# Help Desk Operating Procedures TEMPLATE

**PURPOSE AND USERS**

**Describe the purpose of your help desk** in terms of who your users are and what their needs are (e.g., teachers, students, and parents; support with instructional software issues).

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**SYSTEM**

**Describe how your users submit tickets or requests for support and how these tickets are received by district support staff.** Examples: online ticketing system software, a form that populates a spreadsheet, one or multiple phone number(s)/hotline(s) attended by live support, a voicemail system that generates tickets, or an email address with a shared mailbox.

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**PROCESSES**

**Describe what the user can expect in response to submitting a ticket.** Include a brief description of the following processes:

* *Response to ticket/support request*: Indicate whether the user can expect an email/phone call/other acknowledging receipt, the details included, and whether a deadline for response by support personnel will be included.
* *User follow-up*: Explain what the user should do if they do not receive a response within the described time.
* *Closing tickets/support requests*: Describe how a ticket is closed and whether users receive surveys.
* *Feedback*: Include the preferred steps a user should take if service was unsatisfactory and to whom to report concerns.

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**OPERATING HOURS**

**Describe when your help desk is operating, or addressing tickets/support requests**. Indicate where hours are posted to users.

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**SUPPORT TEAM**

**List the individuals that will respond to tickets or support requests and a brief description of their role.** Include any topic areas that particular members are responsible for responding to.

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| **Support Team** | **Role** | **Topic Areas (if applicable)** |
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**SUPPORT TEAM RESPONSIBILITIES**

**Outline support team commitments.** For example, dealing honestly in describing problems in language the user can understand and acting with sympathy for user inconvenience. If there is a commitment or service level agreement to prioritize certain issues, describe that here.

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**PRIORITY MATRIX**

**A priority matrix helps support team members to understand how to prioritize tickets based on information supplied by the user.** You should define your priority matrix and escalation procedure in this document. The matrix below shows common prioritizations, but these can be customized for your district.

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| **CRITICAL** | Critical tickets may prevent a user from working/providing instruction or cause other devastating consequences. These tickets are often addressed first or passed to a senior team member. |
| **HIGH** | High priority tickets may affect multiple staff members, parents, or departments. |
| **MEDIUM** | Medium priority tickets may affect a limited number of departments or parents. Users may be able to continue work by applying a workaround.  |
| **NORMAL** | Normal priority tickets affect only one or two users and may present an inconvenience, but do not impede work or instruction.  |

**ESCALATION**

**Describe your process for escalating tickets or support requests.**

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**HELP DESK WORKFLOW**

**Describe your workflow from when a user submits an issue or enters a ticket to when the ticket has been completed.** Discuss how users know their ticket has been received, how tickets are routed to district staff or other support individuals or third-party entities, and any pertinent steps. It can be helpful to depict the process in a flowchart. (See Appendix A).

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**APPENDIX A. HELP DESK FLOWCHART**

**A flowchart can help to show what actions to take to complete a helpdesk ticket based on certain conditions.**

STEP

START / END

INPUT / OUTPUT

DOCUMENT

DECISION

**YES**

**NO**

CONNECTORS

**KEY**

**YES**

**NO**

COPY AND PASTE

BLANK ICONS

BELOW

**YES**

**NO**