

**VA ServiceNow Customer Service Management (CSM)  
Application User Guide  
Case Submission and Management**



**November 2020**

**Department of Veterans Affairs  
Office of Information and Technology (OI&T)**

## Revision History

NOTE: The revision history cycle begins once changes or enhancements are requested after the document has been baselined.

| Date       | Revision | Description                                        | Author                                      |
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# 1. Introduction

## 1.1. Purpose

As of November 19, 2020, VA will be migrating all help desk and support services to the ServiceNow Customer Service Management (CSM) application. Users that access the following VA applications will now **report all Technical and Policy inquiries directly into the ServiceNow tool.**

- WebLGY (FFPS and SAH)
- LGYHub
- VA Loan Electronic Reporting Interface (VALERI)
- VALERI Servicer Web Portal (SWP)

This user guide will provide information on how to navigate the ServiceNow CSM application.

## 1.2. Document Orientation

This section describes the orientation of the document.

### 1.2.1. Organization of the Manual

This guide supports the following user types:

- VA Employees that possess a Personal Identification Verification (PIV) Card
- Non-VA Employees that access VA systems using ID.Me/AccessVA
- Guest Users

### 1.2.2. Assumptions

In creating this guide, we assumed the following experience/skills of the audience:

- User has basic knowledge and access to the following systems:
  - WebLGY
  - LGYHub
  - VALERI
  - VALERI Servicer Web Portal
  - FFPS
  - SAH

### 1.2.3. Disclaimers

We provide the following standard VA disclaimers “as written.”

- This user guide is not intended to diagnose system issues or problems in any of the VA applications that will integrate with ServiceNow.

- This user guide will contain basic navigational features of ServiceNow and will not be able to cover every possible Help Desk request scenario.

### 1.2.3.1. Documentation Disclaimer

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of VA.

### 1.2.4. Documentation Conventions

Various symbols are used throughout the documentation to alert the reader to special information. The following table gives a description of each of these symbols:

**Figure 1-1 Documentation Symbols and Descriptions**

|                                                                                   |                                                                                                                               |
|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
|  | Contains supplementary information about a step or process.                                                                   |
|  | Contains cautionary information about a step or process; usually a clarifying statement to assist a user with step execution. |
|  | Indicates highly important information that is critical to a step or process.                                                 |

### 1.2.5. References and Resources

The documents associated with this software are maintained on the VA website: <https://yourit.va.gov/va>

## 2. System Summary

ServiceNow will provide the following benefits to VA system users:

- Access to external users – Previous help desk tools have limited case submissions to only internal VA resources. ServiceNow will allow external users to submit case, eliminating the need to utilize e-mail or other workaround processes.
- Improved communication – Help desk technicians will be able to directly communicate with end-users via the ServiceNow tool.
- Improved customer experience – End-users will be able to view status and progress of their cases. User can now get real time data and see the status of their case.
- Improved reporting – ServiceNow will allow VA to set up dashboards with live data to provide real time performance metrics.
- Improved operations – ServiceNow allows us to automate more processes, allowing a streamlined process for managing help desk requests.

## 2.1. User Access Levels

| User Type                                | Characteristics                                                                                     | Specific Permissions                                                                                                                                                                                                                                                                               |
|------------------------------------------|-----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Registered User (VA Employee)</b>     | User can access VA applications via their PIV Card                                                  | <ul style="list-style-type: none"><li>▪ Can access ServiceNow while logged into a VA application</li><li>▪ Can submit a case</li><li>▪ Can log in to view and respond to submitted cases</li><li>▪ Can respond to a case via e-mail</li><li>▪ Can submit a case on someone else's behalf</li></ul> |
| <b>Registered User (non-VA Employee)</b> | User can access VA applications via their ID.Me/AccessVA account                                    | <ul style="list-style-type: none"><li>▪ Can access ServiceNow while logged into a VA application</li><li>▪ Can submit a case</li><li>▪ Can log in to view and respond to submitted cases</li><li>▪ Can respond to a case via e-mail</li><li>▪ Can submit a case on someone else's behalf</li></ul> |
| <b>Guest User</b>                        | User logs into LGY applications not using ID.ME/AccessVA or does not have access to VA applications | <ul style="list-style-type: none"><li>▪ Can submit a case on the ServiceNow website as a guest user</li><li>▪ Can submit a case on someone else's behalf</li><li>▪ Can respond to a case via e-mail</li></ul>                                                                                      |

## 3. System Access

This section provides a general walkthrough of the system. The logical arrangement of the information is intended to assist users to understand the sequence and flow of the system.

