

# EYECARE PARTNERS

## ServiceNow Playbook

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Enhance Vision.  
Advance Eye Care.  
Improve Lives.



Director of Training for OPT  
Operations  
**Ashley Stritzel**



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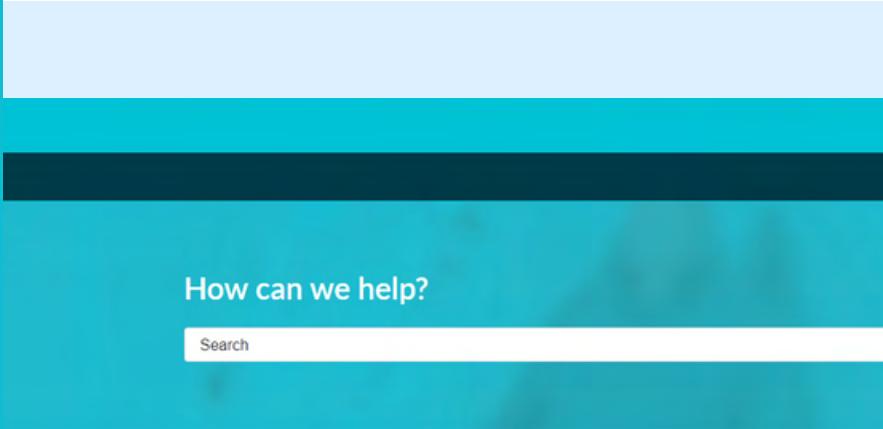
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## Learn about ServiceNow

ServiceNow is a platform that provides a more direct path to solve some common IT issues like password resets. Instead of calling or emailing the IT Help Desk to create a service ticket, you now have access to the ServiceNow portal which will provide information you need to solve your problem more quickly. With this portal you are able to create incidents, monitor progress and resolve incidents on your own. In the future, as an organization, we will have access to trending issues, knowledge articles and streamlined onboarding.

[Pre-Microsoft Migration ServiceNow Link](#)

A screenshot of the ServiceNow portal homepage. The top navigation bar is dark blue with the ServiceNow logo. Below the header, there is a light blue banner with the text "How can we help?". A search bar is located below the banner. The main content area has a teal background. On the left, there is a box for "Announcements" with the message "No information available". On the right, there is a "Quick links" section with three items: "System Status" (showing three people at a desk), "Password Reset" (showing a person at a desk), and "Create Incident" (showing a person holding glasses).

How can we help?

