstanding queries and track response times to analyse and identify areas of support required to further improve our service delivery.

Register and log in

As an EPM customer, you should have received an email with login details to our Customer Communication Platform. If you have not received a login email, please contact your Account Manager who will be happy to re-send you the details.

To register, click on the link in the email to access the registration page and follow the steps to register.

You can find our Customer Communication Platform here: https://epmltd.zohodesk.eu/

Once logged in, the **Home** page is displayed.

Adding a ticket

Tickets are assigned to a specific department, depending on the nature of your query. When adding a ticket, you should first select the appropriate department. If you have multiple queries for different departments, we recommend that you add a new ticket for each department to avoid any delay.

Which department do I need?

HR Advice: HR advice and casework-related queries.

DBS: Safer recruitment and DBS queries.

Customer Experience: Queries regarding your account and miscellaneous queries.

Client Support Hub: Technical and support queries regarding EPM Connect and/or the EPM Portal.

HR Admin: Queries related to your HR Admin service, including contractual documentation.

Payroll & Pensions: Payroll and pensions queries and submission of related documents, such as P45s/new starter checklists.

Implementation Team: Advice and support to new customers onboarding with EPM.

To add a ticket

1. Select **My Area** from the menu at the top of the page or click on **Tickets** in the centre of the **Home** page. The **My Area** page is displayed.

2. Click on **Add ticket** button in the right-hand panel. The **Submit a ticket** page is displayed.

3. From the **Department** drop-down menu, select the EPM department that relates to your query. The fields to be completed will change depending on the department selected.

   Please note: To ensure a speedy response or resolution, please be mindful of selecting the appropriate department.

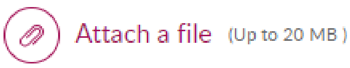
4. In the **Account Name** drop-down menu, click on the magnifying glass. The accounts that you have access to are displayed.
5. Select the account that relates to your query.
6. In the **Subject** text box, add a subject title.
7. In the **Description** text box, add your query.

   Formatting tools are available should you need these.

8. Where a **Category** option is available, please select the category relating to your query.

   This is particularly useful for identifying the nature of the ticket and the most appropriate support required.

9. In the **School Name** text box, add your school name.
10. Click **Attach a file**, to add an attachment.



   Please note: Attachments should not be encrypted.

11. The fields below may be available depending on the department you have selected. These are not mandatory, but the additional information helps to ensure an efficient resolution to your query.

   Area: for Payroll & Pensions department queries, you can further refine this by selecting either Payroll or Pension if appropriate.

   Classifications: the nature of your query.

   Employee No: the employee number for the employee the query relates to, if appropriate.

   Job Role: the job role of the employee the query relates to, if appropriate.

   Case Identifier: for HR Advice queries, the case ID number if applicable.

12. Click **Submit** to submit the ticket.

The submitted ticket is now available to view in **My Area** and you will also receive email notification that the ticket has been raised and assigned a reference number. If you need to contact EPM regarding this ticket, please have the reference number available.

Your tickets

Tickets are available in **My Area**.

You can search for a specific ticket or filter the list according to department, account or ticket status.

To search for a ticket

In **My Area**, use the **Search** function at the top of the page.

Please note: There is also a **Search** function available at the top of the **Home** page.

To filter your tickets

The right-hand panel offers easy access to a number of pre-defined filters. Click on the filter to apply it to your ticket view.

Alternatively, tickets can be filtered according to the following, available at the top of the page:

Department: the EPM department the ticket is assigned to.

Channel: the method used when the ticket was created.

Account: the account the ticket is related to.

Custom Status: the status of your ticket. Tick the check box next to each status you want to include in your filter.

Ticket Status

The following ticket statuses are available:

- **Open**: your ticket is with your EPM team.
- **In Progress**: EPM have responded to your ticket and are waiting for your response.
- **Escalated**: the ticket has been escalated for additional support,
- **Long Term Investigation**: your query requires further investigation and may take longer to resolve, your EPM team will keep you updated with progress.
- **Resolved**: the ticket is closed following resolution of your query.

To view a ticket

Click on the ticket to view it.

The **Ticket Properties** panel on the right-hand side displays details of your ticket, including the ticket reference number, the date a resolution is due by and details of any other contacts who have been copied into the ticket at any stage.

Responding to a ticket

When you receive a response to your ticket, you will receive this as an email as well as directly into the Customer Communication Platform. You can send a response via either method.

Via the Customer Communication Platform

1. Click on the ticket you want to respond to. Your ticket is displayed, with the most recent response at the top.
2. Click on **Reply** at the top of the ticket. A text box is displayed to add your response.
3. Add your response and attach any files if needed.
4. Click on **Send**.

   If you are not ready to send the response, select **Save Draft** to return to this and complete later.

Via email

Reply to the email as normal. Any responses sent via email will also be added to your ticket in the Customer Communication Platform.

Important: If you choose to copy someone into a ticket response sent via email, they will not see the initial ticket request, but they will be included in the correspondence. Please be aware that a copied in participant is unable to close a ticket.

To close a ticket

1. In **My Area**, click on the ticket you want to close.
2. At the bottom of the **Ticket Properties** panel, click on **Close Ticket**. A popup appears, asking you to confirm you want to close the ticket.
3. Click on **Yes**.