### 3.1. Accessing ServiceNow (Registered User)

#### 3.1.1. Access ServiceNow via VALERI

 The following instructions assume that the user is able to log into the VALERI application using a Personal Identification Verification (PIV) card. If the user unable to log into the VALERI application, please see section, ***Access ServiceNow as a Guest User.***

1. Log into the **VALERI** application.
2. Navigate to the **VALERI Home page**.
3. In **Announcements**, locate the message regarding the implementation of ServiceNow.

4. Select the link in the message to open the ServiceNow application.
5. ServiceNow will authenticate the user and profile information will be displayed in the corner of the home screen.

### 3.1.2. Access ServiceNow via VALERI Servicer Web Portal

 The following instructions assume that the user is able to log into the VALERI Servicer Web Portal application using their ID.Me/AccessVA account. If the user is unable to log into the VALERI Servicer Web Portal application, please see section, ***Access ServiceNow as a Guest User.***

6. Log into the **VALERI Servicer Web Portal** using ID.Me/AccessVA.
7. Navigate to the VALERI Servicer Web Portal Home page.
8. In Announcements, locate the message regarding the implementation of ServiceNow.
9. Select the link in the message to open the ServiceNow application.
10. ServiceNow will authenticate the user and profile information will be displayed in the corner of the home screen.

### 3.1.3. Access ServiceNow via WebLGY or LGYHub (Internal VA Employees)

 The following instructions assume that the user is able to log into the WebLGY application using a Personal Identification Verification (PIV) card. If the user unable to log into the WebLGY application, please see section, ***Access ServiceNow as a Guest User.***

11. Log into WebLGY or LGYHub.
12. From the Home page, select Help.
13. Navigate to the bottom of the Help page.
14. Select Submit a Case.

### 3.1.4. Access ServiceNow via WebLGY or LGYHub (Non-VA Employees)

 The following instructions assume that the user is able to log into the LGYHub application using their ID.Me/AccessVA account or a Personal Identification Verification (PIV) card. If the user is unable to log into the LGYHub, please see section, ***Access ServiceNow as a Guest User.***

15. Log into the LGYHub using either ID.Me/AccessVA or a PIV card.
16. From the Home page, select Help.
17. Navigate to the bottom of the Help page.

18. Select Get Help.

### 3.1.5. Access ServiceNow as a Guest User

 The following instructions assume that the user is not able to log into any VA applications (WebLGY, LGY Hub, VALERI, and VALERI Servicer Web Portal) using their ID.Me/AccessVA account or a Personal Identification Verification (PIV) card.

19. Select the [link](#) to access the ServiceNow application.

## 4. Report an Issue (Submit a Case)

The instructions below will guide users on how to reach out to the VA Help Desk using the ServiceNow CSM application.

1. Users that are able to log into the desired application (VALERI, VALERI Servicer Web Portal, WebLGY or LGY Hub) will submit a case as a Registered User. These users include the following:
  - VA Internal Users logging in via Access VA
  - External VA partners logging in via Access VA
2. If the user is having trouble logging in or does not currently have access to any of those VA applications, the user will submit a case as a Guest User.

### 4.1. Submit a Case (Registered Users)

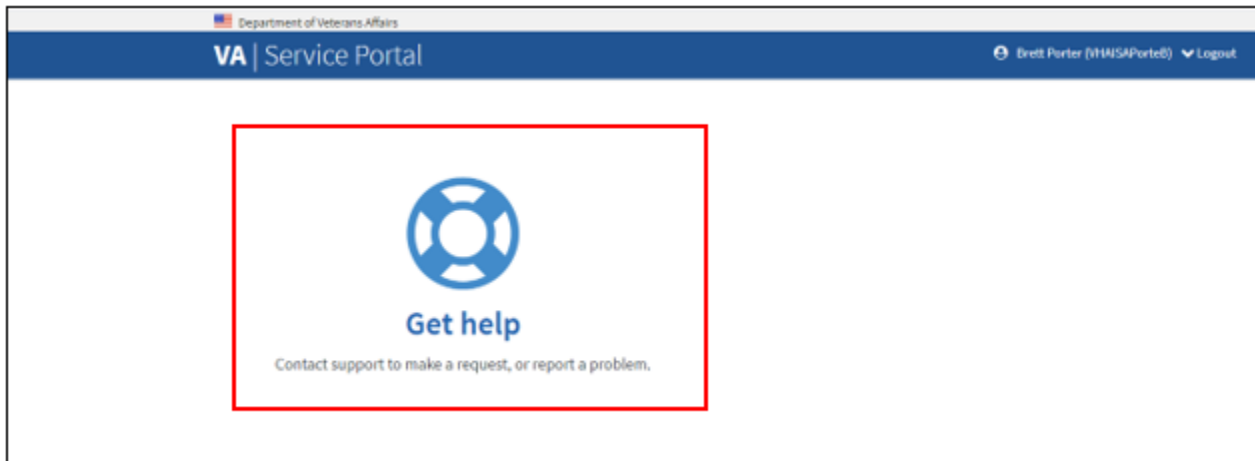
To submit a case as a Registered User, the user must be logged into ServiceNow through one of the following VA applications via PIV card or ID.Me/AccessVA:

- VALERI
- VALERI Servicer Web Portal
- WebLGY
- LGYHub

 For specific information on how to access ServiceNow, please see: ***Accessing ServiceNow.***

3. From the ServiceNow Home Page, select **Get Help**.

Figure 4-1: Link to Create a Case on the ServiceNow Home Page



4. The system will display the **Registered User LGY Support** form.

Figure 4-2: Registered User LGY Support Form

The screenshot shows the 'Registered User LGY Support' form. The title 'Registered User LGY Support' is at the top left. Below it is a subtitle 'Create a Case record to report and ask for assistance with an issue you are having'. A paragraph of text explains that no Personal Identifiable Information (PII) should be entered into any ticket, with examples like Email, Phone Number, Organization, Address, SSN, etc. and a link to the VA's Privacy Service website. The form has several sections: 'Opened By' with a dropdown menu showing 'Brett Porter (VHAISAPorteB)'; 'Email' and 'Phone' fields with text inputs; a question 'Are you having trouble logging in or registering for a VA LGY Product (VALERI, LGYHub, FFPS)?' with a dropdown menu; a section for 'What is your role/affiliation with VA Loan Guaranty Systems?' with fields for 'Affiliate ID', 'Organization', and 'Is there sensitive information?'; a question 'What product are you trying to access or have experienced a problem with?' with a dropdown menu; a 'Browser' field; and a 'Description' field. On the right side of the form, there is a 'Submit' button and a 'Required information' section with a list of questions: 'What is your role/affiliation with VA Loan Guaranty Systems?', 'Organization', and 'What product are you trying to access or have experienced a problem with?'. At the bottom right, there is a link to 'Add attachments'.

5. The system will auto-populate the following fields:

- **Name**
- **Email**
- **Phone**
- **Affiliate ID (Only if provided in LGYHUB)**
- **Role Type (Only if provided LGYHUB)**

Figure 4-3: Submit a Case - Auto-Populated Fields

Opened By

Brett Porter (VHAISAPorteB)

Email

Brett.Porter2@va.gov

Phone

(703) 389-2070

\* Are you having trouble logging in or registering for a VA LGY Product (VALERI, LGYHub, FFPS)?

No, I'm logged in but have another issue

\* What is your role/affiliation with VA Loan Guaranty Systems?

VA Central Office

Affiliate ID

123456

6. User must complete the following fields:

- **Are you having trouble logging in or registering for a VA LGY Product?** (Drop-down list of options)
- **Role** (This will be a required field if it did not auto-populate)
- **Affiliate ID** (Optional free text if it did not auto-populate)
- **Organization** (Free Text)
- **Is there sensitive information?** (Drop-down list of options)



No Personal Identifiable Information (PII) should be entered into a case.

- **What product are you trying to access or have experienced a problem with?** (Drop-down list of options)



Depending on the selection in the question above, a second required field, **Category**, may display.

- **Description** (Text field, max 4000 characters)

7. Select **Add Attachments** (optional) to upload any supporting documentation.

Figure 4-4: Submit a Case - Required Fields

The screenshot shows a web form titled "Submit a Case". At the top, there are two input fields: "VA Eauth SecID" and "Authentication Mechanism". Below these, a large red rectangular box highlights the "Required information" section. This section contains several fields, each with an asterisk indicating it is required:

- \*What is your role/affiliation with VA Loan Guaranty Systems? (Text input)
- \*Are you having trouble logging in or registering for a VA LGY Product (VALERI, LGYHub, FFPS)? (Dropdown menu, currently showing "-- None --")
- \*Organization (Text input)
- \*Is there sensitive information? (Dropdown menu, currently showing "-- None --")
- \*What product are you trying to access or have experienced a problem with? (Dropdown menu, currently showing "VALERI")
- \*Category (Dropdown menu, currently showing "-- None --")
- \*Description (Text input)

To the right of the form, a blue box with an arrow pointing to the required fields contains the text: "Required fields that must be completed by the user." Below the form, there is a red box around the "Add attachments" link, with a blue arrow pointing to it from a box that says "Attachments are optional".