Search

Announcements

No information available

Quick links

System Status

Password Reset

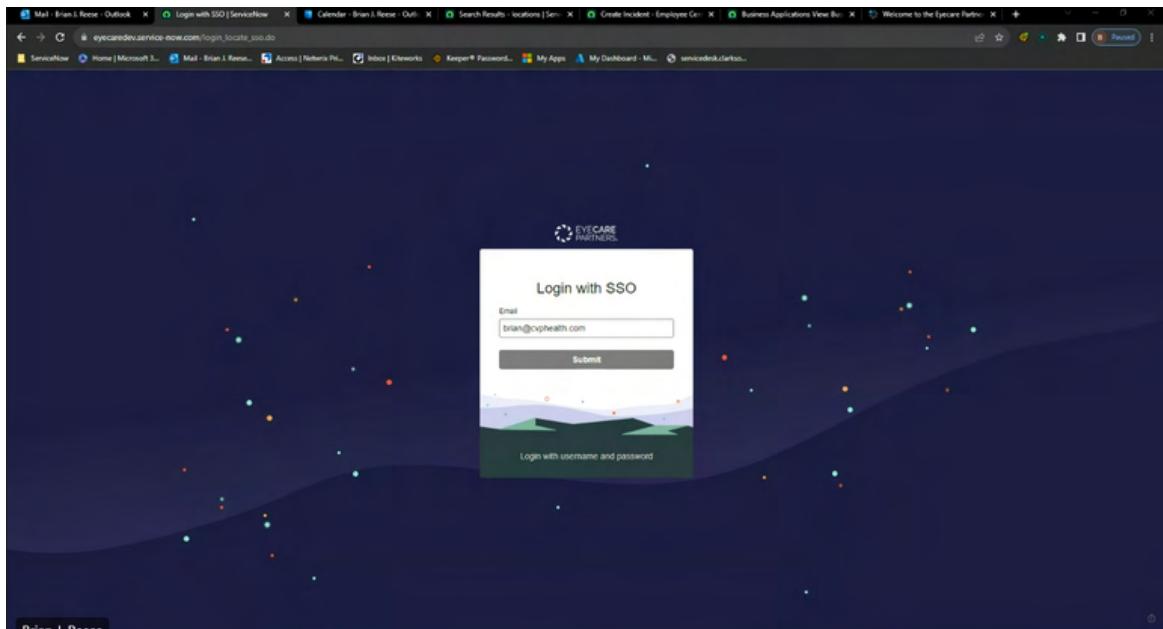
Create Incident



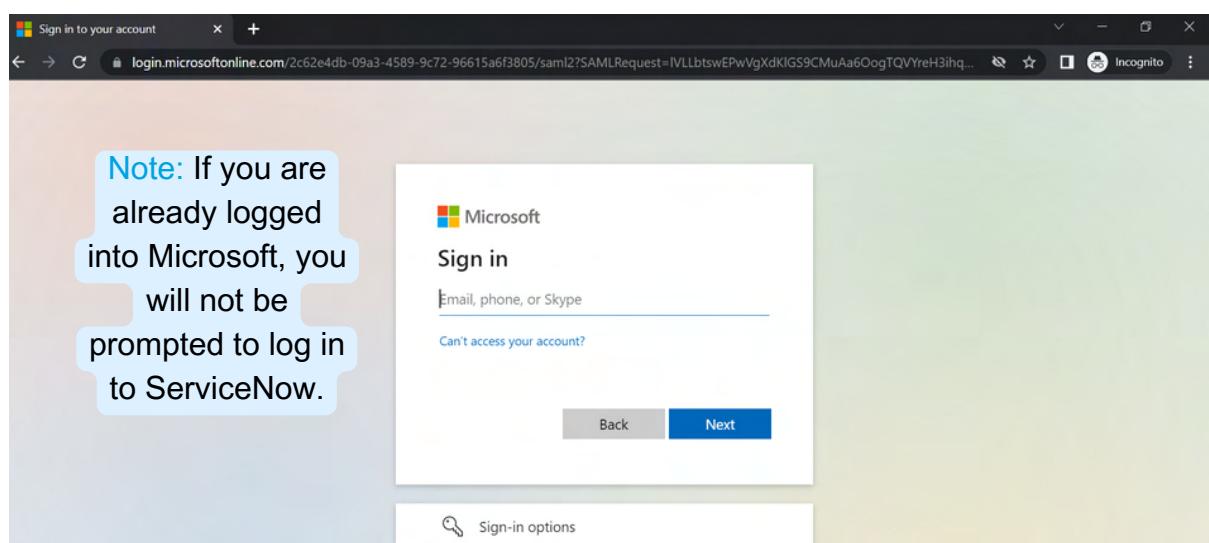
## Log In to ServiceNow via Web Address Pre Migration

**Step 1:** Navigate to [https://eyecaredev.service-now.com/login\\_locate\\_sso.do](https://eyecaredev.service-now.com/login_locate_sso.do)

**Step 2:** Enter your email address and select Submit.



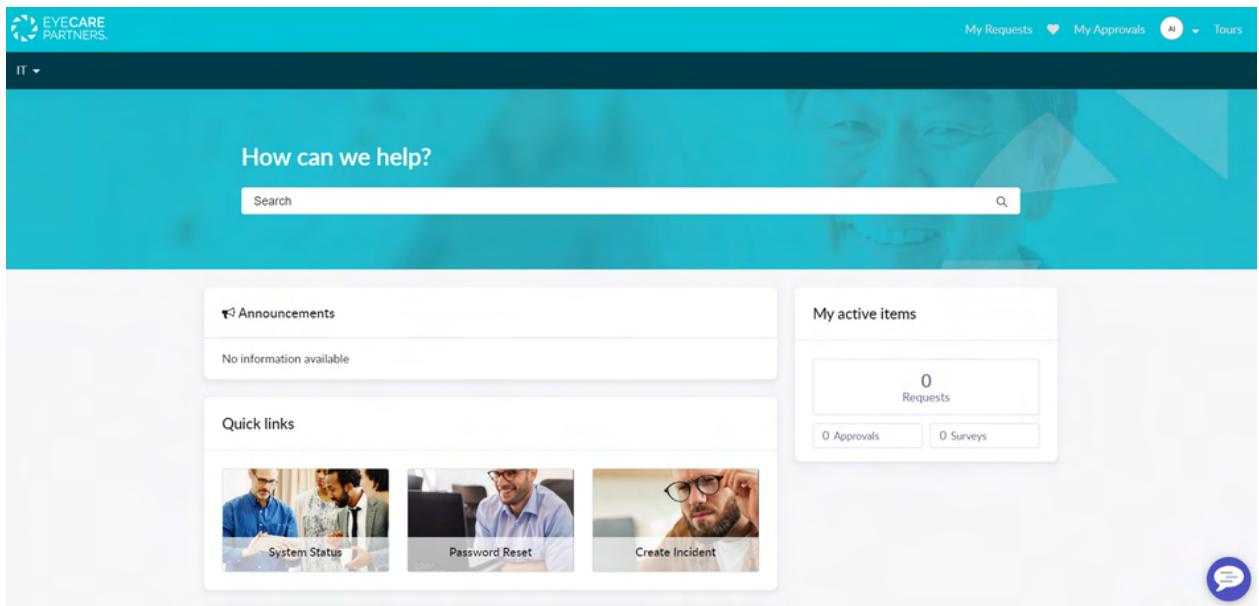
**Step 3:** Enter your Microsoft Credentials.



# ServiceNow Playbook - Log In



**Step 4:** You have successfully logged in when you see the ServiceNow homepage below.

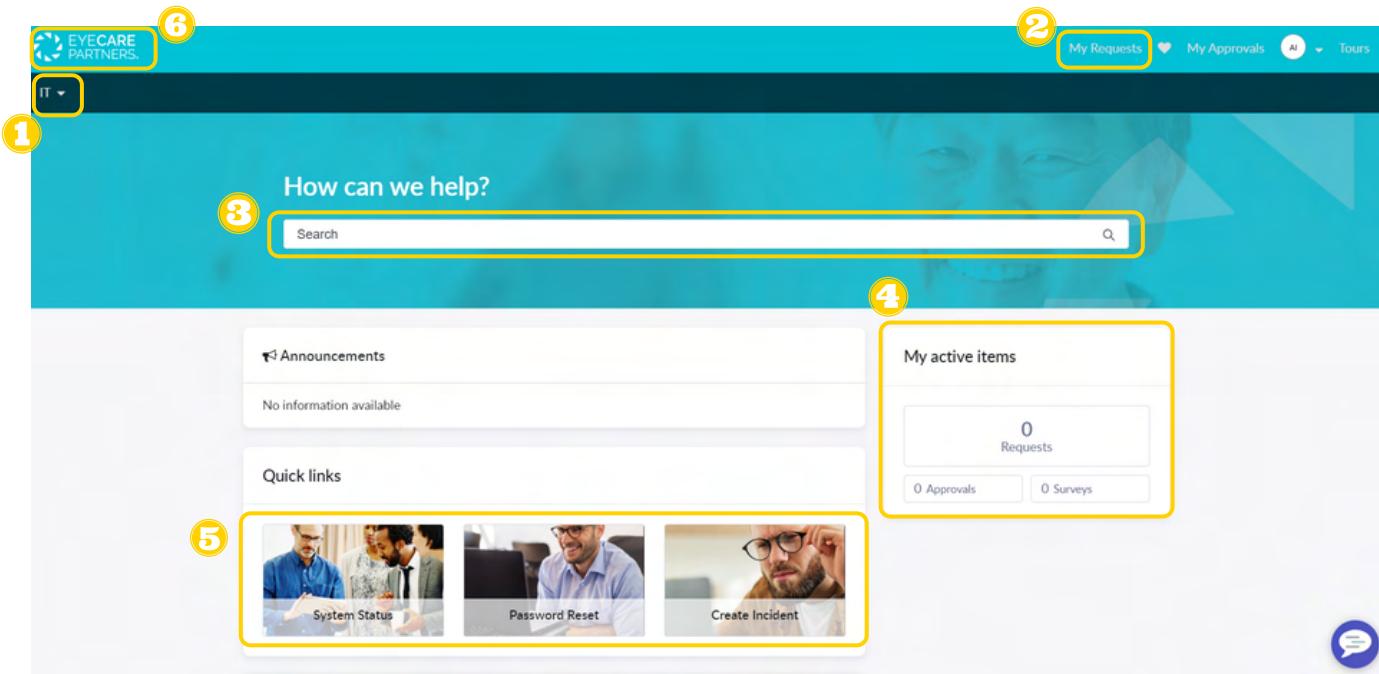


## Receive Error?

If you experience an immediate logout message, contact [servicenow@eyecare-partners.com](mailto:servicenow@eyecare-partners.com). The team will ensure that your ServiceNow credentials are corrected.