8. Select **Submit**.

Figure 4-5: Submit a Case – Submit Button

The screenshot shows the "Registered User LGY Support" page. At the top, there is a navigation bar with links: "Create Case", "Case", "Support", "Tours", "Live Chat", and "Help". Below the navigation bar, there is a search bar and a breadcrumb trail: "Home > Customer Service > Support > Registered User LGY Support". The main content area is titled "Registered User LGY Support" and includes a sub-header "Create a Case record to report and ask for assistance with an issue you are having". Below this, there is a warning about Personal Identifiable Information (PII) and a link to the VA's Privacy Service website. The form fields are organized into two columns:

- Left column: Name (with a dropdown arrow), Phone, VA Eauth SecID.
- Right column: Email (with a dropdown arrow), Affiliate ID, Authentication Mechanism.

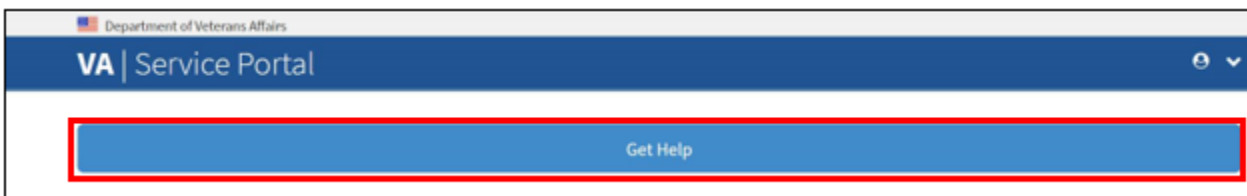
Below the form fields, there is a red box around the "Submit" button, with a blue arrow pointing to it from a box that says "Select Submit". To the right of the form, there is a "Required information" section with a dropdown menu showing "What is your role/affiliation with VA Lo...".

 The system will accept the case submission and display a confirmation message.

## 4.2. Submit a Case (Guest Users)

9. From the [ServiceNow Home Page](#), select **Get Help**.

Figure 4-6: Link to Create a Case on the ServiceNow Home Page



10. The system will display the **Customer Service Case Form**.

**Figure 4-7: Customer Service Case Form**

Submit a Case

If you want to contact us, please fill out the form below.

First Name Last Name

Email Phone Number

Are you having trouble logging in or registering for a VA LGY Product (VALERI, LGYHub, ...)

Please select one role that is associated to the issue you are reporting. For any additional roles, please include that information in the detail description of your issue.

What is your role/affiliation with VA Loan ...

Organization Affiliate ID

What product are you trying to access or have experienced a problem with?

Browser

Please give us a detailed description of your issue, so we can get you adequate help.

Create Case

11. User must complete the following fields:

- **First Name** (*Required Text field*)
- **Last Name** (*Required Text field*)
- **Email** (*Required Text field*)
  - ❗ Users should ensure that contact information is accurate as technicians will use the contact information provided for case resolution.
- **Phone Number** (*Required Numeric field*)
- **Are you having trouble logging in or registering for a VA LGY Product?** (*Drop-down list of options*)

-  Users can only select one product. If the user has multiple product issues, then this information should be provided in the detailed description text field.
  - **What is your role/affiliation with VA Loan Guaranty Systems?** *(Drop-down list of options)*
    -  Users can only select one role/affiliation. If the user has multiple roles, then this information should be provided in the detailed description text field.
  - **Organization** *(Optional Text Field)*
  - **Affiliate ID** *(Optional Text Field)*
  - **What product are your trying to access or have experienced a problem with?** *(Drop-down list of options)*
  - **Please select the appropriate product category.** *(Drop-down list of options)*
  - **Browser** *(Optional Text Field)*
  - **Please give us a detailed description of your issue, so we can get you adequate help.**  
*(Text field, max 4000 characters)*
    -  Users can provide additional details regarding role/affiliation and products in the detailed description text field.
12. Select **Create Case**.
-  The system will accept the case submission and display a confirmation message.