## Overview of Portal Homepage

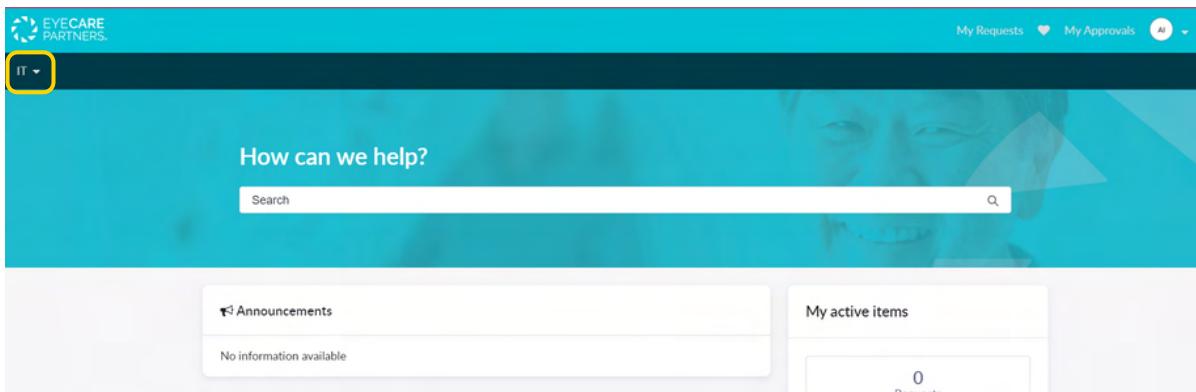


- ① IT drop down menu
- ② Select My Requests to view open and closed requests
- ③ Use the Search feature to locate what you are looking for
- ④ View open or closed requests
- ⑤ Quick links tiles are tailored to your frequent ticket submissions
- ⑥ Quickly navigate to the ServiceNow homepage by clicking the EyeCare Partners logo

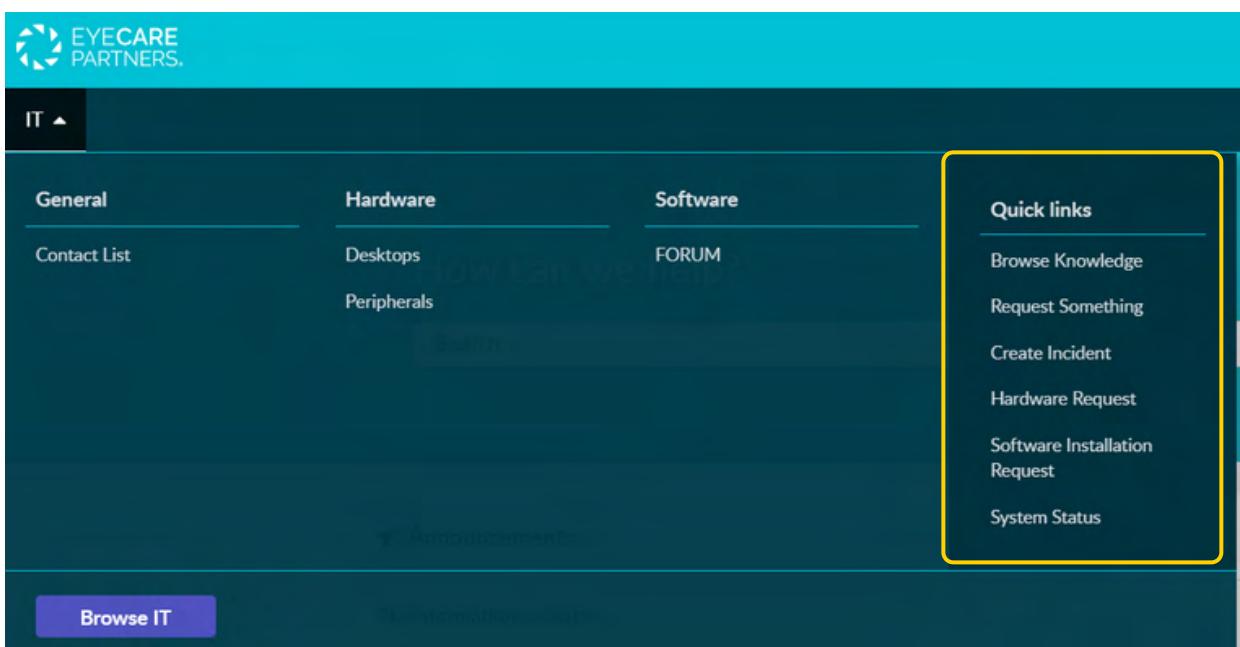


## Overview of Portal Homepage

Select the IT dropdown menu to browse all capabilities of the portal.



From this menu under the Quick Links column, you are able to order hardware, request hardware installation or check system status. *You will notice some of these links are located on the portal homepage.*

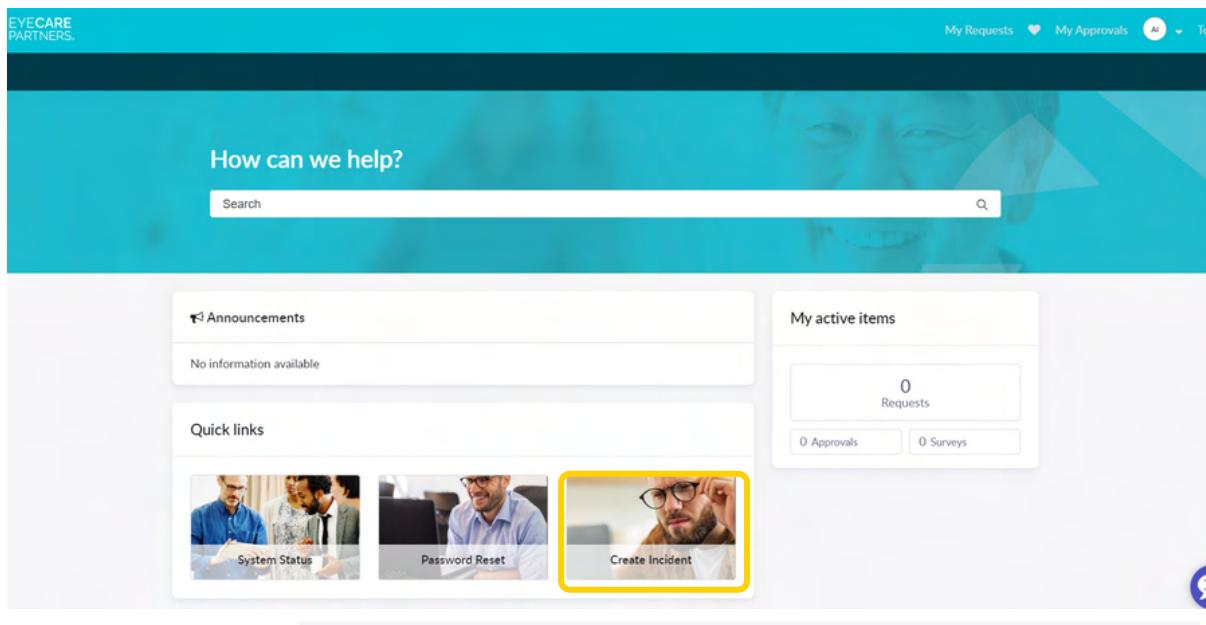


Be sure to log out of the ServiceNow portal each time for security.



## How to Create an Incident Ticket

To create an incident, locate the [Create Incident](#) tile on the portal homepage and select it.



Next, fill in all fields with an **\*** to provide necessary details. Select [Submit](#) after all required fields are filled. Tips on how to find location-see next page.

A screenshot of the 'Create Incident' form. The top right corner has a 'Submit' button highlighted with a yellow box. The form includes sections for 'Required information' (with fields for location, issue, and help type) and 'Additional information' (with fields for affected users and colleagues). Required fields are marked with an asterisk (\*). The 'Requested by' field is set to 'End User AI'. The 'On behalf of' field is also set to 'End User AI'. The 'Location' field is set to 'Americas'.

# ServiceNow Playbook - Creating an Incident



**Office Users-** Search by location name or address. If there are multiple options with the same address, choose the one that best fits your role in the organization. If there is only one option to select for a location, choose what is available. Matching the address is most important.

A screenshot of a search interface. A search bar at the top contains the text 'ellisv'. Below the search bar is a list of results. The first result is 'OPT Staff - Ellisville' with 'Ellisville' and '194 Clarkson Rd.' listed to its right. A magnifying glass icon is in the top right corner of the search bar.

Based on information provided by Dayforce, your location could potentially pre-populate based on your name. **Be sure that your location you are inquiring about is in the Location field.**

**Corporate Users-** If not automatically chosen for you, set your location to Corporate Region.

**Remote / Hybrid Users-** If not automatically chosen for you, set your location to Remote / Hybrid Region.

Once you select submit, you will be taken to the My Requests page. The incident will be routed to the correct department. At this time, there is no further action you need to take.

A screenshot of the ServiceNow My Requests page. At the top, it shows 'Home &gt; My Request - UR0010031'. Below this, the incident details are listed: Number UR0010031, Created 1m ago, Updated 1m ago, State In Progress. The description field contains the text 'I do not have login rights'. Below the description are fields for Caller (EUA), Impact (3 - Limited), Urgency (4 - Low), Service (Ambir), and Assignment group (Service Desk). A 'Actions' button is on the right. The Activity tab is selected, showing a message input field 'Type your message here...' and a 'Post' button. A message from 'End User AI' is shown: 'UR0010031 Created' at 1m ago. A 'Start' button is at the bottom left of the message area.