**Figure 4-8: Confirmation Message of Case Submission**

Submit a Case

If you want to contact us, please fill out the form below.

John Doe

John.Doe@va.gov 555-555-5555

No, I'm logged in but have another issue

Please select one role that is associated to the issue you are reporting. For any additional roles, please include that information in the detail description of your issue.

Servicer

Bank of America 12345

VALERI

Access Issue

Chrome

Test

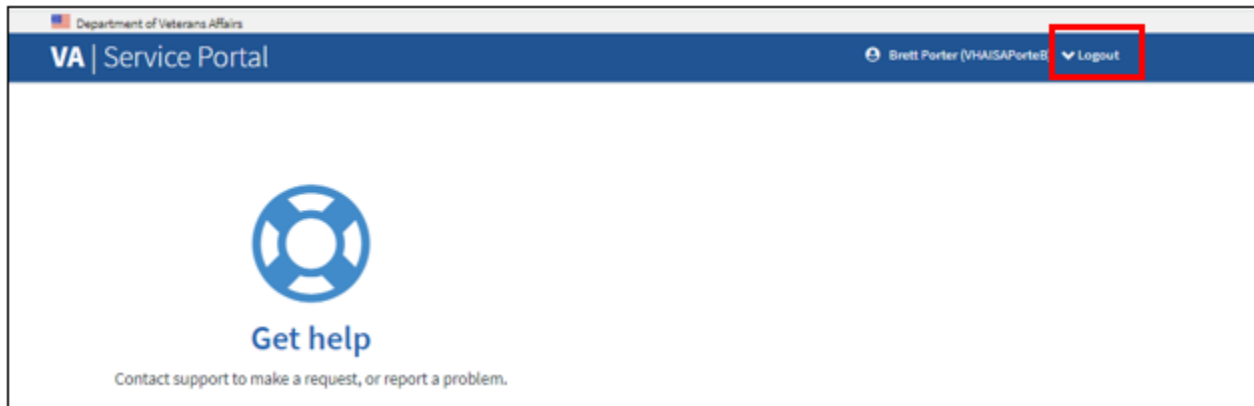
Thank you! Your Case CS0001717 has been submitted. [Create Another Case](#)

### 4.3. Exit System

13. Select the User Icon in the corner of any ServiceNow page.
14. Select Log Out or exit the screen.

❗ A logout option will not be available for Guest users.

Figure 4-9: ServiceNow - Log Out



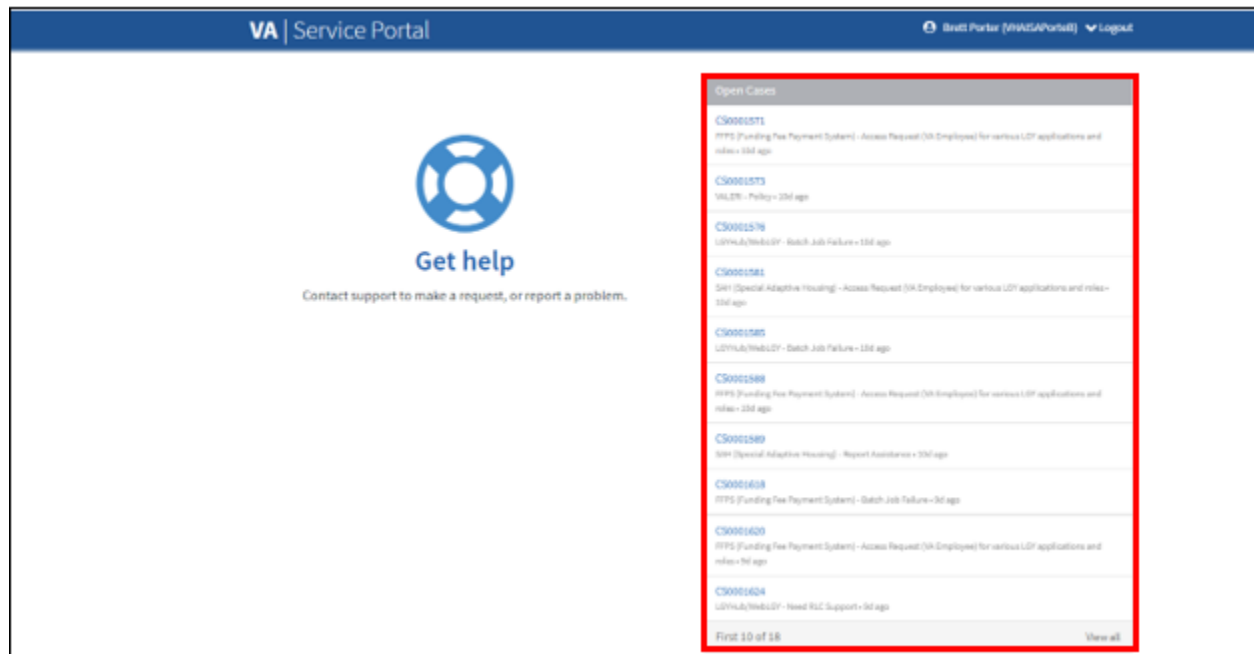
## 5. View Previous Case Submissions / Case Management