## Password Reset

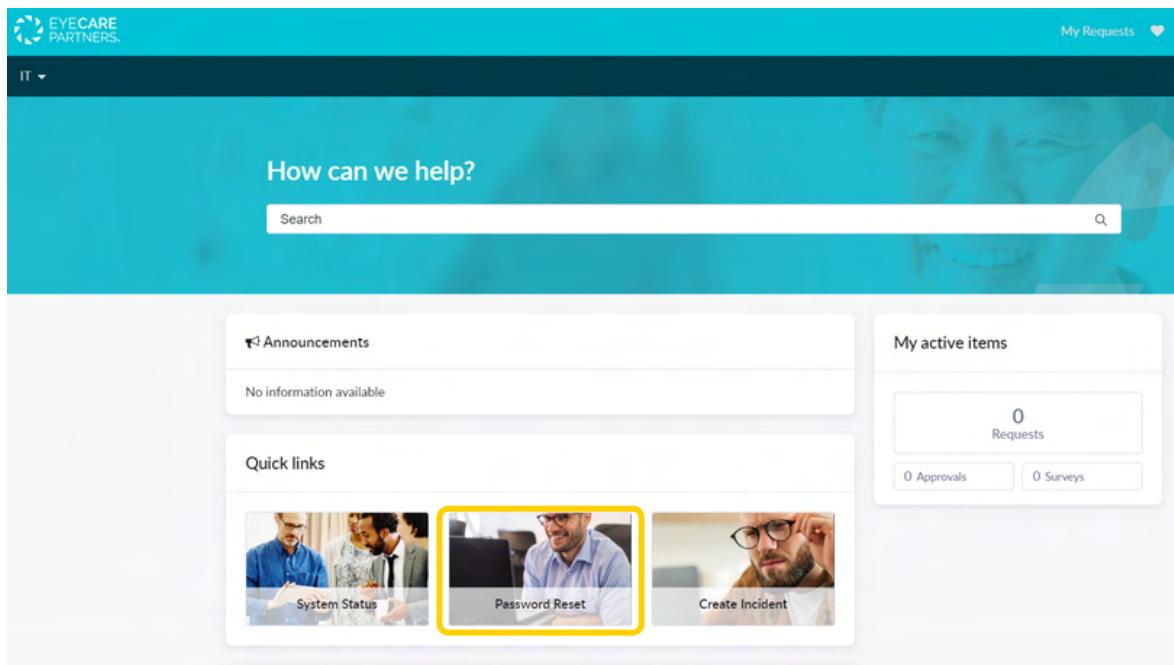
This means you have forgotten your password, cannot log in due to an incorrect login, or receive an incorrect password message or error. After being reset, you will need to create a new password for your account.

## Account Unlock

This means you are unable to access the account due to a lock-out message or error. After being unlocked, your password will not change.