### 5.1. Access ServiceNow to View a Case (Registered User)

 Guest Users will not have access to the functionality outlined in the following section. This section is only applicable to users logged into the VALERI Servicer Web Portal application using their ID.Me/AccessVA account.

1. From the ServiceNow Home page, your open cases will display.

Figure 5-1: Access Cases from the Home Page



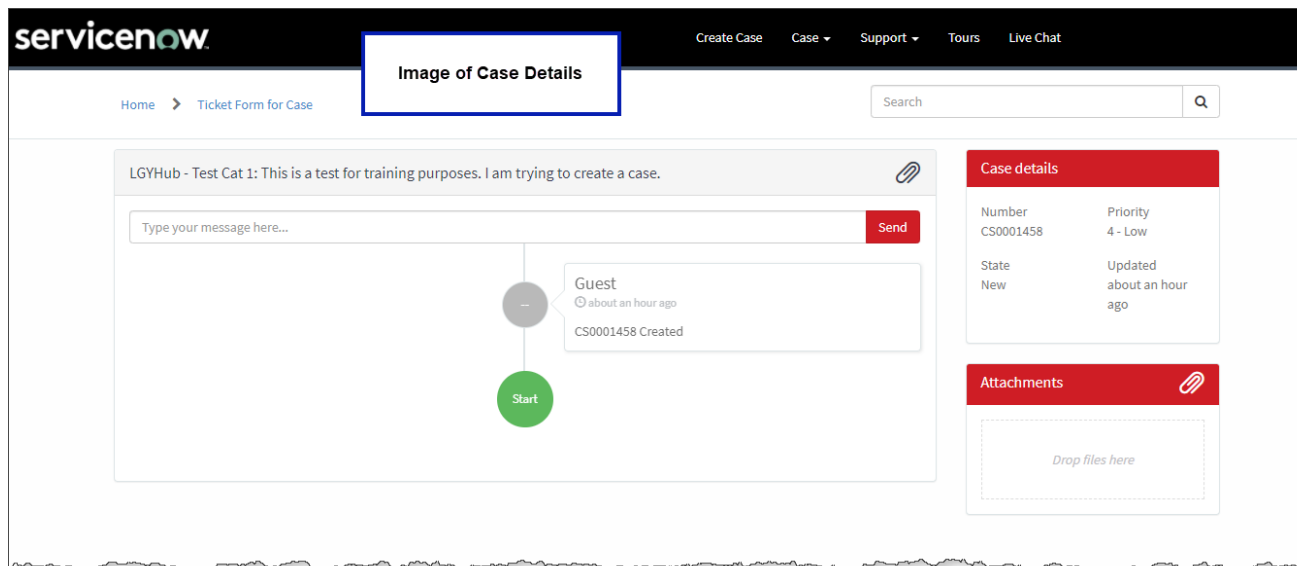
2. Select the **Case** link to view the case.

**Figure 5-2: Select Case Number to View Case Details**

| Open Cases                |                                                                                                                   |
|---------------------------|-------------------------------------------------------------------------------------------------------------------|
| <a href="#">CS0001571</a> | FFPS (Funding Fee Payment System) - Access Request (VA Employee) for various LGY applications and roles • 10d ago |
| <a href="#">CS0001573</a> | VALERI - Policy • 10d ago                                                                                         |
| <a href="#">CS0001576</a> | LGYHub/WebLGY - Batch Job Failure • 10d ago                                                                       |
| <a href="#">CS0001581</a> | SAH (Special Adaptive Housing) - Access Request (VA Employee) for various LGY applications and roles • 10d ago    |
| <a href="#">CS0001585</a> | LGYHub/WebLGY - Batch Job Failure • 10d ago                                                                       |
| <a href="#">CS0001588</a> | FFPS (Funding Fee Payment System) - Access Request (VA Employee) for various LGY applications and roles • 10d ago |

3. **Case Details** will display.