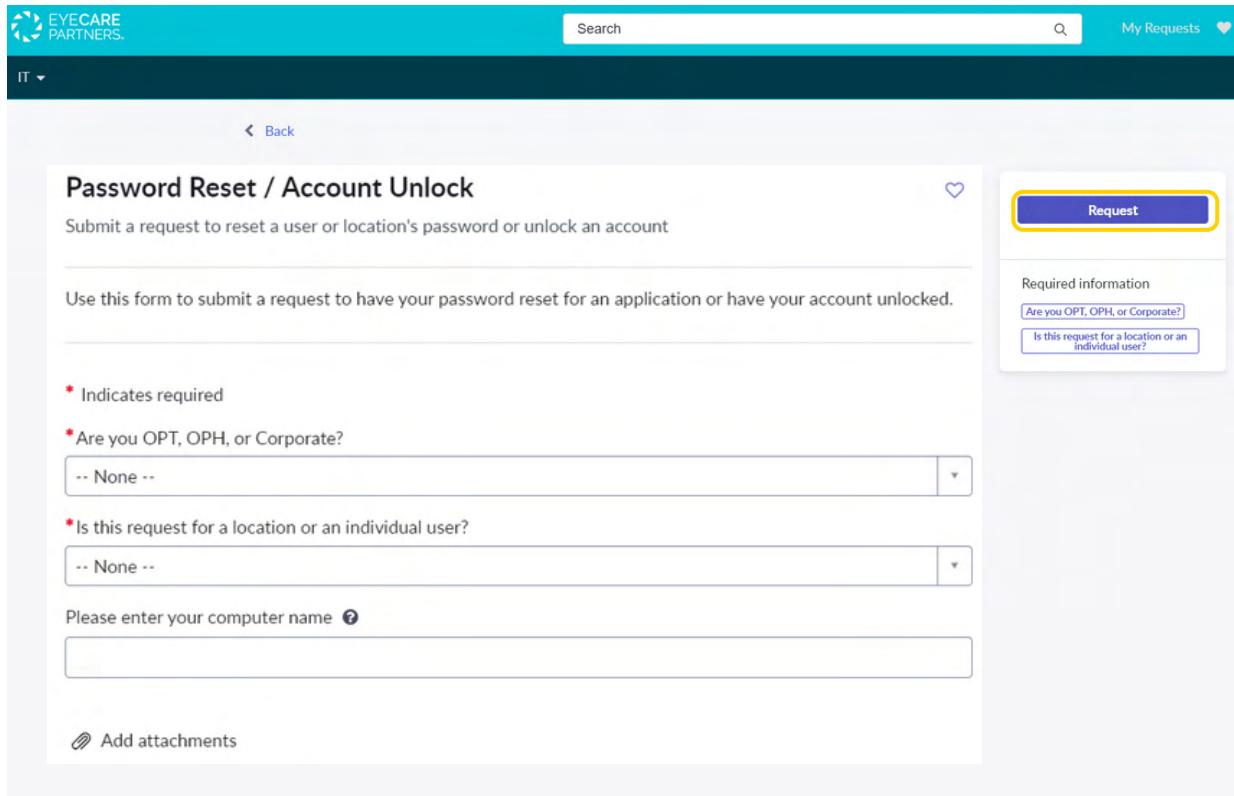
**Please Note:** Passwords not listed in the dropdown menu will need to be reset via established methods. (i.e. OPT insurance password resets will require users to complete the Password Inquiry form.)

Once you determined a password reset is required, login to the ServiceNow portal and select the Password Reset tile or type password reset in the search bar.





Once selected, you will be directed to the screen below. Fill in the required fields with an **\***. The computer name can be found using the question mark (?) on the right side of the question.

A screenshot of a ServiceNow web interface for a 'Password Reset / Account Unlock' request. The top navigation bar includes the EYECARE PARTNERS logo, a search bar, and 'My Requests'. A dropdown menu shows 'IT'. Below the header, a back arrow and the title 'Password Reset / Account Unlock' are visible. A sub-instruction 'Submit a request to reset a user or location's password or unlock an account' is present. The main content area contains several required fields marked with an asterisk (\*): 'Are you OPT, OPH, or Corporate?' (dropdown with 'None' selected), 'Is this request for a location or an individual user?' (dropdown with 'None' selected), and 'Please enter your computer name' (text input field with a question mark icon). A 'Request' button is highlighted with a yellow border on the right side of the form. A sidebar on the right is titled 'Required information' and lists 'Are you OPT, OPH, or Corporate?' and 'Is this request for a location or an individual user?'.

After entering the information, select the request button on the right side of the screen to submit the request.



## Checking Ticket Status & Resolving a Ticket

After a ticket has been submitted, you are able to check the ticket status. To do so, select the My Requests located at the top right on the portal homepage.

A screenshot of the ServiceNow homepage for EYECARE PARTNERS. The top navigation bar is teal with the company logo and the text 'EYECARE PARTNERS'. On the right side of the bar, there are three buttons: 'My Requests' (highlighted with a yellow box), 'My Approvals', and 'My Approvals'. Below the bar, a large blue banner features the text 'How can we help?' and a search bar. The main content area has a light gray background. On the left, there's a box for 'Announcements' with the sub-section 'Quick links' containing three buttons: 'System Status', 'Password Reset', and 'Create Incident'. On the right, there's a box for 'My active items' showing '0 Requests', '0 Approvals', and '0 Surveys'. The overall layout is clean and professional.