Figure 5-3: Image of the Case Details Screen

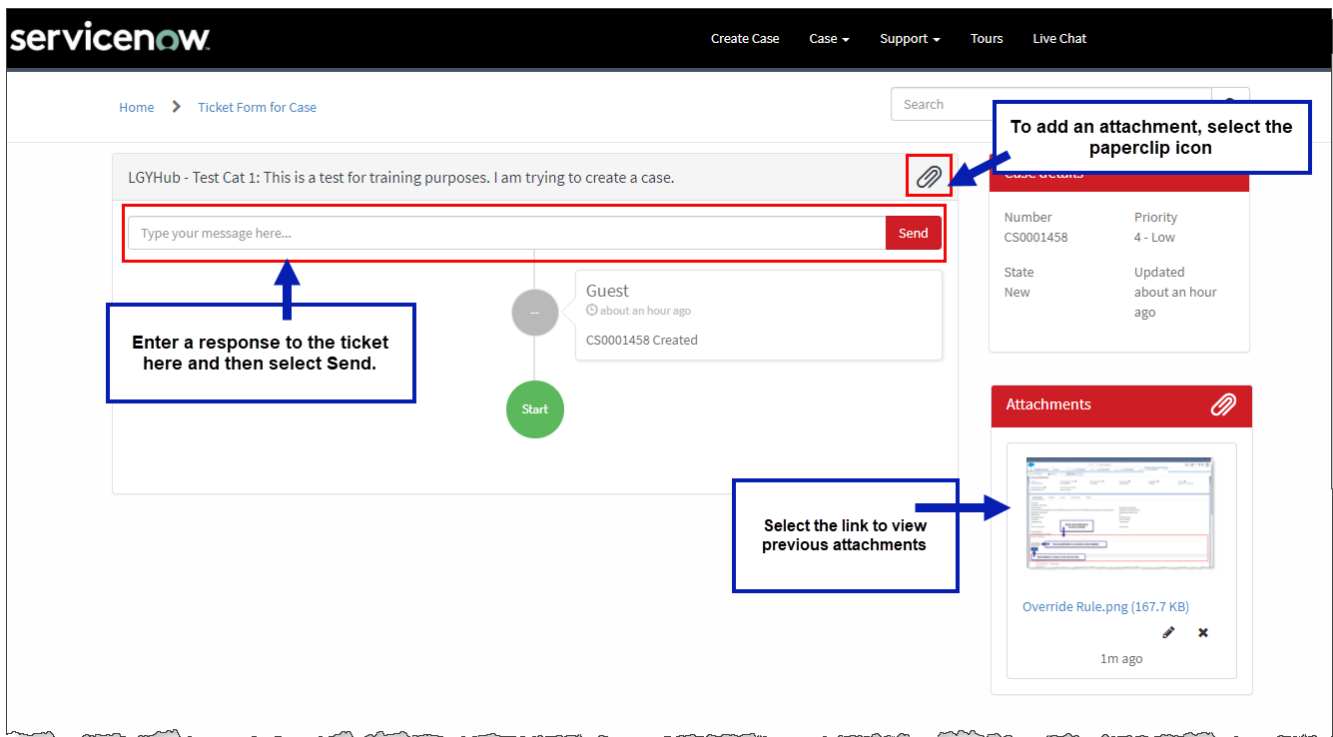


## 5.2. Respond to a Case (Registered User)

4. From the Case Details screen, enter a response in the field, **“Type your message here”**

**i** See section, **Access ServiceNow to View a Case** to open a case.

Figure 5-4: Respond to a Case on the Case Details Screen



**i** To add an **Attachment**, select the paperclip icon.

5. Select **Send**.

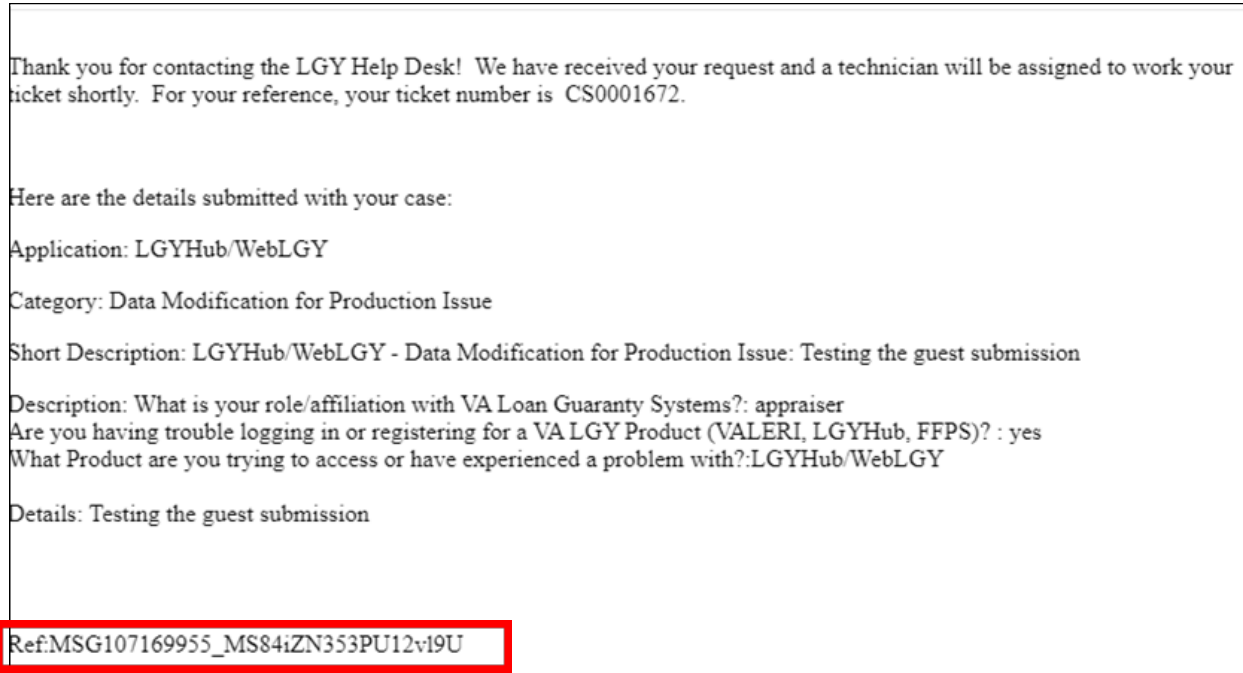
### 5.3. Respond to a Case via Email

Both Registered and Guest Users can respond to technicians via email.

6. Users receive automated emails after a case is submitted and whenever a technician updates details about the case
7. The automated email will be sent from [YourIT@va.gov](mailto:YourIT@va.gov)

**i** **Watermark** – The watermark will be located at the bottom of the email. For each notification, the watermark will be unique.

Figure 5-5: Image of the Help Desk Response E-Mail Watermark



8. From the e-mail, select **Reply**.
9. Enter the desired response and include the watermark from the original email at the bottom of the message.
10. Select **Send**.

## 6. Troubleshooting

If you experience any issues using the system, please submit cases directly in the [ServiceNow guest portal](#). Otherwise, please contact the email addresses listed below.

- VALERI Users - [VALERI.VBACO@va.gov](mailto:VALERI.VBACO@va.gov)
- LGYHub/WebLGY/FFPS/SAH Users - [VIP.VBACO@va.gov](mailto:VIP.VBACO@va.gov)

## Template Revision History

| Date          | Version | Description                                                                                                                                                   | Author               |
|---------------|---------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| March 2016    | 1.7     | Updated to align with new VIP policies and processes                                                                                                          | VIP Business Office  |
| December 2015 | 1.6     | Updated to align with current OI&T Documentation Standards, edited to conform with latest Section 508 guidelines, and remediated with Common Look Office tool | Process Management   |
| June 2015     | 1.5     | Edited to conform with Section 508 guidelines and remediated with Common Look Office tool                                                                     | Process Management   |
| May 2015      | 1.4     | Reviewed and approved by PMAS Process Improvement Lockdown. Updated instructional test                                                                        | Process Management   |
| November 2014 | 1.3     | Updated to conform with latest Section 508 guidelines and remediated with Common Look Office tool                                                             | Process Management   |
| April 2014    | 1.2     | Changed title page to clarify that version number refers to software version                                                                                  | Process Management   |
| April 2011    | 1.1     | Formatted to current ProPath documentation standards and edited to conform with latest Alternative Text (Section 508) guidelines                              | Process Management   |
| June 2009     | 1.0     | Initial Version                                                                                                                                               | PMAS Business Office |