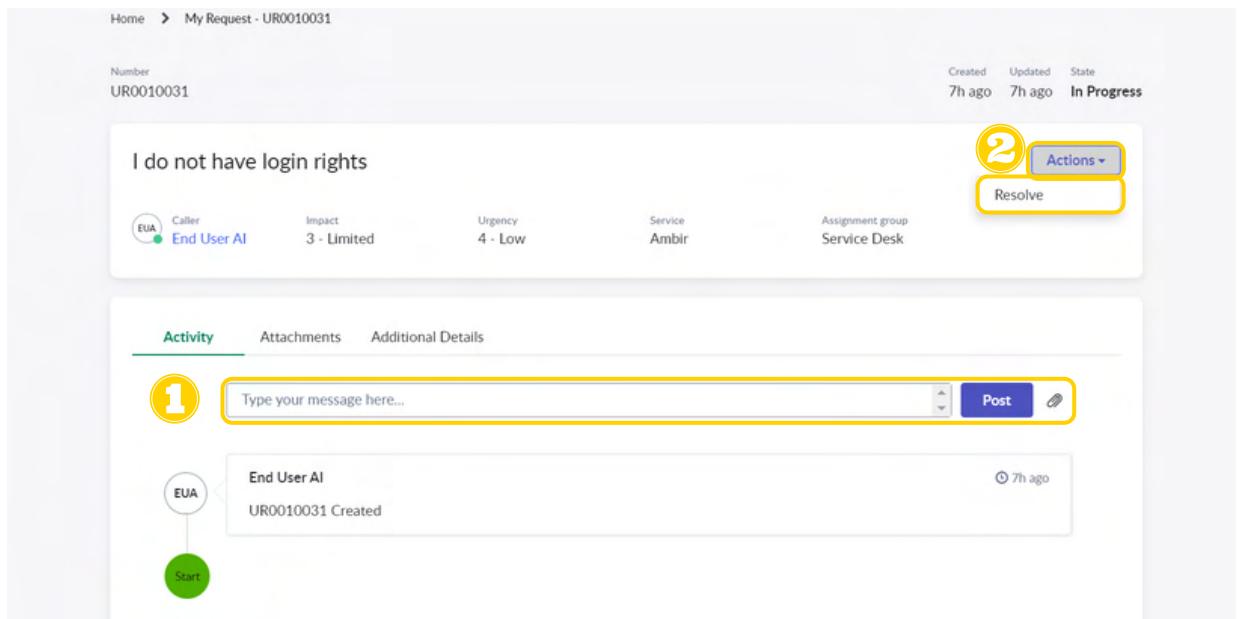
Once you select My Requests, you will see the page below. Select the ticket status you wish to view.

A screenshot of the 'My Requests' page in ServiceNow. The top navigation bar is teal with the company logo and the text 'EYECARE PARTNERS'. On the right side of the bar, there are three buttons: 'My Requests' (highlighted with a yellow box), 'My Approvals', and 'My Approvals'. Below the bar, the page title is 'My Requests'. There are two buttons: 'View' (set to 'Open requests') and 'Search open requests'. The main content area is a table with three columns: 'Request', 'State', and 'Updated'. The first row in the table is highlighted with a yellow box. The table data is as follows:

# ServiceNow Playbook - Checking Ticket Status



After selecting the ticket, the screen below will be shown. You can view the activity and type a message to the IT team if needed.

A screenshot of a ServiceNow ticket detail page. The top navigation shows 'Home > My Request - UR0010031'. The ticket number is UR0010031, and the status is 'In Progress'. The creation and update times are both 7h ago. The ticket details include: Caller (EUA End User AI), Impact (3 - Limited), Urgency (4 - Low), Service (Ambir), and Assignment group (Service Desk). A yellow callout '1' points to the message input field, and another yellow callout '2' points to the 'Resolve' button in the 'Actions' dropdown. The activity feed shows a message from 'End User AI' stating 'UR0010031 Created' at 7h ago. The activity tab is selected, and other tabs for 'Attachments' and 'Additional Details' are visible.

If the incident resolves prior to IT working the ticket, you can resolve the ticket yourself. Select Actions, then Resolve. Once you have indicated the problem has been resolved, there will be no further action taken on the ticket.



## Knowledge Articles

Knowledge articles are resources in the portal to help troubleshoot issues such as password error messages that contain codes. You may see these articles pop up when you use the search feature in the portal. View the article to determine if you are able to fix the issue yourself prior to completing the IT ticket request.

Keep in mind that as we use the ServiceNow portal, the knowledge articles will grow with the inquiries and tickets we create.

## Addendum

As ECP continues to evolve, so will this platform. There will be additional knowledge articles, streamlined onboarding, functions and request capability. The ultimate goal is to provide you one universal system to satisfy many needs across the organization.

After reviewing the information in this document, if you still need support please call the helpdesk at 877-500-4015.

Network/E360 or other practice management system outages that require immediate attention should be called into the IT Helpdesk to ensure the highest priority and quickest resolution.

**Note:** Existing tickets will still be worked using the current IT Helpdesk email until resolved. If unable to submit a ticket within ServiceNow, new incidents can be emailed to [servicenow@eyecare-partners.com](mailto:servicenow@eyecare-partners.com) or submitted via phone.